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Educación LGBTQ+

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Her creative work is based on the landscape or the objects that reach in her eyes, even if it plays a second and complementary role in her career over the years, it is an observatory point of view. Bianca can be reached at Instagram @biancade77.

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SECCIÓN MONOGRÁFICA

LGBTQ+ HISTORIES OF EDUCATION INTRODUCTION.

Historias de la Educación LGTBQ+. Introducción

Karen Graves,^α Mirelsie Velázquez^β and Diana Gonçalves Vidal^γ

Education (through formal schooling and other cultural institutions) has been a central factor regarding the ways marginalized communities are challenged and identities realized within a social context that presents multiple barriers to seeking justice in our daily lives. In the last three decades education historians have ventured into Lesbian Gay Bisexual Transgender Queer (LGBTQ+) studies, seeking to document the ways schools, historically, have reflected and shaped larger cultural perceptions of sexuality and gender. The field has gained some traction in recent years, benefitting from the establishment of LGBTQ+ archives and advances in queer studies more broadly. However, to our knowledge, no history of education journal has yet published a dedicated volume on LGBTQ+ issues. Our aim with this project is two-fold. We take stock of the current status of international research on LGBTQ+ issues in history of education. In addition, we hope this special issue prompts new scholarly work that advances our understanding of the roles that gender and sexual identities have played in educational institutions across time, and the ways that educators and their school communities have contributed to or opposed civil rights movements for LGBTQ+ people. These essays remind us of the work that still needs to be done to ensure that our field is continuing to include the stories and histories often relegated to the margins of history.

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We are reminded of how state policies are informed by the cultural narratives framing spaces, especially in schools. We see this in the growing scholarship on LGBTQ+ education and educators and the roles individuals and organizations played in shaping schools and schooling in the twentieth century and beyond, from communities around the globe. Much of the early research on this topic addressed school experiences of lesbian, gay, bisexual, and transgender teachers and students and this remains a productive area of study, particularly in North America. Three essays in this volume address the recovery work necessary to understanding more about what might be considered LGBTQ+ forebears in the education profession; the history of one of the first LGBTQ+ student organizations in the United States to press for their legal right to exist alongside other student organizations on their college campus; and the experiences of LGBTQ+ teachers in the 1990s as they navigated school and community spaces in conservative parts of the US. Some historians address broader cultural themes regarding gender and sexual identity that intersect with education. In this volume scholars from South America discuss social fixations on bodies as a form of control through essays that examine the emergence of binary definitions of sex, gender, and sexuality in Argentina as revealed through a study of the introduction of toilets in primary schools in Buenos Aires; and teacher training in physical education in Uruguay during the 1950s. Other scholarship, most notably that produced by researchers in Asia, Europe, and South America, focuses on curriculum and textbooks. Along those lines, contributors to this volume address changes regarding sexualities in curriculum guidelines and school textbooks in Japan from 1958 to 2017; and historical pedagogical discourses regarding sexuality and gender in Argentina during the 1990s. The essays are presented in three sections, concentrating on these topics in a chronological order within each section. To reflect a field of study rooted in the historical experiences of lesbian, gay, bisexual, and transgender people, and expanded to consider issues, themes, and concepts consonant with queer theory more broadly we use «LGBTQ+» as a unifying descriptor in this volume although individual authors write in terms specific to their studies. These stories highlight the rich and at times complicated ways populations respond when their identities or positionalities are challenged, and their humanity ignored. Misplaced or misconstrued conversations on morality

in a variety of contexts remind us of the vulnerable status of LGBTQ+ students and teachers, whose everyday existence has been challenged by policies seeking to limit their relationship to schools.

In seeking contributors to this special issue of *Historia y Memoria de la Educación* we consulted databases for relevant publications in the history of education, programs for recent conferences of the International Standing Conference for the History of Education (ISCHE), and shared news of the special issue with members of Australian and New Zealand History of Education Society, Canadian History of Education Association/ Association canadienne d'histoire de l'éducation, ISCHE, History of Education Society (UK), History of Education Society (USA), Sociedade Brasileira de História da Educação, Sociedad Española de Historia de la Educación, Sociedad Mexicana de la Historia de Educación, Sociedad Uruguaya de Historia de la Educación, and Division F: History and Historiography of the American Educational Research Association.

Our database search indicated that the study of LGBTQ+ histories of education is still very much in its early stages. While not exhaustive, one bibliography of work centered on LGBTQ+ histories of education (and limited to English language publications) lists only 82 entries, most focused on studies in the U.S.¹ In commissioning this special issue, the editors of *Historia y Memoria de la Educación* have taken a significant step. Not only have they allowed for the publication of emerging work that will enrich a nascent field of study—they have provided an international platform to invite scholarly discourse on what issues, questions, and resources education historians might tap next.

While a careful reader might identify any number of points of intersection among the essays in this volume, two themes are salient: silences and agency. The writers employ a variety of approaches to their research,

¹ Karen Graves has maintained a bibliography of publications on LGBTQ+ histories of education since 2006, relying primarily on research highlighted through the resources of the American Educational Research Association, the Canadian History of Education Association/ Association canadienne d'histoire de l'éducation, the History of Education Society (USA), and the International Standing Conference for the History of Education as well as multiple searches using *Exe Libris*, «the UK History of Education Society's Online Bibliography». *Exe Libris* reaches leading historical journals in the British Isles and selected international journals on the history of education. See <https://www.hes-exelibris.org.uk/>.

engaging archives, oral histories, text analyses, aspects of material culture, and crossing into the work of biography and legal studies.

The opening essay by Jackie M. Blount anchors the collection by articulating the challenges in writing LGBTQ+ histories. Author of the first comprehensive history of LGBTQ+ educators in the United States, she offers a perspective forged over the arc of a ground-breaking career.² Like many contributors to this volume, Blount's early research began with gender analysis. Noting that teaching was the first public profession to welcome women who desired other women, Blount shows how biographical study can, carefully, without overreach, parse the silences in the historical record regarding our LGBTQ+ forebears.

Paola Dogliotti and Evelise Quitzau take a different tack, relying on theoretical references of sex deconstruction, critique of sex-gender binarism, and Michel Foucault's sexuality device to navigate the silences regarding sexuality in mainstream curricular texts for physical education teachers in Uruguay in the 1950s. Their nuanced treatment of the heteronormative social matrix in this study illustrates how direct or indirect condemnation of gender performance can invalidate the existence of LGBTQ+ people even when sources do not take up the issue explicitly.

Similarly, Lucila da Silva reads between the lines of nineteenth-century architectural plans for primary school toilets to excavate technologies that established binary definitions of sex, gender, and sexuality in Argentina's capitol city. Like other authors in this volume who scrutinize policies related to coeducation to gain insight into implicit views on sexuality, she relates identity practices and discourses to the spatial sex segregation of school toilets. da Silva argues that this particular sanitary issue paralleled the hygienist moral in the minds of early-twentieth-century educators regarding the «sexual awakening» of youth.

In his study of the 1990s battle over curriculum reform in Argentina, Santiago Zemaitis traces the historical-pedagogical discourse involving the Ministry of Culture and Education, representatives of the Catholic Church, and academic feminists in the Program for Equal Opportunities for Women. His thorough analysis of shifting currents in the federal sex

² See Jackie M. Blount, *Fit to teach: same-sex desire, gender, and school work in the twentieth century*. (Albany, NY: State University of New York Press, 2005).

education curriculum that followed the emergence of AIDS takes into account the pattern of silences, inclusion, and exclusion that marked institutional mechanisms of heteronormativity. Zemaitis characterizes this period of reform as a struggle to define which subjects and sexualities had a place in the public school curriculum.

To some extent, all the essays in this volume consider the concept of agency. Blount, for example, connects the twentieth-century, about-face attack on LGBTQ+ educators with reactionary responses to women's emerging political influence in the United States. Zemaitis casts the struggle for visibility of historically repudiated, stigmatized, silenced identities as ongoing. Other essays give more sustained attention to the issue of agency.

In their essay on the Gay Alliance of Students at Virginia Commonwealth University, Michael S. Hevel and Timothy Reese Cain identify the rise of LGBTQ+ student organizations on college campuses as a key turning point in higher education student experiences writ large as well as the broader LGBTQ+ civil rights movement. In this case study we see how the larger political-economic context influenced institutional decision-making, and how student activists transformed the legal landscape regarding LGBTQ+ rights.

Jason Mayernick covers a complex terrain in his study of how LGBTQ+ teachers navigated geographies of safety in conservative communities. His essay illuminates the relative strengths of inadvertent and contested activism, the critical role that national resources began to play in the protection of LGBTQ+ teachers' jobs in the 1990s, and the strategic use of silence by targeted teachers. In each case that Mayernick examines, teachers who successfully rebuffed attacks against them leveraged knowledge of local politics and social norms in their defense. They also shared a sense of self-knowledge that they were «good» teachers.

Ami Kobayashi and Aline Henninger weigh the impact of political culture on textbook reform in Japan. They review changes in national curriculum guidelines regarding gender and sexual orientation in the wake of the international gay rights movement that began in the late-twentieth century. Their detailed study reveals some incremental progress in broadening the curriculum to be more inclusive in terms of

gender and sexuality, even as textbook publishers remain strictly bound to Ministry of Education guidelines that promote heteronormativity. Knowing that what we study matters, Kobayashi and Henninger's study indicates that there is a long way to go between eliminating homophobic content and embracing sexual diversities in the curriculum.

These essays were written during the taxing, difficult years of the Covid-19 pandemic. The co-editors of the special issue recognize the authors' notable work in the most challenging of circumstances and thank them for their contributions to the project. The context is also one in which the academy is confronting multiple questions regarding its purpose and pride of place in global political economies; the study of history itself is threatened in some quarters. Recent gains in civil rights for LGBTQ+ citizens are under renewed threat. This roiling political context makes David A. Bell's recent statement on the value of historical research even more astute: «There is nothing more potentially liberating than the sense of endless possibility that great history can open up—the sense that categories of thought and practice are not fixed, that the world can be made to change in all sorts of strange and unexpected ways».³ The fact that these essays span decades reminds us of the longstanding struggles of LGBTQ+ teachers and students to achieve a sense of justice in their schooling lives, and the myriad ways their humanity continues to be challenged. Emma Pérez tells us, «A historian must remain within the boundaries, the borders, the confines of the debate as it has been conceptualized if she/he is to be legitimate heir to the field».⁴ Perhaps, in being in conversation across space and time as these essays demonstrate, we can undo the borders that our research and field sometimes create, and welcome in new conversations, voices, and histories that not only guide us forward but also demonstrate our commitment to the communities from which we come and write about.

³ David A. Bell, «Two cheers for presentism», *The Chronicle of Higher Education*, August 23, 2022, https://www.chronicle.com/article/two-cheers-for-presentism?utm_source=Iterable&utm_medium=email&utm_campaign=campaign_4936578_nl_Academe-Today_date_20220824&cid=at&source=ams&sourceid=.

⁴ Emma Pérez, *The decolonial imaginary: writing Chicanas into history*. (Bloomington: Indiana University Press, 1999), xiii.

It is our hope that the essays in this volume open up thoughtful reflection on the kinships, heretofore faintly perceived, that cross time regarding LGBTQ+ people in education; that this issue provides new points of perspective regarding the work educators do in challenging socio-political contexts; and that, as scholars in the National Program for the Promotion of Equal Opportunities for Women in Argentina advocated, «...knowledge becomes an ally in the search for a fairer society».⁵

⁵ We thank Santiago Zemaitis for acquainting us with this reference. See: Gloria Bonder, “Programa Nacional de Promoción de la Igualdad de Oportunidades para la Mujer en el Área Educativa. 1991-1995”, in Panel: “La ESI y la perspectiva de género en educación: antecedentes, debates y negociaciones”. Prosecretaría de Géneros y Feminismos. Facultad de Humanidades y Ciencias de la Educación. UNLP. 28 September 2020.

A SEARCH FOR OUR QUEER ANCESTORS IN EDUCATION: ELLA FLAGG YOUNG

*En busca de nuestros ancestros queer en educación:
Ella Flagg Young*

Jackie M. Blount^a

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Abstract. Educators with non-normative sexualities and genders have long existed, but strikingly little historical research has been published that explores their experiences during the Progressive Era in the USA. This was a time when working in schools opened new professional and personal possibilities for a large population of mostly unmarried women. Conducting such research presents many challenges, though, including: 1) difficulties in locating documentation about aspects of educators' lives that they chose not to record, and 2) differences in language that may have been used then versus now to describe such persons. In this article, I describe some of these challenges that I have encountered as I have researched and written a biography of Ella Flagg Young, Chicago's school superintendent from 1909-1915. I argue that Young transgressed bounds of normative sexuality and gender for her time and furthermore, her stories are of continued relevance for people in schools who now identify as LGBTQ+.

Keywords: LGBTQ+; Queer; Historical Methods.

Resumen. *Los educadores con sexualidades y géneros no normativos han existido durante mucho tiempo, pero se ha publicado sorprendentemente poca investigación histórica que explore sus experiencias durante la Era Progresista en los EE. UU. Esta fue una época en la que trabajar en las escuelas abrió nuevas posibilidades profesionales y personales para una gran población de mujeres en su mayoría solteras. Sin embargo, realizar dicha investigación presenta muchos desafíos, que incluyen 1.) dificultades para localizar documentación sobre aspectos de la vida de los educadores que eligieron no registrar, y 2) diferencias en el lenguaje que se puede haber usado en ese*

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entonces versus ahora para describir a tales personas. En este artículo, describo algunos de estos desafíos que he encontrado mientras investigaba y escribía una biografía de Ella Flagg Young, superintendente escolar de Chicago entre 1909 y 1915.

Palabras clave: *LGBTQ+; Queer; Métodos históricos.*

INTRODUCTION

Non-normative sexualities and genders have flourished in a variety of historical contexts. For example, the sudden rise of single-sex communities in and around U.S. military bases during WWII eventually coalesced into “something of a nationwide ‘coming out’ experience” as John D’Emilio and Estelle Freedman put it.¹ Similarly, the expansion of women’s colleges during the late-1800s provided opportunities for women faculty to live together in companionate, if not also sexual relationships, and for romance to thrive among students.² School work has had its moments, too. When teaching rapidly shifted first from men’s to women’s work during the mid-1800s, then soon after to work done almost exclusively by unmarried women, new opportunities opened for such teachers to center their lives on other women rather than marrying by default or remaining with their families of birth.³

Strikingly little scholarship has been published about this Progressive Era moment when teaching in schools arguably became one of the earliest public professions in the U.S. hospitable to women who desired

¹ John D’Emilio and Estelle B. Freedman, *Intimate matters: a history of sexuality in America, third edition* (Chicago: University of Chicago Press, 2021), 289. Also see John D’Emilio, “Capitalism and Gay Identity”, in eds. Henry Abelove, Michele Aina Barale, and David M. Halperin *The lesbian and gay studies reader* (New York: Routledge, 1993), 467-76; and Allan Berube, *Coming out under fire: the history of gay men and women in World War II, twentieth anniversary edition* (Chapel Hill, NC: University of North Carolina Press, 2010).

² Lillian Faderman, *To believe in women: what lesbians have done for America – a history* (New York: Houghton Mifflin Co, 1999); Helen Lefkowitz Horowitz, ‘Nous Autres’: Reading, passion, and the creation of M. Carey Thomas”, *The Journal of American History* 79(1), (June 1992): 68-95; Helen Lefkowitz Horowitz, *The power and passion of M. Carey Thomas* (New York: Knopf, 1994); Patricia Ann Palmieri, *In Adamless Eden: The community of women faculty at Wellesley* (New Haven, CT: Yale University Press, 1995), and Anne MacKay, *Wolf girls at Vassar: lesbian & gay experiences, 1930-1990* (New York: St. Martin’s Press, 1993).

³ Jackie M. Blount, *Fit to teach: same-sex desire, gender, and school work in the twentieth century* (Albany, NY: State University of New York Press, 2005).

or otherwise centered their lives on other women.⁴ However, tantalizing pieces of the puzzle cry out for attention. We know, for instance, that during these years women who taught often deepened their independence by living alone or with other women in similar circumstances. In rural areas, they may have inhabited an alcove in their schoolhouse, an attached space, or shared a separate teacherage, which was housing built specifically for teachers. In cities, they likely lived in women's boarding houses or specialty apartment buildings.⁵ These living arrangements gave women greater access to private spaces in which their relationships with other women might unfold. We know also that women teachers during these decades actively participated in and even led many new professional, social, benevolent, and political associations of other women, effectively creating communities in which their relationships might thrive while they worked for broader empowerment.⁶

Should any doubts linger that some of these relationships were sexual, Katharine Bement Davis's research put them to rest in 1929. This is when she published her monumental, Rockefeller Foundation-funded work, *Factors in the Sex Life of Twenty-Two Hundred Women*, in which she reported (among many other things) that quite a few unmarried women educators had experienced sexual relationships with other women. In her sample of 1200 unmarried, college-educated women, over half indicated having "experienced intense emotional relations with other women". Of these, 39 percent experienced "[i]ntense relationships

⁴ Among the works that do exist are *Fit to teach*, in which I detail such educators in the history of U.S. schools. Unmarried American women teachers also traveled abroad to 'democratize' Colonial subjects. For example, see Sarah Steinbock-Pratt, "We were all Robinson Crusoes': American women teachers in the Philippines", *Women's Studies* 41 (2012): 372-92.

⁵ For women teachers' accommodations in rural areas, see Spencer Maxcy, "The teacherage in American rural education", *The Journal of General Education* 30, no. 4, (1979): 267-74; and Josephine Corliss Preston's NEA Presidential Address about the dire need for teacherages around the country, "The Nation, Our Field", *Addresses and proceedings of the National Education Association, 1920* (Washington, DC: NEA, 1920), 35-39. For a discussion of women's urban accommodations during this time, see Joan Meyerowitz, *Women adrift: independent wage earners in Chicago, 1880-1930* (Chicago: University of Chicago Press, 1988). Also see Kitae Sohn, "The living arrangements of U.S. teachers, 1860-1910", *Historical Social Research* 38, no. 1 (2013): 339-65; and Blount, *Fit to teach*, especially 45-53.

⁶ Blount, *Fit to teach*, especially 53-58; Estelle Freedman, "Separatism as Strategy: Female Institution Building and American Feminism, 1870-1930", *Feminist Studies* 5, no. 3 (1979): 512-29; and Horowitz, *The power and passion of M. Carey Thomas*. Also see Kath Weston's *Families we choose: Lesbians, gays, kinship* (New York: Columbia University Press, 1991) for her discussion of familial and communal ties among circles of people who have transgressed their sexuality and/or gender bounds.

accompanied by mutual masturbation, contact of genital organs, or other physical expressions recognized as sexual in character”. Another 13 percent experienced “[i]ntense relations recognized at the time as sexual in character, but without expression other than hugging and kissing”. Did Davis’s sample of 1200 unmarried women include educators? In fact, educators accounted for over half, 52 percent to be exact.⁷ Without question, then, a notable proportion of unmarried women educators at the time had enjoyed relationships with other women that they understood implicitly or explicitly as sexual.

Beyond examining the rare study of women educators’ sex lives or the patterns of their accommodations and communities, few other strategies have been explored to reveal histories of those from a century ago who defied the bounds of conventional sexualities or genders. First, exceedingly few documents were produced then that openly discussed non-normative sexualities and/or genders. Such matters remained taboo. Second, vandals have since destroyed some of the scarce remaining records.⁸ Third, language used to discuss sexualities and genders – when it was used at all – sometimes was expressed tentatively and without widespread agreement about usage. And fourth, language about sexualities and genders from one hundred years ago often fails to map neatly onto the still-shifting categories/identities that we employ today. Consequently, translational errors are difficult to avoid.

Despite these obstacles, an important way to navigate this historical recovery work is by finding and telling the stories of individual school workers whose sexualities and/or genders might have transgressed norms in some ways. Though it would be wonderful to discover a larger association of such educators that archived its work, the odds of finding such a bonanza are low. Although mainstream bureaus produced statistics and reports that omitted such individuals, works like these can be read critically to understand their careful omissions more precisely. However, retroactively piecing together databases describing sexuality

⁷ Katharine Bement Davis, *Factors in the sex life of twenty-two hundred women* (New York: Harper and Brothers, 1929). See especially Davis’s data on pp. 247 and 263. Also see Vern L. Bullough, “Katharine Bement Davis, Sex Research, and the Rockefeller Foundation”, *Bulletin of the History of Medicine* 62, no. 1 (1988):74-89. Bullough notes that the national League of Women Voters named Davis as one of the 12 greatest living American women in 1922 (p. 79).

⁸ Blount, *Fit to teach*.

and/or gender transgressive educators would range from prohibitively time-consuming to beyond reach. Finally, no personal archives have yet come to light detailing extensive webs of relationships among such educators, though Martin Duberman's biographical treatment of Roger Casement suggests that sources like this occasionally emerge.⁹ My preferred approach, then, is to recover the stories of such *individuals* when possible, a painstaking, one-at-a-time process.

In my quest to find our queer – or LGBTQ+ – ancestors, I understand that I must broaden our currently used language so that my search can encompass the experiences of educators from the Progressive Era. For this reason, I use constructions like “non-conforming sexualities and/or genders”, “sexualities and genders”, and “sexuality and/or gender transgressing” as I write from the present moment about people who lived a century ago. Expressions like these may seem unnecessarily fussy or awkward, but I use them to better honor the possibilities that existed for the people I study rather than to impose my presentist will and identities on them.

I am currently writing a biography of one such sexuality and gender transgressing educator from the Progressive Era, Ella Flagg Young.¹⁰ Young arguably is one of the most notable educators in U.S. history because of her powerful and innovative professional accomplishments over her long career. Two biographies about her already have been published. The first is John McManis's 1916 book, *Ella Flagg Young and a Half Century of Chicago Schools*, that he wrote during Young's later years and with her extensive assistance. This volume offers little examination of personal details about her, though, which is unsurprising given her almost complete refusal to discuss such matters throughout her life. The second biography is Joan K. Smith's *Ella Flagg Young: Portrait of a Leader* (1979). Smith, under no direct obligation to satisfy Young (as was the case with McManis), rendered a much more nuanced analysis in which she probed not just public, but also some limited private aspects of this story. Smith engaged in extensive archival research and careful interpretation to do this. Still, though, Young had managed during her

⁹ Martin Duberman, *Luminous traitor: the just and daring life of Roger Casement, a biographical novel* (Oakland, CA: University of California Press, 2019).

¹⁰ Jackie M. Blount (in progress), *Women's revolution in schools: Ella Flagg Young, 1845-1918*.

life to purge documentary evidence about her private world. She encouraged her closest friends to do the same. This has made finding Young's personal story difficult for those of us interested in her.¹¹

For my biography of Young, I owe a great debt of gratitude both to McManis and Smith for charting the contours of this educator's life. I also have the luxury now of searching vast historical databases and other sources that did not exist when McManis and Smith prepared their biographies. These newly available resources have allowed me – though still with great difficulty – to reconstruct parts of Young's private life. In what follows, I describe a few of these pieces, how I found them, and how I interpret them. In the end, I suggest ways that we might approach recreating the mostly hidden histories of other individual educators who defied the bounds of normative sexualities and genders, especially during times when school work offered many such individuals hope and support.

THE CASE OF ELLA FLAGG YOUNG

Ella Flagg Young was one of the most significant teachers, leaders, and intellectuals of her time. Just when teaching shifted decisively from men's to women's work, she quickly proved so skillful in Chicago's crowded classrooms that within a few years, she was appointed principal of the city's new School of Practice and charged with preparing the system's future teachers. She then soared through a series of leadership positions or challenges in which she was one of the first women *in the country* – if not *the* first: principal of one of the two largest schools in the city (grammar school), assistant and then district superintendent, Ph.D. recipient from and full professor at a research university (University of Chicago), head of a large normal school (Chicago Normal School), superintendent of a large urban district (Chicago), and president of the National Education Association (NEA). In her later years as a famous

¹¹ John McManis, *Ella Flagg Young and a half century of the Chicago Schools*. (Chicago: McClurg, 1916); and Joan K. Smith, *Ella Flagg Young: Portrait of a leader*. (Ames, IA: ISU Research Foundation Press, 1979). Two significant dissertations have proven quite helpful, too. These are Rosemary Donatelli, "The contributions of Ella Flagg Young to the educational enterprise" (Doctoral dissertation, University of Chicago, 1971); and Constance (Connie) Goddard, "Ella Flagg Young's intellectual legacy" (Doctoral dissertation, University of Illinois Chicago, 2005).

public figure, newspapers around the country steadily carried syndicated reports about her activities.¹²

Young regularly crossed conventional gender boundaries during her remarkable career as she gained responsibilities and achieved honors previously reserved only for men; yet she had done so even as she presented as traditionally female in obvious ways. She always kept her neatly parted hair pulled back in conservative, conventional women's styles. She consistently wore simple, functional women's blouses and long skirts except in her later years when she invested in more ornate, but still normatively feminine, full-length dresses. She had married a man during her early 20s, though he died only a few years later. Ever afterwards, she usually was known as "Mrs. Young", thus signaling that she had fulfilled women's customary obligation to marry if possible.

My first hint that Young might have transgressed traditional bounds of sexuality came as I read Smith's biography. Smith repeatedly mentioned someone named Laura Brayton. In so doing, she essentially created a bare outline of Brayton's relationship with Young:

- Brayton started her teaching career at the school where Young served as principal.
- They became friends after each moved on to other positions.
- Eventually they became companions.
- When Young was catapulted into the Chicago superintendency and national attention, Brayton left her teaching responsibilities behind to become Young's personal secretary.
- Then after Young died of influenza during the 1918 pandemic, her will decreed that Brayton receive most of Young's by then sizeable and carefully invested estate.¹³

McManis's earlier biography, however, did not mention Brayton's existence. Given these accounts, both Smith's hints and McManis's omissions, I understood that Young's relationship with Brayton was central

¹² McManis, *Ella Flagg Young*; Smith, *Ella Flagg Young*, and Blount, *Women's revolution in schools*.

¹³ Smith, *Ella Flagg Young*, see especially pp. 36, 60, 186, 199, 207, 211-12, 214, 222, and 230.

and significant. And I suspected I knew much of why Young so vehemently resisted discussing her private life. An important part of my motivation for undertaking this biographical project was and is to much more fully flesh out the outline that Smith suggested. I also sought to understand Young's life and work in light of her non-normative sexualities and genders – essentially how these may have informed her ideas, work, and relationships.

First, to lay the groundwork for understanding Brayton and Young's relationship, I needed to know precisely when they met, worked together, and then lived together. For historical figures over the past century and a half who have merited one, not to mention two or more biographies, information about their primary relationship(s) exists in many forms and sometimes is relatively easy to find. Such individuals tend to leave rich archival collections behind, Jane Addams and John Dewey, for example. Young, however, left no such documentary collection. Neither did Brayton nor any of the other members of their small, tight friendship circle.

Even still, many kinds of sources exist that reveal aspects of their personal lives. These include marriage records, newspaper reports, correspondence among friends and family members with ample mentions of significant relations, cemetery records, and the like. Few of these kinds of records are available to shed light on Brayton and Young's relationship, though. For example, even if Brayton and Young had wanted to get married, legal and cultural restrictions at the time obviously would not have permitted it. The only such existing record for Young is for her 1868 marriage to William Young when she was 22.¹⁴ He left within three years to recover from tuberculosis, then died two years later in 1873.¹⁵ They lived together only about two and a half years.

By examining Chicago Board of Education minutes, I learned that Brayton and Young likely first met at the start of the 1883-84 school year.

¹⁴ "N. Ella Flagg and William Young married on December 30, 1868". Vol. 001, Cook County, IL. Illinois Statewide Marriage Index, searched at the Chicago Historical Museum.

¹⁵ Young recorded the year of her husband's death when she completed a form in advance of receiving an honorary doctoral degree from the University of Illinois in 1910. UIUC Archives, folder: Young, Mrs. Ella Flagg, '10 LLD (Deceased). She named William's cause of death in a newspaper interview: "Innovations Due with Mrs. Young", *Chicago Tribune*, July 30, 1909, 3.

That is when Brayton launched her teaching career at the Skinner School, which was then led by Principal Young.¹⁶ They worked at the same school until 1887 when Young moved to the central office to become an assistant superintendent.¹⁷ A year after Young left Skinner, Brayton was promoted to Head Assistant Teacher at another school.¹⁸ They did not formally work directly together again until Brayton became Superintendent Young's personal secretary some twenty-two years later.

Beyond Young and Brayton's professional engagements together, I next sought to determine when they lived together. Once again, they left no documents that would help future historians in this quest; so I painstakingly worked my way through the collection of Chicago city directories maintained by the Chicago Historical Museum's archives. I discovered that during Brayton's early years as a teacher (from 1883 through 1896), she lived with her aunt, Dr. Mary Harris Thompson.¹⁹ Dr. Thompson, a noted physician and Young's close friend, had founded and run a hospital for women and children in the city. After Thompson died in 1895, Brayton and Young moved into a new residence together. Though they subsequently changed residences multiple times and traveled abroad extensively, they were together from 1896 until Young died in 1918.²⁰

What was the nature of Young and Brayton's relationship? Clearly, they enjoyed a warm and abiding friendship. However, were there also romantic or possibly sexual elements? No documents exist that reveal intimate expressions of love or fondness that they may have spoken to one another. If Brayton and Young ever spent time apart and corresponded with each other, their letters are lost. Exceedingly few letters that

¹⁶ June 29, 1883 Meeting Minutes, *Chicago Board of Education, Proceedings, Sept. 1882-83*, 178.

¹⁷ Notes from the June 29, 1887 meeting, *Proceedings of the Chicago Board of Education* (Chicago: The Board, 1888), 228; and "Appendix," *Annual Report of the Board of Education, 1887* (Chicago: Jameson & Morse Co., 1888), 258.

¹⁸ *Proceedings of the Board of Education, 1888-1889*, July 10, 1889 meeting, 303. (Board of Education Archives).

¹⁹ See *Lakeside Annual Directory for Chicago from 1883-1996* (Chicago: The Chicago Directory).

²⁰ See *Lakeside Annual Directory for Chicago from 1896-1912* (Chicago: The Chicago Directory). From 1913-17, Brayton is not listed in these directories. However, various news reports confirmed their shared residences. See Blount, *Women's Revolution in Schools*.

they sent to their friends exist and are available.²¹ In one rare letter, Young wrote Jane Addams (who carefully archived her own papers and correspondence) to congratulate her on the publication of her recently published book, “Miss Brayton and I are enjoying the expansion of ‘Twenty Years at Hull House’....”²² This short, friendly note implicitly affirms that Young and Brayton were close companions who shared each other’s small and large confidences and experiences. Did Young perhaps feel freer to speak of Brayton in this way in a letter to Addams than with other people? After all, Addams also enjoyed a companionate relationship with a woman, Mary Rozet Smith. In one letter, Addams wrote to Smith during brief time apart: “[y]ou must know, dear, how I long for you all the time....”²³ Other women in Young and Brayton’s extended friendship circles also enjoyed companionate relationships, like Marion Talbot (Dean of Women, University of Chicago) and Sophonisba Breckinridge (activist and Political Science Professor, University of Chicago).²⁴ Such relationships were known to exist among white college-educated professional women who enjoyed the independence and economic means to pursue them.²⁵ They were by necessity discreet; otherwise, they stood to lose their privileged positions. Black and Brown working-class women, though, who may have been less fearful of losing status could be more open about their companionate or intimate relationships with other women.²⁶

²¹ For example, see letter from Laura Brayton to Jane Addams, Sept. 21, 1915, Jane Addams Collection, Midwest Women Archives at the University of Illinois Chicago, 8-1523-1524. Young wrote a brief message to Addams at the bottom of Brayton’s letter.

²² Letter from Ella Flagg Young to Jane Addams, December 12, 1910, Jane Addams papers in the Swarthmore College Peace Collection (microfilm), DG 1, Box 2.

²³ Quoted in Stacy Lynn, “Jane Addams, Mary Rozet Smith, and the Disappointments of One-Sided Correspondence”, Jane Addams Papers Project. <https://janeaddams.ramapo.edu/2019/07/jane-addams-mary-rozet-smith-and-the-disappointments-of-one-sided-correspondence/> (consulted on December 22, 2021). Lynn notes that Addams did not save the letters that Smith wrote to her even though Addams saved her own for posterity.

²⁴ Kathryn Vandervalk, “Entangled Lives”, *UChicago Magazine* 114, no. 1 (Fall 2021). <https://mag.uchicago.edu/law-policy-society/entangled-lives> (accessed December 22, 2021); and Mary Jo Deegan, “Dear Love, Dear Love’: Feminist pragmatism and the Chicago female world of love and ritual”, *Gender and Society* 10, no. 5 (October 1996): 590-607.

²⁵ Lillian Faderman, *To believe in women*.

²⁶ Lillian Faderman, *Odd girls and twilight lovers: a history of lesbian life in twentieth-century America*. (New York: Penguin Books, 1991).

Other than a few letters like Young's short, friendly note to Addams, other correspondence that was exchanged by Young or Brayton with their closest friends is virtually nonexistent. To determine this, I kept a careful list of Young and Brayton's closest friends as well as some in their extended friendship circles. For each, I searched for archival collections. I also ran extensive queries using a variety of databases. Among what emerged were fragments like newspaper obituaries of friends who stressed the importance of their friendships with Young.²⁷ These details, however, do not help me much in understanding Brayton and Young's relationship.

Turning to other strategies, I searched for blueprints/floorplans for apartment buildings, hotels, and houses where Brayton and Young had lived to see if these accommodations had only one bedroom. Similarly, for their travels abroad, I searched for information about their shared cabins on ships. These efforts proved futile, though. Even if I had learned that Young and Brayton had shared bedrooms or even a bed, their relationship still could have been asexual.

Occasionally, I stumbled upon useful clues about their relationship. First, Brayton was listed in the 1910 census as "companion" and Young as "head" of household.²⁸ Though this listing was decidedly asymmetrical, i.e., only one rather than both named as "companion", it nonetheless is language that at least one of them had to have offered the census-taker. At the time, women who lived together as companions typically were not begrudged such relationships that were thought to keep them from being lonely. Many did not even consider the possibility that such women's relationships might have romantic or sexual components. Nonetheless, a "companionate" relationship could have encompassed any of these kinds of attachments.²⁹ Even though this language ultimately clarifies little, I have decided to use it when I speak about Brayton and Young's connection because it is how at least one of them described their relationship.

²⁷ For example, Clara Walker, one of four women in Young's will, was described as "an intimate friend of Mrs. Ella Flagg Young". "Obituary", *Chicago Daily Tribune*, December 13, 1919, 21.

²⁸ 1910 Census, Illinois, Cook County, Tract G8, Supervisor's district 1, Enumeration District 391, Ward 7, Sheet 19.

²⁹ Blount, *Fit to teach*.

Perhaps most confusing – and illuminating – of all, is my discovery of how Brayton managed Young’s gravesite a little more than a year after her burial: Brayton paid to have Young’s coffin repositioned within its larger plot. To explain, some context is in order. In 1918, Young’s 73rd and last year, she traveled across the country by rail to promote Liberty Bond sales in support of U.S. troops fighting in Europe. Brayton and a few of their friends traveled with her. Along the way, Young and Brayton contracted influenza during its most infectious stretch of the 1918 pandemic. Their friends then accompanied the stricken women back to Washington, DC, where Young and Brayton had established their permanent residence, then immediately transferred the rapidly declining women to a hospital. Young succumbed a few days later. Young and Brayton’s friends who had travelled with them realized that Young’s remains needed to return to Chicago to be buried in the Flagg family plot. Some of them accompanied Young’s casket on the train back to Chicago. One of them, Mrs. George Bass, made arrangements for Young’s funeral.

All schoolhouse flags around Chicago flew at half-staff in Young’s honor.³⁰ Because of the pandemic, large events such as funerals in Chicago were prohibited.³¹ Nonetheless, a few close friends and long-time colleagues attended Young’s thoughtful, but relatively low-key event.³² At the Flagg family plot in Rosehill Cemetery, Young’s casket joined those of her mother, father, sister, and brother. The four members of her family of birth neatly filled the western half of the large plot. Young’s remains were buried in the eastern half, to one side (rather than in the middle). Those who had arranged Young’s interment clearly thought that another person would be buried beside Young on the eastern side of the plot. That person could have been no one else but Brayton. If there were any concerns about how this arrangement looked, no one spoke publicly about it. I find it reasonable to conclude, then, that anyone who knew Young understood that Brayton was her companion, her most significant relationship, her chosen family. Of course they would be buried side-by-side.³³

³⁰ “Flags to Fly at Half Mast Today for Mrs. Young”, *Chicago Daily Tribune*, October 28, 1918, 8.

³¹ David E. Ruth, “Don’t Shake – Salute!”, *Chicago History* 19, no. 3 (1990): 4-23.

³² “Military Tinge at Funeral of Ella F. Young”, *Chicago Daily Tribune*, October 29, 1918, 16.

³³ Similarly, the prominent Chicago-connected philanthropist, Robert Allerton, and his long-time companion, John Gregg (his adopted son), each had their ashes scattered at the same Hawaii bay where they had spent much of their time together. See Nicholas L. Syrett, *An open secret: the family*

Meanwhile, Brayton, still in Washington, DC, remained so seriously ill that she floated in and out of consciousness for days, unaware that Young had died. When she eventually recovered, she returned to Chicago to live on her own. Young had left the bulk of her sizeable fortune to Brayton. Brayton also served as Young's executor and as such, handled any remaining business connected with Young's estate. A little over a year after Young's death in 1918, Brayton had Young's casket exhumed and then repositioned right in the middle of the eastern half of the family plot. Then in 1935 when Brayton died, she was buried in the middle of her own plot located about 100 feet away from Young's.³⁴ Brayton likely had purchased her separate plot around the time that Young's remains were moved. I also assume that this plot was the nearest one to Young that was available at the time Brayton purchased it.

How do I know that Brayton paid to have Young's body moved? When I first visited the Flagg family's plot at Rosehill Cemetery, I asked the office staff if they had any records about Flagg and Brayton that I could copy for my biographical research. They kindly obliged.³⁵ In the months after, I studied those records. I saw that Young seemed to have two different interment records, which made no sense to me. I simply could not figure it out. Then at another time as I pored through my complete photocopied sets of Young and Brayton's respective probate records, I discovered a receipt in Young's file issued by Rosehill Cemetery staff for digging up Young's casket and then repositioning it, service requested and paid for by Brayton.³⁶ I then returned to the cemetery records I had obtained earlier, worked out the coordinates specified in them, and then determined precisely how Young's body had been moved. Brayton did not intend to be buried beside Young, but instead in another plot near her.

story of Robert and John Gregg Allerton. (Chicago: University of Chicago Press, 2021), 164-5, 168; and more generally, Weston, *Families We Choose: Lesbians, Gays, Kinship*.

³⁴ I personally observed that sometime between 2005 and 2011, Rosehill Cemetery relocated some burial sites. From conversations with staff, I learned that they first attempted to contact any surviving relatives. Because Brayton had no surviving family members, her grave and plot were moved farther away from Young's grave – by about 200-300 feet farther north and west by my estimation.

³⁵ Plat information for the Flagg family including Ella Flagg Young's first and then final positions: Rosehill Cemetery plat and interment records. Rosehill Cemetery Company, Chicago.

³⁶ Billing statement in Probate Records of Ella Flagg Young. Case#: 57693. Archives, Office of the Clerk of the Circuit Court of Cook County.

Why would Brayton have repositioned Young's remains? Was she concerned that the public might learn of their relationship? Certainly, in their time, they already were generally known by those around them as companions. However, their relationship was not a focus of public discussion. The two women somehow were able to maintain a zone of privacy even as Young was frequently in the national spotlight during her last nine years. Young guarded this zone by side-stepping any public questions about her private life. Brayton helped by describing herself as Young's personal secretary, which meant that she had justification for accompanying Young on her travels, at social events, in managing numerous large and small engagements, and even living together. No doubt, Young needed help managing the heavy demands of national fame. "Hiring" Brayton made sense because she was by all accounts, diligent, thorough, and kind. After extensive digging, I have not uncovered any contemporaneous public critique of this arrangement.

However, in the years leading up to Young's death and extending decades after, generalized interest in the lives of independent women workers, activists, artists, politicians, and other professionals increased steeply. Some was critical. For example, when Theodore Roosevelt addressed the 1905 National Congress of Mothers, he conjured a growing threat posed by women who deliberately chose to forego marriage and motherhood.³⁷ On the other hand, several studies highlighted the accomplishments of such women, detailing links between women's achieved eminence and their decision to remain unmarried.³⁸ Even still, though, critics turned this logic around and asserted that well-educated, accomplished women likely were less attractive to men or, possibly, might even be deviant. This growing scrutiny followed women's increased political power on account of suffrage victories, economic power, and other successes in the public sphere. It came from those who believed women generally had overstepped their bounds and become too powerful. Eventually, this growing backlash focused especially on women who

³⁷ Theodore Roosevelt, "Address", *Report of the national congress of mothers*. (Washington, DC: National Congress of Mothers, 1905), 77-86.

³⁸ Cora Sutton Castle, *A statistical study of eminent women* (New York: Archives of Psychology, 1913); Emilie Hutchinson, *Women and the Ph.D.* (Greensboro, NC: The Institute, 1929); and Luella Cole Pressey, "The women whose names appear in American men of science for 1927", *School and Society* (1929): 96-100.

centered their lives on other women, in part because many such women had been significant leaders in the broader women's movement. And many of these women had been educators at some point in their lives.³⁹

A clear manifestation of this critique was the increasing use of such derogatory terms as "old maid teacher" and "spinster teacher" (which later was often conflated with "homosexual" or "lesbian" teacher). Among the millions of books scanned and listed in Google Books, an Ngram depiction of these terms shows sharp increases in their frequencies from the late 1910s through around 1930. The more descriptive (and less disparaging) term "unmarried teacher" began a steep increase in usage even earlier, starting around 1908 and extending through the late 1930s.⁴⁰ In short, awareness and then critique of unmarried women educators – and the possibility that some might have had intimate relationships with other women – was growing during Young's final years. Brayton may have been acutely aware of this shift and sought to protect Young's legacy.

Another possible explanation for Brayton's rearrangement of Young's gravesite is that Brayton and Young's relationship may have been purely a deep friendship without any romantic or sexual components. Given the heightened scrutiny and critique of women in companionate relationships, though, Brayton may have been especially adamant about avoiding even the appearance of any impropriety.

In the years after Young's death and re-burial, Brayton engaged in efforts to preserve public memory of Young and her accomplishments. Among them, she authored an essay about Young published in a biographical encyclopedia of the nation's most famous women (1925).⁴¹ Around the same time, Brayton corresponded with John Dewey to seek his help in editing and publishing a collection of Young's scholarly writings.⁴²

³⁹ Blount, *Fit to teach*.

⁴⁰ Google Books Ngram Viewer. <https://books.google.com/ngrams> with the search string: "unmarried teacher, old maid teacher, spinster teacher, lesbian teacher" (Accessed December 22, 2021). Note: The term "lesbian teacher" was not used much until the mid-1970s and afterwards, including Anita Bryant's *Save Our Children* crusade (1977) and the fight against the Brigg's Initiative (1978).

⁴¹ Brayton wrote the entry for "Young, Ella Flagg", Mabel Ward Cameron, ed. *Biographical cyclopaedia of American women, Vol. II*. (New York: Halvord Publishing Co, 1924-25), 1-6.

⁴² Letter from Laura T. Brayton to John Dewey, June 8, 1924, John Dewey Center, Southern Illinois University.

Dewey had been Young's doctoral advisor and the two had worked very closely together during his years at the University of Chicago. The University of Chicago Press had even published an edited volume containing three of her essays and three of his, each essay reflecting their mutual intellectual influence.⁴³ Ultimately, though, Dewey did not find a willing publisher for a posthumous collection of Young's work.⁴⁴ Brayton also joined ambitious efforts by the Chicago Woman's Club and other organizations to build a suitable memorial for Young. For complicated reasons, though, these efforts ultimately failed, too.⁴⁵ Nonetheless, Brayton had done her best to ensure that history would treat Young kindly.

CONCLUSION

In the end, were Ella Flagg Young and Laura Brayton our queer/LGBTQ+ forebearers? The answer to this is complicated. Young and Brayton certainly would not have recognized our contemporary use of terms like *lesbian*, *gay*, *bisexual*, *trans**, or *queer*... and so would not have used such language to describe themselves. In particular, "lesbian" did not enjoy broad usage until the mid-twentieth century.⁴⁶ Among those of us with non-conforming sexual identities, choosing our own language to describe our sexualities has been important for our efforts to build community and resist oppression against us. During Brayton and Young's time, sexual dimensions of women's relationships with each other usually remained unspoken; but if they were discussed at all, language usage generally was inconsistent and nonspecific.

⁴³ Ella Flagg Young and John Dewey, *Contributions to education series*. (Chicago: University of Chicago Press, 1901-02). See also Jackie M. Blount, "The mutual intellectual relationship of John Dewey and Ella Flagg Young: *Contributions to Education Series, 1901-1902*", in eds. Antoinette Errante, Jackie M. Blount, and Bruce Kimball *Philosophy and History of Education: Diverse Perspectives on Their Value and Relationship* (Lanham, MD: Rowman & Littlefield, 2017), 27-38; and Jackie M. Blount, "Ella Flagg Young and the Gender Politics of Democracy and Education", *Journal of the Gilded Age and Progressive Era* 16, 4 (2017): 409-423.

⁴⁴ Letter from John Dewey to Richard J. Walsh, August 7, 1930, John Dewey Center, Southern Illinois University.

⁴⁵ Blount, *Women's revolution in schools*.

⁴⁶ Google Books Ngram Viewer. <https://books.google.com/ngrams> with the search term "lesbian".

Similarly, Young likely would have opposed contemporary ways of identifying as gender nonconforming. Without question, though, she regularly marched outside professional boundaries then accorded to women and in this sense, she transgressed gender bounds. She likely would have viewed her efforts as a highly visible and influential school leader as helping to open opportunities for women to claim powers that had been systematically denied to them. She did suffer some criticism, though, when she publicly asserted her views, behavior that some people regarded as abnormal gender presentation. For instance, Helen Mead, the wife of one of Young's University of Chicago colleagues, George H. Mead, sarcastically described Young in a letter to Alice Dewey, whose husband was John Dewey. Helen Mead wrote in unconventionally gendered terms about seeing Young at a dinner event: "It [Young] was like a war-horse with the scent of battle".⁴⁷ Young sometimes acted powerfully and certainly was a force to be reckoned with. Despite such seeming gender transgression, she also endeavored to present a traditionally feminine appearance and countenance, though modestly so.⁴⁸

In reciprocal fashion, although Young and Brayton – from the vantage of their historical moment – would have resisted our contemporary labels for sexualities and genders, I sometimes have been frustrated with their reluctance to describe themselves and their relationship publicly, especially in any sexuality and gender transgressive terms. This is true even though I understand that at the time, women teachers were held to exceedingly lofty standards of morality, were expected to serve as models of unimpeachable behavior, and, to these ends, typically were scrutinized closely by their communities. Consequently, I know they almost certainly would have been horrified to learn that one of Young's future biographers would try to see if their homes had only one bedroom. After all, they invested great effort in carving a zone of privacy around their lives together and likely would have regarded my efforts as intrusive. I do understand this perspective and consequently have wrestled extensively with the ethics of my approach. Ultimately, though, I have decided that because: 1) Young was a very public figure in her

⁴⁷ Letter from Helen Castle Mead to Alice Chipman Dewey, October 2, 1905, John Dewey Center, Southern Illinois University.

⁴⁸ Blount, *Women's revolution in schools*.

time, 2) her unconventional gender(s) and sexuality(/ies) enhanced her capacity to become a highly accomplished and significant leader in some ways, and 3) Young knew that they could just as easily be held against her, her gender and sexuality transgressions therefore are important parts of her story and should be explored by anyone who wants to understand her.

Perhaps what interests me most deeply about Young and Brayton, though, is that however they may have characterized their relationship and their genders, they were among a class of people who would have been increasingly stigmatized in education. Had they lived during the Cold War, they might have been driven out of school-related work during the sweeping mid-twentieth century purge of unmarried, widowed, and divorced women teachers.⁴⁹ During the late-1950s and into the 1960s, by maintaining a companionate relationship even without openly claiming any sexuality and gender non-conforming identities, they could have been hunted down, interrogated extensively, publicly humiliated, or even fired as Karen Graves has so carefully documented in her history of Florida's Cold War purge of lesbian and gay teachers.⁵⁰ In short, even though particular identities, labels, and behaviors do not neatly correspond across this past century, many of us have faced some kinds of oppression on account of our sexuality and gender non-conformity. This is a basis for our kinship in my view.

Though Young and Brayton were not fired or humiliated during their lives for their seeming sexuality and/or gender non-conformities, they were largely forgotten afterwards. Brayton made herself invisible in some ways during her years with Young by strategies such as keeping her image out of published works. Her traces in the historical record ever since have been rare and quite difficult to find. Young, arguably a towering figure in the history of U.S. education, hardly surfaces in published education scholarship since her death. Some of her ideas have been attributed to Dewey and others, for example. More significantly, Young's choice to

⁴⁹ Jackie M. Blount, "Manly men and womanly women: deviance, gender role polarization, and the shift in women's school employment, 1900-1976", *Harvard Educational Review* 66, no. 2 (1996): 318-38.

⁵⁰ Karen L. Graves, *And they were wonderful teachers: Florida's purge of gay and lesbian teachers*. (Urbana, IL: University of Illinois Press, 2009).

leave no personal artifacts to posterity makes her story difficult to discover and interpret.⁵¹

I argue that an important reason Young and Brayton may have made these choices to obscure their personal lives was because they understood that their relationship, whatever it was, might have been condemned were it named and discussed openly. Also, they both may simply have been private people by nature. Another factor may have been that Young's family of birth faced some difficult crises that she did not want to air publicly, including her older sister's imprisonment throughout her adulthood and her mother's death by tuberculosis, then an often-unspeakable malady.⁵² And finally, Young – a very public figure – nonetheless consistently managed to create broad spaces for private thought and relationships. This may have been a fundamentally important part of her effort to support and renew herself over the long term; as such it may offer a window into understanding who she may have been.⁵³ Though Young and Brayton had their reasons for leaving no documents to future generations, ultimately I find their stories to be of great significance and well worth the effort to recover them because of Young's important contributions to the field of education and because of the questions their stories raise about LGBTQ+ history.⁵⁴

Telling the stories of our queer/LGBTQ+ forebearers in education, those folks who in some ways transgressed bounds of normative sexualities and/or genders, is challenging. The language we choose to use generally does not translate easily or well across time. Sources are difficult to find and interpret. They often require looking in shadows to identify what evidence is systematically missing vs. what exists, and then devising arguments, perhaps imperceptible at first, that elucidate previously unseen facets. And then we may find remarkable stories of those who came before us, people we recognize in important ways who aspired to create more equitable, welcoming, and empowering schools for all its members.

⁵¹ Blount, *Women's revolution in schools*.

⁵² Ibid.

⁵³ I thank an anonymous reviewer of this manuscript for this meaningful insight.

⁵⁴ Ibid.

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“WE DIDN’T THINK IT WOULD BE WELL RECEIVED”: THE GAY ALLIANCE OF STUDENTS’ LEGAL VICTORY OVER VIRGINIA COMMONWEALTH UNIVERSITY, 1974-1976*


«No pensábamos que fuera a tener buena acogida»: la victoria legal de la Alianza Gay de Estudiantes sobre la Virginia Commonwealth University, 1974-1976


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Abstract. In 1974, a group of college students attempted to undertake the simple act of registering an official student organization at Virginia Commonwealth University (VCU). In contrast to every other student group that had sought such status, the group, the Gay Alliance of Students (GAS), was denied registration. They were denied because the group was composed of LGBTQI+ students who wanted to promote the well-being and understanding of themselves and other LGBTQI+ individuals on campus. This article examines the founding, experience, and legal battles of GAS, an important organization in both the history of LGBTQI+ students and the history of LGBTQI+ rights more broadly. In response to its denial, GAS sued VCU in US federal district court, claiming violations of its fundamental rights under the US Constitution. After a split decision in its initial case, GAS appealed and won a resounding victory over VCU administrators and their attempts to deny LGBTQI+ students their rights. That victory was one of the first ever for an LGBTQI+ student organization at the federal appellate level and set a precedent for other LGBTQI+ students in five states. This article uses historical methods to situate these efforts in their institutional and local context, contribute to

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the nascent literature on LGBTQI+ student legal cases, and consider this key case that had implications beyond VCU and, indeed, beyond higher education.

Keywords: LGBTQI+; College Students; Activism; Law; Higher Education.

Resumen. *En 1974, un grupo de estudiantes universitarios intentó llevar a cabo el sencillo acto de registrar una organización estudiantil oficial en la Virginia Commonwealth University (VCU). A diferencia de todos los demás grupos de estudiantes que habían solicitado dicho estatus, al grupo, la Alianza Gay de Estudiantes (GAS), se le denegó el registro. Se le denegó porque el grupo estaba compuesto por estudiantes LGTBQI+ que querían promover el bienestar y la comprensión de sí mismos y de otras personas LGTBQI+ en el campus. Este artículo examina la fundación, la experiencia y las batallas legales de GAS, una organización importante tanto en la historia de los estudiantes LGTBQI+ como en la historia de los derechos LGTBQI+ en general. En respuesta a su denegación, GAS demandó a VCU ante un tribunal federal de distrito de EE.UU., alegando violaciones de sus derechos fundamentales en virtud de la Constitución de EE.UU.. Tras una decisión dividida en su caso inicial, GAS apeló y obtuvo una rotunda victoria sobre los administradores de VCU y sus intentos de negar a los estudiantes LGTBQI+ sus derechos. Esa victoria fue una de las primeras de una organización estudiantil LGBTQI+ a nivel de apelación federal y sentó un precedente para otros estudiantes LGTBQI+ en cinco estados. Este artículo utiliza métodos históricos para situar estos esfuerzos en su contexto institucional y local, contribuir a la incipiente literatura sobre casos legales de estudiantes LGTBQI+ y considerar este caso clave que tuvo implicaciones más allá de VCU y, de hecho, más allá de la educación superior.*

Palabras clave: *LGTBQI+; Estudiantes universitarios; Activismo; Derecho; Educación superior.*

In September 1974, Brenda Kriegel and other members of the newly founded Gay Alliance of Students (GAS) applied for registration from Virginia Commonwealth University (VCU). One hundred and forty-four times in the five-year history of the institution, other students had undertaken the simple process of filing paperwork with the Office of the Dean of Student Life. In each instance, their groups had been registered as a VCU student organization. Once registered, student organizations could reserve space on campus, apply for student activity funds, and access a variety of other services. But when GAS applied for registration, student affairs officials first asked for clarifications and then deviated

from both policy and precedent by sending the application to the institution's Board of Visitors. The board rejected the application and set off a two-year legal battle that ultimately established an important precedent for LGBTQI+ college student organizations.¹

This article examines the founding, lived experience of members, and legal battles of this groundbreaking LGBTQI+ college student organization. In doing so, it contributes to the small but growing literature on the historical importance and contributions of LGBTQI+ student organizations in the United States. In particular, this article advances the even smaller literature about the lawsuits that some LGBTQI+ groups had to pursue to secure rights that university leaders attempted to withhold. From the 1970 lawsuit filed against Sacramento State College through the currently pending case involving the recognition of a student organization at Yeshiva University, LGBTQI+ students have been forced into courtrooms to claim rights readily available to other students.² The GAS case was one of the first to reach the appellate level of the federal judiciary and set precedent in five states under the jurisdiction of the US Court of Appeals for the Fourth Circuit. This article situates this landmark case in its institutional and urban contexts and demonstrates the influence of the larger political environment on institutional decision making.

Studies of LGBTQI+ college student organizations are important as they help to document and explain key shifts in how sexually minoritized

¹ We use LGBTQI+ when speaking generally or about modern situations but rely on the terms used by the participants when discussing specific events or sources in the time period under consideration. Most often, the word gay or lesbian was used.

² David A. Reichard, "‘We can't hide and they are wrong’: the Society for Homosexual Freedom and the struggle for recognition at Sacramento State College, 1969-1970", *Law and History Review* 28, no. 3 (2010): 629-674; Elizabeth Redden, "Students sue over denial of LGBTQ+ club recognition", *Inside Higher Ed*, 28 April 2021. <https://www.insidehighered.com/news/2021/04/28/yeshiva-students-sue-seeking-recognition-lgbtq-student-club>. (consulted on 12-7-2022). Other students, especially members of racially marginalized communities, also had to sue for access and equal treatment over the course of U.S. history. The higher education lawsuits that preceded *Brown v. Board*, the *Dixon v. Alabama* ruling that signalled the beginning of the end of *in loco parentis*, and the *Healy v. James* decision discussed below all point to the legal challenges that students launched against their institutions. On broader higher education legal challenges see, for example, Amy Gajda, *The trials of academe: the new era of campus litigation* (Cambridge: Harvard University Press, 2010); Michael A. Olivas, *Suing alma mater: higher education and the courts* (Baltimore: Johns Hopkins University Press, 2013); Scott M. Gelber, *Courtrooms and classrooms: a legal history of college access, 1860-1960* (Baltimore: Johns Hopkins University, 2016).

students experienced higher education in the United States. For most of the twentieth century many colleges and universities enacted overt and institutionalized efforts to oppress LGBTQI+ individuals. As Patrick Dilley argued in 2002, the “systemic removal of postsecondary students found or believed to engage in homosexual behavior was widespread across the United States from the 1940s through the 1960s”.³ Later scholars would demonstrate that such “purges” reached back to at least the 1920s.⁴ Often institutional leaders expelled alleged LGBTQI+ students with little evidence and no due process. At times they notified police of students’ alleged criminal behavior; in other instances they punished LGBTQI+ students more harshly than did the legal system.⁵

Scholars have identified the formative years of US-based campus LGBTQI+ student organizations as a period of intense activism that resulted in positive social changes in many nations, as the intergrationist approach of the homophile movement was eclipsed by the bolder aims of a transnational gay liberation movement. While these studies largely overlook the role of college students, the rise of campus-based LGBTQI+ organizations was a key turning point in both student experiences and the broader LGBTQI+ rights movement in the US. In studying the first LGBTQI+ student organizations founded at Columbia and Cornell Universities directly before the Stonewall riots, Beemyn noted:

While Stonewall served as a main catalyst for the rise of a new era in the struggle for lesbian, gay, bisexual, and transgender (LGBT) rights, the preceding gay activism at Columbia, Cornell, and a handful of other universities played a critical role in laying the groundwork that would enable a militant movement to emerge following the riots. Not only did the student groups take the lead in asserting a sense of pride in being gay, but, through speaking unabashedly to others about their personal experiences [...] and developing alliances with those engaged in other struggles,

³ Patrick Dilley, “20th century postsecondary practices and policies to control gay students”, *Review of Higher Education* 25, no. 4 (2002): 417.

⁴ William Wright, *Harvard’s secret court: the savage 1920 purge of campus homosexuals* (New York: St. Martin’s Press, 2005); Nicholas L. Syrett, “The boys of Beaver Meadow: a homosexual community at 1920s Dartmouth College”, *American Studies* 48 (2007): 9-18.

⁵ Margaret A. Nash and Jennifer A. R. Silverman, “An indelible mark’: gay purges in higher education in the 1940s”, *History of Education Quarterly* 55, no. 4 (2015): 441-459.

[...] they made gay liberation an important concern for many nongay people.⁶

By 1971, more than 175 such groups existed on US college campuses, providing members with emotional support and social outlets, offering speakers bureaus and educational activities, and pushing for institutional and societal change. Over the next several decades, the numbers of LGBTQI+ student organizations exponentially increased. These groups improved the campus climate for LGBTQI+ students, increased the visibility of LGBTQI+ people among both straight and sexually minoritized people, and advanced the LGBTQI+ rights movement.⁷

While the existing literature about LGBTQI+ student organizations often acknowledges the intense homophobia their members confronted, the intransigence of institutional leaders has been largely overlooked. Yet some students were forced to sue their institutions to claim their rights to form an organization. Studies of the lawsuits that GAS and other LGBTQI+ student organizations undertook document student actions against institutionalized power, integrate LGBTQI+ college students' efforts into the broader literature on LGBTQI+ rights, and refine nuanced understandings of student activism. While the outcomes of these lawsuits have been referenced in legal scholarship – work that demonstrates how courts developed a test from the US Supreme Court's decision in *Healy v. James* to determine whether a public institution had to recognize a student organization – the historical scholarship on them

⁶ Laura A. Belmonte, *The international LGBT rights movement* (London: Bloomsbury, 2021), 109-144; Brett Beemyn, "The silence is broken: a history of the first lesbian, gay, and bisexual student groups", *Journal of the History of Sexuality* 12, no. 2 (2003): 205.

⁷ On the important contributions of LGBTQI+ student organizations, see, for example, Jessica Clawson, "Coming out of the campus closet: the emerging visibility of queer students at the University of Florida, 1970-1982", *Educational Studies* 50, no. 3 (2014): 209-230; Patrick Dille, *Gay liberation to campus assimilation: early non-heterosexual student organizing at midwestern universities* (New York: Palgrave Macmillan, 2019); T. Evan Faulkenbury and Aaron Hayworth, "The Carolina Gay Association, oral history, and coming out at the University of North Carolina", *Oral History Review* 43, no. 1 (2016): 115-137; David Nichols and Morris J. Kafka-Hozschlag, "The Rutgers University Lesbian/Gay Alliance, 1969-1989: the first twenty years", *Journal of the Rutgers University Libraries* 51, no. 2 (1989): 55-95. For an important recent discussion of the historical literature on LGBTQI+ experiences in higher education, see, Karen L. Graves, "The history of lesbian, gay, bisexual, transgender, queer issues in higher education", in *Higher education: handbook of theory and research*, vol. 33, ed. Michael Paulsen (Cham: Springer: 2018), 127-173.

remains sparse.⁸ Beth Bailey and David Reichard, respectively, provide histories of early lawsuits in the 1970s at the University of Kansas and Sacramento State College, while Dilley argues that requiring students to bring these lawsuits represented a troubling form of administrative persecution of LGBTQI+ students in the late-twentieth century.⁹ Reichard asserts these lawsuits provide a critical window on the struggles gay, lesbian, and bisexual students faced, the tactics they employed, and the impact of the experience as they attempted to gain their first public footing on college campuses”.¹⁰

Surprisingly, little historical research has focused on the reported cases of LGBTQI+ student organizations lawsuits. This is unfortunate as these lawsuits, which LGBTQI+ students overwhelmingly won, represent important, underappreciated legal victories in the LGBTQI+ rights movement.¹¹ Our recent article examined the Committee on Gay Education’s two lawsuits against the University of Georgia, the latter of which resulted in the first published judicial opinion. There has been some scholarly attention to the protracted legal battle between Gay Student Services and Texas A&M University between 1977 and 1985.¹² Only Stein, in a recent article examining the broader legal strategies employed to decouple criminalized sexual activities from LGBTQI+ student organizations, has emphasized the importance of the VCU case. Here, though, we step back and consider the founding of GAS in its institutional and

⁸ *Healy v. James*, 408 US 169 (1972); Annette Gibbs, “Gay student organizations on campus: the controversy continues”, *Journal of College Student Personnel* 20, no. 6 (1989): 485-489; Loren J. Rullman, “A legal history: university recognition of homosexual organizations”, *ACU-I Bulletin* 59, no. 2 (1991): 4-9.

⁹ Beth Bailey, *Sex in the heartland* (Cambridge: Harvard University Press, 1999), 175-190; Reichard, “We can’t hide”, 632-633; Patrick Dilley, *Queer man on campus: a history of non-heterosexual college men, 1945-2000* (New York: RoutledgeFalmer, 2002), 169-173.

¹⁰ Reichard, “We can’t hide”, 632.

¹¹ Reported cases are lawsuits that have published judicial opinions. See, for example, Patricia A. Cain, *Rainbow rights: the role of lawyers and courts in the lesbian and gay civil rights movement* (Boulder, CO: Westview Press, 2000).

¹² Timothy Reese Cain and Michael S. Hevel, “Gay people pay activity fees too’: the Committee on Gay Education’s pioneering legal victories at the University of Georgia”, *Review of Higher Education* 45, no. 1 (2021): 61-91; Andrew Vaserfirer, “(In)visibility in lesbian and gay student organizing: the case of Gay Student Services”, *Journal of Homosexuality* 59, no. 4 (2012): 610-627; Michael S. Hevel and Charles J. Thompson, “Aggies are not queers’: a history of *Gay Student Services v. Texas A&M University*”, in *Resist, organize, build: feminist and queer activism in Britain and the United States in the long 1980s*, ed. Sarah Crook and Charlie Jeffries (Albany: SUNY Press, 2022), 31-52.

urban contexts – the latter of which was especially important for an institution with a “non-traditional” population in an urban setting – describe the organization’s purposes and the homophobia it faced, and detail its landmark legal battle.¹³

INSTITUTIONAL AND URBAN CONTEXT

While most studies of LGBTQI+ student organizations consider students at established institutions disrupting longstanding institutional values and practices, the situation at VCU was different. Founded on July 1, 1968, through the Virginia legislature’s merger of two dissimilar institutions, the Medical College of Virginia (MCV) and the Richmond Professional Institute (RPI), VCU was paradoxically a new institution with a long history. MCV traced its origins to 1838 but had recently modernized, building new facilities and receiving full accreditation from the American Medical Association’s Council on Education. In addition to medical degrees and doctorates in the health sciences, MCV offered undergraduate degrees in fields such as nursing and pharmacy. By the time of the merger, MCV faculty were pursuing funded research and medical innovation. RPI began in 1917 as the Richmond School of Social Work and Public Health. In 1924, it affiliated with the College of William and Mary, and soon added art instruction, occupational programs, and, eventually, a business school. It lacked, though, a significant core of liberal arts and sciences. By the early 1960s, when it separated from William and Mary, most of its campus consisted of formerly stately houses that had been repurposed into academic buildings in a “declining” neighborhood.¹⁴

Though there was an effort to relocate the merged institutions to the edge of the city, the head of the commission appointed to oversee the merger conceived of VCU as an urban institution aimed at addressing

¹³ Marc Stein, “Students, sodomy, and the state: LGBT campus struggles in the 1970s”, *Law and Social Inquiry* 49, no 2 (2022), 531-560. On the problematic nature of the term “non-traditional”, see Regina Deil-Amen, “The traditional college student: a smaller and smaller minority and its implications for diversity and access institutions”, in *Remaking college: the changing ecology of higher education*, ed. Michael W. Kirst and Mitchell L. Stevens (Palo Alto: Stanford University Press, 2015), 134-165.

¹⁴ John T. Kneebone and Eugene P. Trani, *Fulfilling the promise: Virginia Commonwealth University and the City of Richmond* (Charlottesville: University of Virginia Press, 2020), 9-16.

the needs of an urban center.¹⁵ Edward A. Wayne, leader of the eponymous Wayne Commission, looked to Philadelphia's Temple University as a model and promoted the "urban university concept – an institution that is a living part of the city".¹⁶ He argued, "there is a great opportunity for an urban university to serve the burgeoning urban growth of Virginia".¹⁷ VCU ultimately assumed the former institutions' two campuses, roughly a mile and a half apart in downtown Richmond, guided by this urban mission. Amid the broader massification of higher education in the country, the institution quickly grew to accommodate more members of the state's growing college student population. As it did, it faced numerous tensions, including that members of MCV looked down upon RPI, believing that that the merger dealt a blow to MCV's prestige.¹⁸

The founding emphasis initially provided a focus and the promise of a unique mission in the state. Faculty, for example, were engaged with urban issues such as busing, school desegregation, and access to health care. Yet, by the mid-1970s, being tagged an "urban university" was seen as problematic by many in the US. It was, according to Steven J. Diner, "a low-status label, which many universities in cities now avoided".¹⁹ Encountering racially charged negative perceptions of "urban", as well as concerns about safety in an area that had been hit hard by suburbanization and White flight, VCU leaders sought a new identity.²⁰ For example, in 1977, President T. Edward Temple told the student newspaper, the *Commonwealth Times*, that while many people saw the institution as located in and focused on an urban core, "I like to think of us now being a comprehensive university with an urban thrust. There is a difference... It gives us a wider definition".²¹

¹⁵ Kneebone and Trani, *Fulfilling the promise*, 22-25.

¹⁶ Robert Holland, "Early university start hoped", *Richmond Times Dispatch*, 22 January 1967. Reprinted in *Scarab*, February 1967, 17.

¹⁷ Holland, "Early university", 7.

¹⁸ Kneebone and Trani, *Fulfilling the promise*, 32-33, 46-50.

¹⁹ Steven J. Diner, *Universities and their cities: urban higher education in America* (Baltimore: Johns Hopkins University Press, 2017), 91.

²⁰ Kneebone and Trani, *Fulfilling the promise*, 9-28, 72-76, 81-82.

²¹ Jim Jennings, Mike Welton, and Brett Averill, "The selling of the university 1977: An interview with the President", *Commonwealth Times*, 17-23 January 1977.

While the centrality of an urban identity would become contested, the institution's location affected the experience and perception of students in multiple ways. In the mid-1970s, roughly 40% of the student population attended part-time, and the vast majority lived off campus.²² Just a few months before GAS was formed, the school's yearbook editor, Marjorie Bendl, told the *Commonwealth Times*: "As an urban university, there is something unique about VCU". She continued, "VCU's students face the realities of living in the city like battling traffic, finding places to park, dealing with crime. We think the most important part of your education goes on outside the classroom".²³ In short, students engaged in the city as much or more than on-campus activities, contributing to what would be perceived as apathy to the features of student life common at more residential colleges and universities.

RPI's location in a neighborhood that had been home to beatniks in the 1950s and hippies in the 1960s further affected perceptions of that institution and then of VCU; to many, there was little separating the students from the other residents of the neighborhood.²⁴ In 1970, while opposing the expansion of the university's campus, Richmond mayor Philip J. Bagley noted that a subset of the student population had given the institution "an unwholesome image". He continued, "This element, by their obnoxious behavior and idiotic behavior, have changed Franklin Street into Freak Avenue and Grace Street into Skid Row".²⁵ It was not just those outside the institution who were concerned. The MCV reaction to the merger was based, in part, on the reputation of RPI students. Moreover, in reporting on the aforementioned interview with Temple, student reporters noted, "Perhaps the major part of the image problem of the university has been the makeup of the student body. For years, the university has had a reputation for 'freak' students, 'hippies' and 'artists' accompanied by a feeling that it is the most liberal college in the state".

²² Mike Grubbs, "Enrollment: administrators ask... will a better image pull up the figures", *Commonwealth Times*, 17-23 January 1977.

²³ "VCU's urban nature explored", *Commonwealth Times*, 4 April 1974.

²⁴ Ann Laurens Williams, "In search of a home: an historical analysis of the major factors concerning the location of Virginia Commonwealth University" (Doctoral thesis, College of William and Mary, 1985), 38; Kneebone and Trani, *Fulfilling the promise*, 32-33.

²⁵ Mike Boykin, "Bagley's stop sign", *Commonwealth Times*, 13 November 1970.

Temple indicated that the image was being “overcome” and replaced with one “of quality education, of certain schools with prestige”.²⁶

VCU’s reputation as a liberal college was an exaggeration. While in the late 1960s and early 1970s VCU student activists sought improved conditions for Black students, protested against the Vietnam War, rallied in support of Black assistant dean Vincent Wright after his surprise dismissal, and pursued other progressive causes, their efforts were limited in comparison to student activism on many campuses. Anti-war sentiment was relatively restrained, and a 1968 poll of VCU students found most respondents favored Richard Nixon for president followed by Barry Goldwater. In the aftermath of the Ohio National Guard killing four young people at Kent State University in May 1970, other institutions in Virginia and across the nation erupted in protest. The response at VCU was more muted, as students largely accepted the administration’s refusal to pause classes.²⁷ One *Commonwealth Times* columnist pointed to the incongruity of the state’s supposedly “most liberal” student population responding in a restrained way by asking if the institution’s reputation would change to reflect reality.²⁸ Another explained the campus’s calm reaction by noting “what else would one expect when the overwhelming majority of students are so politically nonexistent that even the term apathetical does not even come close to being an appropriate adjective”.²⁹ In 1971, the student government voted itself out of existence; an effort to replace it with a new representative body failed in 1973 when only 8.5% of the students voted on the referendum. Student apathy, frequently lamented, was seen as the cause.³⁰

Richmond remained a conservative Southern city – and that ethos impinged on VCU. Formerly the capital of the Confederacy, Richmond served as the capital of a state that pursued “massive resistance” to school desegregation and racial justice.³¹ White flight from Richmond

²⁶ Jennings, Welton, and Averill, “The selling of the university”.

²⁷ Kneebone and Trani, *Fulfilling the promise*, 32-33, 54-56.

²⁸ Mike Boykin, “Will VCU’s image change?”, *Commonwealth Times*, 15 May 1970.

²⁹ Bill Eby, “New coalition faces VCU apathy”, *Commonwealth Times*, 20 May 1970.

³⁰ Gail Barnes, “Referendum vote falls short”, *Commonwealth Times*, 8 November 1973.

³¹ Lewis A. Randolph and Gayle T. Tate, *Rights for a season: the politics of race, class, and gender in Richmond* (Knoxville: University of Tennessee Press, 2003).

and efforts to combat student busing were widespread. In 1970, the city annexed much of a neighboring county in an explicit attempt to capture White voters to offset a growing Black electorate.³² Housing discrimination likewise posed a significant problem for Black campus and community members. As former VCU professor Edward H. Peeples noted in his memoir, “the first challenging test given to new Black VCU students was not administered by a professor. It was the test of fortitude needed to obtain a place to live”.³³ More recently, GAS founder Dottie Cirelli recalled, “This was Richmond, Virginia, so you can imagine it was homophobic and it was racist”.³⁴

Concerns about the conservative Richmond context swayed VCU administrators’ actions on progressive issues. While significant advances toward attracting and serving a diverse student population were made in the institution’s opening years, the upper administration felt beholden to larger public sentiment in a segregated state. When Vincent Wright was passed over for a promotion in 1971, for example, he was reportedly told by Vice President for Student Affairs Richard Wilson that “Richmond, Virginia, is not ready for a Black dean”.³⁵ When students returned the next fall to find that Wright, who had actively recruited Black students and was viewed as widely supportive of all students, had been dismissed, they rallied to his defense and protested the institution’s racism. According to Peeples, who had recruited Wright to VCU and was a close friend, Wilson admitted that Wright’s transgression was violating Southern racial norms by dating a White woman. Peeples argued that Wilson and other leaders operated not out of racial animus but that they worried about “‘perilous blowback from white Virginians who feared blacks were ‘taking over’ a ‘white institution’”.”³⁶ Fear of external political pressures – and institutional unwillingness to bear them – would again be implicated when GAS sought registration.

³² John V. Moeser and Rutledge M. Dennis, *The politics of annexation: oligarchic power in a southern city* (Cambridge: Schenkman Books Inc., 1982).

³³ Edward H. Peeples, *Scalawag: a white southerner's journey through segregation to human rights activism* (Charlottesville: University of Virginia Press, 2014), 148.

³⁴ Dottie Cirelli, interviewed by Michael S. Hevel, 22 December 2021.

³⁵ Peeples, *Scalawag*, 161.

³⁶ Peeples believed that administrators were too timid and misjudged the potential reception of a changing Richmond Peeples, *Scalawag*, 163.

In short, the students who founded GAS attended a university with a bifurcated legacy. From RPI, VCU inherited a progressive and liberal culture, associated in part with its education in social services and in part with its neighborhood. From MCV, it inherited a more conservative and professional culture, striving for heightened prestige. VCU leaders felt both internal and external pressures to shed its liberal reputation. Such a reputation was undeserved anyway, as there was little activism on campus, many students supported conservative politicians, and racism remained unchecked on campus. VCU leaders also contemplated their relationship with greater Richmond, a city with its own complex legacy toward LGBTQI+ people.

LGBTQI+ RICHMOND

Compared to most “college towns” – typically much smaller than a large city in the US – Richmond had a long history of LGBTQI+ communities. Yet in the decade before the founding of GAS, opportunities constricted for these communities to exist. By the early 1970s, a growing number of LGBTQI+ individuals recognized that community and campus organization could be effective conduits to advance their rights. Yet in places most hostile to social change, such groups faced intense resistance to their mere existence.

While evidence of gay sex stretches back to the start of western colonization of Virginia, the earliest evidence of an LGBTQI+ community in Richmond dates to a “private, home-centered gay social scene” in the 1920s and 1930s. Concentrated among the avant-garde White literati, this community provided a “fairly comfortable gay social life at a time when the vast majority of gays and lesbians lived deeply-closeted lives”.³⁷ The disruption of World War II, which included the relocation of millions of people from their homes and communities – especially from rural areas to cities and other areas concentrated with young people

³⁷ Bob Swisher, “Letters, diaries provide view of the 1920’s and 1930’s”, *Our Own Community Press*, September 1988. On a similar lengthy history of LGBTQI+ people and communities in Roanoke, Virginia, see Gregory Samantha Rosenthal, *Living queer history: remembrance and belonging in a southern city* (Chicago, University of Chicago Press), 18-58.

– brought Americans new opportunities to explore their sexuality.³⁸ In Richmond, this occurred downtown in an area that would later become known as “the Block”. Just off RPI’s campus, the Block was home to the United Service Organizations (USO), as well as the bus and railroad stations. It had a constant flow of people exploring new freedoms. During the war and for close to a decade after, gay bars operated discretely but mostly without police raids; hotels, alleys, and basements were others spaces in the Block that facilitated same-sex encounters and relationships. In the segregated South, the bars and broader LGBTQI+ communities were likewise segregated, with the Block being a primarily White space.³⁹

The relative – though far from absolute – openness of the 1940s and early 1950s soon ended amid increased anti-LGBTQI+ sentiment and policing in Richmond. In the 1960s, Eton Inn, founded in 1962 after the forced closure of another gay bar and commonly called Eton’s, became a popular hangout for LGBTQI+ people. Like other such establishments, the bar was under scrutiny from the Alcohol Beverage Control (ABC), which enforced a law that forbid serving alcohol to gays or lesbians. Located only a block from RPI, Eton’s drew the ire of the institution’s administrators. They barred RPI students from patronizing it and called on the ABC to investigate. These actions quickly led to the closing of Eton’s and the arrest of its owner. When, in early 1969, a successor bar had its alcohol license revoked for violating the same code, the city’s first public protests against anti-LGBTQI+ laws and policing occurred.⁴⁰ A few months later, the Stonewall uprising in New York helped bring LGBTQI+ rights to the national stage.

In the months that followed, a small Gay Liberation Front (GLF) “emerged from the anti-war, anti-Establishment, hippie counter-culture

³⁸ John D’Emilio, *Sexual politics, sexual communities: the making of a homosexual minority in the United States, 1940–1970* (Chicago: University of Chicago Press, 1983), 24.

³⁹ Bob Swisher, “‘While straights slept, gays played.’ part 1, 1944–1952”, *Our Own Community Press*, April 1988; Beth Marschak and Alex Lorch, *Lesbian and gay Richmond* (Mount Pleasant: Arcadia Publishing, 2008), 26.

⁴⁰ D’Emilio, *Sexual politics, sexual communities*, 201; Marshack and Lorch, *Lesbian and gay Richmond*, 32–33. On the importance of gay bars as meeting places for LGBTQI+ students, see Beemyn, “The silence is broken”, 215, 220–221.

[...] around VCU”.⁴¹ A nascent movement rather than a formal organization, GLF consisted of a handful of VCU students and area residents who would meet near campus at the apartment of VCU graduate student Kenneth Pederson. There, they discussed LGBTQI+ issues and planned awareness-raising activities such as distributing pamphlets and engaging in conversations with straight people. Dances, at least two of which GLF sponsored in 1971, were especially important events in the battle for acceptance. GLF’s last meeting was in late summer 1971. Pederson later claimed that he continued his advocacy efforts until he was expelled from the university for speaking about gay liberation in a guest lecture in the School of Social Work.⁴² In 1974, months before he became a leader and spokesperson of GAS, Walter Foery penned an anonymous piece for the student yearbook noting that GLF “never really caught on. Maybe because VCU’s campus-less student body is too diverse for any political or social idea to catch on. Maybe because there’s simply no need”.⁴³ Still, the prospect of a LGBTQI+ student organization caught institutional leaders’ attention and portended a future clash while also showing the weakness of the institution’s ultimate position. In December 1972, the president reported to the Board of Visitors, “Student organizations are being registered on campus. We have no basis to deny a gay liberation group should such a group request registration”.⁴⁴

Other avenues for LGBTQI+ individuals to meet in Richmond persisted, including what a lesbian activist called “nip joints or shot houses – illegal operations where they sold drinks by the glass, cooked nice meals, and if you got too drunk to drive you could always crash there”.⁴⁵

⁴¹ Bob Swisher, “Shameless in public: gay lib 1969–1972”, *Our Own Community Press*, May 1988.

⁴² Swisher, “Shameless in public”; Gary Thompson and Mike Whitlow, “Out of the closets, into the streets... the gay revolution is here to stay”, *Commonwealth Times*, 12 March 1971; Marshack and Lorch, *Lesbian and gay Richmond*, 37. On the importance of dances for LGBTQI+ college students, see Dilley, *Gay liberation*, 17-21, 43-64; Cain and Hevel, “Gay people pay”, 72-78.

⁴³ Paul Atreides [Walter Foery], “One foot in the closet, one foot out”, *Cobblestone* (Richmond, VA: 1974), 75-76, 76. On Foery’s authorship, Walter Foery, interviewed by Michael S. Hevel, 9 December 2017.

⁴⁴ “Report of the President to the Board of Visitors”, in Minutes of a Regular Meeting of the Board of Visitors of the Virginia Commonwealth University, 21 December 1972, p. 4. <https://digital.library.vcu.edu/islandora/object/vcu%3Abov>

⁴⁵ James T. Sears, *Rebels, rubyfruit, and rhinestones: queering space in the Stonewall South* (New Brunswick: Rutgers University Press, 2001), 134.

Such places were at the center of the city's Black lesbian and gay community. The Richmond Women's Center, housed for a time in the YWCA, included many lesbians and helped coalesce a lesbian rights movement in the early 1970s. But the primary successor to Richmond's GLF as an explicitly LGBTQI+ organization was the Gay Awareness in Perspective (GAP), founded in the aftermath of an April 1974 talk by feminist lesbian author Rita Mae Brown, who had been invited to campus by three students, Kriegel, Cirelli, and Frances Stewart.⁴⁶ After Brown gave what Cirelli later called "a great motivational speech about being gay and the need to come out and fight for our rights", Cirelli circulated a sheet of paper for people to sign up as founding members of the new organization. For the next four years, GAP served to build community, sponsor discussions, and share information through its newsletter *GAP Rap*, though it was less politically active than some desired. While GAP was founded by VCU students and was led in part by VCU Assistant Dean of Student Life Stephen Lenton, who gradually became an openly gay at work, GAP was not a formal campus organization and drew membership from across the city.⁴⁷

"YOU CANNOT BE GAY ALLIANCE OF STUDENTS"⁴⁸

GAP was a city-based organization, but some students – including those who had invited Brown to VCU – sought a campus-specific analogue. As Kriegel later remembered, a group of gay and lesbian students sought a place to gather other than bars and looked to GAP for inspiration: "there were some students – like Dottie Cirelli and myself – who thought, "Why can't we have something like this on campus for just students?". She continued, "We didn't think it would be well-received, but we wanted to have a place to meet to deal with both internal and external

⁴⁶ Sears, *Rebels, rubyfruit, and rhinestones*, 135-136; Bob Swisher, "Author/wit Rita Mae Brown inspired first organization", *Our Own Community Press*, June 1988.

⁴⁷ Brian McNeill, "Inside the fight to win VCU's recognition of the university's first LGBTQIA student organization", *VCU News*, 29 September 2016; Cirelli, interviewed by Hevel; Brenda Kriegel, interviewed by Michael S. Hevel, 21 December 2021; Sears, *Rebels, rubyfruit, and rhinestones*, 135-136; Swisher, "Author/wit Rita Mae Brown"; Michael S. Hevel and Timothy Reese Cain, "The queer student affairs career of Stephen Lenton", *Journal of Women and Gender in Higher Education* 15, no. 3 (2022): 261-278.

⁴⁸ Foery, interviewed by Hevel.

homophobia”.⁴⁹ In early fall, as the group wanted to start a counseling hotline for lesbian and gay students, they realized that they needed to be an official organization.⁵⁰ Lenton agreed to serve as the group’s advisor and, on September 5, 1974, Kriegel submitted GAS’s initial application for registration to the office in which Lenton worked. The stated purposes included creating a “supportive community”, undertaking education efforts, and pursuing “gay rights in concert with the civil liberties of all people”. The application also indicated that the group was still being formed and that it anticipated affiliating with GAP due to shared interests and overlapping membership.⁵¹ In response to the Office of Student Life’s concerns over perceived vagueness, a revised version of the form stripped mention of GAP and streamlined the group’s purpose to focus on consciousness raising, supporting the Equal Rights Amendment, and ending discrimination based on sexual orientation. The group intended to spend the fall planning educational events, gathering literature, creating a speakers bureau to address classes and other gatherings, and establishing a gay counseling service; it hoped to implement the plans in the spring term. Crossing out “Spokesmen” on the form, Kriegel identified herself as GAS’s “Spokesperson”.⁵²

Such applications were routinely submitted and approved, but GAS’s was handled differently. The Office of Student Life forwarded the application to Vice President of Student Affairs Richard Wilson, who likewise decided that the registration of an LGBTQI+ student organization was too sensitive for him to handle. On October 17, Wilson presented the

⁴⁹ McNeill, “Inside the fight”.

⁵⁰ Ray McAllister, “Pretrial talks due on Gay Alliance’s suit against VCU”, *Richmond Times Dispatch*, 22 May 1975.

⁵¹ “Application for registration of a student organization”, 5 September 1974, Folder 1, Box 1, VCU Gay Alliance of Students Collection (hereafter cited “GAS Collection”), Special Collections and Archives, James Branch Cabell Library, Virginia Commonwealth University, Richmond, VA (hereafter cited as “VCU Libraries”).

⁵² “Application for registration of a student organization”, 2 October 1974, Folder 1, Box 1, GAS Collection, VCU Libraries. For the administrator’s concerns, see William H. DuVall to Brenda C. Kriegel, September 16, 1974. Gay Alliance of Students (Richmond, Va.) Records, 1974-1976. Mss3 G2543 a (hereafter cited as “GAS Records”), Virginia Museum of History and Culture, Richmond, VA (hereafter cited as “VMCH”). Throughout its existence, GAS eschewed a formal organization structure, relying on consensus building instead. The only officers were “spokespeople” who were sometimes called colloquially called “president” but did not act in such a capacity. Walter A. Foery, who was not an original member but would soon join Kriegel as a spokesperson, noted that it was important to the organization to have both a lesbian and gay male spokesperson. Foery, interviewed by Hevel.

application to the institution's governing board. He said that his office intended to approve it, but he also suggested that the board could instead assert its control and reject the application. Wilson was joined by James L. Mathis, the head of the psychiatry department, who presented on current understandings of homosexuality in society, which the American Psychological Association had de-pathologized the previous year. A "long and often anguished" discussion ensued, with the board ultimately voting 7-2 against registration. Its formal statement read: "Resolved, having deep human regard for the severe human problem involved, the Board expresses its sense that the Gay Alliance of Students not be registered".⁵³ In essence, as Foery later commented, the decision amounted to the board declaring, "You cannot be the Gay Alliance of Students".⁵⁴

The board's resolution was vague but problematic, which *GAP Rap* highlighted by pointing out that "the source of the 'severe human problem involved' is the greater public's biased attitude toward the gay minority".⁵⁵ The board's leader, Wyndham Blanton, stated that registering GAS "was not in the best interest of the institution in terms of the total job of the institution". The dean of students, Alfred T. Matthews, similarly wrote that the board had decided that registering GAS "would not serve the broader interests of the university or be consistent with the objectives for the registration of student organizations".⁵⁶ Vice President Wilson contended that the board was simply trying to represent the will of the people of the state, while a person in the meeting believed that the board wanted the courts to "force" them to act.⁵⁷ Many believed the board acted based on its fear that registering GAS would damage VCU's already questionable reputation and threaten both state funding and private donations. The institution formally denied that finances were a factor, but people close to the board indicated that they were a concern, at least to some degree. One stated, "That distinctly was a factor... I think there were concerns about a bad reaction from the General

⁵³ McAllister, "Pretrial talks due".

⁵⁴ Foery, interviewed by Hevel.

⁵⁵ "G.A.S. case progresses", *GAP Rap*, 20 March 1975, Folder 34, Series 2 Stephen Michael Lenton Papers (hereafter cited as "Lenton Papers"), VMHC.

⁵⁶ Paul Woody, "Gay awareness club rejected", *Commonwealth Times*, November 1, 1974; Alfred T. Matthews to Brenda Kriegel, October 23, 1974, GAS Records, VMHC.

⁵⁷ Woody, "Gay awareness club rejected"; McAllister, "Pretrial talks due".

Assembly, to be sure. And there were concerns about a bad reaction from the people of Virginia, particularly the people of Richmond”.⁵⁸

GAS members were offended by the board’s decision, and the *Commonwealth Times* editorialized against it on multiple occasions.⁵⁹ Calling it “A Step Backward” in early November, the latter noted, “It is loudly proclaimed that VCU is a modern, innovative university which readies its students for life in the outside world. The decision by the Board of Visitors to deny registration to the Gay Awareness organization contradicts this proclamation and destroys the basic idea that all men are created equal”. The student editors argued that the board had “allowed the school to be subjected to the whims of backward and neanderthalic thinking”.⁶⁰ Later that month, managing editor Jim Baynton presciently looked to the US Supreme Court’s ruling in *Healy v. James* to argue that the board was on the wrong side of the law.⁶¹ Six weeks after the board’s decision, the *Commonwealth Times* criticized not only the Office of Student Life and the board, but the student population: “it is difficult to understand [...] how allegedly aware, liberal, open minded, modern, urban, and understanding students could have so little to say when a group of their fellow students have their rights trampled upon”.⁶²

As this critique suggests, beyond the strong support from the student press, the reaction on campus was mixed and somewhat muted. A few progressive student organizations supported GAS. The VCU Young Democrats Club questioned the decision and the campus chapter of the American Civil Liberties Union (ACLU) responded by barring discrimination based on sexual orientation within its organization and calling on others to do the same.⁶³ Sharon Talarico, a student leader who served on the Council for University Student Affairs – an umbrella group that supported student organizations – helped lead a small group rallying

⁵⁸ McAllister, “Pretrial talks due”.

⁵⁹ Foery, interviewed by Hevel; “The fight for equality: remembering students’ civil rights fight 40 years later”, *Commonwealth Times*, 11 October 2016.

⁶⁰ “A step backward”, editorial, *Commonwealth Times*, 1 November 1974.

⁶¹ Jim Baynton, “BOV usurped constitution”, editorial, *Commonwealth Times*, 22 November 1974.

⁶² “It’s over”, editorial, *Commonwealth Times*, 6 December 1974.

⁶³ “Democrats question actions of Board of Visitors”, *Commonwealth Times*, 8 November 1974; Stanley G. Carp, Jr., letter to the editor, *Commonwealth Times*, 14 February 1975.

support for GAS from other registered student organizations. Yet she remembered being met with resistance and assumptions about her sexuality. A member of a religious organization informed her that “our faith does not support what you and your group are, your lifestyles”. At the time, Talarico exclusively dated men.⁶⁴

Some, though, countered the decision was made for more base reasons. For example, the petition that Talarico and others circulated to try to rally support from other organizations explicitly challenged the notion that state funds were involved:

Can this argument by the Board of Visitors, that VCU might lose state money, be true? Can it be true that the Board of Visitors thinks that money is more important than human rights?

We think not. We believe that the Board’s action was discriminatory, pure and simple.⁶⁵

Convinced that they were experiencing overt discrimination, GAS members were increasingly determined to fight for registration.

SUING VCU

In December, Wilson reported to the board that the students trying to register GAS were “very calm and reasoned, yet determined” and warned that a legal challenge could be forthcoming.⁶⁶ As a handful of LGBTQI+ student organizations had done to that point, and others have done since, GAS soon took that step, suing for rights that other student groups were routinely afforded. GAS sought support from the ACLU of Virginia, which agreed to help but then struggled to find an attorney to take the case. Lawyers feared damaging their reputations and practices if they

⁶⁴ McNeill, “Inside the fight”; Sharon Talarico, interviewed by Michael S. Hevel, 16 February 2018.

⁶⁵ Sharon Talarico, Deborah Whitham, Robert Callahan, and Walter Gilliam, untitled letter, 20 January 1975, GAS Records, VMHC. The piece also appeared in the *Commonwealth Times*, 24 January 1975.

⁶⁶ “Report of the University Interim Administrative Committee”, in Minutes of a Regular Meeting of the Board of Visitors of the Virginia Commonwealth University, 19 December 1974, p. 4. <https://digital.library.vcu.edu/islandora/object/vcu%3Abov>

represented GAS.⁶⁷ Ultimately, local attorney John M. McCarthy accepted the case and, on April 9, 1975, filed a lawsuit on GAS's behalf in US district court. The suit, *Gay Alliance of Students v. Alfred T. Matthews et. al.*, alleged that senior student affairs officers and members of the Board of Visitors violated the students' First and Fourteenth Amendment rights by refusing to register the organization. In response, the assistant attorney general of Virginia, representing VCU and those individuals named as defendants, offered four reasons that they believed justified their actions: GAS would increase opportunities for homosexual contact; the existence of GAS as a registered organization would encourage some students to join the organization who otherwise might not join; being involved in GAS could be socially and psychologically harmful to individuals; and GAS would tend to attract more homosexuals to VCU.⁶⁸ Though these reasons would largely be accepted by District Judge D. Dortch Warriner, one observer noted that "they rather resemble the vapid words and desperate phrases uttered by racist Whites in denying civil rights to Blacks".⁶⁹

On November 7, 1975, Warriner issued a summary judgement noting that the facts of the case were not in dispute. After briefly summarizing the case Warriner let known where his sympathies lay. He wrote that board members "were attempting to further the best interests of VCU when they refused to recognize GAS. Their decision reflected society's centuries old abhorrence of homosexual conduct. This ancient fear and loathing still finds considerable expression in contemporary laws". He noted that the board "indicated their disapproval of homosexuality" by denying GAS registration, and described their reasoning as "rational" and reflecting "the overwhelming sentiment of" Virginians "who by their taxes have created and maintained Virginia Commonwealth University".⁷⁰ Warriner worried that support for educational institutions could dissipate if institutional leaders could not consider the perspectives of

⁶⁷ "Gays getting bad reception from law", *Commonwealth Times*, 7 February 1975; McCallister, "Pre-trial talks due".

⁶⁸ *Gay Alliance of Students, etc. v. Alfred T. Matthews, et al.*, Civil Action No: 75-0181-R, (E.D. Vir. 1975). Located in Folder 17, Box 1, GAS Collection, VCU Libraries.

⁶⁹ F. Keith Olsen, "The concept of freedom in the GAS decision", *Commonwealth Times*, 19 March 1976.

⁷⁰ *Gay Alliance of Students* [75-0181-R], at 2-3.

most taxpayers. The public had “expressed their condemnation of homosexual practices” through multiple legislative and judicial actions. The Supreme Court had upheld homosexuality as a rationale for deportation in 1967, the military prohibited the service of gay people, and Virginians who committed sodomy could be sentenced to 5 years in prison.⁷¹

Unfortunately for both Warriner and the Board, recent case law placed their biases on shaky legal ground. Warriner noted the “public’s right to regulate and set its norms was circumscribed” by federal court decisions in 1974 against the University of New Hampshire for not recognizing a gay student organization. Indeed, he seemed to disgruntledly acknowledge, in recent years the courts had “almost uniformly” demanded that gay student organizations and “similarly unpopular student groups [...] be accorded the same privileges as other campus organizations”.⁷²

Warriner noted that rights of individuals to join a group to advance their beliefs had long been protected by the First Amendment and that the government could not control speech based “on the content or subject matter of the message”. Moreover, a recent Supreme Court decision highlighted that college administrators had no more latitude to regulate speech on campus than did other governmental officials. “Since the reasons advanced by the Board for denying official recognition are necessarily predicated on the content of GAS’s message, those privileges of registration, the withholding of which constitutes an impermissible infringement of GAS’s associational interests, must be made available to the organization”. Warriner acknowledged that VCU administrators continued to enjoy “wide discretion” in regulating conduct on campus, but such “efforts must be undertaken in such a way as not to offend fundamental constitutional guarantees”.⁷³

Warriner interpreted the Supreme Court’s decision in *Healy v. James* and the federal case from the University of New Hampshire to require

⁷¹ *Gay Alliance of Students* [75-0181-R], at 3-5.

⁷² *Gay Alliance of Students* [75-0181-R], at 5. “Similarly unpopular student groups” likely referred to Students for a Democratic Society (SDS) and other left-wing organizations. Central Connecticut State College’s refusal to recognize a campus chapter of SDS led to *Healy v. James* in which the Supreme Court found the refusal violated the constitutional rights of SDS members.

⁷³ *Gay Alliance of Students* [75-0181-R], at 7-8.

him to consider each benefit of recognition and determine if its denial prevented GAS's ability "to communicate its message within the University environs". Warriner listed eight benefits of registration for student organizations at VCU, five of which related to the ability to meet, advertise, and recruit members. Warriner found GAS constitutionally entitled to these benefits: access to University facilities for meetings and events; free advertising in the student newspaper and on the campus radio; use of bulletin boards; being listed as an organization in the student directory; and being provided a booth during orientation.⁷⁴

Other benefits included receiving advising from university staff and the ability to apply for funds from the student government. Warriner determined that withholding advising did not violate GAS's First Amendment rights, writing that the existing law "does not [...] require that university officials must... affirmatively condone and aid groups with which they do not agree in the furtherance of their goals". The same was true, Warriner believed, in terms of the ability to apply for funding. The final benefit of registration was the somewhat esoteric benefit of registration itself. As with the advisory and funding benefits, Warriner concluded that VCU's unwillingness to register GAS did not violate its members' First Amendment rights. Once GAS had received the benefits of registration to which it was constitutionally entitled, not being registered did not "infringe the associational interests of GAS".⁷⁵

Having determined that GAS was entitled to five of the eight benefits of registration under the First Amendment, Warriner next assessed GAS's equal protections claims under the Fourteenth Amendment for the remaining three. He ultimately decided that the Supreme Court had endorsed an emerging level of "intermediate scrutiny", which permitted a government action that resulted in discrimination if the government articulated a legitimate interest and the action was rationally related to achieving that interest.⁷⁶ In applying intermediate scrutiny to GAS's claims, Warriner determined that VCU had a legitimate interest in discouraging conduct it believed detrimental to students, and he also

⁷⁴ *Gay Alliance of Students* [75-0181-R], at 9-10.

⁷⁵ *Gay Alliance of Students* [75-0181-R], at 11-13.

⁷⁶ *Gay Alliance of Students* [75-0181-R], at 13-17.

concluded the denial of GAS's registration was legitimately related to that interest. Warriner wrote:

It was reasonable for the Board to conclude that certain persons who might otherwise be inclined to exercise a measure of control over their latent proclivities, would be influenced by the existence of GAS as an official campus organization to ignore societal opprobrium and indulge their homosexual impulses. Furthermore, it follows that in a society which shuns sexual relationships between members of the same sex, the formal existence of an organization which condones, defends and extols such behavior would afford a haven for those wishing to engage in homosexual activity.⁷⁷

Therefore, Warriner found that refusing to provide advising, funding, and recognition was a rational governmental response to discouraging homosexuality. Warriner ended his opinion with a reminder of the benefits of registration that he found GAS entitled to while also justifying the refusal to extend all benefits of registered student organizations, concluding, "It is hoped that the benefits to be derived from plaintiff's exercise of its right to freedom of speech and association will outweigh the detriment to their University and to other students".⁷⁸

Despite Warriner's disdainful tone, GAS was in a stronger position at the end of the trial than at its start. The organization had achieved most of the rights that would normally accompany registration, though not registration itself as Warriner allowed VCU to treat GAS as a second-class student organization. GAS members would have to decide how to move forward. They could take these gains and make the most with them on campus. Or they could appeal and provide a higher court the opportunity to determine that they were entitled to all the benefits of registration. That court could also decide they were entitled to none at all.

"WE ARE NOT TIMID. WE ARE NOT INTIMIDATED".

In the immediate aftermath of the ruling, Foery, the 27-year-old spokesperson for GAS, and Lenton, the advisor who was instrumental in

⁷⁷ *Gay Alliance of Students* [75-0181-R], at 20.

⁷⁸ *Gay Alliance of Students* [75-0181-R], at 21.

guiding the organization as it sued his employer and bosses, issued a press release criticizing Warriner's decision. They contended that the ruling was discriminatory and would impede efforts to recruit new members. They explained that the organization was considering whether it would "focus all our energies on local organization and education, in our separate and unequal status, or, as a small group of students without money, dare to challenge the right of the government to legislate morality". The release concluded with their resolve, noting "we are aware that freedom is lost by timidity as well as by intimidation. We are not timid. We are not intimidated".⁷⁹

Within days, GAS members announced that they would appeal, seeking to go from a partial victory to achieve full standing as a registered VCU student organization.⁸⁰ They declared, "We are united in our cause and willing to pursue it to its outcome".⁸¹ At the same time, Foery urged the board to reconsider its stance and to meet in person to discuss the situation before the appeal deadline in early December. He concluded his request: "We fully expect to win the case, and your recalcitrance, forcing us into court, will result in more people than us being positively affected".⁸² The board declined in a curt note, and it soon also appealed the district court decision in hopes of undoing the gains the initial ruling had provided for GAS.⁸³

Foery would eventually prove to be correct on all counts but, at the time, significant challenges remained. In early December the entire case was almost derailed when McCarthy, under intense stress from the blowback of representing GAS, neglected to submit court fees necessary to appeal. On the last afternoon that the fees could be submitted, Foery realized the oversight and wrote a personal check to cover the costs. He would, in all, loan GAS more than \$300 to support the case (over \$1,700

⁷⁹ Walter Foery and Stephen M. Lenton, press release, n.d., Folder 21, Box 1, GAS Collection, VCU Libraries.

⁸⁰ Jim Jennings, "GAS plans to appeal court's ruling", *Commonwealth Times*, 21 November 1975.

⁸¹ "Press release", n.d., Folder 21, Box 1, GAS Collection, VCU Libraries.

⁸² Walter Foery to Wyndam Blanton, 19 November 1975, GAS Records, VMHC.

⁸³ Wyndham Blanton to Walter Foery, 20 November 1975, Folder 4, Box 1, GAS Collection, VCU Libraries; Foery, interviewed by Hevel; McNeill, "Inside the fight". Foery identifies the letter as relating to the initial rejection of the application in 1974 but both his appeal to the board and Blanton's response occurred just after the first court ruling.

in 2023 dollars).⁸⁴ Foery's payment highlighted another difficulty: the ACLU of Virginia did not commit to participating in the appeal. This forced Foery and Lenton to reach out to other organizations for support, including the National Gay Student Center and the Lamda Legal Defense and Education Fund.⁸⁵ Bruce Voeller, the co-founder and executive director of the National Gay Task Force (NGTF) whom Foery had met at the 1975 Gay Academic Union Conference in New York, suggested other possible routes for assistance and appealed to NGTF members for donations, ultimately raising \$115 for the cause.⁸⁶ Voeller also pressured the ACLU of Virginia to continue the case. He turned to Marilyn Haft, director of the ACLU's Sexual Privacy Project, and "very strongly urged her to raise hell". When the ACLU of Virginia told Haft that they were dropping the case, according to Voeller, "she had a real row" and urged them not to.⁸⁷ Within a few days, Voeller expressed optimism that the ACLU would soon come on board.⁸⁸ Ultimately, the ACLU of Virginia provided limited financial support for the appeal, though minimal communication between GAS's lawyer and the ACLU of Virginia impeded its input. In the end, though, its legal director, Richard E. Crouch, would play a vital, if unanticipated, role.⁸⁹

In February 1976, Lenton informed student affairs officials of recent developments regarding GAS. During a seven-hour meeting in January GAS leaders developed a robust new statement of purpose to guide the organization, including building a broad community opposed to discrimination based on gender or sexual orientation, starting a forum focused

⁸⁴ Letter from Voeller; Foery, interviewed by Hevel. In the interview, Foery expressed that McCarthy's oversight angered him at the time but that he later recognized how much McCarthy had risked to represent GAS, noting that McCarthy was "an otherwise terrific supporter of GAS".

⁸⁵ Walter Foery and Stephen M. Lenton to National Gay Student Center, 12 November 1975, GAS Records, VMHC; Walter Foery and Stephen M. Lenton to William J. Thom, 12 November 1975, GAS Records, VMHC.

⁸⁶ Bruce Voeller to John M. McCarthy and Walter Foery, 11 March 1976, Folder 10, Box 1, GAS Collection, VCU Libraries; Robert Herrick to John M. McCarthy, 1 September 1976, Folder 10, Box 1, GAS Collection, VCU Libraries; Foery, interviewed by Hevel.

⁸⁷ Bruce Voeller to Walter Foery, 12 December 1975, Folder 10, Box 1, GAS Collection, VCU Libraries.

⁸⁸ Bruce Voeller to Walter Foery, 15 December 1975, Folder 10, Box 1, GAS Collection, VCU Libraries.

⁸⁹ Richard E. Crouch, Motion for Leave to File Bill of Costs Out of Time, 23 November 1976; Case File 75-2359; Correspondence Relating to Cases; Records of the US Court of Appeals for the Fourth Circuit, Record Group 276 (hereafter cited as "Records of the Fourth Circuit"), National Archives at Kansas City (Kansas City, MO; hereafter cited as "NAKC").

on lesbian and gay issues, providing information to the campus and community, and improving student life by making it more attentive to the needs of gay students. The fifth and final purpose spoke to an issue that many believed was central to the board's handling of GAS's initial application: "To assist the university in building a more positive institutional image". At the same meeting, they had decided to host a dance to fundraise and help cover a \$400 legal debt (almost \$2,200 in 2023 dollars). Lenton referred to the debt as "our debt", demonstrating his commitment and allegiance to GAS, even as it conflicted with his employer.⁹⁰

While the new statement of purpose helped define organizational goals, the dance emphasized the centrality of the lawsuit to the GAS's existence. The organization's major event was a fundraiser to help ensure it could exist, rather than an event that advanced its larger purpose of improving the lives of LGBTQI+ students at VCU. Indeed, although Foery would be invited to talk in college classes and the group would have small informal meetings, the lawsuit dominated the organization's efforts for its first two years. Foery recalled that "our entire focus, our *raison d'etre*, [was] to be recognized".⁹¹ Moreover, the legal challenge was taking a toll. Kriegel recently recalled that "the group was demoralized, so we blended more with the community group, the Richmond group".⁹²

The dance was held on February 15, 1976, at the Cha Cha Palace, an LGBTQI+-friendly disco club that had opened the year before a few blocks from campus.⁹³ Foery recalled:

That night was probably the most proud I ever was of what I was doing. Because my boyfriend at the time, Steve Pierce, and I worked our butts off. We handed flyers out, we tacked fliers, we talked nonstop. We did everything that needed to be done.

⁹⁰ Stephen M. Lenton to Student Life Staff, Tim Langston, Os Parker, and Richard Wilson, 2 February 1976, GAS Records, VMHC. See, also, "G.A.S.", *GAP Rap*, February 1976, Folder 34, Series 2, Lenton Papers, VMHC. The exact amount of the debt is hard to pin down as both contemporaneous evidence and more recent recollections offer differing amounts.

⁹¹ Foery, interviewed by Hevel.

⁹² Kriegel, interviewed by Hevel.

⁹³ "Cha-Cha [*sic*] Palace opens", *Gap Rap*, 20 March 1975, Folder 34, Series 2, Lenton Papers, VMHC.

So we got there plenty early, and we're thinking, "Oh God, what if nobody comes? What if nobody comes? What if nobody comes?" Finally, it's eight o'clock, or whenever it was supposed to start, and nobody's there, and so we're panicking. And then eventually, the place filled. It was like a Saturday night. We were ecstatic. I remember hugging and crying on the dance floor, me and Steve. All the straight friends I could count on were there. Almost every one of them came. And then tons of gay people I knew. Tons of gay people I didn't know. It was a huge success.⁹⁴

In all, more than 300 people attended the event, which had a requested donation of two dollars per person. GAS raised enough to pay off its debt to Foery and cover its other existing obligations, while also garnering substantial emotional support.⁹⁵

The success of the dance helped GAS with the appeal, but one more significant hurdle remained. Shortly before the June arguments, McCarthy, GAS's lawyer, shut down his law practice and entered a mental hospital. His secretary contacted the ACLU's Crouch informing him of the development and telling him that McCarthy wanted Crouch to continue with the case. Unable to contact McCarthy and with only skeletal files of his own, Crouch scrambled to prepare for the appeal. Months after he agreed to represent GAS, Crouch reported that he still did not have access to the full case files and what he had was "in a chaotic and uninformative state".⁹⁶

THE APPEAL

Despite being dealt an unorganized hand, Crouch represented GAS during oral arguments before a three-judge panel of the Fourth Circuit of the US Court of Appeals on June 7, 1976. VCU was again represented by an assistant attorney general of Virginia. Nearly five months passed

⁹⁴ Foery, interviewed by Hevel.

⁹⁵ "Gays thank public", Unidentified newspaper clipping, Folder 18, Box 1, GAS Collection, VCU Libraries; Untitled flyer, Folder 18, Box 1, GAS Collection, VCU Libraries. This turnout and support seemingly helped overcome a perceived sense of conflict between GAP and GAS that Foery had expressed in a letter to the editor of *GAP Rap* in the same issue that the dance was announced. Walter Foery, letter to the editor, *GAP Rap* 2, February 1976, Folder 34, Series 2, Lenton Papers, VMHC.

⁹⁶ Crouch, "Motion for Leave", Records of the Fourth Circuit; NAKC.

before the judges issued their ruling on October 28. The ruling noted that no one was claiming that GAS engaged in illegal activities. Rather, GAS was a “pro-homosexual” organization that advocated to end sodomy laws and to improve the lives “of individuals whose sexual orientation is wholly or partly homosexual”.⁹⁷ Citing the Supreme Court’s *Healy* decision, the judges quickly rejected VCU’s claim that the refusal to register GAS did not violate its members’ First Amendment rights. In fact, the judges determined that all the benefits of registration – including those withheld by Warriner’s decision – should be granted to GAS under *Healy* unless there was a constitutionally acceptable reason for denying registration.⁹⁸

The judges turned their attention to VCU’s justifications for denying GAS registration, first considering VCU’s claim that registration would denote a degree of institutional approval and therefore increase GAS’s membership. They pointed to the diverse range of student organizations at VCU and a VCU administrator’s testimony that registration did not include university endorsement of the group. Moreover, the Fourth Circuit had ruled in 1973 that providing state-supported facilities to a group did not convey state approval of the group. In terms of increased membership, the judges noted that this advanced the purpose of the First Amendment. “If it is the right of an individual to associate with others in furtherance of their mutual beliefs, that right is furthered if those who may wish to join GAS are encouraged by the fact of registration to take that step”, they wrote.⁹⁹

Likewise, the judges were “not impressed” with VCU’s reasoning that some students “would suffer detriment” if GAS became a registered organization. “The very essence of the first amendment is that each individual makes his own decision as to whether joining an organization would be harmful to him”, wrote the judges in the universal male jargon of their day, “and whether any countervailing benefits outweigh the harm”.¹⁰⁰ In terms of the claim that GAS would “increase the

⁹⁷ *Gay Alliance of Students v. Alfred T. Matthews*, 544 F.2d 162, 164 (4th Cir. 1976).

⁹⁸ *Gay Alliance of Students*, 544 F.2d at 164-165.

⁹⁹ *Gay Alliance of Students*, 544 F.2d at 165.

¹⁰⁰ *Gay Alliance of Students*, 544 F.2d at 165-166.

opportunity for homosexual contacts” and attract more gay students to VCU, the judges tried to parse the institution’s meaning of “homosexual contacts”. If this meant gay students meeting together, this was clearly protected under the First Amendment. If the university meant illegal sexual activity, then this could certainly be regulated. Quoting *Healy*, the judges noted that advocacy – even advocating for something illegal or to make something legal that was illegal – was protected by the Constitution. And the judges observed that there was “no evidence that GAS is an organization devoted to carrying out illegal, specifically proscribed sexual practices”. VCU could discipline students who broke laws related to gay sex or otherwise disrupted campus. But even if the existence of GAS increased the prevalence of gay sex, denying its members their First Amendment rights would be an overreach forbidden by the Constitution. The same reasoning applied to VCU’s concern that GAS would attract more gay students to campus.¹⁰¹

The judges spent little time on the equal protection claim, but they found in favor of GAS. Because all of VCU’s reasons for denying GAS registration were based on the content of the group’s message, such justifications had to survive strict scrutiny. As the judges had detailed in their First Amendment analysis, VCU had not met that standard. Not only would VCU be required to register GAS and provide the group with all the relevant benefits, the judges ruled it would also have to cover the organization’s legal costs.

AFTERMATH

When the ruling came down, GAS members were ecstatic. Foery recalled that he learned of the ruling from Pierce: “He screamed into the phone, “We won!” And I didn’t know what he was talking about because he didn’t preface it with anything and we’d been waiting for weeks or months by that time. I said, “What are you talking about?” He told me, and I was as happy as he was”.¹⁰² That joy showed through in Foery’s letter to Voeller sharing the news, which began “Oh Happy Day!”¹⁰³ The

¹⁰¹ *Gay Alliance of Students*, 544 F.2d at 166-167.

¹⁰² Foery, interviewed by Hevel.

¹⁰³ Walter Foery to Bruce Voeller, 2 November 1975, GAS Records, VMHC.

legal victory enabled the group to focus on its intended purposes of educating people about gay issues and improving the lives of LGBTQI+ people. A few weeks after the appellate decision, GAS offered a two-day workshop titled “The Gay/Lesbian Experience”.¹⁰⁴ The session was designed for gays and lesbians, though others “with an empathetic understanding” could participate. The event was designed to build community and promote discussion. Workshops continued in ensuing years, as did occasional special events such as GAS’s showings of *Word is Out: The Story of Some of Our Lives*, a groundbreaking documentary that is considered the first film about gay and lesbian people made by gay and lesbian people.¹⁰⁵

More typical, though, were small weekly GAS meetings at which members interacted in a supportive environment. As Lenton described in a 1978 guest column in the James Madison University’s student newspaper, the sessions were informal and unstructured, taking different paths depending on who showed up and what ideas were raised. They might include discussions of current events, campus issues, gay literature, or personal experiences of coming out. As Lenton explained, “GAS is still young and new and in the process of discovering community”. In spring 1979, GAS changed its name to Lambda League, looking to increase its activity while retaining the core purposes that GAS had developed in early 1976.¹⁰⁶ While GAS and Lambda League were small – typically with about 20 members into the early 1980s¹⁰⁷ – the limited documentary evidence shows an organization that continued to provide programming while trying to define its purpose, a common concern for LGBTQI+ student organizations in the period.¹⁰⁸

Even as GAS continued to make contributions to VCU, being forced to sue to register had both immediate and lasting consequences. This was especially true for those who had shepherded the lawsuit through to

¹⁰⁴ “Calendar”, *Commonwealth Times*, 12-18 November 1976.

¹⁰⁵ Brett Averill, “The word is out”, *Commonwealth Times*, 17-23 October 1978; Richard Brody, “Word is Out’: a pioneering documentary of gay voices”, *New Yorker*, 21 July 2020. <https://www.newyorker.com/culture/the-front-row/word-is-out-a-pioneering-documentary-of-gay-voices>

¹⁰⁶ Dale Davis, “Gay current events”, *Commonwealth Times*, 30 October-5 November 1979.

¹⁰⁷ Tom Phipps, “Lambda League: homosexuals get together”, *Commonwealth Times*, 23 February-1 March 1982.

¹⁰⁸ Dilley, *Gay liberation*.

its successful conclusion. As Foery later recalled, “This had consumed my life [...]. When we finally won, I was exhausted. I wanted my life back. I wanted some privacy”.¹⁰⁹ He could not remember any engagement with GAS after the victory.¹¹⁰ Moreover, the lawsuit robbed the group of its founders’ initial vision and energy. Foery remembered, “What I tell people is that when we finally won [...] it was like, ‘What do we do now?’ My memory was that we didn’t have an answer to that question”.¹¹¹ This was evident at the group’s second workshop after the lawsuit, which was designed to address “the many questions gay/lesbian people have which we are not able to answer alone”. Among them, was whether there should even be “a student organization, and, if so, for what?”.¹¹² Lenton admitted in the guest column that GAS’s future was “murky”, continuing, “If left alone, GAS will probably continue in its current course of meeting every Wednesday night for the sake of spending a few hours each week together in a supportive atmosphere. Students will probably continue to attend for a wide variety of reasons, chief of these being comradeship”.¹¹³

Lenton’s future was soon murky itself. In 1980, he left VCU when it became clear that his career was being stifled due to him being openly gay and advocating for LGBTQI+ students. He later recalled, that after having a promotion rescinded and his oversight of programs removed, “I was told, ‘You know we’ll never fire you. You can work here forever. You can do whatever you want. We are never going to ask you to do anything. Also you would never be promoted in any way or shape or form or title’”.¹¹⁴ Thus, while GAS’s opponents eventually lost the legal battle, by channeling its founders’ energy into fighting a lawsuit rather than establishing services and planning events, leaving these members exhausted and uncertain at the end of the case, and contributing to its gay advisor’s eventual resignation, they hampered the development of a

¹⁰⁹ Foery, interviewed by Hevel.

¹¹⁰ McNeill, “Inside the fight”.

¹¹¹ Foery, interviewed by Hevel.

¹¹² “The gay/lesbian experience, ’77”, Flyer, Folder 1, Series 1, Lenton Papers, VMHC.

¹¹³ Stephen M. Lenton, “Alliance offers security to gays”, *The Breeze*, 17 March 1978.

¹¹⁴ “An oral history of Stephen Micheal Lenton”, p. 43, Folder 140, Series 26, Lenton Papers, VMHC. See, also, Stephen M. Lenton, “Excellence is not enough”, *Commonwealth Times*, 22-28 April 1980; Hevel and Cain, “Queer student affairs career”.

vibrant LGBTQI+ student organization and community in ways impossible to quantify.

What GAS may have been able to contribute to VCU and its students if not for two years of administrative intransigence remains unknown, but their successful lawsuit influenced the lives of LGBTQI+ students far beyond Richmond. The appellate judges' ruling that held GAS was entitled to registration and its benefits at VCU created precedent across the Fourth Circuit. This meant that students at every public college and university in Maryland, North Carolina, South Carolina, West Virginia, and Virginia – states which represented nearly ten percent of the US population in 1976 – had the right to start an LGBTQI+ student organization without interference.

These were, it almost goes without saying, not states particularly welcoming to sexual minorities. But by 1991, a gay University of Richmond student told a reporter, "It's really uncool to be homophobic on campus. Maybe being gay isn't totally accepted, but it is tolerated". This improvement on campus was due in part to a small group of students at an urban university in the former capital of the Confederacy who resolved to start an LGBTQI+ student organization nearly two decades earlier. Faced with seemingly insurmountable hurdles as administrative and political leaders fought to stop their efforts, they persevered, often at great costs to themselves and their nascent organization. Two years after the legal victory, Lenton, the advisor who helped bring the organization into existence and mentored many of its members, lamented the fading memory of the struggle for registration. Yet Lenton pointed to the vital and significant role played by GAS on campus, even if its numbers were small: "Each time this quiet, small group of students meets, whether they feel it or not, history is in the making".¹¹⁵

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¹¹⁵ Lisa Guernsey, "Gays find campuses more tolerant, supportive", *Richmond News Leader*, 13 August 1991; Lenton, "Alliance offers security to gays", 23.

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QUEER TEACHERS NEGOTIATING GEOGRAPHIES OF SAFETY IN THE 1990S*

*Profesores queers negociando geografías
de seguridad en los años noventa*

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Abstract. This study demonstrates how three queer teachers in conservative spaces created *geographies of safety* during the 1990s. Each of the three teachers discussed initiated a *geography of safety*, and these histories are relevant to the ongoing negotiation that queer elementary and secondary educators today engage as they reconcile their moral authority as teachers with their gender(s) and sexualities.

Keywords: Queer; LGTBIQ+ teachers; 1990s; History.

Resumen. *Este estudio demuestra cómo tres profesores queers en espacios conservadores crearon geografías de seguridad durante la década de los noventa. Cada uno de los tres profesores analizados inició una geografía de seguridad, y estas historias son relevantes para la negociación en curso que los educadores queers de primaria y secundaria llevan a cabo hoy en día al reconciliar su autoridad moral como profesores con su(s) género(s) y sexualidad(es).*

Palabras clave: *Queer; Profesorado LGTBIQ+; noventas; Historia.*

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I've been a good coach and a good teacher. I've never done anything that infringed on anybody. Then, all of the sudden, I was not living the lifestyle they wanted me to live or being the role model I had always been.

*Wendy Weaver, 1997*¹

This study demonstrates how three queer teachers in conservative spaces created “geographies of safety” during the 1990s.² At its most basic a “geography of safety” is a space of relative security defined and pursued by an individual or group through negotiation with oppositional forces. In this study, I argue that each of the three teachers discussed initiated a “geography of safety”, and that these histories are relevant to the ongoing negotiation that queer elementary and secondary educators today engage as they reconcile their moral authority as teachers with their gender(s) and sexualities. The histories of these teachers are constructed by utilizing oral histories and extensive analysis of newspaper sources and relevant secondary sources.

I utilize the term “geography of safety” to capture the complexity of the interactions queer teachers had with their schools and local communities. For the purposes of this essay a *geography* entails a collection of spaces over time.³ It also indicates a dynamic, rather than static interaction, with other geographies. These geographies can be physically

¹ Mike Carter, “Lesbian teacher fired from coaching job, sues school for civil rights violation”, *The Greenville News*, October 22 (1997).

² Queer is being used in this paper as an all-encompassing term to describe gender and sexual minorities and is intended as being inclusive of LGBTQ communities as a whole. In instances where authors or the individuals being discussed identified with a specific community, i.e. gay or lesbian, this article will use that term. Otherwise “queer” and LGBTQ will be used interchangeably. It should be noted that during the period that this paper is concerned with queer was primarily used as a pejorative and its use in this paper is intentionally part of the decades long project of reclaiming the word for the LGBTQIAA community.

³ This study is distinctly a part of a broader historiographical effort to chart the creation and maintenance of queer spaces. A significant amount of historical research has been written about the value of specifically queer space in the queer community and, in particular, for groups that have often been marginalized within queer communities. This body of research focuses on the creation of queer space for the purposes of socializing, artistic expression, as a platform for activism, and to create professional security. Exemplars of this research include: Jim Downs, *Stand by me: the forgotten history of gay liberation* (New York, Basic Books, 2016). Marlon M. Bailey, *Butch queens up in pumps: gender, performance, and ballroom culture in Detroit* (University of Michigan Press, 2013); Philip James Tiemeyer, *Plane queer: labor, sexuality, and AIDS in the history of male flight attendants* (Berkeley, University of California Press, 2013).

adjacent, or even overlap, but also may be separated by space, time, or lived experience and are ultimately informed by intersectionality. For example, LGBTQ teachers in rural spaces in the 1990s could be informed, and perhaps even inspired by, urban queer activism during the 1990s and preceding decades.⁴

The qualifier “of safety” entails relational dynamism. Individuals and groups often construct ideas of safety by comparing their experiences to the experiences of other groups. This process of comparison can be temporal and/or geographic. For instance, one might compare a person’s relative safety as a queer teacher in America today to queer teachers in the 1990s, or compare one’s own experience of safety as a queer person in the United States in 2023 to the experiences of a queer person in Russia. Judgements about what constitutes a geography of safety can be based on a mix of perception and knowledge. A queer teacher in Alabama did not need to know the legislative minutiae of California or New York to feel that it was safer there, to want their own state to afford similar protections, and to work toward that equality. The queer teachers discussed in this study determined their goals, the conditions that could create a “geography of safety”, in relation to their heterosexual colleagues and in relation to their understanding of what queer teachers in other parts of the country were experiencing. Their beliefs about how they should be treated, what they were entitled to, and how a teacher should act professionally were constructed in relation to the educational milieu that they were trained and employed in. Each of the teachers discussed were previously closeted in their workplaces and so had experienced, at least in part, some norms of safety enjoyed by their heterosexual colleagues.

⁴ Doreen Massey explores this overlapping of space and time, and the interaction of space and time, throughout her writings on geography and makes the claim that distinctions between the two are artificial. For Massey’s summary of thought regarding the relationship of time and space See: Doreen B. Massey, *For space* (London ; SAGE Publications Ltd, 2005), 20-30. For her discussion of the relationship of space and politics particularly as they relate to gender See: Doreen B. Massey, *Space, place, and gender* (Minneapolis: University of Minnesota Press, 1994) Chapter 11. This study, while attempting to avoid the philosophical pitfalls that Massey articulates, exists within the disciplinary norms of history which has classically viewed individuals and communities as existing in specific times/spaces and creating/possessing characteristics that can be discerned and discussed within those timeframes.

The presence, or even potential presence, of a queer teacher has the capacity to shift the policies, actions, and expectations of entire communities. Negotiations and conflicts over the functions that schools fulfill in society exist at multiple levels with debates ranging in scope from the kitchen table conversations of individual families to the federal level where legislators make decisions impacting tens of millions of students. In between these two extremes a panoply of school boards, superintendents, state administrators, and bureaucrats from across the political spectrum make decisions which echo down to the level of individual teachers conducting the business of actually educating young people in classrooms. Teachers themselves are a perennial subject of these debates, both as members of a profession and as individuals. “Who should teach?”, “Who should be barred from teaching?”, “How should teachers be judged?”, and “Who should do the judging?” are just a few of the larger questions perpetually orbiting elementary and secondary educators in the United States.⁵ Teachers navigate their continued employment and the trajectory of their profession within a political maelstrom while attempting to exert their own agency as educational stakeholders.

Queer teachers in the United States have historically been unsafe in the schools where they teach. They exemplify challenges facing all teachers. The threat of losing their livelihood, profession, and dignity has hung over their heads for generations. The proximity of elementary and secondary teachers to children and the longstanding falsehood that coupled LGBTQ people with sexual predators heightened the threat of social ruin and fiscal devastation which all LGBTQ people faced.⁶ Queer teachers have learned as individuals, and eventually, as groups, to negotiate

⁵ For detailed discussions of these debates and the responses of teachers as educational stakeholders see: Diana D’Amico, *Blaming teachers: professionalization policies and the failure of reform in American history* (New Brunswick, New Jersey: Rutgers University Press, 2020); Dana Goldstein. *The teacher wars: a history of America’s most embattled profession* (New York: Anchor, 2015).

⁶ Labor historians have articulated specific economic threats, and the political impacts of those threats, that faced racial minorities who were denied union membership in the 1950s and 1960s. Miriam Frank has shown how LGBTQ workers struggled to attain job protections afforded by unions as a matter of civil rights. The connection between equitable treatment in the workplace and equitable political participation is so strong that many question whether equitable political participation can exist without equitable treatment in the workplace. See: Miriam Frank, *Out in the union: a labor history of queer America* (Philadelphia: Temple University Press, 2014); Nancy MacLean, *Freedom is not enough: the opening of the American workplace*, Illustrated edition (Cambridge, MA: Harvard University Press, 2008); Lane Windham, *Knocking on labor’s door: union organizing in the 1970s and the roots of a new economic divide* (Chapel Hill: The University of North Carolina Press, 2017).

geographies of safety in response to this threat.⁷ This negotiation has been intergenerational, ranging from at least the early-twentieth century to today.⁸ Each subsequent generation of queer teachers has had to negotiate national professional expectations which were impacted by federal, state, and local policies.⁹ Debates among educational stakeholders, such as teachers unions and religious activists, took place, precariously balanced on top of this tripod of local, state, and federal legislation. Under these conditions, a queer teacher in Kansas during the 1990's had to be concerned about state legislation and federal policies even if she lived in Lawrence, a "liberal" city that is home to the University of Kansas. Similarly, a queer teacher in a conservative corner of a "liberal" state could still be greatly impacted by local politics despite state level protections.

⁷ For examples of an LGBTQ teacher organization in an urban setting before the time period addressed in this article, see Jason Mayernick, "The Gay Teachers Association of NYC and LGB students: 1974-1985", *Teachers College Record*, 122 no 9 (2020): 1-30.

⁸ Inquiry into the lives and experiences of LGBTQ teachers has been an ongoing project for the past forty years. Early works in the 1980s and 1990s attempted to qualify the national scope of the LGBTQ experience and often utilized a legal framework or a series of biographic narratives. See: Rita M. Kissen, *The last closet: the real lives of lesbian and gay teachers* (Portsmouth, NH: Heinemann, 1996); Karen Marie Harbeck, *Gay and lesbian educators: personal freedoms, public constraints* (Malden, MA: Amethyst Press, 1997); Ronni L. Sanlo, *Unheard voices: the effects of silence on lesbian and gay educators* (Westport, CT: Bergin & Garvey, 1999); Eric E. Rofes, *A radical rethinking of sexuality and schooling: status quo or status queer* (Lanham, MD: Rowman & Littlefield Publishers, 2005). Works in the 2000s incorporated queer theory and argued for utilizing the experiences of LGBTQ educators as a means of interrogating U.S. education as a whole. See Catherine A. Lugg, "Sissies, faggots, lezzies, and dykes: Gender, sexual orientation, and a new politics of education?", *Educational Administration Quarterly*, 39 no 1 (February 2003): 95-134; Catherine A. Lugg, *US public schools and the politics of queer erasure* (New York: Palgrave Pivot, 2015). Foundational histories of queer teachers were also written in this period which incorporated archival sources, the use of queer theory, and an analysis of legal frameworks relevant to the scope of their discussions. These later works also have the history of LGBTQ teachers in relationship to labor history, political movements – such as the Civil Rights Movement, and broader histories of women teachers and the overall impact of the female dominance of American teaching on the profession. See Jackie M. Blount, *Fit to teach: same-sex desire, gender, and school work in the twentieth century* (Albany: State University of New York Press, 2005); Jackie M. Blount, "Spinsters, bachelors, and other gender transgressors in school employment, 1850-1990", *Review of Educational Research*, 70 no 1 (March 2000): 83-101; Karen L. Graves, *And they were wonderful teachers: Florida's purge of gay and lesbian teachers* (Urbana: University of Illinois Press, 2009). These histories coupled with recent works detailing the organization of LGBTQ students in higher education settings provide a framework for discussing queer teachers in the 1990's, as teachers in this period were once college students. See: Patrick Dille, *Gay liberation to campus assimilation: early non-heterosexual student organizing at midwestern universities* (New York: Palgrave Macmillan, 2019).

⁹ Karen Graves' research on the Florida purge of gay and lesbian teachers provides an example of these multiter interactions and highlights connections between federal, state, and local level authorities. See Graves, *And They Were Wonderful Teachers*, Chapters 2 and 3.

The 1990s were a pivotal time in the history of queer teachers in the United States. As the decade progressed confrontations between LGBTQ teachers and the conservative elements of the communities where they taught broadened geographically.¹⁰ By the 1990's the fight for queer teacher dignity spread throughout the country, bolstered by the broader LGBTQ movement and emboldened by the earlier successes and legal battles of their colleagues. Karen Graves and Margaret Nash provide a detailed analysis of these legal battles, showing the progression and regression of LGBTQ rights in U.S. schools during this decade.¹¹ Many of the earliest teachers contesting heterosexual norms in schools were inadvertent activists; they had successfully been teaching while closeted to varying degrees for years when they were outed by circumstances beyond their control. Others actively chose activism as a way of engaging the political process.

This study examines the narratives of three teachers and the challenges they faced as they negotiated geographies of safety in communities they had taught in for many years. It focuses on two regions, the

¹⁰ The paramount political issue for the LGBTQ movement entering the 1990s was the AIDS Crisis which dominated fundraising, political organizing, and arguably the historical narrative of the community as a result of the trauma. In many respects the dominance of the AIDS Crisis, with thousands of queer people dying, made organizing around workplace protections, marriage equality, and civil rights a secondary concern for major LGBTQ organizations and many LGBTQ people. This fundamental focus would last at least until the late 1990s when the lethality of the epidemic was substantially mitigated among LGBTQ people in the United States through drug treatments and the collective activism of the previous decade. For the purposes of this study, it is important to note that the personal narratives of the teachers discussed occurred in the context of, and were informed by, at least a decade of experience with the AIDS Crisis and its political and personal impact on queer people. For example, early in the AIDS Crisis there were calls by politicians for mandatory testing of school teachers as a preventative measure under the guise of protecting students from infection. For discussions on the impact of the AIDS crisis on the LGBTQ community and the pivot towards the AIDS crisis in LGBTQ activism see:

Ann Cvetkovich, *An archive of feelings: trauma, sexuality, and lesbian public cultures* (Durham, NC: Duke University Press Books, 2003), 156-160, 160-162, 167-202; Steven Seidman, *The social construction of sexuality*, 2nd edition (New York, NY: W. W. Norton & Company, 2009), 69, 78, 196. Seidman argues that after the AIDS crisis peaked in the late 1980s, LGBTQ persons refocused the movement on civil rights such as marriage. Marc Stein, *Rethinking the gay and lesbian movement* (New York, NY: Routledge, 2012), 141-145, 151-155. Stein titles the period from 1981 to 1990 as "The Age of AIDS" and argues that AIDS-related activism completely superseded other political activism during this period, including efforts to secure employment rights. For a discussion of the dominance and impact of the AIDS Crisis on queer historiography, see: Christopher Castiglia and Christopher Reed, *If memory serves: gay men, AIDS, and the promise of the queer past* (Minneapolis, MN: University of Minnesota, 2012).

¹¹ Margaret A. Nash, and Karen L. Graves. *Mad River, Marjorie Rowland, and the quest for LGBTQ teachers' rights* (New Brunswick: Rutgers University Press, 2022), Chapter 1.

conservative communities of Western Michigan and the Utah Valley surrounding Salt Lake City, Utah. As is discussed more fully below, both communities were composed of large, though different, religious communities with strong anti-LGBTQ teachings. This study illustrates the impact of LGBTQ teachers on their communities and their capacity to create geographies of safety. They individually defended their livelihoods and reputations and collectively proved that being a gay or lesbian person was defensible in conservative educational spaces. Two of these teachers were inadvertently drawn into activism by defending their livelihoods while the third actively chose to contest the discrimination faced by LGBTQ students and teachers. The teachers discussed in this study all utilized their knowledge of local politics and social norms in conjunction with resources from state and national organizations to defend their rights.

The histories in this study underscore the challenges facing all elementary and secondary teachers confronted with controversy, but particularly illuminate the challenges of queer teachers as they continue to negotiate geographies of safety and security in conservative school districts across the United States. All teachers rely on the trust of their communities, but queer teachers had to overcome the assumption that they were inherently untrustworthy. They existed outside the well-worn boundaries of behavior that were considered acceptable for educators which had been negotiated by communities over the course of generations. Most minority teachers could readily be discriminated against by local communities by denying them employment in the first place. LGBTQ teachers were “subversive” because their transgression of community norms only became apparent when they chose to come out or were unexpectedly discovered. The emergence of queer teachers forced states and local communities to redefine the boundaries of acceptability around elementary and secondary educators, whether they wanted to or not. This was a significant development because, while there was potential for LGBTQ teachers to continue to be excluded as a deviant class, there was also the possibility that they would be included inside the boundaries of acceptability. By contesting boundaries of acceptability in conservative spaces LGBTQ teachers created, and continue to create, “geographies of safety” for themselves and their students.¹²

¹² For a discussion of this process of definition see Margot Canaday, *The straight state: sexuality and citizenship in twentieth-century America* (Princeton, NJ: Princeton University Press, 2011), Chapters 2, 5 and 6.

ZEELAND, MICHIGAN

David Van Heest was forced into negotiating a “geography of safety” because of police entrapment. The Michigan teacher was caught up in a larger effort by the local police to expose a supposed “homosexual underground” and was faced with the prospect of losing his job and standing in the community. Van Heest’s knowledge of local politics, the legal system, and the resources available to him as a union member combined to challenge the practice of police entrapment, and allowed him to keep his job in the conservative town of Zeeland, Michigan.

Zeeland is located between Holland and Grand Rapids in a belt of historically agricultural and majority-white towns and counties which run up the eastern shore of Lake Michigan from the state border with Indiana. This area was among the first settled regions in the state and was centered on, but culturally distinct, from the manufacturing hub of Grand Rapids. Deeply conservative and with strong ties to the Dutch Reformed Church, this area of Michigan had a reputation as a conservative bastion and a political counterweight to the more liberal southeast of the state.¹³ Local newspapers I examined for this study were filled with the triumphs of high school sports, a myriad of furniture store advertisements, and the occasional local interest piece describing the benefits of living in a small community. The happenings at local schools and the accomplishments of their teachers and students also showed up with regularity in the pages of the *Zeeland Record* and *The Holland Sentinel*.

David Van Heest was born and made his career teaching high school in these small towns. By 1990 he had taught for 20 years in the same high school where he did his student teaching and was known as an excellent English teacher.¹⁴ Like many LGBTQ teachers, he kept his private life separate from his professional life and while he was open to colleagues about having a male partner, he did not discuss his private life with students.¹⁵ In Fall 1990, Van Heest and his husband were invited to

¹³ Julie Rowe, “Western Michigan, the liberal southeast’s counterweight”, *The Michigan Daily*, November 2, 2008, <http://www.michigandaily.com/uncategorized/western-mich-republicans-canvass-mc-cain/>.

¹⁴ “Parents seeking to oust gay teacher”, *The Herald-Palladium*, September 12, 1990, p. 22.

¹⁵ David Van Heest Interview, Author’s Collection, November 11, 2021. (22:00-23:00), (3:00-4:20).

a party in a neighboring town at the home of two other gay men.¹⁶ It was the kind of party that was a mainstay of social life for gay men living in small towns and big cities across America for generations, involving alcohol, conversations with friends, and might entail sex between consenting adults.¹⁷ Unlike the other parties these men had attended over the years, this one ended with their arrests.

The scandal was extraordinary. Of the six men arrested, four were teachers and one was a school district administrator; all were charged with soliciting sex from a minor. The county sheriff's office, reportedly, had uncovered a "homosexual ring" and the details shocked the local populace. Teenage boys had reportedly been invited to a private party and while there, tempted with alcohol and deviant sexual acts by men who could have been their teachers.¹⁸ The school district suspended Van Heest with pay and waited to see what the outcome of the trial would be. All the men pled not guilty to the charges and, as the weeks went by, what at face value seemed like a sordid tale of lust became more complicated.

Even at the arraignment hearing, there was something that didn't add up in the details that the Ottawa County Sheriff's Department had disclosed. Van Heest and the other men had been arrested during a raid on a party at a private residence "... which followed several weeks of investigation". Van Heest's lawyer raised suspicions to the press at the arraignment saying, "The 17-year-old (informant) may have represented himself as an adult and appeared to be one. He, along with the undercover officers, may have arranged the whole thing".¹⁹ This concern about police entrapment did not begin to cover the complexity of what had occurred.

¹⁶ Al Stark, "Reading, writing, and wrath", *Detroit Free Press*, October 27, 1990. 29

¹⁷ For discussions of house parties as venues for socialization and sexual relationships for gay men, see: Allan Bérubé, John D'Emilio, and Estelle B. Freedman, *Coming out under fire: the history of gay men and women in World War II* (Chapel Hill: University of North Carolina Press, 2010); Peter Boag, *Same-sex affairs: constructing and controlling homosexuality in the Pacific Northwest* (Berkeley: University of California Press, 2003); John Howard, *Men like that: a southern queer history* (Chicago: University of Chicago Press, 2001).

¹⁸ "Teacher charged in sex crimes with boys", *Courier-Post*, January 11, 1990.

¹⁹ "2 teachers, 3 others, plead not guilty in sex-with-boys-case", *Battle Creek Enquirer*, January 11, 1990.

More than a year earlier a local bartender, Timothy VandenBeldt, had been arrested by the sheriff's office for allegedly having teenagers pose nude for photographs. As part of a plea deal, VandenBeldt agreed to "infiltrate and expose" the gay "underground" of Ottawa County. He gave the police a list of fifty men in the county that he claimed were gay, including teachers who had allegedly bragged about having sex with students.²⁰ VandenBeldt arranged the party that ensnared Van Heest as part of his plea deal, which included an agreement to work with law enforcement.²¹ The sheriff's office recruited a local high school senior, Ross Boeserma, who volunteered to be part of the sting and was "interested in a career in law enforcement." As details of the case came to light, Boeserma's recollection of the events at the party changed from being solicited for sexual activity to merely witnessing sexual activity.²² The criminal case against Van Heest fell apart because of this obvious attempt at entrapment. Even though all charges against him were dropped, he was left to pick up the pieces of his teaching career.

While the case was proceeding an anonymous school official remarked that, "It would be difficult to return any of these men to their old job" even without convictions.²³ Two of the teachers pled guilty to a misdemeanor charge of serving alcohol to a minor and were summarily terminated by their schools.²⁴ So, it must have come as a surprise to school administrators when Van Heest petitioned to return to his teaching job at Zeeland High School.²⁵ It certainly was a shock to a vocal minority of local parents who were appalled by the prospect of an openly gay man teaching their children and outraged when the local school board reinstated Van Heest for the following year.²⁶ Some parents and students

²⁰ "Witch hunt? Shattered lives in aftermath of failed sex sting", *The Herald-Palladium*, January 8, 1991.

²¹ Lydia Smigielski, and Melissa Birks, "'Gay Underground' was target of probe, police records show", *The Grand Rapids Press*, November 21, 1990; Van Heest Interview (9:40-10:20).

²² "Miscommunication cited in sex case", *Lansing State Journal*, January 8, 1991, p. 1B; "Probe of gay educators mired in chaos", *Lansing State Journal*, January 8, 1991, p. 9.

²³ "Miscommunication cited", p. 3B.

²⁴ Smigielski, and Birks "'Gay Underground'"; "Was Target of Probe".

²⁵ Susan Collins, "Zeeland teacher wants his job back this fall", *The Grand Rapids Press*, August 5, 1990.

²⁶ Stark, "Reading, writing, and wrath", 29

in Zeeland spoke on behalf of Van Heest at school board meetings, citing the unfairness of the accusations against him and his long-standing record as an excellent teacher. They also voiced their support in letters to the editor.²⁷

This support did not stop the 25 parents who opposed Van Heest's return to the classroom from starting a petition which collected 600 signatures around the community and demanded his firing. These parents expressed their concerns in explicitly religious terms with one mother saying, "We continue to pray for Mr. Van Heest to repent. His knowledge of English and Teaching skills are greatly needed. However, his role model as a practicing homosexual is not acceptable". Other parents wanted to know "if he had been tested for AIDS" before he was reinstated.²⁸ While the attempts to keep Van Heest out of the classroom appeared to be a grassroots initiative, they were not. According to Van Heest, the Rutherford Institute, a conservative organization that advocates for civil liberties, had recruited a local family with a student enrolled in one of Van Heest's classes to file proceedings that could lead to his termination. This family contended that their daughter was being forced to associate with "homosexuals" because Van Heest was the only teacher she could take for an American College Testing preparation course.²⁹ Ultimately, these efforts were unsuccessful, though the district did compromise with concerned parents by allowing them to remove their children from Van Heest's classes.³⁰ Fortunately, Van Heest belonged to the Michigan Education Association which provided an attorney, advice from a union negotiator, and financial support throughout his second court battle.³¹

Van Heest kept a low profile during this debate. He did not attend the school board meetings where his worthiness to teach was discussed nor

²⁷ Melissa Birks, and Lydia Smigielski, "Support grows for gay teacher targeted by parents for firing", *The Grand Rapids Press*, October 8, 1990. Melissa Birks, "Speakers back gay teacher facing ouster bid", *The Grand Rapids Press*, October 9, 1990.

²⁸ "Parents seeking to oust gay teacher".

²⁹ Van Heest Interview (14:00-16:00).

³⁰ "Students pulled from class", *The Times Herald*, October 9, 1990.

³¹ Van Heest Interview (15:00-16:00). The National Education Association (NEA) has affiliates in every state in the United States and in more than 14,000 communities.

issue statements criticizing his detractors in the community. His reticence to speak needs to be understood in context. Van Heest had the benefit of state laws which made firing a tenured educator without due cause extremely difficult in Michigan. Even if he was fired, he could appeal to a state-level board that had the power to overturn terminations. He had not committed any acts or discussed anything that could be construed as inappropriate with any students. Unlike two of the other teachers at the party, he had not been charged with providing alcohol to a minor. By remaining silent, he was taking full advantage of due process and the relevant labor laws in his state. As we will see in the other historical narratives examined in this study, an understanding of the local context and state laws was critical for LGBTQ teachers negotiating geographies of safety in the 1990s.

Van Heest had lived most of his life with the people who were now trying to get him fired. He intended to continue living among them and as of the writing of this article still lives in Holland, a fifteen-minute drive from the high school where he worked. A *Detroit Free Press* article on the furor that had erupted in Zeeland noted, “Van Heest takes pains to say that even his most severe critics among the town folk were good people whom he has always been happy to be around, however they feel about him now.” As a veteran teacher, he could have gone to work in a more liberal school district, but Van Heest preferred to remain in Western Michigan. Van Heest explained, “They aren’t bad people, those who are so frightened by this. People ask why I stay at Zeeland and I say it’s because I can be what I’m supposed to be there, a teacher. I don’t have to spend a lot of time keeping order like teachers do other places.”³²

Van Heest understood the local context of his battle to remain at Zeeland High School and acted to regain the geography of safety he had negotiated successfully for twenty years before being caught up in a blatant act of police entrapment. He had the support of the Michigan Education Association, which had filed motions on his behalf to prevent the release of police reports, and competent legal representation, which engaged in interviews with media on his behalf.³³ The local Zeeland Education Association had presented a petition with 546 signatures

³² Stark, “Reading, writing, and wrath”.

³³ Ibid.

supporting Van Heest to the school board; local students presented a separate petition with 261 signatures.³⁴ He also had the support of other teachers and local LGBTQ community members who had raised seven thousand dollars for the legal defense of the men caught up in the police sting.³⁵

Issuing statements to the press about intolerance in the local community was risky and could be counterproductive. Such publicity might not only anger people who were already opposed to Van Heest being a teacher but might also cause community members who supported him to remain silent to avoid bitter confrontation with their neighbors. Many of his colleagues were willing to support him based on the principle that all teachers should be judged on their professional capacity, not on their private lives.³⁶ But that support required Van Heest to meet professional standards which were based on expectations surrounding “typical” heterosexuals’ sex lives and identities. When contacted about the situation by the press, attorneys cautioned that the act of weighing in against the parents could be used against Van Heest because, “... the State Teacher Tenure Commission has upheld firings where school boards have decided, aside from guilt or innocence, that a teacher is no longer effective because of controversy”.³⁷

Recalling the events of thirty years ago, Van Heest described the school administrators as being supportive throughout the entire incident. Van Heest was a known quantity to his principal and the district superintendent. He had taught his principal’s children and the superintendent thought of him as a good teacher. His superintendent approached Van Heest after the trials were over and told him that the situation had inspired him to read as much as he could about homosexuality. He assured Van Heest, “You deserve to be here” . This put the administrator at odds with some members of the school board and Van Heest felt that both men paid a political price for supporting a gay teacher. His principal was passed over for the role of superintendent and the superintendent

³⁴ “Union, students petition in support of teacher”, *Detroit Free Press*, October 10, 1990, 11.

³⁵ “Teachers backed”, *The Herald-Palladium*, March 23, 1990, 22.

³⁶ “Union, students petition”, 11.

³⁷ Stark, “Reading, writing, and wrath”, 29

was unable to secure changes to school programming with the elected board.³⁸ Van Heest spent the rest of his teaching career at Zeeland High School and retired after 27 years as an educator.

SPANISH FORK, UTAH

Wendy Chandler negotiated a “geography of safety” in the place she knew the best.³⁹ She had raised two children and spent more than a decade married to a man in Spanish Fork, Utah. She knew the schools and the deeply patriarchal culture of the towns south of Salt Lake City. Like David Van Heest, she didn’t set out to be an activist but when confronted with an assault on her dignity as a professional she refused to give in to the demands of the men who ran her school district. Chandler knew she was a good teacher and a good coach and negotiated a “geography of safety” secure in that knowledge. She marshalled the resources of the Utah American Civil Liberties Union (ACLU), eventually winning two lawsuits and securing her position in the Nebo Valley School District until her retirement after more than 30 years of teaching.⁴⁰

It is difficult to overstate the historical impact that the Church of Jesus Christ of Latter-day Saints (LDS) has had on the culture of Utah, anchoring an LDS heartland that extends into Nevada, Arizona, Southern Idaho, and Oregon. In 2018 the percentage of Utah residents belonging to the LDS church dropped to a low of 61 percent, with less than 50 percent of Salt Lake City residents belonging to the church. But in the 1990s the LDS church was even more dominant, the demographic impact felt strongly in towns like Spanish Fork in Utah County which still today has 82 percent of its residents claiming LDS membership.⁴¹

³⁸ Van Heest Interview (24:20-25:00).

³⁹ Note: Wendy Chandler went by her married surname, Weaver, at the time of the events discussed in this study. When referring to current events I will use the name Chandler but in quotations will use Weaver. Wendy Chandler Interview, Author’s Collection, July 15, 2021. (2:00-2:30).

⁴⁰ The American Civil Liberties Union, founded in 1920, is a national organization that works to defend and preserve individual rights and liberties guaranteed by the Constitution and laws of the United States. The ACLU has affiliates in every state, the District of Columbia, and Puerto Rico.

⁴¹ Matt Canham, “Salt Lake County is now minority Mormon, and the impacts are far reaching”, *The Salt Lake Tribune*, consulted on September 6, 2021, <https://www.sltrib.com/religion/2018/12/09/salt-lake-county-is-now/>.

When Wendy Chandler came to Spanish Fork in 1979 to teach physical education and coach, the town had roughly 7,300 residents. It centered on Interstate 15 which runs up through the city of Provo and continues another 50 miles north to Salt Lake City. This access to the city swelled the town's population and by the mid-1990s Spanish Fork had more than doubled in size with almost 17,500 residents.⁴² Chandler came to Spanish Fork directly out of college and taught for twenty years. An acclaimed volleyball coach, she led her team to numerous state titles and received a distinguished service award from Utah High School Activities Association (UHSAA).⁴³ A member of the LDS church, Wendy married Gary Weaver, the school psychologist at Spanish Fork High School, where they were both employed. The couple had two children.

Chandler taught physical education in the Nebo Valley School District for 17 years before taking a two-year sabbatical from coaching to pursue a MA in Sports Psychology.⁴⁴ When she returned after summer break she was called into the principal's office and told that the school district wouldn't be rehiring her to coach. When she asked what the reasoning was behind this abrupt shift the principal told her that his "perception" of her had changed. What had changed in Chandler's life was that after her divorce the previous April she had moved in with Rachel Smith, a local mother of five, and was living in a "committed, loving, and marital like relationship".⁴⁵ The school district had learned of Chandler's relationship from a student who had been on Chandler's volleyball team and asked her coach if she was gay. Chandler responded yes and went on to explain that her sexuality wasn't going to change anything about how the volleyball team was run. The student persisted, saying she wouldn't be playing and that she "just didn't want to be around it".⁴⁶ The student and her parents then met with school district leaders who told them that

⁴² *US decennial census of population and Housing, 1970,1980,1990,2000*. Washington: Government Printing Office, consulted on September 6, 2021, <https://www.census.gov/prod/www/decennial.html>

⁴³ Jay Drew, "Volleyball coaches unite in effort to change format of state tourney", *The Salt Lake Tribune*, November 12, 1993, p. E6. Bob Hudson, "Boosters help keep preps going", *The Daily Herald*, October 26, 1994, p. C1.

⁴⁴ Chandler Interview (3:00-3:30).

⁴⁵ Mike Carter, "Lesbian teacher fired as coach, sues district over gag order", *The Daily Spectrum*, October 22, 1997.

⁴⁶ Chandler Interview (3:40-4:30).

Chandler had revealed to a student that she was a lesbian; the parents urged that she be fired from her positions in the Nebo Valley School District.

The school district did not attempt to remove Chandler from her teaching position, but the next day presented her with a draconian gag order which dictated that she had to remain silent about her lesbian relationship. The gag order stipulated that this silence extended outside of the school to any public space where parents or students connected to the school district might be. According to the official letter, any discussion of her sexuality “would be grounds for dismissal not only from coaching but from her teaching position as well”. Her ex-husband was presented with a similar letter that forbade him from discussing his ex-wife’s sexuality.⁴⁷

Reflecting on the experience in an interview for this study, Chandler said that if the school district had been more knowledgeable about disciplining employees based on activities occurring off school grounds, if they had told her she wasn’t coaching at the beginning of the year as opposed to just a few weeks before the start of the season, or hadn’t put the gag order in writing, she probably wouldn’t have had a case. But they had provided her with a contract, in essence endorsing her abilities as a coach, and made a legal misstep by assuming she wouldn’t contest the gag order. Chandler felt that she had been underestimated; the leaders of the local schools were all deeply patriarchal men steeped in the culture of the LDS church, and because she was a woman they expected her to lose her coaching position and be satisfied with remaining quiet in order to keep her job as a teacher.⁴⁸ Chandler tried to negotiate the terms of the memorandum with the district but was refused. The portion regarding students’ parents was particularly troubling because her partner had five children in the Nebo Valley School District. Even speaking to the woman she loved would have violated the terms laid down by the school district.⁴⁹

⁴⁷ Ibid., 7:00-8:00.

⁴⁸ Ibid., (15:45-17:20).

⁴⁹ The letter Chandler received read in part. “The District has received reports that you have made public and expressed to students your homosexual orientation and lifestyle. If these reports are true, we are concerned about the potential disruption in the school community and advise you of the

Chandler felt that the gag order was an infringement on her rights but was at a loss about how to handle the situation. She sent out 25 letters to different attorneys and organizations but received only five responses, all of which were sympathetic but unanimously declined to take up a case dealing with “sexual orientation issues”.⁵⁰ Chandler eventually approached the ACLU of Utah which agreed to take her case.⁵¹ In the next few weeks Chandler learned that a group of parents, backed by the Utah Eagle Forum (a conservative advocacy group) had filed a lawsuit against her on the basis that she had revealed committing sodomy in her lawsuit against the district. Admitting to a felony in Utah was grounds for termination from teaching. The ACLU agreed to represent her in both cases and Chandler was put in the unusual position of being both a defendant and plaintiff in cases over the same issue.

For Chandler, the suit brought by the parents was in many ways more offensive than the efforts of the school district to remove her from coaching. It seemed to call into question her moral character and while the coaching position paid 1500 dollars a year, her main livelihood and means of supporting her family came from her teaching. Like David Van Heest in Michigan, Chandler was a veteran teacher with an accomplished record. Court documents noted “Her reputation as an educator at Spanish Fork is unblemished: she has always been considered an effective and capable teacher, her evaluations range from good to excellent, and she has never been the subject of any disciplinary action”.⁵² Chandler defended her record to the press saying, “I’ve been a good coach and a good teacher. I’ve never done anything that infringed on anybody. Then, all of the sudden, I was not living the lifestyle they wanted me to live or being the role model, I had always been”.⁵³

following: You are not to make any comments, announcements or statements to students, staff members, or parents of students regarding your homosexual orientation or lifestyle.” *Weaver v. Nebo School Dist.*, 29 F. Supp. 2d 1279 (D. Utah 1998).

⁵⁰ Chandler Interview (6:00-6:35).

⁵¹ American Civil Liberties Union, “ACLU of Utah applauds State Supreme Court decision to uphold the rights of lesbian high school teacher”, consulted on September 8, 2021, <https://www.aclu.org/press-releases/aclu-utah-applauds-state-supreme-court-decision-uphold-rights-lesbian-high-school>.

⁵² *Weaver v. Nebo School Dist.*, 29 F. Supp. 2d 1279 (D. Utah 1998).

⁵³ Mike Carter, “Lesbian teacher fired from coaching job, sues school for civil rights violation”, *The Greenville News*, October 22, 1997.

Both cases brought a considerable amount of publicity to communities that prided themselves on being quiet, small towns. Kevin Jennings, founder of the Gay Lesbian Straight Education Network (GLSEN), said that the Utah case was “... one that every American should be concerned about”. The Associated Press picked up the story and Chandler’s efforts to regain her coaching position and retain her teaching position became national news for a few days.⁵⁴

The suit that Chandler filed against the Nebo Valley School District resolved the following year with a US District Court observing, “The School District must demonstrate that allowing Ms. Weaver to speak about her sexual orientation would result in a ‘material and substantial interference or disruption’ in the normal activities of the school”. Finding no such interference the court noted, “Ms. Weaver continued to teach her classes without any problems. Indeed, the defendants have been unable to point to any actual disruptive events since Ms. Weaver’s sexual orientation became public knowledge”. The school district lacked the “compelling evidence” needed to justify restricting the speech of its employees. In addition to protecting Weaver’s exercise of free speech, the court exposed the school’s discriminatory action: “It appears that the plain language of the Fourteenth Amendment’s Equal Protection Clause prohibits a state government or agency from engaging in intentional discrimination even based on sexual orientation absent some rational basis for so doing”.⁵⁵

The case filed by local parents against Wendy Chandler was appealed up through the state court system with the financial backing of the Eagle Forum. The case was finally settled by the Utah Supreme Court in 2003 which upheld the rulings of the lower courts and found that the plaintiffs had presented no reasonable grounds to pursue legal action against Chandler. The court pointed out that the legal authority to discipline a teacher had been granted by the legislature to the local school district, the Commission, or the State Board of Education and that granting

⁵⁴ Louis Sahagún, “Lesbian coach sues Utah school”, *Los Angeles Times*, October 22, 1997. Chandler Interview (6:00-6:35).

⁵⁵ *Weaver v. Nebo School Dist.*, 29 F. Supp. 2d 1279 (D. Utah 1998). Joe Costanzo, and Jeffrey Haney, “Lesbian teacher wins suit against school officials”, *Desert News*, November 26, 1998. The first section of the 14th Amendment to the United States Constitution, adopted in 1868, addresses citizenship rights and equal protection under the law.

private citizens the authority to do the same would, "... override, by judicial fiat, a system which the Legislature has at least tacitly, if not expressly, sanctioned". The court firmly stated that redress of the concerns that some of the community members had with Chandler could not happen through the court system because "This court does not have the authority to fire Weaver or order the school board to do so; nor may we force the State Board of Education to take any action at this point".⁵⁶

After almost six years of litigation Chandler was free to continue teaching her classes. When asked about the impact she thought her experiences had had on the local school district she noted that she continued to teach and coach for another seven years with no incidents. Another coach in the district eventually came out as a lesbian and rose up the ranks to become an assistant principal at the same high school Chandler had worked at for her entire 25 years as an educator.⁵⁷ Chandler's court cases had shown educators throughout Utah that their jobs and reputations could be protected against discrimination based on sexual orientation, even in conservative school districts dominated by the LDS Church.

SALT LAKE CITY, UTAH

While Wendy Chandler was struggling to find legal representation, forty miles up the interstate in Salt Lake City Doug Wortham was engaging a political battle in defense of newly-established Gay Straight Alliances (GSA) in schools. Now known as Genders and Sexualities Alliances, GSAs are student-led organizations founded to support LGBTQ youth in middle schools, secondary schools, and colleges. Salt Lake City as the capital of Utah was the largest community in the state, the historic headquarters of the Church of Jesus Christ and Latter Day Saints, and arguably both the cultural and economic center of the state.

Wortham had been the French teacher at Roland Hall, St. Mark's School, an Episcopalian preparatory school, since 1978. This was his first job after college and serving as an LDS missionary in France and

⁵⁶ *Miller v. Weaver*, 66 P. 3d 592 (Supreme Court 2003). ¶ 22, 27.

⁵⁷ Chandler Interview (34:00- 34:50).

Belgium.⁵⁸ The private school and its supporters formed a relatively liberal enclave that provided Wortham the possibility of being politically active in ways that would have been difficult for a public school teacher. Wortham had remained closeted at his own school early in his career. But by the 1990s, with the security of being known as an excellent teacher, the discrepancy between being openly gay in his personal life but closeted in his professional life became unacceptable.⁵⁹ After a decade at Roland Park he concluded that he should come out and went to his principal to explain the situation.⁶⁰ Wortham was supported by his school; a sharp difference from the gag orders, parental protests, and the court cases faced by Van Heest and Chandler.⁶¹

Doug Wortham was in a position of privilege as a teacher at a relatively liberal private school in Utah in the 1990s; in effect he had already initiated a “geography of safety” that consisted of the community at Roland Hall. He was a known quantity at his school, respected and professionally stable. His livelihood was not susceptible to the same public outcry that public school teachers faced. He understood this and felt a sense of responsibility to the hundreds of LGBTQ teachers in Utah who could not reasonably be out and remain in their chosen profession as educators.⁶² A survey of local newspaper coverage from the 1990s seems to indicate that Wortham was practically the only openly gay teacher in his state until 1996. The earliest mention of Wortham in connection to LGBTQ issues is a newspaper article by the Associated Press about the State Board of Education banning references to homosexuality in

⁵⁸ “Doug Wortham: celebrating 40 years and looking to the future”, consulted on August 17, 2017, https://www.rowlandhall.org/cf_news/view.cfm?newsid=1709.

⁵⁹ Doug Wortham Interview. Author’s Collection. July 24th, 2021. (4:00-4:50).

⁶⁰ Ibid. (5:00-6:00).

⁶¹ Ibid. (16:00-17:00).

⁶² Kevin Jennings who founded the Gay Lesbian Straight Education Network (GLSEN) also taught at a private school, though in Boston, and initially conceived of GLSEN as an association for private school teachers. Liberal private schools offered an opportunity for early organizing because they were sheltered from many of the political pressures faced by public schools. Even the school administration and students’ families were supportive in a public school LGBTQ teachers still had to contend with politicians and other local community stakeholders. Private schools were primarily answerable to their boards. See Kevin Jennings, *Mama’s boy, preacher’s son: a memoir of growing up, coming out, and changing America’s schools* (Boston: Beacon Press, 2007).

textbooks. Wortham spoke against the ban before the board and was quoted saying, “kids want to know the truth”.⁶³

As the 1990s progressed concerns regarding LGBTQ students meeting on school grounds and forming Gay Straight Alliances became central to local queer political activity. Students at East High School attempted to start a GSA in 1996 with the support of the building’s principal. This effort was met with horror by Republicans in the state legislature, who met secretly in defiance of a state law that prevented lawmakers from holding nonpublic meetings. After watching an infamously anti-gay film, *Gay Rights – Special Rights*, and viewing materials compiled by the Utah Eagle Forum, the lawmakers were so appalled that they immediately began planning a law to exclude gay and lesbian clubs from schools in all of Utah.⁶⁴ Liberal community organizations from across the state held a rally under the capitol dome, protesting the secret meeting and preemptively expressing their dissent of the law that seemed certain to be passed by Utah Republicans who were firmly in control of both Houses.⁶⁵

As perhaps the only openly gay teacher in Salt Lake City, Wortham became intensely involved in the effort to support the formation of GSAs in Utah. One week after the legislators’ secret meeting Wortham, Camille Lee and Clayton K. Vetter founded the Utah chapter of GLSEN at a press conference on the steps of the Utah Capitol. There Vetter, a debate teacher at Skyline High School, came out as the first openly gay public school teacher in Utah.⁶⁶ In addition to the looming anti-GSA legislation, the founders of Utah GLSEN believed that teachers in the state did not feel safe to come out, be unintentionally outed, or even to sponsor a GSA at

⁶³ “Board bans textbook homosexuality references”, *The Daily Herald*, June 16, 1993, p. B1. <http://www.newspapers.com/image/470786133>

⁶⁴ Lili Wright, “Caucus’ surprise: Anti-gay film with LDS bashing ties”, *The Salt Lake Tribune at Newspapers.Com*, February 3, 1996, A1. Tony Semerad, “Lawmakers looking at anti-gay club bill”, *The Salt Lake Tribune*, February 3, 1996, p. A4. This secret meeting was met with considerable disapproval from the Democrats in the Utah State House, the ACLU who threatened legal action, and the Utah Education Association which represented 85 percent of Utah elementary and secondary teachers. See Tony Semerad, and Dan Harrie, “Unlike the Senate’s anti-gay meeting, the anger of critics is no secret”, *The Salt Lake Tribune at Newspapers.Com*, February 2, 1996, p. A1, A10.

⁶⁵ Kristen Reidelbach, “Legislators hide in closets as protestors come out”, *The Daily Utah Chronicle*, February 7, 1996, p.1.

⁶⁶ Samuel Autman, “Skyline teacher tells crowd at Capitol he’s gay”, *The Salt Lake Tribune*, February 28, 1996, p. B1. Wortham Interview (10:30-11:30).

their own school. The fear of being fired and having their reputations ruined kept LGBTQ teachers and their heterosexual allies from advocating for themselves or their students.⁶⁷

Support from local progressive stakeholders extended only so far in a state that was politically dominated by conservative groups. Salt Lake City was the stronghold of the state's Democratic Party, which had little power outside the city limits. Likewise, although the Utah Education Association claimed to represent 85 percent of teachers, they were operating in a right-to-work state. "Right-to-work" laws prohibit agreements between employers and labor unions that require non-union employees to contribute to the costs of union representation. The teacher's organization had significant limitations on what political power it could bring to bear.⁶⁸ LGBTQ teachers needed to defend their own rights and their students' rights. But how to convince them? It seems what Wortham and the newly-founded Utah GLSEN chapter needed were public displays that showed closeted teachers that they could keep their jobs and still pursue their right to freedom of speech. Over the next two years the Salt Lake City School Board, the Utah Legislature, and the saga of Wendy Chandler in Spanish Fork provided that publicity.

On February 22, 1996, three weeks after the students at East High School formed their GSA, the Salt Lake City School Board determined how to resolve the issue of GSAs in their city. To avoid breaking the 1984 Equal Access Act, which forbade school districts from discriminating against student clubs on the basis of religious, political, philosophical, or other speech, they would cancel every extra-curricular club in all public schools. In a meeting filled with shouting matches and impassioned speeches for and against the GSA, the Council voted 4-3 to ban all school clubs.⁶⁹ This draconian measure halted everything from chess to ski club and canceled meetings for the 49 clubs that met in the city's three high schools.⁷⁰ The Board chose to ban all clubs rather than allow the GSA to meet in compliance with federal law.

⁶⁷ Ibid. (7:00-8:00).

⁶⁸ Semerad, and Harrie, "Unlike the Senate's Anti-Gay Meeting", p. A1, A10.

⁶⁹ "Gay issue resolved; No campus clubs", *The Daily Utah Chronicle*, January 23, 1998, 6.

⁷⁰ Matthew Brown, "Club founder says gays will meet in spite of ban", *The Daily Herald*, February 22, 1996, A11.

Being forced into this position was particularly ironic because the Equal Access law had been sponsored by conservative Utah Senator Orrin Hatch as a way of preventing schools in liberal communities from banning bible study and prayer groups.⁷¹ Senator Hatch was outraged that the law he sponsored was being used to protect GSAs. "School-board authorities can and should be able to ban homosexual and heterosexual clubs", he argued, "especially if they fly in the face of community standards".⁷² Given a choice between a permissive-all or an exclusionary-nothing, the Salt Lake City School Board chose nothing and made headlines across the country.

While school clubs in Salt Lake City ground to a halt, conservative lawmakers were busy trying to figure a way around the Equal Access Act.⁷³ In a potent example of overreach authority, Senator Craig Taylor went on record, saying he wanted a law that would ban teachers from "promoting illegal activities in their classrooms" but neglected to define what those activities might be.⁷⁴ Taylor's proposal quickly passed the State Senate and would, if passed by the State House, "impose the same prohibitions on teachers' private lives if those actions endanger the health, safety or welfare of the students, disrupts school activities or undermines the public confidence in the schools".⁷⁵ When students at a second high school just north of the city announced that they were also forming a GSA, Taylor accused national gay rights organizations and the ACLU of orchestrating the spread of GSAs. He claimed, "... they can't reproduce [so] they have basically said, 'We will seduce and sodomize your children'". Taylor pointed to students' walkouts and the founding of the Utah GLSEN as other examples of interference from outsiders.⁷⁶

Taylor's bill easily passed the legislature and headed to the governor's desk to be signed. The Utah Education Association opposed the bill and

⁷¹ Jed Clark, "Equal Access Act protects prayer circles and gays", *The Daily Utah Chronicle*, January 23, 1996.

⁷² Dan Harrie, "Politicians want gay clubs out of schools", *The Salt Lake Tribune*, February 10, 1996, A1, A5.

⁷³ Tony Semerad, "Lawmakers looking at anti-gay club bill", *The Salt Lake Tribune*, February 3, 1996, A4.

⁷⁴ Lili Wright, "A Vague Victory", *The Salt Lake Tribune*, February 26, 1996, A1.

⁷⁵ "Utah educators for gay-straight alliance", *The Daily Spectrum*, February 28, 1996, A5.

⁷⁶ "Students to form gay club; Critics cry adult manipulation", *The Daily Spectrum*, March 3, 1996, A6.

called for the governor to veto the legislation because it imposed second-class citizenship on teachers by policing their private lives and “making them walk on eggshells” around controversial topics.⁷⁷ Governor Mike Leavitt was ultimately convinced to veto the bill due to the impact it would have on free speech and the cost of the state being sued over the constitutionality of the law. The governor clarified that he agreed with the law and would support future legislation that accomplished its aims without infringing on free speech.⁷⁸ This legislative controversy and the open-ended willingness of the governor to consider antigay teacher laws swelled the ranks of Utah GLSEN which grew from its initial three members to more than 50 in the course of a year. Wortham credited Senator Taylor’s efforts for this increase, joking that, “After Craig Taylor worked his magic our membership just exploded. He’s done more for our movement than anyone”.⁷⁹

For the teachers involved with Utah GLSEN life continued in the midst of the legislative spectacles occurring at the State Capitol. Papers needed to be graded, lessons had to be planned, and the support of the GLSEN chapter, while not making the job of teaching any easier, did provide LGBTQ educators with a venue to socialize. Though not all members of the new queer teacher group were interested in activism, a substantial minority were willing to go on the record as openly gay. Much of the early work of the chapter involved reaching out to other LGBTQ teachers and it was in that context that Doug Wortham first heard about Wendy Chandler’s saga.

Every Friday night Wortham got together with a few lesbian friends, some of whom were also teachers, and talked over pizza and beer. During one of these gatherings a teacher, who was also a volleyball coach, told the group about “... a horrific story about Wendy Weaver”.⁸⁰ Wortham eventually found her phone number through his gay teacher network and called her saying, “This is who I am, and this is why I’m calling. We

⁷⁷ Samuel Autman, “Teachers’ union want Leavitt’s veto”, *The Salt Lake Tribune*, March 5, 1996, B1.

⁷⁸ “Governor vetoes teacher gag bill”, *The Daily Spectrum*, March 21, 1996, A1, A11.

⁷⁹ Hillary Groutage, “Gay straight teacher group comes to Utah”, *The Salt Lake Tribune*, March 22, 1997, B1, B4.

⁸⁰ Wortham Interview (18:00-20:30).

don't know each other from Adam or Eve but I might be able to help".⁸¹ He then asked if she would contact the ACLU for legal counsel.⁸² Contacting the ACLU had also been suggested to Chandler by her wife's professor. It is likely that the suggestion coming from multiple sources directed Chandler to the expertise of the Utah ACLU. Wortham invited Chandler to a GLSEN picnic that was also attended by the Utah ACLU executive director, Carol Gnade, and the long legal battle that ensued showed teachers across Utah that it was possible to be out and a teacher even in the most conservative parts of the state.⁸³

Wortham's connecting Chandler with the ACLU illustrates a hallmark of LGBTQ teacher activism: partnering with straight progressive allies to counter conservative and discriminatory elements in their local communities. Utah was, as a whole, tremendously conservative but there was active, organized, and often successful political resistance to that conservatism by a vocal liberal minority. In the case of the debates over GSAs in Utah Public Schools, success for this progressive coalition involved a drawn-out series of legal battles which kept the issue, and debates about the needs of queer youth, in newspaper headlines across the state.

Wortham retired in 2021 after 43 years of teaching at Roland Park.⁸⁴ Reflecting on the queer students who came through his classroom over the years Wortham wryly noted, "... now I have gay kids in a lot of classes and I'm just the old teacher who happens to be gay and there's nothing special about it at all... But for the first time ever this year I had a kid say, 'What was it like back in the day when you couldn't be out at Roland Hall?'"⁸⁵ The ability of students at Roland Hall to ask these questions, Wortham's long career at the school, and even there being "nothing special" about being an openly gay teacher at a prestigious private school in a conservative state are all testaments to the effectiveness of his activism.

⁸¹ Hillary Groutage, "Weaver: Caught in storm after coming out", *The Salt Lake Tribune*, October 26, 1997, C5.

⁸² Wortham Interview (18:50-19:00).

⁸³ Groutage, "Weaver: Caught in Storm", C1, C5.

⁸⁴ Wortham Interview (1:00-1:30).

⁸⁵ Wortham Interview (47:00-49:00).

CONCLUSION

Each of the three teachers detailed in this study provides a compelling example of creating and maintaining “geographies of safety”. They also each illustrate that geographies of safety created by queer teachers, while based on knowledge of local contexts, extended to encompass state-level negotiations of safety. Finally, each of these three historical narratives underscores the broader dilemmas faced by LGBTQ elementary and secondary educators throughout the twentieth century. By successfully negotiating these concerns in conservative local spaces, these three narratives pointed to the potential resolution of similar challenges at a national level.

David Van Heest was intimately aware of the complexities of living as a closeted gay man in Western Michigan. Within that context, he had strategically engaged in a long career and, while this geography of safety may have been politically limiting, it did provide him stability and a respected place in a community that valued his teaching. When his private sexual activity was made public through an entrapment scheme by local law enforcement, he utilized his understanding of the local geography of safety to defend his livelihood. Moreover, many in the community who valued him as a teacher were outraged by his entrapment and supported him in the local media and at school board meetings. Van Heest and his attorney understood that state-level stakeholders with an interest in due process for teachers, such as the Michigan Education Association, could be allies in the effort to retain his teaching position.

Van Heest maintained a strategic silence even when confronted with the effort to terminate his position after the criminal charges against him had been dismissed. This silence was based on knowledge of the state laws and the context of disciplining a teacher in Michigan as well as an awareness that he was a good teacher who had earned the support of countless community members. Hundreds of people had signed a petition for him to keep his job throughout the debacle that called into question his professionalism. Local community members assured him that he had made a positive impact on their lives. The community he taught in was *his community* and he knew how to negotiate a geography of safety within it.

Wendy Chandler also understood that she was a good teacher and an excellent coach. She knew that she had a reputation in the community for building the volleyball program at Spanish Fork High School into a state powerhouse. She also understood the local context of being an educator in a conservative majority LDS community. She had lived in Spanish Fork for most of her adult life and raised children there. Chandler was in an advantageous position to navigate the complexities of being outed because of these experiences. She understood the local power structure and how that structure related to her as a woman and as a lesbian. As an educated person she also understood that the local powers that were attempting to silence her were counting on her continued silence. To get away with the gag order the Spanish Fork School District assumed Chandler would settle for losing her coaching position and keeping her teaching job.

Chandler did not settle; instead, she found support from the ACLU and the members of her community that knew her value as an educator. The ACLU was in a position to provide the legal expertise needed to prove in court what Chandler knew to be the case; the school district she had worked for successfully for 18 years had trampled all over her constitutional rights. Her successful defense of those rights and continued employment in Spanish Fork showed teachers across Utah that advocating for LGBTQ rights was possible even in conservative corners of the state.

Doug Wortham saw the possibility of gay and lesbian teachers advocating not only for themselves but also for their students. As the controversy surrounding the GSA at East High School extended to cover the entire state, Wortham utilized his relatively privileged position as a private school teacher to organize and coordinate public school teachers. Wortham recognized the potential of Wendy Chandler's case to shift educators' beliefs about whether they could come out of the closet, or even publicly support LGBTQ students, and still keep their jobs.

Each of these teachers were experienced educators. They were recognized as "good" teachers in their communities and their reputations as good teachers bolstered not only their defense in lawsuits but also in the court of public opinion which they each had to navigate. Indeed, it is difficult to imagine LGBTQ teachers in the 1990s being able to negotiate

geographies of safety without the approval of a substantial portion of their community. The histories discussed in this study invite us to consider how much the process of “negotiating geographies of safety” has changed for LGBTQ elementary and secondary educators.

Queer people in the United States have recently made progress in the arena of workers’ rights that would have astonished the teachers discussed in this study. The 2020 Supreme Court ruling, *Bostock v. Clayton County, Georgia* was a landmark case for LGBTQ workers’ rights. In this ruling conservative Supreme Court Justice Neil Gorsuch wrote,

An employer who fired an individual for being homosexual or transgender fires that person for traits or actions it would not have questioned in members of a different sex. Sex plays a necessary and undisguisable role in the decision; exactly what Title VII forbids. Those who adopted the Civil Rights Act might not have anticipated their work would lead to this particular result. But the limits of the drafters’ imagination supply no reason to ignore the law’s demands. Only the written word is the law, and all persons are entitled to its benefit.⁸⁶

This ruling is a potential answer to the legal complexity that LGBTQ workers have faced and represents an amazing degree of progress for queer teachers, in particular. *Bostock v. Clayton County* provides LGBTQ public school teachers with significant security by cutting through the policies of fifty states and thousands of school districts. Their continued employment is not a matter of legal debate after this ruling, and termination because of gender expression or sexuality is not legitimate grounds for termination. But a Supreme Court ruling is not legislation and shifts in the membership of the Supreme Court could lead the Court to revisit the rights of LGBTQ workers. For queer people, who exist as a perpetual minority, all progress can be contested and must be guarded.

Even if *Bostock v. Clayton County* remains precedent for decades, the narratives that have been explored in this study make clear the challenges the LGBTQ teachers still face. The ability to defend one’s rights is contingent on time, money, and personal willingness to engage in public

⁸⁶ *Bostock v. Clayton County, Georgia*, 590 U.S. 140 S. Ct. 1731; 2020 WL 3146686; 2020 U.S. LEXIS 3252.

controversy. In the case of the Supreme Court recognizing protections for LGBTQ workers under Title VII, the time to contest a firing, the financial resources to do so in court, and the personal willingness to take on an employer are all realities that other groups of minorities protected under Title VII are all too familiar with. *Bostock v. Clayton County* fundamentally alters the equations that LGBTQ teachers engage in when deciding to work in a school and a particular community but the calculus remains dominated by the same question, “Will they think I shouldn’t be a teacher?”.

Bostock v. Clayton County limits the ability of school districts and administrators to explicitly justify the termination of teachers based on their gender expression and sexuality but it does not create equality between LGBTQ educators and their cisgender and heterosexual colleagues. The onus of proving discrimination remains with the employee. Perhaps less visibly but more pervasively, norms of “appropriate behavior” prescribed for elementary and secondary educators are principally informed by heteronormative conceptions of the roles of sexuality and gender in the public sphere.⁸⁷ This hegemonic ability to determine what is appropriate is a significant barrier to equality in the workplace for queer people.

This study points to at least three areas that require further historical inquiry. First, and most broadly, many of the narratives of LGBTQ elementary and secondary educators can only be obtained through a combination of oral histories and detailed analysis of local newspaper coverage. Without a systemic effort to gather these oral histories, the accomplishments of these teachers will remain unknown. As with all oral history projects these efforts are a race against time. Second, the role of conservative political organizations pushing back against LGBTQ progress in conservative spaces, like the ones discussed in this study, needs to be interrogated. While the national and state-level efforts of organizations like the Eagle Forum have been examined by historians, their reach into local-level politics, in this case school districts, have yet to be examined fully. Third, the reasons

⁸⁷ Discussions of what constitutes the public sphere, which groups determine admissibility into said sphere, and the formation of “counterpublics” in response to the hegemony are outside the scope of this study but warrant further research, particularly as they relate to LGBTQ people in positions of public trust. For a discussion of these concepts See Michael Warner, *Publics and counterpublics* (New York: Zone Books, 2005).

that LGBTQ teachers chose to work in conservative spaces needs to be considered. By the 1990s queer teachers had the option of working in educational spaces that offered significantly greater employment protections through state laws, local ordinances, and negotiated agreements through teachers' unions. Given these options, why did some LGBTQ teachers choose to work in conservative places that required negotiating "geographies of safety"? Exploring individual teachers' answers to this question can give us a more full-bodied understanding of the lived experience and motivations of queer people across America during the final decades of the twentieth century.

The historical conversation surrounding LGBTQ teachers in the United States of America has consistently pointed to the importance of understanding the interaction of education with local, state, and federal stakeholders and politics. That importance is heightened by the American system of K-12 education which shares legislative and administrative governance between these three levels of authority. This study offers "geographies of safety" as a model that can be utilized and built upon in future research to explore and compare spaces of relative security that were defined and pursued by queer teachers and their allies.

By interrogating the "geographies of safety" negotiated by queer teachers and their allies it is possible to articulate the agency that queer people brought to bear in conservative spaces. These histories are not simple binaries of progress vs. stagnation and significantly complicate the narrative of queer political activism at a national level which still dominates much of queer history as a field of research.⁸⁸ At an international level, approaching histories of LGBTQ teachers by examining geographies of safety offers scholars a way of examining the narratives of countries with nascent, or even nonexistent, gay rights movements for evidence of political agency. This provides an opportunity for comparison without resorting to hierarchies that place the successes of "Western" LGBTQ communities above the continued work of queer communities in much of the world. There are untold histories about queer teachers

⁸⁸ Other historical works which seek to examine the often complex goals and motivations of LGBTQ people at the local level include Tracy Baim, *Out and proud in Chicago: an overview of the city's gay community* (Evanston, IL: Agate Publishing, 2009) and Will Fellows, and Helen P. Branson, *Gay bar: the fabulous, true story of a daring woman and her boys in the 1950s* (Madison: University of Wisconsin Press, 2010).

from across the world establishing their own “geographies of safety” which need to be written.

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FIRST HYPOTHESES ABOUT THE EMERGENCE OF “SEX” SEGREGATED TOILETS IN PRIMARY SCHOOLS, BUENOS AIRES*

*Primeras hipótesis sobre la introducción de los sanitarios
segregados por «sexos» en las escuelas primarias de Buenos Aires*

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Abstract. This article, based on a study of the introduction of toilets in primary schools in Buenos Aires, Argentina, is part of a line of research that locates the emergence of binary definitions of sex, gender and sexuality as we know them (associated with a set of behaviours, gestures, corporalities, and values), between the mid-nineteenth century and the early twentieth century.

There is consensus regarding the central role that primary schooling has played in regulating gender and sexuality along cis and heterosexual norms. As this study shows, school architecture was one of the technologies that worked in this sense.

At the end of the nineteenth century the practicality of “men” and “women” sharing educational spaces was widely discussed. However, the practice of marking toilets in primary schools according to “sex” had not yet become widespread. The aim of this article is to identify practices and discourses related to spatial “sex” segregation regarding primary school toilets. We argue that the “sexual” segregation of toilets is part of a series of discourses and practices that have operated since the end of

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the nineteenth century, producing two hegemonic and excluding sex-gender figures: “man” and “woman”.

Keywords: History of schooling; School toilets; Sex-gender; School architecture.

Resumen. *Este artículo está basado en una investigación acerca de la emergencia de los sanitarios en escuelas primarias de Buenos Aires, Argentina. A su vez, se enmarca en una línea de investigación que ubica el surgimiento de definiciones binarias de sexo, género y sexualidad tal como las conocemos (asociadas a un conjunto de conductas, gestos, corporalidades y valores), entre mediados del siglo XIX y principios del XX.*

Existe consenso respecto al rol central que ha desempeñado la educación primaria en la regulación del género y la sexualidad, junto con las normas cis y heterosexuales. Como muestra este estudio, la arquitectura escolar fue una de las tecnologías que funcionó en este sentido.

A finales del siglo XIX se discutió ampliamente la conveniencia de que “hombres” y “mujeres” compartieran espacios educativos. Sin embargo, la práctica de identificar los baños en las escuelas primarias según el “sexo” aún no se había generalizado. A partir de allí, el objetivo de este artículo es identificar prácticas y discursos relacionados con la segregación espacial “por sexo” en relación con los baños de las escuelas primarias argentinas. Sostenemos que la segregación “sexual” de los baños escolares forma parte de una serie de discursos y prácticas que han operado desde finales del siglo XIX, produciendo dos figuras sexo-genéricas hegemónicas y excluyentes: el “hombre” y la “mujer”.

Palabras clave: *Historia de la escolarización; Baños escolares; Sexo-género; Arquitectura escolar.*

INTRODUCTION

The wild profusion of infantile sexuality will always be tamed.¹

The relations of the sexes, that is, the strong protection of one part and the loving help of the other, must have their place in the new education and the students must learn it.²

¹ Gayle Rubin “El Tráfico de Mujeres: Notas sobre la Economía Política del Sexo”, *Nueva Antropología* VIII, no. 30 (1986): 131.

² Bertilda Ayarragaray, “Coeducación de los sexos”, *Archivos de Pedagogía y Ciencias Afines* 5, no. 16 (1909): 75.

In 1986 the historian Joan Scott published an article entitled *Gender: A Useful Category for Historical Analysis*. She addressed the incorporation of the concept “gender”, stressing that it has been useful to escape the “biological determinism” implicit in the notions of “sex” and “sexual difference”.³ This text is essential since it allows us to think about the category “gender” from a historical perspective. The author identifies a “descriptive”⁴ historical analysis, by proposing the need to “reject the fixed and permanent quality of binary opposition, achieve a genuine historicity and deconstruction of the terms of sexual difference”.

In a similar path, Judith Butler’s works published in the early 1990s critiques the notions of “sex”, “gender”, “sexuality” and “desire”, which were intended – and still are – to be necessary linked. In her studies, the relationships of “coherence” or “continuity” between these elements are established and maintained thanks to the existence of a specific number of “intelligible genres”.⁵ Hence, some authors such as Moira Pérez point out that Butler thought of gender identity “not only as a construction, but as possibilities, and how that construction restricts them”.⁶ Besides, the author demonstrates how the “materialization” of “sex” in the body is also related to gender: “The regulatory norms of “sex” work in a performative way to constitute the materiality of bodies and, more specifically, to materialize the sex of the body, to materialize sexual difference to consolidate the heterosexual imperative”.⁷

The theoretical trace marked by these contributions is currently followed by numerous empirical works. Queer Theory and Trans Studies have opened a relatively new research agenda, by proposing that it is necessary to “point out the historical processes through which certain physical characteristics were isolated and privileged” to establish the gender-sex binary.⁸

³ Joan Wallach Scott, “Gender as a Useful Category of Historical Analysis”, in *Culture, Society and Sexuality* (London: Routledge, 2007), 77.

⁴ Scott, “Gender as a Useful Category of Historical Analysis”, 79.

⁵ Judith Butler, *Bodies That Matter: On the Discursive Limits of Sex* (London: Routledge, 2011), 72.

⁶ Moira Pérez, “Teoría Queer, ¿para qué?”, *Isel* 5 (2016): 189.

⁷ Butler, *Bodies That Matter: On the Discursive Limits of Sex*, 18.

⁸ Pérez, “Teoría Queer, ¿para qué?”, 190.

This article is based on a study of the introduction of toilets in primary schools in Buenos Aires, Argentina. It is also grounded in the aforementioned conceptualizations, locating the emergence of binary definitions of sex, gender, and sexuality as we know them (associated with a set of behaviours, gestures, corporalities, and values), between the mid-nineteenth century and the early twentieth century.⁹ Furthermore, the central theoretical position of this work is Foucauldian, since it emphasizes the productive nature of power relations. In this regard, we aim to take distance from the “repressive hypothesis”,¹⁰ and inquiry about practices and discourses that emerged along with the modern beliefs about children’s sexuality and gender.

This text is very modest in scope. In fact, its “hypothetical” character is emphasized in the title. The reason is that, at the turn of the twentieth century, the identification of toilets according to binary criteria of “sex” had not been generalized in Buenos Aires city primary schools.¹¹ This procedure was present in “monumental”¹² buildings that had been designed as schools. However, most primary institutions operated then in rented housing, and there the sexual segregation of “latrines” or “W.C.” was not a material concern.

Despite this, numerous investigations have shown that anxieties about the sexual segregation of space were current. The prudence of “men” and “women” sharing spaces (specially educative ones) had been widely discussed since the end of the nineteenth century. Considering this scenario, we directed our efforts to comprehend this configuration of toilets, by tracking discourses and practices about the “sexual” division of the school space.

⁹ Judith Butler, *Bodies that matter: on the discursive limits of sex* (New York: Routledge, 2011); Michel Foucault, *Historia de la sexualidad I. La voluntad de saber* (Madrid: Siglo Veintiuno España Editores, 2013); Norbert Elias, *The civilizing process: sociogenetic and psychogenetic investigations* (Malden, Mass: Blackwell Publishers, 2000); Thomas Laqueur, *Making sex: body and gender from the Greeks to Freud* (Cambridge, MA: Harvard University Press, 2003); Pérez, “Teoría Queer, ¿para qué?”; Joan Scott, “La mujer trabajadora en el siglo XIX”, in George Duby and Michel Perrot *Historia de las Mujeres en Occidente*, vol. 4 (Taurus: Madrid, 1993), 425-461; Louis-Georges Tin, *The invention of heterosexual culture* (Cambridge, MA: MIT Press, 2012).

¹⁰ Foucault, *Historia de la sexualidad*; Butler, *Bodies that matter*.

¹¹ Throughout this article we refer to the notion of “sex” since it was the one used at the time studied.

¹² Fabio Grementieri and Claudia Schmidt, *Arquitectura, educación y patrimonio: Argentina, 1600-1975* (Buenos Aires: Pamplatina, 2010).

The discussion presented here is the continuation of previous works.¹³ We analysed official files, press articles, blueprints and legislation related to the emergence of primary school toilets, between 1875 and 1905.¹⁴ In this article, we focus on a corpus of documents under the thematic unit “coeducation” (also called “mixed education”) as a strategy to access statements about sexual segmentation in school spaces.

MATERIALS AND METHODS

The analysis we present here is the result of the work with diverse official sources, in a period established between 1875 and 1905. The period was defined in relation to Laws n° 988 (1875), and n° 4878 (1905). These two points were chosen since they established the terms of the emerging common education system in Argentina. Besides, the last third of the nineteenth century was a period of building criteria consolidation in the city of Buenos Aires. So, first, we studied regulations about education, hygiene and construction, to inquiry if these mentioned bathrooms and what they said about it. With surprise, we noticed that these spaces were hardly mentioned in this period. This fact allowed us to infer that we were dealing with an emerging concern.

At the same time, we started studying school blueprints. We expected to find both here and in regulations the material features of these spaces. Soon we realized that only new schools had official blueprints. Also, when we examined school architecture closer,¹⁵ we conclude that we wouldn't find a model of school bathrooms because there were any guidelines for

¹³ Lucila da Silva, “Siete notas breves acerca de la historia de los Sanitarios Escolares en Argentina”, *Barda* 5, no. 8 (2019): 12-19; Lucila da Silva, “Subjetivación, Arquitectura y Poder: Claves para un Debate acerca de los Sanitarios Escolares sin Género”, *Espacios en Blanco. Revista de Educación* 1, no. 29 (2019): 133-44; Lucila da Silva, “Hacia una Genealogía del Sanitario Escolar. Primeros Hallazgos: Buenos Aires (1881-1905)”, *Anuario de Historia de la Educación* 19 (2019): 24-49.

¹⁴ Study period 1875-1905 (Law 988, of Common Education in Buenos Aires province; Law 4874/05 of schooling in provinces). Sources: Legislation (national and provincial laws, municipal regulations), National Council of Education (CNE) files, architectural drawings, magazine articles, photographs. Archives: National General Archive (AGN): over 300 files, period 1882-1905; Center of documentation and research of public architecture (CeDIAP): 96 files, including architectural drawings; National Teachers' Library (BNM): educational legislation and *El Monitor de la Educación Común* magazine articles; Legislature of Buenos Aires city Library 'Esteban Echeverría' (BEE); Library Ing. Agustín Gonzalez (BAysa).

¹⁵ Lucila da Silva, “Iniciativas Oficiales para la Edificación de Escuelas Primarias en la Ciudad de Buenos Aires durante el siglo XIX”, *Espacio, Tiempo y Educación* 9, no. 1 (2022): 150-167.

school buildings; and fundamentally because most primary schools worked in rental housing.

Therefore, we decided to consider these official sources as “existing”, “non-existing” or “emerging” State concerns. Then, we found another fundamental source that allowed us to approach the quotidian life in schools: The National Council of Education (CNE) files. These documents contained much valuable information: 1) Letters from principals requesting resources, repairs, personnel, etc.; 2) Reports from specialized offices and inspectors; 3) Budgets; 4) Unofficial blueprints (from tenants of school-houses); among others.

In light of this empirical ground, we attempted to intersect these diverse sources to address the major problem about school bathrooms emergence in Buenos Aires, Argentina. There, as mentioned, we did not find regulations or discourses about segregation of toilets until mid-twentieth century. But we knew from the documents that this was present in some institutions. In this article, as a strategy to get closer to these phenomena, we decided to include material on coeducation. Our attempt was to analyse our findings about bathrooms considering these discourses. It is the result of that work what we present here.

DISCUSSION

Coeducation of the sexes in Argentina

Important studies have focused on the history of “mixed education” or “coeducation”, mainly in the United States and Europe, including studies in Spain as well as in Spanish-speaking countries in South America such as Ecuador and Peru.¹⁶ Unfortunately, the topic seems to have received little attention in Argentina. It has been treated tangentially in works about women’s education or those with a gender perspective. It

¹⁶ Rebecca Rogers, “État des lieux de la mixité. Historiographies comparées en Europe”, *Clio* 18 (2003): 177-202, consulted on: <https://doi.org/10.4000/cli0.620>; David B. Tyack and Elisabeth Hansot, *Learning together: a history of coeducation in American public schools* (New York: Russell Sage Foundation, 1992); Marina Subirats, “¿Coeducación o escuela segregada? Un viejo y persistente debate”, *Revista de Sociología de la Educación-RASE* 3, no. 1 (2010): 143-158. Ana María Goetschel, “La separación de los sexos: Educación y relaciones de género”, *Íconos-Revista de Ciencias Sociales* 16 (2003): 124-128. Enrique G. Gordillo, “Historia de la educación mixta y su difusión en la educación formal occidental”, *Revista Historia de la Educación Latinoamericana* 17, no. 25 (2015): 107-124.

also received mention in works that describe the positions of specialists and personalities with political influence. Nevertheless, we haven't found works that analyse these discourses about coeducation along with daily school practices.

As mentioned, discussions about the convenience of "single-sex education" in Argentina were prolific at the turn of the twentieth century. In fact, by the 1930s the topic remained in force. It was still discussed in educational journals such as *El Monitor de la Educación Común*, and in more popular publications such as *Caras y Caretas*.¹⁷

As a starting point, it is fundamental to point out that behind the figure of "mixed education" or "coeducation" there are a series of practices that are impossible to reduce to the formal registration of schools as belonging to "girls", "boys", or "mixed". Indeed, there were a multiplicity of gendering practices in public schools of which there is no systematic record, and which preceded the institutionalization of bathrooms. Although the study was carried out in the United States, some practices mentioned by Tyack and Hansot can give us indications of a still unexplored multiplicity:

There were many ways to educate boys and girls together under the same roof of the public school: to separate them in distinct rooms or on opposite sides of the classroom but give them the same course of studies; to offer them distinct curricula; or to mix boys and girls together in the classroom, teach them the same subjects, and subject them to the same set of rules and rewards. The last arrangement became over time the most common gender practice in public education; school people of the latter half of the nineteenth century called it "identical coeducation".

In Argentina, for instance, we can locate different quotidian practices like single-sex schools that eventually housed children "of the opposite sex", specificities according to level (primary or secondary), segregation "by sex" within schools, differentiated disciplinary sanctions, etc.

¹⁷ Josefina Fernández and Daniel Hernández, "La devolución de las cacerolas: representaciones sobre la mujer en la construcción de la nación argentina", in ed. Dora Barrancos, Donna Guy y Adriana Valobra, *Moralidades y comportamientos sexuales. Argentina, 1880-2011* (Buenos Aires: Biblos, 2014), 131-154.

All these practices suggest that sexual segregation in common schools had many nuances, being more a chimera than a consistently delivered policy.

When we inquired about the reasons for sex segregated initiatives, we found that one of the most common analyses affirms that sex segregation had its roots in the reticence to educate girls. However, in the 1880s the female presence in the primary schools of the Municipality of Buenos Aires was a fact. Some data is recorded in this regard in the Report on the State of Common Education of 1881 (“Informe sobre el estado de la educación común de 1881”). First, the “Number of female teachers” (439) already exceeded the “Number of male teachers” (398), registering a tendency to displace male teachers from public institutions, a phenomenon historians defined as the “feminization of teaching”. Also, the fact that male teachers dominated the teaching corps in private schools reinforces the idea that early public institutions preferred female teachers because they had lower salaries. This same trend was reflected in attendance at common schools as recorded in the Report. Female students in common schools represented 53.78 % of the total number of children enrolled in school.¹⁸

As we see, the reticence to educate girls is a phenomenon that demand a closer approach and is not the cause for segregated schooling. We want to propose here that, in the case of Argentina in this period of study, we will see how many of the concerns that crystallized in the discussions about common mixed education, coeducation, or as “the problem of women” were part of a middle-term debate about what would be the bodies, gestures, roles, and places that “women” and “men” should occupy in the ongoing modernization process.

Indeed, the “civilizing” work¹⁹ of modern schooling was a process that took many years. The sphere of influence and the curriculum of primary

¹⁸ Domingo Faustino Sarmiento, *Informe sobre el estado de la educación común en la Capital y la Aplicación en las provincias de la ley nacional de subvenciones seguido de documentos y circulares* (Buenos Aires: Tipográfica de la Escuela de Artes y oficios, 1881).

¹⁹ Elsa Muñiz García, “Historia y género. Hacia la construcción de una historia cultural del género” in ed. Sara Elena Pérez Gil y Patricia Ravelo (Coord.) *Voces disidentes. debates contemporáneos en los estudios de género en México* (México: Miguel Ángel Porrúa, 1999); Pablo Scharagrodsky y Mariano Narodowski, “Investigación educativa y masculinidades: más allá del feminismo, más acá de la testosterona”, *Revista Colombiana de Educación* 49 (2005): 61-80.

school emerged along with compulsory schooling. In this context, this institution operated as an effective gender *dispositif*,²⁰ thus contributing to the emergence of the “spheres” of “the feminine” and “the masculine”. That is why some authors argue that this project’s aim was producing the citizen, and his wife/mother.²¹

In this sense, it is possible to agree with Morgade²² that nineteenth-century education was strongly oriented toward defining the functions of persons gendered women. Nevertheless, there is a paradigm shift here that reflects the modern spirit of the time, since women began to be considered useful members of society who should be educated because their knowledge “could no longer be entrusted only to instinct”.²³ These convictions are still found in conservative figures such as Estrada, who affirms that “difference in functions implies a difference in preparation”.²⁴

As a result of the work with documents, we observe that politicians and specialists who advocated co-education gave principally economic reasons. It was too expensive to build and support separate buildings. However, they also believed that the school building should reproduce what they understood to be “the natural order” so that students of “both sexes” learn to relate “harmoniously”: “Because the mixed school is not another thing that a social family shaped in everything according to the natural family”.²⁵ This position is expressed in some articles of *El Monitor*²⁶ journal:

²⁰ Michel Foucault, *Vigilar y castigar: nacimiento de la prisión* (México: Siglo XXI, 2000); Nari, “La educación de la mujer”.

²¹ Nari, “La educación de la mujer”; Scharagrodsky and Narodowski, “Investigación educativa”.

²² Graciela Morgade, “Mujeres y educación formal: De la lucha por el acceso a la lucha por el currículum”, *Espacios de Crítica y Producción. FILO UBA* (1995): 26-34.

²³ Nari, “La educación de la mujer”, 36.

²⁴ José Manuel Estrada, *Memoria sobre la educación común en la Provincia de Buenos Aires* (Buenos Aires: UNIPE, 2011), 123

²⁵ Ayarragaray, “Coeducación de los sexos”, 75.

²⁶ As mentioned in previous works (Lucila da Silva, “El niño débil en la revista argentina *El Monitor de la Educación Común, 1908-1929*”, *Historia Social y de la Educación* 1 (2017): 1-22), the relevance of *El Monitor de la Educación Común* is important for two reasons: First, the pedagogical press played a fundamental role in Argentina; educators, politicians, specialists, and authorities discussed in these documents characteristics of the emerging common school. Second, this journal was the official document of the National Council of Education. It was used to broadcast legislation, statistics, official reports, etc.

The temporary separation of the sexes, that is, during the school years, is an ill-advised and counter-productive action; As for the absolute separation of the cloister, since it is anti-natural, anti-social, anti-human, we do not hesitate to label it hateful and criminal.²⁷

Another similar argument arises along with the feminization of teaching. Mixed primary school could be a place where the vocation of women – who naturally possessed aptitudes to educate all children – was fostered.²⁸ This position reflects a close connection between the formalization of girls' and mixed schooling, and the feminization of the teaching profession: "With the teacher we will be able to multiply the mixed schools in which they are educated, are formed by rubbing shoulders, and learn to esteem each other, to appreciate each other while respecting both sexes".²⁹ Besides, the feminization of teaching involved two other processes. On one hand, the "theory of separate spheres" sealed the professional and labour destiny of middle-class women with normal school training. On the other hand, it evidenced the early prominence of a liberal-utilitarian decision-making logic, centred on the notion of "cost".

In addition, those who opposed coeducation shared the idea of the school as a *theatre of life* but taking the argument to the extreme. They pointed out that "coeducational schools are in a certain way society itself: a society into which innocent children enter without defence".³⁰ It was argued that the natural reflection of society should be the family – not the school – and it constituted an enormous risk to expose children who had not yet incorporated the precepts of "reason" to mixed schools.

The idea of mixed education finally triumphed because, as Nari³¹ claims, the sexual division of schooling was ensured by the curriculum. This position was specified in the Buenos Aires province Law of 1875, where no consideration was made about sexual organization, but it was established that "[Art. 3] school duty lasts eight years for men and six for women, beginning

²⁷ CNE "Examen de maestros", *El Monitor de la Educación Común* 24, no. II (1883), 148.

²⁸ Estrada, *Memoria sobre la educación común*; Nari, "La educación de la mujer"; Tyack and Hansot, *Learning Together*.

²⁹ CNE 1883, 148.

³⁰ Estrada, *Memoria sobre la educación común*, 123.

³¹ Nari, "La educación de la mujer".

all at the age of six fulfilled, except for weakness of body or spirit".³² And later, the Common Education Law of 1884 formally sanctioned that "primary education for children from six to ten years of age, will preferably be given in mixed classes, under the exclusive direction of authorized teachers", but it established rigid distinctions regarding the curriculum:

Art. 6. The minimum compulsory instruction includes the following subjects: Reading and Writing; Arithmetic [...] Particular geography of the Republic and notions of Universal Geography; History of the Republic and notions of General History; National Language, Morality and Civility; Hygiene notions; notions of Mathematical, Physical and Natural Sciences; notions of drawing and vocal music; Gymnastics and knowledge of the National Constitution. For girls, knowledge of handicrafts and notions of home economics will also be mandatory. For boys, knowledge of the simplest military exercises and evolutions. And in the campaigns, notions of agriculture and livestock.

"Coeducation" as a debate about the sexual definition of school space

In the 1880s the positions against and for coeducation achieved a certain rapprochement, to the extent that both sides agreed on the importance of redefining the curricular design of common schools, incorporating specificities to train girls according to their "mission". However, fundamental differences remained in relation to the school space. Discussions about the need to educate "girls" and "boys" separately escalated. In the documents we examined these debates focused on differentiation of curricula, games, and physical education classes. However, we didn't find discussions expressing the need of segregate bathrooms.

In reference to the curricula, one of the areas that has received the most attention is the area of "gymnastic" education,³³ but there is a lack

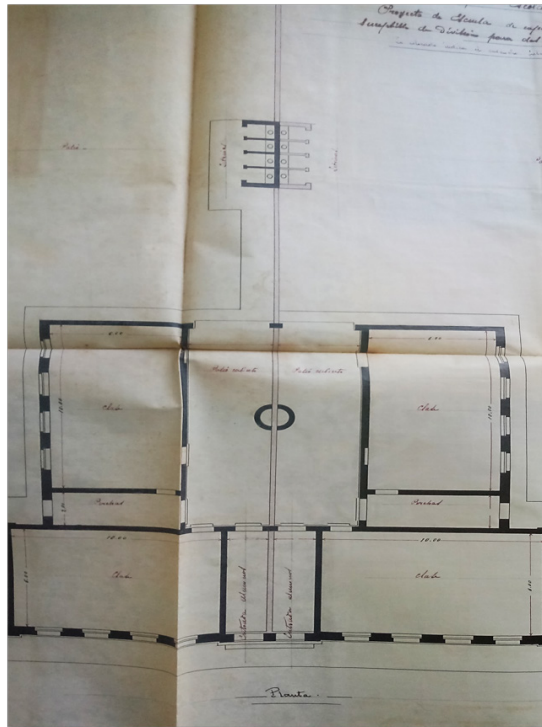
³² Ley n° 988 de Educación Común de la provincia de Buenos Aires del 14 de septiembre de 1875. Imprenta Rural, Buenos Aires, Argentina. (Part III) Chap 6.

³³ Pablo Scharagrodsky, "Eercitando" los cuerpos masculinos y femeninos. Aportes para una historia de la educación física escolar argentina (1880-1990)" *Apuntes. Educación física y deportes* 85 (2006): 82-89; Pablo Scharagrodsky, "El cuerpo en la escuela" *Explora las ciencias contemporáneas X* (2008): 1-16. Pablo Scharagrodsky, *Gobernar es ejercitar. Fragmentos históricos de la Educación Física en Iberoamérica* (Buenos Aires: Prometeo, 2008). Pablo Scharagrodsky, *Mujeres en movimiento. Deporte, cultura física y femeneidades. Argentina, 1870-1980* (Buenos Aires: Prometeo, 2016).

research about this type of spatial practices referring to other areas. For example, we do not know if during the “sewing” and “agriculture” class the students remained in the same room, or how the schools were spatially organized to support that gendered curriculum.

Despite this inconsistency, it worth mentioning two initiatives that took place in school buildings designed in the same period: First, some building designs featured two identical wings completely separating “girls” and “boys” (Figure 1). Second, a few blueprints introduced segregated restrooms, thus introducing the room that has most successfully sustained the modern sex-gender binary.

Figure 1. Blueprint of a primary school building. The wall in the middle divide boy’s wing from girls



Source: General Archive of the Nation (AGN) National Council of Education (CNE) File # 0775/81, 1891.

Although bathrooms segregation was not directly discussed, we believe these broader discussions can give us some clues about the scenario

that made possible the consolidation of this structure. Toward the beginning of the new century those who supported “mixed” education developed more nuanced arguments. In 1904, an article stated without hesitation that the co-education of the sexes in primary school “does not seem controversial”.³⁴ This agreement about primary school is useful to explore how age division was a major factor in discussions about the sexual definition of school space. Statements about the schooling conditions of each of the two “sexes” took different directions depending on whether they referred to infants, young people, or adults.

For instance, in debates on the sanction of Law 1420 the jurist Luis Varela, speaking at the National Pedagogical Congress, made observations comparing experiences of “mixed” and “single-sex” establishments to maintain that the first option was preferable. He affirmed, however, that this was accepted “because it is about small children”.³⁵ In the same context, politician and pedagogue Domingo Sarmiento referred to this issue when commenting on the experience of Chile. There, an alternate system of attendance that allowed boys to attend for five months and then girls for another five months was implemented temporarily, since the government did not have the resources to allow for separate educational buildings. Sarmiento pointed out this Chilean method as a mistake, contrasting it to the system found in the United States and England. He underlined the specific strategy that, according to him, guaranteed the success of coeducation in these countries:

To avert the risk presumed by the overly cautious, the English and North Americans practice having children of both sexes dressed in children’s clothing until the most advanced age possible. To keep them in their ideas, in their games, and even in their form, as much as possible. This rule of moral hygiene makes [...] mixed schools prevail until reaching grammar or higher schools, which require the separation of the sexes.³⁶

³⁴ CNE (1904), “La coeducación de los sexos y las aptitudes de las mujeres”, *El Monitor de la Educación Común* 361, no. XIX, 717.

³⁵ Pedro Varela, “Congreso Pedagógico”, *El Monitor de la Educación Común* 18, no. I (1882): 564- 573.

³⁶ Domingo Faustino Sarmiento, “Estado actual de la educación primaria en Chile y causas de su decadencia”, *El Monitor de la Educación Común* 1, no. I (1881): 78.

Sarmiento's observation allows us to strengthen the hypothesis about the fundamental role age played concerning the interrelationship of the students. It is essential to note that most arguments limited mixed primary schooling to the early grades or up to ten years of age. There seemed to be a consensus regarding the inconvenience of educating boys and girls over ten years old together. This point materialized in Article Ten of Law 1420. It established that "Primary education for children from six to ten years of age, will preferably be given in mixed classes".³⁷ However, schools did not apply the laws directly; and the institutional readings and practices were multiple. For example, a report from 1881 shows 49 schools for boys and 99 schools for girls in the Municipality of Buenos Aires. However, according to statistics, the population of "girls" represented approximately 50 % of the total school population. Were girls' schools sparsely populated, or were boys' schools overcrowded? The reason for this (apparently) contradictory data is that the distribution of students was not as straightforward as one might think. Indeed, years later the government officially recognized that girls' schools accepted boys up to ten years old³⁸. Indeed, the incorporation of boys in girls' schools was openly discussed in 1888. Juan Tufró, director of the 3rd school district, argued as follows:

If the opinion of the teachers of the district should be considered, I would use it to support the thesis contrary to that defended by the School Council [which was opposed to the admission of boys]. Precisely the experienced and intelligent Director of the Graduate School for Girls has told she admitted small male students as do all the Graduate Schools for Girls in which 794 boys are currently educated, and that they should be sent home if this matter is resolved as proposed by the School Council.³⁹

It is also worth reproducing a fragment published in the magazine *El Monitor* ten years later, under the title "School Statistics":

³⁷ Law 1420, art. 10.

³⁸ CNE "Sección oficial. Coeducación de los sexos", *El Monitor de la Educación Común* 321, no. XVII (1888): 22.

³⁹ CNE, 1888, 22.

231 public schools have operated in the capital of the republic: 36 superior, 134 elementary, 32 infants, 20 night for adults and 9 military. Of the superior ones, 16 are for boys and 20 for girls. Of the elementary schools, 45 are for boys and 89 are for girls, with the latter also attended by boys up to the age of 10; the 32 for infants are mixed and the nocturnal and military ones are for men. So there are 90 boys' schools and 141 mixed schools.⁴⁰

Clearly, we find in these debates an argument that subsumes coeducation to considerations about children's age and sexuality. It pointed out the need to separate students for "moral" reasons that seemed to clear up when they were infantilized. This is a strong vector to understand why separating bathrooms was not a concern in primary public schools.⁴¹ In the nineteenth century, the discourse against coeducation was presented as necessary decisions to protect the "hygiene of the fair sex" (young women) from possible corruption. Here, "moral" concerns seem to focus in the "promiscuity" resulting from eventual affective-sexual encounters with classmates of the "male sex". This popular reasoning undoubtedly supported the decision to promote mixed schooling only for up to ten years.

Although this idea prevailed, we found other arguments against coeducation evoking reasons that – although within the spectrum of sexuality – seem to be of another kind:

The evils that physiological criticism reveals are common to all civilizations and races. Condourcet's proposition that "the meeting of the two sexes in the same schools favours emulation" can no longer be doubted.⁴²

The main inconvenience was that coexistence led "girls" – because they were the "weaker sex" – to imitate "boys", thus affecting their "moral health". Here we can see arising another meaning for morals. Former, girl's morals were threatened by heterosexual encounters. On the

⁴⁰ CNE, "Noticias. Estadística escolar", *El Monitor de la Educación Común* 301, no. XVI (1898): 986.

⁴¹ In respect to the age as a criteria for separating school bathrooms, it worth mentioning that actual regulations in Argentina allow infant schools to have mixed services but demand "sex" identified locals for primary and secondary levels.

⁴² CNE, 1883, 406.

contrary, in this argument their “moral health” could be affected if they imitate masculine conducts or gestures. Considering this, Tyack’s statement seems to have merit: “In the nineteenth century, when traditionalists were determined to set sharp boundaries around the separate spheres of the sexes, critics claimed that coeducational public schools made girls too virile”.⁴³ Nevertheless, not all “emulation” emerged as negative. Another position is shown in the following quote: “Excellent strength is undoubtedly that of emulation at school, as long as this happens between individuals of the same sex”.⁴⁴

We can suggest there was a fear that coexistence in school would blur or spoil this project of two ontologically different subjectivities, corporeality, and functions.⁴⁵ And those who advocated coeducational education had the same fears. They pointed out that “the education of the two sexes in common can be useful to prevent the birth of sexual instincts towards the same sex”.⁴⁶ Consequently, there seemed to be two positions that, although from different angles, informed practices that monitored the correspondence between sex, gender, and sexuality.

In this respect, various authors have shown that the prohibition of homosexuality has been a fundamental part of the production of the modern sex-gender binary.⁴⁷ Twentieth-century developments led some to argue for the creation of “a new sexual ethic” based on heterosexuality.⁴⁸ This required a series of strategies of “sexual illustration”⁴⁹ which crystallized in different *dispositifs*,⁵⁰ and the school was one of the most important.⁵¹ Other institutions stood along schools in articulating this

⁴³ Tyack and Hansot, *Learning Together*, 11.

⁴⁴ CNE, 1883, 406.

⁴⁵ Laqueur, *Making sex*.

⁴⁶ CNE 1883, 406.

⁴⁷ Judith Butler, *Undoing gender* (London: Routledge, 2004); Foucault, *Historia de la sexualidad*; Rubin, “El tráfico de mujeres”; Scharagrodsky and Narodowski, “Investigación educativa”; Tin, *The invention of heterosexual culture*.

⁴⁸ CNE 1904, 765.

⁴⁹ Elias, *The civilizing process*.

⁵⁰ Michel Foucault, *Vigilar y Castigar*. (Buenos Aires: Siglo XXI. 2002).

⁵¹ A significant part of this “sexual enlightenment” is constituted by the formal curriculum known as “sexual education”. An example is found in the *El Monitor* article referenced here (CNE, 1904b).

new sexual *ethos*. For instance, the family was perceived as “one of the main anchor points of modernity, an affective space within which concerns about the number, education and future of the children were born”. The capitalistic system offered another opportunity for “sexual and economic institutions interacting with each other”.⁵² Also, strategies of sexual illustration were informed and strengthened by a set of knowledge that emerged in the twentieth century. The development of disciplinary fields such as anatomy, physiology, criminology, psychiatry, psychology, and educational psychology accompanied discussions about “coeducation”.

What Do School Toilets Separated by “Sex” Make Possible?

With real surprise for me, the coeducation of men and women quickly became generalized, signifying a high degree of advancement of our social groupings. If any latent resistance may remain, it will disappear when we build special houses for schools.⁵³

Do not imagine that before sin humans were blind. Hadn't Eve seen “that the fruit was good to eat” and pleasing to the eye? They could thus see their own body. But do we have to admit that, in fact, they were looking at her sex?⁵⁴

Previously, we approached sexual definitions of school space. This means, exploring how conceptions about sex, gender and sexuality informed decisions about school architecture and interior design. At this point, we would like to briefly explore another aspect: how the material features of school space, specifically bathrooms, contributed to the consolidation of the modern sex-gender binary.

One of this work's main hypotheses is that the sexual separation of public-school toilets can be inscribed in the series of discourses and

By all accounts, this is a very prolific field. Fortunately, it is currently being investigated by colleagues from different institutions, with different approaches. Among them, it is worth mentioning the works with a historical perspective developed in Argentina by Dr. Santiago Zemaitis.

⁵² Scott, “La mujer trabajadora en el siglo XIX”, 406.

⁵³ Ayarragaray, “Coeducación de los sexos”, 81.

⁵⁴ Michel Foucault, *Historia de la sexualidad IV. las confesiones de la carne* (México: Siglo XXI, 2008), 281.

practices that have operated producing the figures of “sex”: their corporality, their functions and, of course, their spatiality.

By 1905 only the toilets in some new school buildings in Buenos Aires were wholly separate and identified by “sex”. Educative architecture was not consolidated, and many buildings did not include toilets. Analysis of the National Council of Education files (which includes letters from directors, inspectors, and members of neighbourhood councils) suggests that concern about “latrines” emerged in the primary schools of the city of Buenos Aires toward the end of the nineteenth century. As mentioned, separating toilets materially by sex seemed not to be a requirement yet. Of course, this does not mean that there were no practices regulating children’s access to restrooms according to assigned sex. We can only affirm that it was not a problem materially translated, since public schools did not request resources to achieve it, but we cannot deny the existence of other practices of sexual organization of the space.

The thoughts around this lack of material initiatives brings back the aforementioned discourse about children’s sexuality. Indeed, in some documents in which specialists discuss coeducation it appears that children of a certain age “did not have sex”:

According to this Minister’s report, coeducation should not have the scope it has, in terms of age, in Germany, Austria, and Sweden (up to 12 years), but only nine years, that is, during the lower elementary course. It goes like this: “Until the age of nine, the child does not have sex; it is a boy”.⁵⁵

Certainly, in this period disciplines and discourses about children’s sexuality were still diffuse. Several authors have study how the knowledge that accompanied the expansion and hegemony of the modern school consolidated during the twentieth century.⁵⁶ As a result, we can

⁵⁵ Ayarragaray, “Coeducación de los sexos”, 84.

⁵⁶ Pablo Scharagrodsky, Laura Manolakis, and Rosana Barroso, “La Educación Física argentina en los manuales y textos escolares (1880-1930). Sobre los ejercicios físicos o acerca de cómo configurar cuerpos útiles, productivos, obedientes, dóciles y racionales”, *Revista Brasileira de História Da Educação* 3, no. 1 (2003): 69-91; Santiago Zemaitis, “Pedagogías de la sexualidad. antecedentes, conceptos e historia en el campo de la educación sexual de la juventud” (Trabajo Final Integrador, Universidad Nacional de La Plata. Facultad de Humanidades y Ciencias de la Educación, 2016).

sustain that the category “sex” did not signify yet two subjectivities and corporalities as discrete sets of differentiated and distinguishable attributes.

Here we agree with one of the pioneer works that discuss the sexual production of the body: *Making sex: Body and gender from the Greeks to Freud*, by Thomas Laqueur. This author postulates that towards the beginning of the nineteenth century there was a shift in the way of understanding the body, which became then dichotomously sexed. Previously, the differences between the bodies of people identified and defined as “women” or “men” were considered a matter of degrees. Thus, a woman’s body could be considered “less vital” or “less perfect” than men, but not an ontologically different body. For Laqueur, this displacement is a necessary condition to create the differences between the sexes that – thanks to the mobilization of the great modern scientific machinery – expanded to all moral and physical aspects.

We found other documents supporting this hypothesis. For example, an article in *El Monitor* reports on education. There, when referring to the “Gymnastics” classes:

It seems that it will not be long before the ridiculous admonition against physical exercises in girls disappears. Some say that the young ladies do not need them, that they will be helpful only to the men, as if women were not, like men, a harmonic set of forces that all support each other.⁵⁷

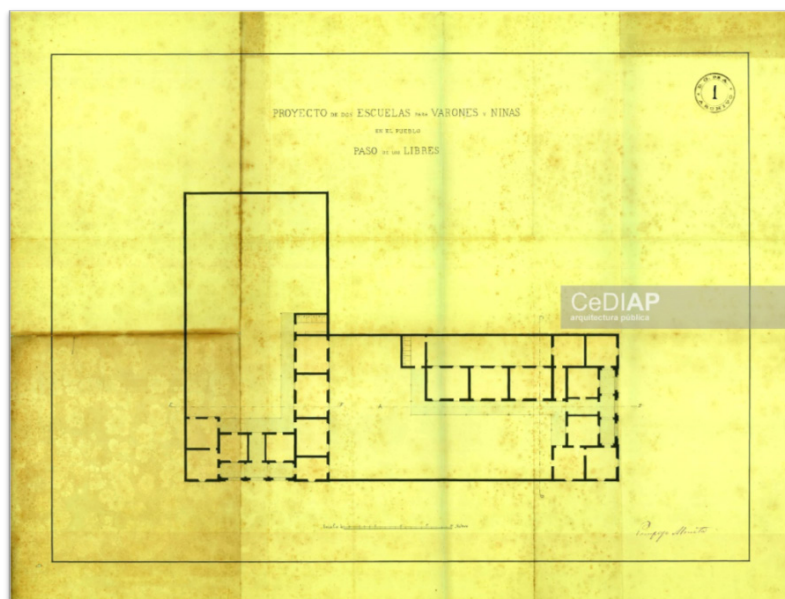
Consequently, we observe there was a singular engaging between notions about “sex”, “corporeality”, and “school spaces”: although the need to segregate children was fervently postulated in certain areas, the idea that these two types of corporality demanded specific spatialities was not present.

Of course, this is questionable regarding public schools that worked in rental houses and hardly had resources to materialize these initiatives. However, this diagnosis is correct for monumental schools and twentieth century school architecture: The spaces “for girls” and “for boys” – beyond their gendered designation – had the same form and structure. As we have seen, this was evident in the case of buildings

⁵⁷ CNE “Escuelas de niñas”, *El Monitor de la Educación Común* 53, no. III (1884): 385.

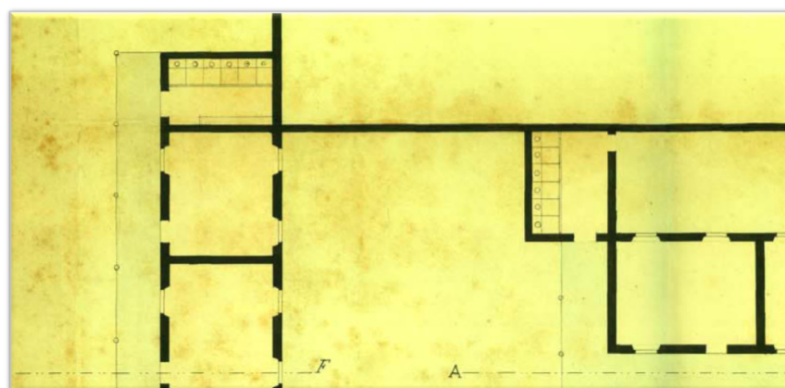
separated into two identical wings, and it is also clear that there were no architectural peculiarities in the exclusive “boys” or “girls” schools. Finally, there was no significant difference between the few segregated toilets except for the existence of urinals. In addition to the material structure, the toilets had the same scale and dimensions (Figures 2 and 3).

Figure 2. Project of two schools for boys and girls



Source: CEDIAP File 1373-00001_C, end of the nineteenth century.

Figure 3. Detail of bathrooms



Nevertheless, some notions in force at the time could lead us to think that certain characteristics attributed to masculinity⁵⁸ such as “vigour”, greater activity, or simply the hierarchy assigned to people sexed males could have some material translation. However, this seems not to have happened (at least not on a large scale). To some extent, this is contradictory regarding the role attributed here to toilets in the production of the modern sex-gender system. However, it is a fact that makes historical analyses more complex. It suggests that other elements related to toilets operated in the consolidation of the modern sex-gender system, beyond its general material structure.

The place of women

One of the few authors who has studied toilets recently, the lawyer Terry Kogan,⁵⁹ argues that sexual segregation in access to toilets originated due to the concern of the late- nineteenth century with “the place of women”. He mentions that rules dictated that the place of women was the home and that there was resistance to integrate them into public life. However, it is necessary to introduce some nuances since Kogan carries out a historiographical approach different from the one we adopt here. He postulates that this was a social response to the novelty of working women. We, however, agree with other thesis⁶⁰ that most nineteenth-century women from popular classes worked. Rather, what was named at the time “the woman problem” was the success of a “medical, scientific, political, and moral” discourse known as “the separate spheres doctrine”.⁶¹ Official discourses wanted to present women as weak subjectivities who needed protection in their “transit” through public space. Consequently, many new spaces such as workplaces, reading rooms, and toilets were segregated. This spirit is present in what, according to Kogan, was the

⁵⁸ Raewyn W. Connell, “Educatando a los muchachos: Nuevas investigaciones sobre masculinidad y estrategias de género para las escuelas”, *Nómadas (Col)* 14 (2001): 156-171; Scharagrodsky and Narodowski, “Investigación educativa”.

⁵⁹ Terry S. Kogan, “Transsexuals and critical gender theory: The possibility of a restroom labeled other”, *Hastings LJ* 48 (1996): 1223.

⁶⁰ Josefina Fernández and Daniel Hernández, “La devolución de las caserolas: representaciones sobre la mujer en la construcción de la nación argentina”, in *Moralidades y comportamientos sexuales. Argentina, 1880-2011* (Buenos Aires: Biblos, 2014), 131-154; Mirta Lobato, *Historia de las trabajadoras en la Argentina (1869-1960)* (Buenos Aires: Edhasa, 2007); Scott, “La mujer trabajadora en el siglo XIX”.

⁶¹ Scott, “La mujer trabajadora en el siglo XIX”, 403.

first law that sexually segregated access to public restrooms in the United States.⁶²

Regarding the figure of female weakness, some authors mention that this concept of “the feminine” operated at the end of the nineteenth century as an “antidote against the risks that could come with [women’s] access to public space and collective work”.⁶³ We can locate in this path the argument of Fernández & Hernández.⁶⁴ The mobilized, public woman was presented to public opinion as a threat. This notion engendered a series of devices destined to fix their subjectivity to the private, domestic sphere.⁶⁵ In addition, some authors mention that this configuration did not affect only female sexed persons. Scharagrodsky⁶⁶ positions some masculinization strategies (such as scouting) also as a product of a specific female presence in public space:

In the late nineteenth and early twentieth centuries, amid industrial expansion, an increasing number of American and English men began to worry about the virility of their sons openly. Terrified by feminist discourses, concerned about the feminization of family and school education and the power of the maternal law, they feared that their boys would not have the opportunity to learn to be men.⁶⁷

In light of this, the sexual separation of public access toilets (including those in schools) can be listed in the series of discourses and practices that produced the figure of the “fair sex”, the “weaker sex”: their corporeality, its functions and, of course, its spatiality.

Somehow, our goal was to know the “place of women” and “men”, analysing the discursive meaning of “place” with a material meaning

⁶² Government Of Massachusetts. *Act To Secure Proper Sanitary Provisions In Factories And Workshops*. Session Laws 668-670. Approved March 21, 1887. In Argentina, the first regulations about public bathrooms’ segregation emerged in the twentieth century. Particularly, school restrooms were formally segregated in a Building Regulation of 1943.

⁶³ Paula Caldo, “No parecían mujeres, pero lo eran. La educación femenina de las maestras, Argentina 1920-1930”, *Historia y Sociedad* 26 (2014): 242.

⁶⁴ Fernández and Hernández, “La devolución de las caserolas”.

⁶⁵ Paula Lucía Aguilar, “Una utopía cotidiana: Archivos, hogar, genealogía”, *Ensamblés* 2, no. 3 (2015): 133-145; Fernández and Hernández, “La devolución de las caserolas”.

⁶⁶ Scharagrodsky, “Ejercitando’ los cuerpos masculinos y femeninos”.

⁶⁷ Scharagrodsky, “Ejercitando’ los cuerpos masculinos y femeninos”.

Figure 5. Detail. “Mingitorios y W.C” means urinals and W.C.

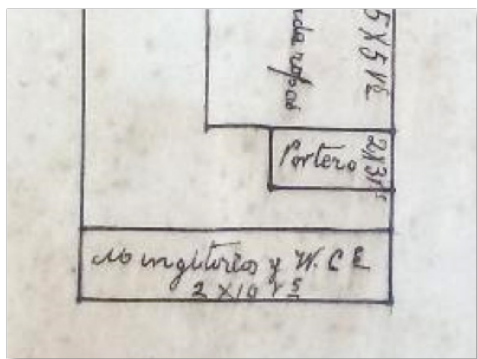
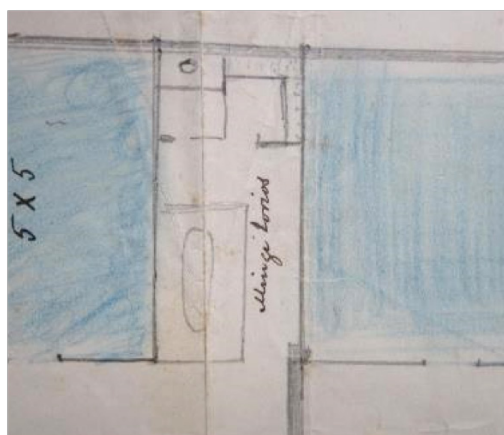


Figure 6. Drawing of a public primary school made by the tenant of the house. Detail. The legend is “mingitorios” (urinals). The rectangle with a circle inside was the usual drawing for latrines. It is unclear what the other drawings meant



Source: General Archive of the Nation (AGN) National Council of Education (CNE) File #1795/98 (1898).

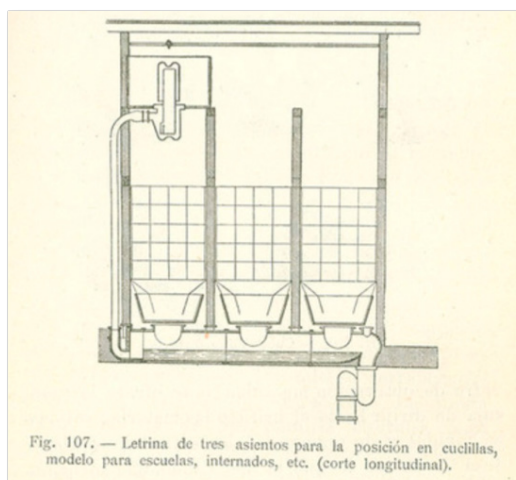
However, toward the end of the nineteenth century, the form it has today was already manifested as desirable:

These urinals must be divided by employing vertical and standard plates to their headwall, preserving them from rainwater. [...] It is convenient that the space of each square is not so big that it admits two children in it, nor so small that they cannot get between the two plates; That is why we judge a good width of about 40 to

50 centimetres, and a little less than exit for the dividing plates, with a height of approximately one and a half meters.⁷¹

Although it is impossible to delve into this fertile subject here, we can affirm that this device generated a body posture and a field of vision utterly different from that of common latrines. The male bodies must have been visible to the naked eye when they were upright since the urinals did not have doors, and the latrines did. Therefore, they came to be in a certain way public. However, in addition to an interpretation that indicates a symbolic relationship between the masculinized body as the sovereign-citizen body, typical of the public sphere⁷², we are interested in rescuing another facet of this visibility.

Figure 7. Three seats squatting latrine, model for schools, internships, etc.⁷³



⁷¹ Benjamín Zorrilla, *Educación común en la Capital, provincias, y territorios nacionales. Año 1889-90-91*. (Buenos Aires: Compañía Sudamericana de billetes de banco, 1892).

⁷² Several authors point out the impossibility of studying this topic without introducing a problematization of the role of women. Without delving into this discussion, we are interested in recovering these works since they successfully highlight the liberal fiction of two separate spheres (one private or domestic and the other public or political). This construction was only possible thanks to a process of inscription and reclusion of popular class women in this emerging domestic sphere. Cfr. Nancy Fraser, & Violeta Ruiz, "Repensar el ámbito público: Una contribución a la crítica de la democracia realmente existente", *Debate Feminista* 7 (1993): 23-58; Adriana Hernández, "Razón y cuerpo. Feminismo, esferas públicas y prácticas pedagógicas" *La Aljaba, IV* (1999): 141-152; Carole Pateman, "Críticas feministas a la dicotomía público/privado", in ed. Carme Castells, *Perspectivas feministas en teoría política* (Barcelona: Paidós Ibérica, 1996), 31-52.

⁷³ Súnico, Francisco, *Nociones de higiene*, 257. Francisco Súnico, *Nociones de higiene escolar* (Buenos Aires: Taller Tipográfico de la Penitenciaría Nacional, 1902), 257.

From a Foucauldian perspective, visibility fields are diagrams that enable the emergence and proliferation of circuits through which specific rules circulate.⁷⁴ The visibility of the masculinized body supposes their inscription in the public sphere. Furthermore, the field of visibility of the urinals makes it possible for these corporalities to become the object and relay of specific norms. As Foucault has shown, normalization is a dynamic process that operates codifying the experience into a complex net of relations of power-knowledge. Unlike the law, that defines reality into two terms (legal, illegal), normalization establishes a gradient of positions, where the upper scores are privileged and wanted, and lower scores are defined as “abnormals”. However, normalization does not operate excluding nor repressing. On the contrary, it operates producing new “objetcs” and discourses about them. In this case, we are exploring how in bathrooms masculinized bodies seemed to become objects of cis and heterosexual norms, among other.

In short, we would like to suggest that due to their exposure, masculinized bodies were privileged objects and recipients of normalization in school toilets at the end of the nineteenth century and the beginning of the twentieth century. Undoubtedly, this visibility allowed a more detailed “examination”⁷⁵ and a set of sanctions. As Connell affirms, schools were created to build masculinities”.⁷⁶ The approach of Scharagrodsky and Narodowski⁷⁷ follows this same path, in their statement that “masculinity was the object of central attention”. There is no doubt that the existence of these highly masculinizing spaces generated the conditions for the emergence and proliferation of a series of homosocializing practices and discourses. Many practices of this type are easily recognizable in that period: urinals, military gymnastics, scouting, public events, mass sports, male clubs, among others.

These arguments seem to hold. However, questions arise about feminizing practices. We could ask ourselves what kind of feminizing practices of this type occurred in the toilets in later stages or in other places. We propose that the feminized corporalities were less visible in the

⁷⁴ Foucault, *Vigilar y castigar*.

⁷⁵ Foucault, *Vigilar y castigar*.

⁷⁶ Connell, “Educando a los muchachos”, 161.

⁷⁷ Scharagrodsky and Narodowski, “Investigación educativa”.

toilets. However, they surely observed each other in other spaces, equally homosocializing, which have been barely studied.

The innocence

By the end of the nineteenth century, Argentina was still very influenced by Catholic values inherited from Spain. Religious and secular actors had strong disputes about the conception of massive primary schooling, that was finally sanctioned as “laic”. Nonetheless, the ideas about “Moral education of the spirit, physical education of the body and intellectual education of the mind” were still current.

Despite this inheritance, the meaning of “moral” was fluctuant and diverse. On one hand, Catholics understood that moral principles were “God’s laws”: “Man, then, is destined to achieve order of good through the practice of the moral law, which is nothing than the very religion that you profess as Christians”.⁷⁸ They believed proximity between “men” and “women” was a significant moral concern. As previously mentioned, these notions were present in discourses about “modesty” and “promiscuity”. For instance, in 1888 the baths in Mar del Plata city were strictly regulated and the separation between “men” and “ladies” became a priority.

On the other hand, we found positions aligned with the growing hygienist movement. As mentioned in other works, the goal of these specialists was the prevention of diseases. Therefore, they had a broad sphere of influence. Regarding Argentinian schooling, it involved essentially the surveillance of scholar’s bodies and the inspection of buildings. Hygienists did not particularly discuss the sexual segregation of bathrooms; but they played a fundamental role in redefining the ideas about morality. Far from the abstract ideas about morality as “good actions” and “God’s laws”, late-nineteenth century educators hold practical moral principles based on medical arguments.

These new moral precepts had other objects: clothing, body cleaning (in primary schools focused on ears and nails), and habits such as “punctuality”, “modesty”, and “sobriety”.⁷⁹ Also, as reflected in Mercante’s

⁷⁸ Esteban Echeverría, *Manual de enseñanza moral* (Buenos Aires: Maravilla Literaria, 1869), 6.

⁷⁹ Vicente García Aguilera, *La escuela*. (Buenos Aires: Imprenta de Pablo E. Coni, 1873); José de Urcullu, *Lecciones de moral, virtud y urbanidad* (Buenos Aires: Imprenta de Pablo E. Coni, 1870); Esteban Lamadrid, *Nociones prácticas de moral* (Buenos Aires: Félix Lajouane, 1894).

words,⁸⁰ this morality was presented in close relation with “working”, being “industrious”, and the “love for the homeland”. In the context of the modern State emergence, this appeared as an openly “civilizatory” concept that established close relations between race, discipline over the body, poverty, and conduct.

But the transition from Catholic ideals to the new ones was gradual. And these two meanings of morality kept overlapping each other. Somehow, in Christian beliefs it was implicit the idea of morals as something that should be preserved. On the contrary, the hygienist movement was attempting to spread these rules over a population considered as foreigner and threatening.

We can observe the complexity of this notion in some arguments about coeducation. Goetschel⁸¹ mentions that many of the speeches that opposed coeducation did so by arguing that it led to “the loss of innocence”. Although it is unclear what “innocence” meant at the end of the nineteenth century, some authors suggest coordinates that can be followed. For instance, Ana María Fernández⁸² notes that there was a semantic link between “innocence” and “ignorance”. From this point of view, innocence meant not knowing certain things about the world.

From contemporary mentality, it is logical to think that the sexual regulation of access to the school toilets sought to avoid proximity between corporalities defined as feminine and masculine. Moreover, one can infer that the objective was to remove the genitals from the “opposite sex” gaze. Therefore, “conserving the innocence” meant preventing scholars from knowing the “opposite sex” body.

Nevertheless, the relevant fact is that in those days in Buenos Aires city, bodies were open to sight. In the first place, all corporalities were exposed to a certain extent since the use of toilets had not been institutionalized and the practice of urinating in the street was maintained (a practice that in the case of masculine sexed persons has retained its

⁸⁰ Víctor Mercante, *Museos escolares argentinos y la escuela moderna* (Buenos Aires: Imprenta de Juan A. Alsina, 1893).

⁸¹ Ana María Goetschel, “La separación de los sexos: educación y relaciones de género”, *ICONOS* 16 (2003): 124-128.

⁸² Ana María Fernández, *La invención de la niña* (Buenos Aires: UNICEF, 1993).

acceptability to this days). Then, in those cases where urinals had been constructed, people identified as men were widely visible (visibility that would later be extended to female sexed bodies in areas such as changing rooms). Finally, “men” and “women” shared spaces daily. Contrary to certain grandiose images, Buenos Aires at the end of the nineteenth century was “a great village”⁸³ in which sexual practices were visible in the streets.⁸⁴ Also, collective housing (*conventillos*) was widely spread among popular classes, and these buildings often had a single bathroom.

Indeed, as a result of our research, we have seen that visibility in school bathrooms was not always conceived the same. Many of the nineteenth century bathroom doors we have seen in drawings and pictures were shutter-style doors. It is interesting to notice that these doors were bigger than actual ones, and allowed air to go through the door, but not to see the occupant. As we know, the model of bathroom doors that prevailed was the smaller one. Our hypothesis is that these doors operated pointing out the parts of the body that, from then on, should not be seen.

Figure 8. Latrine's doors. Nineteenth century school



Source: archeological work.⁸⁵

⁸³ Francisco Liernur, “Una ciudad efímera. Consideraciones sobre las características materiales de Buenos Aires en la segunda mitad del siglo XIX”, *Estudios Sociales* 2 (1993): 123-131.

⁸⁴ Pablo Ben, “La ciudad del pecado: Moral sexual de las clases populares en la Buenos Aires del 900”, in ed. Dora Barrancos, Donna Guy y Adriana Valobra, *Moralidades y comportamientos sexuales. Argentina, 1880-2011* (Buenos Aires: Biblos, n.d.), 95-114.

⁸⁵ Daniel Schavelzon “Los baños del Caserón de Rosas en Palermo: nuevos hallazgos (2013-2014)” *Conicet Digital* (2014).

CONCLUSION

In this article we addressed the emergence and consolidation of bathroom's sexual segregation on primary schools. Our approach was grounded in previous research and in the analysis of documents about the coeducation of children, in Buenos Aires city, in a period between 1875 and 1905. In the first part, we summarize the discussions about coeducation. We showed how these differences were solved by ensuring the sexual segregation of curriculum. However, we also suggested that this anxieties about "boys" and "girls" sharing spaces remained in force until mid-twentieth century.

In the second part, we explore with more detail this spatial segregation, inquiring how different discourses about sex and sexuality informed different positions. Finally, we attempted to show how the structure of segregated bathrooms contributed to the consolidation of the corporealities, roles, discourses surrounding the cis-sex, gender, heterosexual binary.

As we argued, we were surprised because sources have shown that in the period boys and girls shared many spaces (including school) and their bodies were exposed to sight. That is why we propose that these *dispositifs* (bathrooms) seemed to produce ignorance about something already known.

We believe that it is possible to locate these transformations in the context of a larger process of "channeling behaviors"⁸⁶ throughout the modern proliferation of practices of "sexual illustration".⁸⁷

Although it has been the object of criticism and reworking, many authors have commented on Philippe Aries's thesis about childhoods. In short, during the *Ancien Régime* "children were not different from adults either by the clothes they wore or the jobs they did or the things they normally said or kept silent".⁸⁸ Norbert Elias observes that this "relative lack of dissimulation" with which adults and children spoke and behaved, changed with the advent of modernity. Then, adults and children begin to conceive of themselves as separate, specific subjectivities.

⁸⁶ Foucault, *Vigilar y castigar*, 175.

⁸⁷ Elias, *The civilizing process*, 218.

⁸⁸ Mariano Narodowski, *Infancia y Poder* (Buenos Aires: AIQUE, 1994).

Along with this distance between children and adults, emerged new educational questions about the specificity of children's knowledge. In this context, arise what Elias calls the "problem of sexual education, that is, of the child's integration into the behaviour patterns of his society".⁸⁹ Closely related to this process is the link between the "feeling of childhood"⁹⁰ and the "family-school alliance".⁹¹ As Foucault proposed, the sexuality of scholars became then a public concern.⁹²

Therefore, we can suggest that sex segregated toilets participated in a process of expropriation of an already existing group of knowledge about bodies. These were long-term processes that in their most institutionalized stage took the form of an "alienation" of cultural faculties and discourses.

Nevertheless, these phenomena should not be read in repressive terms. It is essential to maintain a positive way of studying modern sexuality. This is the central theoretical position of this work, and it has to do with emphasizing the productive nature of power relations. Starting from this productive conception of knowledge-power relations, we wanted to explore toilets rejecting the "repressive hypothesis".⁹³

The institutionalization of toilets progressively confined certain practices (urination, defecation, smoking, sexuality, violence, etc.) to the darkness of two set of rooms. However, this is not a repressive movement since, by hiding them, they become the subject/object of other discourses. Along with the hygienist moral, the "sexual awakening" of youth was emerging as a sanitary issue. So, practices that occurred nowadays in bathrooms were by the end of the nineteenth century alienated from everyday lives and turned into practices that must be hidden from certain views but offered to the specialist's eye: pedagogy, psychiatry, medicine, and other.

⁸⁹ Elias, *The civilizing process*, 219.

⁹⁰ Fernández, *La invención de la niña*, 7.

⁹¹ Narodowski, *Infancia y poder*, 6.

⁹² Michel Foucault, *Historia de la sexualidad I. La voluntad de saber* (Madrid: Siglo veintiuno España editores, 2013).

⁹³ Foucault, *Historia de la sexualidad*; Butler, *Bodies that matter*.

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WOMEN'S PHYSICAL EXERCISE AND GYMNASTICS IN URUGUAY: BODIES, GENDER, AND SEXUALITIES IN PHYSICAL EDUCATION TEACHER TRAINING IN THE 1950s

*Ejercicio físico y gimnasia femeninos en Uruguay: cuerpos,
género y sexualidades en la formación del magisterio de
educación física en los 1950s*

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Abstract. In the 1950s, Uruguay had outstanding international recognition at an educational and cultural level and was called “the Switzerland of the Americas”. In this context, the Third Pan-American Congress of Physical Education was held in Montevideo. This article analyses three conferences on women’s gymnastics presented at the Congress by prominent Uruguayans. Their writing reveals mainstream understandings of the female sex and the effects generated by physical exercises and various forms of moving over female bodies. Although these sources do not explicitly approach LGBTQ+ people, they condemn (either directly or indirectly) forms of being feminine and masculine that were linked to homosexuality. This paper studies the most recommended bodily practices, adaptations and prohibitions prescribed for women in the mid-twentieth century. These texts were not only published by the National Commission of Physical Education (CNEF), which regulated physical education and sport at the national level; they were also integrated into the curriculum for training

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physical education teachers in Uruguay during that decade. This study is framed by theoretical references of sex deconstruction, Judith Butler's critique of sex-gender binarism, and Michel Foucault's sexuality device. Finally, it shows how medical knowledge crossed the discourse of sexuality in the field of physical education and supported the justification of the prescriptions of exercises and movements. These recommendations and prohibitions for women were based on the heteronormative sexual matrix, invalidating the existence of LGBTQ+ identities in the realm of physical education and sport.

Keywords: Bodies; Gender; Sexualities, Physical education; Uruguay.

Resumen. *En la década del cincuenta Uruguay tenía un reconocimiento internacional destacado a nivel educativo y cultural, denominado la "Suiza de América", en este contexto tuvo sede en Montevideo el Tercer Congreso Panamericano de Educación Física al que acudieron figuras relevantes a nivel internacional. El presente artículo analiza fundamentalmente tres conferencias relativas a la gimnasia femenina presentadas en el congreso por uruguayos que tuvieron un rol destacado a nivel nacional e internacional. Se entiende que estos textos muestran los principales sentidos en torno al sexo femenino y sus efectos en los cuerpos y modos de moverse y realizar ejercicios físicos. Se indaga sobre las prácticas corporales más recomendadas y las adaptaciones y prohibiciones que se prescribían para las mujeres en ese contexto. Si bien estas fuentes no abordan explícitamente la visión de LGBTQ+ people, directa e indirectamente condenan formas de ser femenino y masculino ligadas a la homosexualidad (lesbianas y gays). Estos textos además de ser publicados por la Comisión Nacional de Educación Física (CNEF) que regulaba la educación física y el deporte a nivel nacional, formaron parte del currículum de la formación de las y los profesores de educación física en el Uruguay en esa década. Para este estudio se parte de los referenciales teóricos de la deconstrucción del sexo, y la crítica al binarismo sexo-género de Judith Butler y del dispositivo de la sexualidad de Michel Foucault. Se muestra como el saber médico atravesó al discurso de la sexualidad en el campo de la educación física y estaba en la base de la justificación de las prescripciones de ejercicios y movimientos recomendados y prohibidos para las mujeres a partir de la matriz sexual heteronormativa, no habilitando la existencia de otras identidades LGBTQ+.*

Palabras clave: *Cuerpos; Géneros,; Sexualidades; Educación física; Uruguay.*

INTRODUCTION

In the 1950s, Uruguay had outstanding international recognition at the educational and cultural level, being called the "Switzerland of the

Americas". When the Third Pan-American Congress of Physical Education was held in 1950, Uruguay had already been governed for three years by neo-Batllismo¹ under the presidency of Luis Batlle Berres, which marked the beginning of the myth known as "the golden decade".² Neo-Batllismo promoted national industry through a growth model that substituted imports, expanding the state's sphere of action, trade union organizations and labour and social legislation, while strengthening political democracy. The main strategies of the export substitution model, an industrial policy oriented to the substitution of imported consumer goods, were: large subsidies to local industry, taxes or barriers to imports, and the prevention of direct foreign investments. Between 1945 and 1955, Uruguayan industrial production grew by 8.5% annually.³ By way of example, in 1950 the Family Allowances Council, which included representatives of the government, employers, and workers, granted economic subsidies to minors and health coverage with the creation of maternity and infant centres. At the same time, the establishment of a maternity salary and rules for equalising women's salaries with men's were other measures promoted during the period.⁴ All these aspects were key items in its agenda, denoting a clear idea of progress that permeated this historical period, even reaching beyond the government of the Colorado Party Collegiates that covered almost the entire decade, marking a developmentalist agenda.⁵ In this context the National Commission of Physical Education (CNEF) regulated physical education and sport at a national level.⁶ CNEF policies included: a wide international circulation

¹ This was a sector of the Colorado Party that aimed to deepen the reformism started in the early twentieth century by José Batlle y Ordóñez.

² A series of international triumphs in sports reinforced the myth of a golden decade: World Football Champion in 1950, third and fourth place in the 1952 and 1956 Basketball World Championships, fourth place in the 1954 Football World Cup, and good performances at the Pan-American athletics championships in Chicago and the South American tournament in Montevideo in 1958.

³ Benjamin Nahum, Ángel Cocchi, Ana Frega, and Ivette Trochón, *Historia Uruguaya. Tomo 7. Crisis política y recuperación económica 1930-1958* (Montevideo: Ediciones de la Banda Oriental, 2007), 125.

⁴ Nahum, Cocchi, Frega, and Trochón, *Historia Uruguaya*, 140.

⁵ Esther Ruiz, "Cap. 4. El 'Uruguay Prospero' y su crisis. 1946-1964", in eds. Ana Frega, Ana María Rodríguez Aycaguer, Esther Ruiz y Rodolfo Porrini *Historia del Uruguay en el siglo XX (1890-2005)* (Montevideo: Banda Oriental, 2008), 123-162; Benjamín Nahum, Ángel Cocchi, Ana Frega, and Ivette Trochón, *Historia Uruguaya.*; Benjamín Nahum, *Breve historia del Uruguay independiente* (Montevideo: Ediciones de la Banda Oriental, 2008).

⁶ CNEF was founded in 1911 with ministerial scope during the twentieth century. It was responsible for the physical education policies in the national education system (primary, secondary and tertiary

of ideas, agents and practices through various actions such as scholarships and study trips abroad; the participation of official delegations in the main events and congresses within the field of physical education both in Europe and the United States, as well as in other countries in the region; the organization of international congresses in Uruguay, welcoming figures of international renown; and the reissue of the CNEF's official journal. A certain discursive articulation can be observed between the moment when the CNEF was founded in 1911 in the first period of Batllismo, and this second stage, when Uruguayan physical education and sport policies gained momentum.⁷ They were very profitable in terms of transnational circulation, promoting the movement of agents, ideas, and material objects. It had been a little over a decade since Uruguay became the first country in the region to grant women the right to vote in 1927, thus increasing their political visibility.⁸ The first four women legislators in Uruguayan history were elected in 1942, and it was shortly after (1943-1947) that the Women's Civil Rights Act was passed. Still, the fact that "voting was not enough" soon became clear. "However, this notion of Uruguay as an exceptional country persisted for some time in Latin America, contributing to a 'myth' of absolute equality between men and women in the 1950s".⁹ This myth was further enhanced by the high rates of student enrolment and retention at all levels in the education system. In 1957, illiteracy above the age of 15 was down to 9.5%, setting Uruguay apart from other Latin American countries. Enrolment rates for secondary education rocketed with a growing number of female students and students from lower social classes.¹⁰ However, it is noteworthy that these changes and advancements did not have immediate effects regarding heteronormative sexual matrices. Heteronormative

education), the public sports facilities system, the regulation of sports associations and clubs, and the training of physical education teachers at the Higher Institute of Physical Education (ISEF), the only teacher training institution at the national level, established in 1939.

⁷ Paola Dogliotti, "Educación/enseñanza del cuerpo en la formación del profesor de educación física en el Uruguay (1948-1970)" (Tesis doctoral, Universidad Nacional de La Plata, 2018), checked on 3rd September 2021, <http://sedici.unlp.edu.ar/handle/10915/73914>

⁸ Gerardo Leibner, "Nosotras (Uruguay, 1945-1953): Las contradicciones de la escritura femenina comunista y sus significados sociales", in ed. Roland R. Forgues and J. Jean-Marie Flores *Escritura femenina y reivindicación de género en América Latina* (París: Mare & Martin, 2004).

⁹ Graciela Sapriza, "'Nos habíamos amado tanto'. Años revueltos. Mujeres, colectivos y la pelea por el espacio público", *Revista Estudios Feministas* 23 (3), (2015): 939-58, 940.

¹⁰ Nahum, Cocchi, Frega, and Trochón, *Historia Uruguaya*, 156-7.

arguments such as motherhood were also used by the feminist movements to vindicate social participation, reinforcing gender roles and stereotypes.¹¹

It was in this context that the Third Pan-American Congress of Physical Education was held in Montevideo in 1950. Organized since 1943,¹² the Pan-American Congresses of Physical Education symbolized the consolidation of the circulation of knowledge on physical education and sport in Latin American countries.¹³ Gradually, these congresses were regarded as an important exchange space for physical education, even steering sport policymaking and training curricula in the region.¹⁴ This influence is quite visible in the Uruguayan case. Some of the lectures given at the Third Congress were published by the CNEF and formed part of the academic programme of the Higher Institute of Physical Education (ISEF). In this essay we analyse lectures on women's gymnastics presented by prominent scholar Alberto Langlade¹⁵ (Professor of Didactic Theory and Practice of Gymnastics), followed by works of other prominent Uruguayan scholars of the field, namely Nelly Rey de Langlade¹⁶

¹¹ Asunción Lavrin, *Mujeres, feminismo y cambio social en Argentina, Chile y Uruguay 1890-1940* (Santiago: Ediciones de la Dirección de Bibliotecas, Archivos y Museos, 2005).

¹² The first two editions of the congress were held in Rio de Janeiro (1943) and Mexico (1946). For an analysis of the second congress, see Pablo Scharagrodsky, "Cartografiando saberes, grupos ocupacionales, instituciones, agentes y redes. El caso del Segundo Congreso Panamericano de Educación Física, México, 1946", *Revista Mexicana de Historia de la Educación*, 9 (17), (2021), 118-142, consultado el 12 de julio de 2021, doi: <https://doi.org/10.29351/rmhe.v9i17.336>.

¹³ Pablo Scharagrodsky, "Cuerpos, políticas y pedagogías en disputa. El V Congreso Panamericano de Educación Física, Buenos Aires, 1970", *Historia y problemas del siglo XX* | Año 12 (14), (2021), 146-163, <https://ojs.fhce.edu.uy/index.php/cont/article/view/1097>.

¹⁴ Scharagrodsky, "Cuerpos, políticas".

¹⁵ After an annual scholarship in Chile, Alberto Langlade (1919 - 1980) graduated as a physical education teacher from ISEF in 1945. Between 1946 and 1966, he taught Practical Gymnastics and Gymnastics Theory at ISEF and from 1948, he held the position of Head of Studies at ISEF until 1966, when he retired. He was also a professor of Special Gymnastics in the Physiotherapy course at the Faculty of Medicine and did frequent visits to specialized physical education centres in Europe. Through his mediation, several professors obtained scholarships to study at the GCI in Stockholm and the School of Physical Education in Cologne, Germany. In 1963 he was appointed Extraordinary Professor of the Faculty of Philosophy and Education of the University of Chile. He gave postgraduate courses and lectures on gymnastics and sports training at the international level. The ISEF is named after him by law 16.086 of October 18, 1989 (Available at: <http://www.parlamento.gub.uy/leyes/ AccesoTextoLey.aspLey=16086&Anchor>).

¹⁶ Nelly Rey de Langlade was primary school teacher and physical education teacher. She was a professor of Educational Gymnastics and Modern Gymnastics, Rhythms and Dances for women at ISEF (1949 -1960s). She attended several international congresses and made several study trips to

(Professor of Practical Gymnastics and Dance at the ISEF), and Dr. Juan M. Herrera (Professor of Anatomy, Ex-Professor of Physiology at the ISEF and Head of the Physical Sports Education Section of the National Commission of Physical Education). Our aim is to understand how particular understandings of the female sex and the effects of gymnastics on their bodies contributed to consolidating a heteronormative model of the body by condemning feminine and masculine ways of being which these authors associated with homosexuality. We understand that these sources do not speak directly about the LGBTQ+ population because they were not addressed initially to this social group. Furthermore, in 1950s Uruguay, all those who belonged to “sex-generic dissidences”¹⁷ and challenged cis-heteronormative regulations were not yet organised according to a transnational queer culture that currently gathers these dissidences around the monogram LGBTQ+.

The fact that these sources did not address this population directly could be an obstacle to research on this subject. However, instead of seeing them as an obstacle, one might consider them a possibility with challenges. The silences about those now organised as LGBTQ+ pose a challenge for historians since they could mean, at a superficial first glance, that these people did not attend sports and physical education spaces. As Ginzburg states, we must look for the “evidence that is imperceptible to most people”,¹⁸ which implies looking for the “infinitesimal traces” that could enable “the comprehension of a deeper, otherwise unattainable reality”.¹⁹ Working from this perspective means the historian must be careful to identify those subtle clues that could turn the silences into glimpses of the reality being analysed.

From the perspective mentioned above, the selected sources addressed to women’s gymnastics could be considered a clue to how Uruguay saw the relations between gender and physical exercises during

Europe to specialise in the field of gymnastics and dance. She gave theoretical and practical courses in this field in several South American countries. She was the representative for Uruguay in the International Federation of Physical Education (Langlade; Rey de Langlade, 1970).

¹⁷ Debora D’Antonio and Diego Sempol, “Cono Sur, Autoritarismo y Disidencias Sexo-Genéricas”, *Revista Uruguaya de Ciencia Política*, 31:1(2022), 7-23.

¹⁸ Carlo Ginzburg, *Clues, myths, and the historical method* (Baltimore: The Johns Hopkins University Press, 1989), 98.

¹⁹ Carlo Ginzburg, *Clues, myths, and the historical method*, 101.

most of the 20th century. There are no manuals or conferences about men's gymnastics, for men were not a group who needed "special care". Men – white, heterosexual, male individuals – were still the model, and physical exercises did not pose a threat to their sexuality. On the contrary, physical exercises were understood as a fundamental element of male education. Women, on the other hand, had to be taken care of. It was believed that physical exercises for women, if not duly regulated, could threaten their health and, mainly, their sexuality. Thus, manuals on women's gymnastics are the kinds of publications where aspects such as sexuality are discussed (whether more or less explicitly). These documents are "privileged zones" that can give us clues as to how physical education in Uruguay was constructed and is still marked by a particular aversion to sexual and gender diversity.

In a previous work based on these same sources, we analysed, from a historical-discursive perspective: a) the discursive disputes between racial justifications and material conditions as an explanation for local adaptations of Uruguayan and Latin American women's gymnastics; and b) the discursive tensions between conceiving women and women's gymnastics mainly from a maternity standpoint, which is central to the eugenic discourse, and the possibility of transcending this view.²⁰ In addition, another Uruguayan study analysed an identical bound version of Alberto Langlade's lecture that had circulated amongst physical education teachers since 1947, when Langlade was an Assistant Teacher at the "Theory of Gymnastics" course.²¹ The study critically analyses women's gymnastics, focusing on the scientific assumptions of anatomy and physiology that justified differences between the sexes.²²

²⁰ Paola Dogliotti, "Sexuality and eugenics in female gymnastics in the mid-twentieth century in Uruguay", *The International Journal of the History of Sport*, 38 (2021), 1-15. doi: <https://doi.org/10.1080/09523367.2021.1997996>.

²¹ Alberto Langlade, *Gimnástica Femenina* (Montevideo: Curso para la Preparación de Profesores de Educación Física, Comisión Nacional de Educación Física, n. p., 1947).

²² Tamara Parada, "Biopolítica y la gimnasia femenina de Alberto Langlade en 1947", in eds. Paola Dogliotti, Evelise Quitau and Gianfranco Ruggiano *Historia de la educación física: miradas desde Uruguay, Argentina y Brasil* (Montevideo: Comisión Sectorial de Investigación Científica, Universidad de la República, 2020), 225-36.

MASCULINE/FEMININE IDEAL TYPES CONSOLIDATED THROUGH GYMNASTICS

Alberto Langlade's lecture entitled "Women's Gymnastics" is the longest of the three lectures in the publication issued by the CNEF in 1950.²³ In the introduction, he discusses the new role that women should take at that time, with obligations and prerogatives that go beyond motherhood and housework and explains how women would benefit from physical education. He then briefly conceptualizes physical education with its different fields of action, such as sports, athletics, recreation, and gymnastics. Focusing on the latter, "incipient women's gymnastics", Langlade, points out: "Consider the many difficulties that must be overcome to create a female system or, if possible, to adapt a male system to the biological requirements of women".²⁴ For Langlade, a leading expert in gymnastics in the Southern Cone, the feminine system of gymnastics is built by adapting the masculine system according to biological differences. Naming Annie Collan, Elin Falk, Elli Björkstén, Bess Mensendieck and Agnete Bertram as "revolutionary figures and creators of new forms of women's workout", he points out that "this is how gymnastics evolved from men's gymnastics performed by young women to the current workout method".²⁵ Langlade seems to make a distinction between *women's gymnastics* and *men's gymnastics performed by women*, the former being the true gymnastics, which avoided "effeminacy and affectation" – as if there were a temperamental and biological (morphological) essentiality of the female being that separated the two gymnastics according to "sex" and made it possible to distinguish a woman from a weak man. He criticized a certain "affected" and "effeminate" way of acting in both men and women.

Langlade reaffirms a dominant binary and heterosexual sexuality, and a certain aversion to or rejection²⁶ of other affected or homosexual

²³ Herrera, Langlade y Rey de Langlade, *Gimnástica femenina*.

²⁴ Alberto Langlade, "Gimnástica Femenina", in eds. Juan M. Herrera, Alberto Langlade and Nelly Rey de Langlade *Gimnástica femenina en el Uruguay. Ponencia para el III Congreso Pan – Americano de Educación Física*, (Montevideo: Departamento Médico - Dirección Técnica. Comisión Nacional de Educación Física, 1950), 31-59, 33.

²⁵ Langlade, "Gimnástica Femenina", 33. Original in uppercase letter. All citations in uppercase letter appear like that in the original text.

²⁶ Judith Butler, *Cuerpos que importan. sobre los límites materiales y discursivos del "sexo"* (Buenos Aires: Paidós, 2005).

sexualities that do not abide by this dominant pattern. In a period where discussions on homosexuality were starting to take socio-contextual matters into account and where psychiatrists considered every individual could become a homosexual if inserted into a “perverted environment”,²⁷ Langlade’s viewpoint on gymnastics somewhat reflected these ideas. His remarks on women’s gymnastics indicate his ideas were somewhat related to “transfiguration instinct”, first presented in Uruguay by the Brazilian physical education teacher Inezil Penna Marinho in 1949 during a course on “Logical contribution to the Physical Education method”, and later published by the CNEF, in 1956. According to Marinho, this instinct could be defined as the “latent, potential, untamed, mysterious, and inexplicable force, responsible for the successive physical, somatic (anatomic-physiological) and, above all, mental or psychic (structural and functional) transformations”²⁸ and the great danger about such instinct was the fact that it could “sometimes manifest itself in a truly alarming way, culminating in sexual transfiguration”.²⁹ In a context where “homosexual” was commonly used to refer to a puzzled corporality and to allude to traces of the other gender, instead of sexuality itself,³⁰ gymnastics for women should not be a job for “weak men”, nor should it be male gymnastics disguised in “effeminacy”. The body, as well as women’s ways of moving and expressing themselves, should be educated based on their own practices, capable of maintaining a certain ideal of femininity. Although the aim is to keep women’s workout far from what could be considered a workout “for a weak man”, all considerations regarding strength exercises for women go in this direction. The anatomy and physiology of women is shown in terms of diminution and weakness, establishing a universal model of the female body which is always in a place of biological inferiority in relation to the male body. For Langlade, the proposition of a system of women’s gymnastics should involve a “comparative study of male and female anatomies, physiologies and temperaments [that] is adapted to their structure,

²⁷ Diego Sempol, “Homosexual: entre el insulto y el orgullo”, *Políticas de la memoria*, 18 (2018/2019), 222-234. Diego Sempol, *De los baños a la calle* (Montevideo: Debate, 2013).

²⁸ Paola Dogliotti and Pablo Scharagrodsky, “Eugenics and sexuality in Physical Education teacher training in Uruguay (1948-1970)”, *Paedagogica Historica*, 57 (2021), doi:10.1080/00309230.2021.1987483.

²⁹ Inezil Marinho, “El juego – Teoría de la transfiguración”, *Anales de Educación Física. Órgano de Documentación Administrativa y Técnica CNEF* 1, no. 2 (1956): 79.

³⁰ Sempol, “Homosexual”.

functions and temperament”.³¹ The bodily variables that should help to determine the types of exercise suitable for women, by studying their structure (morphology), functions (physiology) and temperament, are the structuring elements of biotypology.³²

From biomedical sciences, an ideal body is presented based on a balanced biometry, which is a sign of normality according to which all bodies should be adjusted, measured, classified, and hierarchized. A norm is created, defining the expectations regarding women’s bodies. Any bodies, behaviours or forms of expression that defied this pattern could be considered pathological, and physical education teachers should work to prevent these abnormalities.³³ Gymnastics must cultivate this body as the basis of physical education for the subsequent development of sports or athletic activities. Biometry stands as a “metromania” of western science,³⁴ as a conjunction of eugenic, biotypological, and psychological postulates that had great repercussions in the field of physical education, in its ways of measuring, classifying, and assessing it.³⁵ An example of this is the VARFCEFAMLERVe.Vr. coefficient (an acronym in Spanish), which is specific to the field of gymnastics: “In every gymnastic performance, a

³¹ Langlade, “Gimnástica Femenina”, 35.

³² Biotypology was a branch of eugenics founded in Italy by Nicola Pende. It spread widely in Latin America, creating solid networks. In the field of physical education in Uruguay, it had a certain impact at the instrumental level through the dissemination of techniques and tests for measuring bodies. A subject called ‘Biotypology’ was taught between 1948 and 1968 at the ISEF, and several degree theses dealt with this subject in the 1940s and 1950s. For a further analysis of these aspects, the following are recommended: Camilo Rodríguez, “El examen de ingreso al Curso de Profesores de Educación Física en el Uruguay. Una herramienta de selección en clave biotipológica”, *Cartografías del Sur*, no. 4 (2016): 196-223; Camilo Rodríguez, “La eugenesia en Uruguay y su vínculo con el campo de la educación física (1900-1948)” (master’s thesis, Facultad de Humanidades y Ciencias de la Educación, Universidad de la República, 2020); Dogliotti, “Educación/enseñanza del cuerpo”, 275-90; Dogliotti and Scharagrodsky, “Eugenics and sexuality”.

³³ As Canguilhem argues, norms are created in physiology and other biomedical sciences as a principal of classification and correction. Once a norm is scientifically determined, every intervention over people and bodily functions, from a biomedical point of view, aims at maintaining the subject close to the norm. Any deviance from the norm is considered a pathology. In the case of physical education, interventions aim to keep people close to what is considered the “normal physical fitness”. On Canguilhem’s ideas, see: Georges Canguilhem, *The normal and the pathological* (New York: Zone Books, 1991).

³⁴ John Hoberman, “The early development of sports medicine in Germany”, in eds. Jack W. Berryman and Roberta J. Park *Sport and Exercise Science: Essays in the History of Sports Medicine* (Chicago: University of Illinois Press, 1992), 233-82.

³⁵ Eduardo Galak, *Educación de los cuerpos al servicio de la política. cultura física, higienismo, raza y eugenesia en Argentina y Brasil* (Buenos Aires: Biblos, 2016), 43.

series of values are exalted which are synthesized in the following coefficient: Velocity; Agility; Resistance; Strength; Coordination; Equilibrium; Flexibility; Attitude; Mobility; Localization; Aesthetics; Rhythm; Spiritual values; Reaction time".³⁶

Alberto Langlade and Nelly Rey de Langlade were never explicit as to the person who may have come up with this coefficient. However, the origin of the coefficient is to be found in French constitutional medicine, which was then adopted and adapted by Thooris's functional morphology and the by biotopologists Grasso and Pende.³⁷ In establishing the ideal women's gymnastics system on the basis of these postulates, the authors once again started from a certain hegemonic standard that sought to exclude any expression of femininity (and in turn masculinity) that could potentially express other possible sexualities.

ESTABLISHING DIFFERENCES, NORMALIZING BODIES

Langlade's 1950 article, "Women's Gymnastics", contained several elements that largely coincided with those that would later appear in his *Manual of Didactics of Gymnastics* published in 1956. This manual was the basis of the two programs of General Theory of Gymnastics located in the last two years of the career, the most challenging subject and which implied the highest demand for its approval according to the students of the time.³⁸ This program was the only one at the national level and trained students who would later work throughout the national territory. This subject, in turn, was the only one that trained in didactic and pedagogical aspects for the work of the physical education teacher in primary and secondary education.

³⁶ Nelly Rey de Langlade, "Untitled", in ed. Juan M. Herrera, Alberto Langlade and Nelly Rey de Langlade *Gimnástica Femenina en el Uruguay. Ponencia para el III Congreso Pan - Americano de Educación Física* (Montevideo: Departamento Médico - Dirección Técnica. Comisión Nacional de Educación Física, 1950), 11-30, 23.

³⁷ Andrés Reggiani, "Constitución, biotopología y cultura física femenina", in ed. Pablo Scharagrodsky *Mujeres en movimiento. Deporte, cultura física y feminidades. Argentina, 1870-1980* (Buenos Aires: Prometeo, 2016), 127-59. In it there also appears a detailed chart with the taxonomies of athletes based on the cited authors' V.A.R.F coefficient.

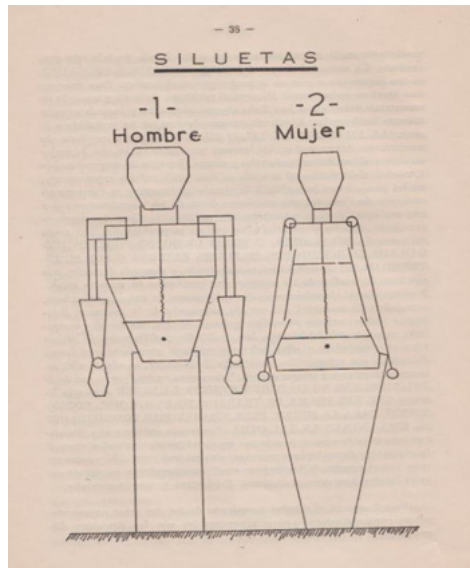
³⁸ Ana Torrón, "Gimnasia y Deporte en el Instituto Superior de Educación Física (1939-1973): su configuración y su enseñanza" (Tesis de maestría, Universidad de la República, 2015).

Through pedagogical, moral and hygienic prescriptions, the manual was configured as an articulating discourse of educating bodies and being a teacher, which went beyond the teaching of gymnastics but rather matrixed physical education in the different areas of professional performance. All these aspects show this manual's relevance not only for the training of physical education teachers in Uruguay but also for the field of physical education in general. Hence, they also coincided with the syllabus of the second "Theory of Gymnastics" course, which integrated the training course of physical education teachers in Uruguay according to the 1948, 1956, and 1966 academic programmes. In these documents, Langlade starts from the anatomical, physiological, and temperamental differences between women and men, and dedicates three sections to physical exercise and gymnastics in women. Temperament, as in biotypology, together with the physical differences of the body, is important to determine the types of exercise for each sex.

These exact topics were discussed in the same order in Chapter II of the 1956 *Manual of Didactics of Gymnastics*. The section entitled "Anatomical, physiological and temperamental differences between men and women" begins with the following footnote: "In this section, we transcribed what was expressed by Johannes³⁹ in his text 'Theory of Gymnastics'".⁴⁰ In both sources, there is an extensive comparison of the male and female bodies for which the following drawing is used as a starting point:

³⁹ Dr. Lindhard (1870-1947) was a Danish doctor and physiologist, part of the Northern Movement of Gymnastics. He worked in the field of physiological research and physiology of gymnastics. As his main contribution, he managed to interest the scientific world, mainly physiologists, in the general problems of physical exercise and mainly of gymnastics. Alberto Langlade and Nelly Rey de Langlade, *Teoría general de la gimnasia* (Buenos Aires: Stadium, 1970), 243-6.

⁴⁰ Alberto Langlade, *Manual de didáctica de la gimnástica* (Montevideo: Publicación n.º 1. ISEF – CNEF, 1956), 35.

Figure 1. Male (1) and female (2) silhouettes⁴¹

Langlade then elaborated on the size differences between men and women in height and weight, growth, and puberty, and in terms of their skeleton. The differences he describes between male and female bodies in the 1950s reproduce perspectives that first came about in the 18th century, when anatomical studies began to focus on describing the biological differences between the two sexes, with a clear tendency to collect data that would justify the fragility of the female body.⁴² While these differences initially focused on the male and female skeletons,⁴³ they began to focus on the uterus and ovaries during the 19th century and, finally, on the recently discovered hormones⁴⁴ in the first decades of the 20th century. In Alberto Langlade's model, women are generally presented in

⁴¹ Langlade, "Gimnástica Femenina", 36; Langlade, *Manual de Didáctica*, 35.

⁴² Thomas Laqueur, *Making sex: body and gender from the Greeks to Freud* (Cambridge: Harvard University Press, 1994).

⁴³ Londa Schiebinger, "Skeletons in the closet: The first illustrations of the female skeleton in eighteenth-century anatomy", *Representations*, No. 14, (1986): 42-82.

⁴⁴ Nelly Oudshoorn, *Beyond the natural body. An archaeology of sex hormones* (London: Taylor and Francis, 1994); Anne Fausto-Sterling, *Sexing the body* (New York: Basic Books, 2000); Cecilia Rustoyburu, "Infancias, hormonas y género. Un análisis histórico de los discursos de la biotipología en Argentina en los años 1930", *Sexualidad, Salud y Sociedad*, 11, (2012), 9-36, consulted on 18 November 2021, doi: <https://doi.org/10.1590/S1984-64872012000500002>.

a differentially negative way with respect to men, as being weaker: “weaker bone and muscle development in women, together with a more abundant presence of adipose tissue”.⁴⁵ “(1)⁴⁶ man, has a more vigorous neck, of greater circumference and endowed with more muscular relief than (2) woman”⁴⁷ (see Figure 1). The words used always attribute greater power, strength, vigour, potency and superiority to men, while women are valued in terms of weakness, poor development, scarcity and inferiority.

Softness and delicateness are moral characteristics rather than organic ones, and they do not respond in any way to a supposed organic difference between the “sexes”. Differences are described based on scientific advances in descriptive muscular anatomy but are ideologically tinged with subjective attributes such as “softness and delicateness”, which are far from anatomical observation. Additionally, based on anatomical observation, features like a larger size and more muscular development are based, among others, on natural, organic, and genetic differences, disregarding any cultural construction of the body depending on what has been culturally exercised by each of the “sexes”. Cultural differences, which are the product of social stereotypes assigned to each “sex”, are hidden in a supposed anatomical differentiation of male and female bodies. The female sex is defined as weaker, less vigorous, more delicate, and softer than the male sex. All these are characteristics that have been constructed by the medical discourse and that constitute a biological imaginary. This is accentuated when the rates of workout for each “sex” are compared and indices are used to prove that men are more efficient than women, emphasizing the importance of biological determination over social determination. While the influence of social conditions is not ruled out it does reinforce towards the end the determination of “biological laws”.

⁴⁵ Langlade, *Manual de Didáctica*, 35.

⁴⁶ (1) Man and (2) Woman, according to the scheme. It is not random that Man appears first after number 1.

⁴⁷ Langlade, “Gimnástica Femenina”, 37.

BETWEEN THE “ETERNALLY WOUNDED” WOMAN AND THE HYSTERICAL FIGURE

The lectures presented by Alberto Langlade, as well as some of his other publications on women's gymnastics, reproduced an attempt not only to identify organic differences between men and women, but also to use them to construct certain discourses that always relegated women's bodies to a place of inferiority. These lectures also contributed to consolidate the idea of motherhood as women's main role. When describing the hip, Langlade does so with clear signs of weakness due to its “future mission”: motherhood.

(1) presents a narrow hip, strong and firm due to well-developed muscles and with a ligamentous apparatus that is not very extensible. [...] The pelvis of (2) is large, very voluminous, lower than that of (1) but much wider, its inclination is greater by four degrees and its ligamentous apparatus weaker because of its future mission.⁴⁸

The essentialization of the female body as inferior and destined for motherhood is also expressed through Langlade's observations on its physiological functioning:

From a physiological standpoint, the lesser development of the cardiac muscle makes women inferior to men for prolonged efforts. The female nervous system is more delicate, fragile and excitable than its male counterpart. This is shown by the greater intensity of women's emotional states. This excitability of a woman's system makes her reaction time slower than a man's, and increases her possibilities of distraction, since the calmer an individual is, the shorter their reaction time is.⁴⁹

Once again, we can see that the author intended to establish biological elements that would justify the supposed weakness of the normal female body. In the preceding quotation, when referring to the nervous system, although not explicitly stated, women are associated with the

⁴⁸ Langlade, “Gimnástica Femenina”, 38.

⁴⁹ Langlade, “Gimnástica Femenina”, 38-9.

figure of “hysteria”⁵⁰; more delicate, fragile, and excitable, with greater intensity of emotional states. It is determined without any basis whatsoever that the greater the serenity or calmness, the shorter the reaction time, a quality which is associated with men.

Laughter, crying, and weeping, blushing and heart palpitations, all express emotion, half psychic, half motor, and are all more difficult to master and control in women than in men. Women’s unstable nervous equilibrium is also demonstrated by the fact that they are more easily distracted in their workout than men.⁵¹

It is more accepted for women to show their emotions (laughing, crying, blushing) than men, but this is shown as a symptom of weakness and lack of rational control and mastery of themselves. This female instability is associated with menstruation.

The entire nervous system of women is also subject to fluctuations associated with the menstruation process [...] the so-called premenstrual period, in which nervous irritability increases, as if it were an accentuation of women’s lack of nervous equilibrium. [...] From mild, almost imperceptible cases to serious nervous disorders, which turn an individual into an invalid. [...] After the cessation, there is another period of increased irritability for another couple of days, which then gives way smoothly to the comparatively stable intermenstrual period.⁵²

Menstruation is discursively constructed as part of the device of hysteria, dominating a woman’s body and trapping her inside a place of affective instability, disorders, and illness to the point of “invalidity”. One of the pioneering historiographical studies on the relationship between

⁵⁰ According to Foucault, after the 18th century the hysterisation of women’s bodies was configured as one of the four devices of sexuality (of knowledge and power) that produced a political economy of the body and of populations. He defines it as a threefold process according to which the female body was analysed, integrated into medicine and traversed by social elements, always from a view that placed women, and especially the ‘nervous woman’, in a pathologized category. Michel Foucault, *History of sexuality. Volume 1: an introduction* (New York: Pantheon Books, 1978).

⁵¹ Langlade, *Manual de Didáctica*, 40.

⁵² Langlade, “Gimnástica Femenina”, 40.

menstruation and physical exercise is the work of Vertinsky.⁵³ She stated that the medical establishment on both sides of the Atlantic in the last third of the 19th century promoted a theory of menstrual disability that contributed substantially to positioning the female sex as weak and to stressing the unmodifiable nature of their physical inferiority and their special physical needs, which required permanent custody by these guardians and quasi-moral directors of women's intimate and personal behaviour. As Vertinsky points out from the analysis of medical discourses on the female body and physical exercise in the 19th century.

These notions identified by Vertinsky in 19th century Anglo-Saxon medicine also appear in Langlade's reflections on women's bodies. For the Uruguayan author, menstruation (and the consequent hysteria it produces) was seen as a "necessary evil" to be endured, and women were placed in a position of suffering, of being "eternally wounded", of sickness, of lack of movement, of an involuntary lack of control to the point of convulsion, of "hysteria". We agree with Scharagrodsky that

the flip side of motherhood as a metaphor for health was hysteria as a metaphor for illness [...] Calming women or tying up a "madwoman" were the opposite objectives of motherhood, insofar as women who did not become wives and mothers were considered dangerous or pathologically ill. In this scenario, the different bodily practices were powerful channelling moral means rather than physical ones, aiming at controlling the device of sexuality via the genital apparatus and, at the same time, the sexualization of the entire female body.⁵⁴

After citing a vast number of scientific studies on physical exercise and menstruation, with a variety of often opposing and contradictory results, Langlade concludes that:

a) All intense exercise, especially of a sporting nature, during menstruation is discouraged.

⁵³ Patricia Vertinsky, "Exercise, physical capability, and the eternally wounded woman", *Journal of Sport History*, 14, (1), (1987): 7-27.

⁵⁴ Pablo Scharagrodsky, "Entre la maternidad y la histeria. Medicina, prácticas corporales y feminidad en el Buenos Aires del fin del siglo XX", in ed. Pablo Scharagrodsky *Gobernar es Ejercitar. Fragmentos Históricos de la Educación Física en Iberoamérica* (Buenos Aires: Prometeo, 2008), 105-35, 133-4.

b) All activities capable of causing trauma and strong emotions are considered to be dangerous.

c) It is advised to leave to personal will, and according to the physical and spiritual state, the performance of any physical exercise, either of light or mild intensity, during menstrual periods.⁵⁵

Although women are not forbidden to exercise during menstruation, this period is described as “delicate”, “special”, and it is left to the woman’s “will” whether she can exercise with “light or mild intensity” during this period. The normalization of menstruation and its management promotes a non-menstrual, masculine body ideal.⁵⁶ Women’s bodies are controlled based on a medical discourse that prohibits intense exercise and the experience of intense emotions. An ideology is constructed around menstruation which, together with a supposedly weaker skeleton, places women in a place of inferiority, incapability and suffering that keeps them in a lower hierarchical position than men. This combination of a supposedly weaker body and uncontrolled emotions verging hysteria put women closely to the idea of abnormality⁵⁷, and only a few exercises would be appropriate to keep women’s emotions and physicality within the “normal standards”.

THE BODIES DETERMINE THE PRACTICES: LIMITATIONS AND RECOMMENDATIONS IMPOSED ON WOMEN

Regarding the difference between the male and female sexual organs, there was a great deal of negative differentiation toward the latter in terms of the movements and exercises that could be performed by one “sex” or the other. The large amount of work dedicated to this subject shows the fixation on and importance of the sexual organs in determining not only female sexuality but also in prescribing and prohibiting certain types of exercise. “The differentiation in the location of the

⁵⁵ Langlade, *Manual de Didáctica*, 46.

⁵⁶ Eugenia Tarzibachi, “Deporte y recreación durante la menstruación. historia de una habilitación a partir de la difusión de las toallas y los tampones industriales en Argentina, 1930-1980”, in ed. Pablo Scharagrodsky *Mujeres en movimiento. Deporte, cultura física y feminidades. Argentina, 1870-1980* (Buenos Aires: Prometeo, 2016), 85-108; Eugenia Tarzibachi. *Cosa de mujeres. menstruación, género y poder* (Buenos Aires: Sudamericana, 2017).

⁵⁷ Michel Foucault, *Abnormal* (London; New York: Verso, 2003).

sexual organs makes the gymnastic possibilities of the two sexes different".⁵⁸ In this argumentation, the uterus and the perineum were given a preferential position due to their location and constitution.

In the writings on women's gymnastics produced in Uruguay in the mid-twentieth century, there is a great obsession with determining normality and seeking a fixed position for the uterus. The uterus is described from an ideological approach rather than from a scientific one. The "causes of deviation of the uterus" come next. "The uterus, due to its extreme mobility, can go through a series of changes in its position that deviate from normal".⁵⁹ The causes and types of these "anomalies" or deviations from the "norm" are mentioned: "of all inflammatory processes, the largest percentage have their origin in blennorrhagia. Blennorrhagia can affect even married women as they may get it from their husbands".⁶⁰ Blennorrhagia was one of the main "evils", along with alcoholism, syphilis, and tuberculosis, and was combated as part of the main preventive measures of social medicine by the Uruguayan eugenic movement from the 1920s. According to Barrán, "for this reason, all medical records asked about hereditary background with special reference to syphilis, blennorrhagia, tuberculosis and alcoholism".⁶¹ In turn, "The second feature of Uruguayan eugenics was its obsession with the "destructive effect on our species" of these diseases".⁶² It also mentioned prolapse as another uterine "disorder", listing its multiple causes, which included "great efforts, such as lifting heavy weights [...] deep jumps or violent impacts when performing a jump".⁶³

All these accounts, supposedly based on scientific gynaecological knowledge, helped to create a discourse of control and power over women that put them in places of inferiority with respect to men in relation to the possibility of doing gymnastics and physical exercise. Anatomy, physiology, psychiatry, and gynaecology were among the medical disciplines

⁵⁸ Langlade, "Gimnástica Femenina", 39.

⁵⁹ Langlade, "Gimnástica Femenina", 43.

⁶⁰ Langlade, "Gimnástica Femenina", 43.

⁶¹ José Pedro Barrán, *Medicina y Sociedad en el Uruguay del Novecientos. La invención del cuerpo* (Montevideo: Banda Oriental, 1995), 214.

⁶² Barrán, *Medicina y Sociedad*, 216.

⁶³ Langlade, "Gimnástica Femenina", 44.

that most contributed to this device of female sexuality in an articulation with its main purpose, motherhood, determining their bodies and what type of physical exercise was allowed and forbidden. Traces of eugenic discourses can be found in these justifications. A vast bibliography has addressed the emphasis that eugenic policies placed on motherhood and the importance given to physical exercise geared to this end.⁶⁴ In this line, based on a long enumeration of the “anatomical, functional and temperamental differences of the two sexes”, the best form of workout for women was developed according to “their constitution and idiosyncrasies”.⁶⁵ The use of terms such as temperamental, idiosyncrasy⁶⁶ and constitution is not a minor issue: the first two integrated the biotypological discourse, while the third was used in constitutional medicine and was later adopted by biotypologists.⁶⁷

Medical knowledge, especially exercise physiology dictated the main prescriptions for adequate physical exercise that would not harm the special female anatomy and physiology. On the basis of “natural” differences between the sexes, the medical discourse configured a set of truths about the sexes and their physical exercises. Because of organic differences (both temperamental and constitutional), strength leg exercises were discouraged but flexibility exercises were promoted. Flexibility was opposed to strength, and it was said about the arms that “women’s lesser

⁶⁴ Marcela Nari, *Políticas de la maternidad y meternalismo político, Buenos Aires (1890-1940)* (Buenos Aires: Biblos, 2004); Nadia Ledesma and Adriana Valobra “Eugenésia y derechos: idearios médico-políticos sobre los roles públicos y privados de las mujeres en la Argentina, 1930-1945”, in eds. Marisa Miranda and Gustavo Vallejo *Una historia de la Eugenesia. Argentina y las Redes Biopolíticas Internacionales 1912-1945* (Buenos Aires: Biblos, 2012), 411-36; Adriana Valobra “Public health policies, women’s organizations and mothers in the province of Buenos Aires, 1946-1952”, in eds. Aran S. MacKinnon and Jonathan D. Ablard (*Un) Healthy Interiors: Contestations at the Intersection of Public Health and Private Space, Studies in Social Sciences* (Carrollton: University of West Georgia, vol. XXXVIII, 2005), 79-95. https://www.academia.edu/43248703/Public_health_policies_women_s_organizations_and_mothers_in_the_province_of_Buenos_Aires_1946_1952 (accessed April 2021); Grant Rodwell “The eugenic and political dynamics in the early history of physical education in Australia, 1900–50”, *Melbourne Studies in Education* 40(1), (1999), 93-113, 102, DOI: 10.1080/17508489909556327; Grégory Quin and Anais Bohuon, “Muscles, nerves, and sex: The contradictions of the medical approach to female bodies in movement in France, 1847-1914”, *Gender & History*, 24, (1), (2012), 172-86, <https://doi.org/10.1111/j.1468-0424.2011.01674.x>

⁶⁵ Langlade, “Gimnástica Femenina”, 44.

⁶⁶ According to Merriam-Webster’s dictionary, “idiosyncrasy” is defined as “a peculiarity of constitution or temperament: an individualizing characteristic or quality”.

⁶⁷ Reggiani, “Constitución, biotipología”.

muscular power makes their joints essentially flexible".⁶⁸ In the following quotation, Langlade censures again a certain femininity, which he describes as exaggerated or stereotyped, consigning it to the realm of abjection.

The suppleness and softness to which I have referred are in no way languid movements, without a location and without a fixed plane on which to be executed. Languid, stereotyped movements and gazing at the great beyond are not typical of women's gymnastics, but of pseudo-feminine gymnastics born in a period of confusion.⁶⁹

Langlade rejects women's "effeminate", languid and stereotypical movements; he consigns both virile ("affected") women and women who are too feminine ("effeminate" or "gazing at the great beyond") to a place of abjection, categorizing them as "pseudo-feminine".

The device of sexuality configures different identities: gender, sexual, desire, pleasure, and emotional identities. The discourses referring to women's physical exercise are influenced by macro-political concerns related to the device of sexuality.⁷⁰ Both Langlade's and Herrera's lectures present an essentiality on women's way of "being in movement" associated with flexibility, softness, beauty and opposed to strength, energy, and precision.

To determine what a woman should do and how she should move, what she is and is not "fit" for, there is a continuity between her way of being and the way of moving ("a woman with a strongly muscled neck would not be feminine at all"⁷¹), from attitude and values to exercise, from her temperament to her physique, from moral to biology. The word "fit" becomes relevant and is used, like in the biotypological discourse, to prescribe and indicate the normality of the body and its movements.

⁶⁸ Langlade, "Gimnástica Femenina", 46.

⁶⁹ Langlade, "Gimnástica Femenina", 46.

⁷⁰ Scharagrodsky, "Entre la maternidad y la histeria", 106.

⁷¹ Langlade, "Gimnástica Femenina", 47.

Flexibility is presented as a muscular characteristic predisposed by female genetics, while power and strength are inherent to men (as if all women and men were the same). However, exercise adaptations, such as avoiding “static” positions, are prescribed only for women.

One must never lose sight of the unequal anatomical architecture of the two sexes [...] women, having less power (less developed muscles) must fight against greater resistance, so the contraction [...] shall be rapid and avoid, as specialists emphasise, remaining in “static” positions.⁷²

Flexibility is much more accentuated in women [...] The full flexion of the trunk to the front and down is a relatively easy exercise for women.⁷³

Trunk exercises in the frontal plane have little difference with the opposite sex. They shall only differ in intensity and duration.⁷⁴

In addition to exercise adaptations, exercises for women are prohibited without physiological arguments, which is not the case for men. It is claimed that women are prone to suffering from “an accentuation of their physiological lordosis”.⁷⁵ Langlade points out that balance exercises on the floor are more “suitable” for women than for men, but “this superiority [...] due to their constitutional conditions is lost when the exercise of balance on the floor also requires the strength factor”.⁷⁶ In agreement with Langlade, Herrera writes:

Balance exercises on the floor or on the bar, for which women’s physical conditions are admirable, shall be accomplished without reaching positions of strength and without danger of failure; I am here referring to the height and width of the bar.⁷⁷

⁷² Herrera, “Untitled”, 9.

⁷³ Langlade, “Gimnástica Femenina”, 48.

⁷⁴ Herrera, “Untitled”, 8.

⁷⁵ Langlade, “Gimnástica Femenina”, 49.

⁷⁶ Langlade, “Gimnástica Femenina”, 53.

⁷⁷ Herrera, “Untitled”, 8.

Women's possible movements are again limited, even in those exercises for which they have greater "aptitude", alluding once more to their "hysterization" through the instability and precariousness of their nervous system.

And although morphological conditions continue to favour women in execution, temperamental conditions work against them. The greater excitability of their nervous system, the fear of accidents, mean that the inhibitory psychic factor influences the morphological conditions – it is for this reason that the exercises of balance at height in women must follow a very careful gradation, and the height at which they workout must always be lower than for young men of the same age.⁷⁸

In terms of suspension exercises, although they may require strength, it is argued that they must be taught to women in an adapted form in case of an accident as it could save their lives.

In case of an accident, for example, in a fire, and being the only means of salvation to move along an extended rope, a woman, like any man, must be able to save herself by her own means. In modern times, this idea that a woman is a "bibelot" has been or must be discarded. A woman must possess not the strength of a man BUT ENOUGH STRENGTH TO CONTROL HER BODY. [...] THESE NOT ONLY MAY BUT MUST BE USED. [...] All suspension exercises which are in accordance with women's biotypology and temperamental conditions are appropriate for women's gymnastics.⁷⁹

Strengthening the female body becomes accepted for a very clear purpose: to save herself in situations of risk. If, on the one hand, she can no longer be a "bibelot", neither should she be transformed into a body that is too strong, too masculine. Although Langlade proposes a more active place for women, he considers that women should be obliged to perform suspension exercises in life-or-death situations. For this, he follows the parameters of a biotypology and puts women in a place of

⁷⁸ Langlade, "Gimnástica Femenina", 53-4.

⁷⁹ Langlade, "Gimnástica Femenina", 54-5.

inferiority in relation to men, constructing a gendered and hierarchical bodily and sexual order.⁸⁰

In the same vein, walking and running “shall not be as energetic and precise” for physical reasons (shorter strides due to shorter limbs and greater pelvic oscillations and torsion movements), but mainly for temperamental reasons. Moral reasons rather than physical reasons prescribe the type of exercise. Long-distance runs, which require functional and muscular endurance workout, are “not suitable for women” either. “Fast-paced races and short runs or jogs are particularly suitable for women’s general conditions”.⁸¹

The “differential importance” between the sexual organs of each sex and the classification of women (from a medical discourse and knowledge) according to number of pregnancies are factors that determine the type of jumping and agility floor exercises that they can perform. Women “are not particularly suitable for jumping”, as “the intra-abdominal pressure” that the perineum must withstand means they could suffer alterations in the position of the uterus. For this, Langlade presents “two fundamental female types, nulliparous women and multiparous women, and, within these, certain characters”:⁸² on the physical level, having shorter and less powerful lower limbs and greater weight in the pelvis; on the psychic level, “less resolution and decisiveness in action”.⁸³ A biological ideology is presented which determines not only the physical aspect, but also the psychic or temperamental ones.

RECOMMENDED BODILY PRACTICES FOR WOMEN

It was not only the type of exercise that needed to be “adapted” based on women’s organic, genetic, temperamental, and physical predisposition.

⁸⁰ Pablo Scharagrodsky, “Discursos pedagógicos, procesos de escolarización y educación de los cuerpos”, in eds. Valeria Varea and Eduardo Galak *Cuerpo y Educación Física. Perspectivas Latinoamericanas para Pensar la Educación de los Cuerpos* (Buenos Aires: Biblos, 2013), 15-43, 37; Pablo Scharagrodsky, “El padre de la educación física argentina: Fabricando una política corporal generizada (1901-1938)”, in eds. Ángela Aisenstein and Pablo Scharagrodsky *Tras las huellas de la Educación Física Escolar Argentina. Cuerpo, Género y Pedagogía: 1880-1950* (Buenos Aires: Prometeo, 2006), 159- 197, 160.

⁸¹ Langlade, “Gimnástica Femenina”, 56.

⁸² Langlade, “Gimnástica Femenina”, 56.

⁸³ Langlade, “Gimnástica Femenina”, 56.

Women were considered a special group for which it was necessary to also adapt the bodily practices that were most suitable for their biotype. One of the bodily practices that contributed most to building and educating female bodies was rhythmic gymnastics. It is not a minor point that, on this subject, it was the female lecturer, a teacher of this discipline in the training of physical education teachers, who introduced the recommendations.

It was only at the beginning of the 20th century that the problem of women's gymnastics began to be considered [...] Elli Björkstén (1870-1947), who laid the foundations of modern women's gymnastics [...] introduced rhythm and the expression of moral values in gymnastics. She moved away from the stereotyped attitudes of male gymnastics, rounding and lengthening the movements and introducing new concepts of plastic arts. [...] In Switzerland, Jaques-Dalcroze (1865) was the creator of rhythmic gymnastics [...] the study of rhythmic gymnastics fortifies the metric and rhythmic senses, thanks to the joint study of the body's natural rhythms and music's artistic rhythms. It tends to regularize the nervous functions, strengthen willpower, develop the imagination and harmonize physical and spiritual faculties. It seeks to overcome the intellectual or physical resistances which go against the natural rhythms of personality and to ensure more freedom and awareness.⁸⁴

In these gymnastics, femininity is associated with the development of rhythm, expression, plasticity, and rounded movements. Metaphorically, it would be a "more rounded" body than the male body. This is all combined with what is natural and contributes to developing values that are somewhat "lacking" in women, such as "the regularization of nervous functions" because of sexual problems (hysteria at its most critical state), as well as to strengthening willpower, the imagination and the harmonization of bodily and spiritual faculties.

Attributes of rhythmic gymnastics such as flexibility, balance, harmony, spontaneity, good manners, grace, order, attention, and discipline are added, all of which are linked to femininity. There is a stable identification of

⁸⁴ Rey de Langlade, "Untitled", 17.

a type of gymnastics for each “sex”. “Nowadays, women’s gymnastics has become totally detached from men’s gymnastics. Its evolution is such that it has overtaken the latter, because men have fewer possibilities in the field of rhythm, plastic arts, and expression”.⁸⁵ Contrary to what was generally the case, women’s greater rhythmic, plastic, and expressive advantages in relation to men were shown, with a radical separation between men’s and women’s gymnastics. Like sex, gymnastics became binary and exclusive.

In 1956, an article entitled “Ideas for women’s physical education” was published in the CNEF’s official journal, which was the only one of its kind and had a wide circulation. In this article, Medau, one of the greatest figures of German rhythmic gymnastics, mentioned three requirements for an ideal physical education for women: health, beauty of body shape and posture, and grace of movement.⁸⁶ Through the enumeration of eleven theses with axiomatic brevity, the ideal physical education for women is associated with health (as opposed to sport), with biological maturational development (which determines spiritual development), with form and posture, relaxation, play, feeling, and with beauty and rhythm.

1. Before championships of sporting achievements, there must be championships of health.
2. Attention must be paid to growth and maturation power.
3. Reserve energy must be cultivated and perfected in every way.
4. New biological and psychological knowledge demands that physical exercise should be increased and expanded on the dynamic side, on the side of circulation and respiration.
5. The supreme form and the best state of training are only learnt in practice.
6. Attention must be paid to the body’s form and posture.

⁸⁵ Rey de Langlade, “Untitled”, 21.

⁸⁶ Henrich Medau, “Ideas para una nueva educación física de la mujer”. Translated by Baltazar Mezzera. *Anales de Educación Física*. Tomo I N.º 1, Enero-Febrero 1956, CNEF. Montevideo. The original text was published in German in the *Leibesübungen* journal (8), August, 1955, Francfort del Main, 79-83.

7. It is necessary to teach not only tension, but also relaxation.
8. Use more play as practice.
9. Cultivate willpower and cultivate feeling (the beauty of nature, form, movement).
10. Breathing is the gymnastics of old age.
11. Rhythm is fundamental to the physical education of women.⁸⁷

In addition to rhythmic gymnastics, Rey de Langlade recommends “training dance steps and dances”,⁸⁸ which, according to Herrera, except for violent and strenuous dances typified by acrobatic dance, offers a wide range of educational dances appropriate for women.⁸⁹

As can be seen when reading the construction of a modern scheme of educational gymnastics for women, he contemplates a series of works of which the Uruguayan Gymnastics Federation is interested in knowing their possibilities of application. Dance, in its natural or folkloric form, rhythmic, plastic art, working out with small apparatus, balance exercises, working out with Swedish walls (erroneously called ‘Swedish ladders’) and gymnastic jumps with and without support ARE ACTIVITIES OF WOMEN'S GYMNASTICS.⁹⁰

Women's gymnastics are essentialized in relation to certain specific characteristics of female bodies, according to the scientific knowledge of biology and medicine (anatomy, physiology, etc.).

“As for the workout with apparatus (large apparatus [German] or Swedish apparatus), women are also suitable for it and should take advantage of the benefits derived from its practice [...] This kind of workout can and in many cases should be done by women”.⁹¹ But Dr. Herrera clarifies:

⁸⁷ Medau, “Ideas para una nueva”, 83.

⁸⁸ Rey de Langlade, “Untitled”, 26.

⁸⁹ Herrera, “Untitled”, 9.

⁹⁰ Rey de Langlade, “Untitled”, 27.

⁹¹ Rey de Langlade, “Untitled”, 27.

with reference to the Olympic competitions in women's gymnastics, Uruguayan women, at present, would only be able to take part in simple individual or group exercises; exercises on parallel bars, benches and vaults without hoops would escape their possibilities. The future will show whether Uruguayan women's ability will progress sufficiently to use large gymnastic apparatus, as established by international programmes.⁹²

This prohibition is based on two aspects: "We are removing a great danger to the physical integrity of our women and at the same time we are eliminating an element that creates a sensibility that is alien to women's idiosyncrasy".⁹³ There is a certain contradiction: on the one hand, the argument is based on physical reasons because of insufficient muscular development due to the lack of physical education at school; on the other, it is based on temperamental aspects, on a "sensibility" that is opposed to her supposed identity. The latter overrides the former, labelling and pigeonholing Uruguayan women as submissive or inferior to European women who, conversely, do practise gymnastics with apparatus and are not forbidden to do exercises on parallel bars, horizontal bars, rings, ropes, and vaults with hoops. In conclusion to her work, Nelly Rey de Langlade recommends:

GIVEN THE CURRENT STATE OF WOMEN'S GYMNASTICS IN URUGUAY, WE CONSIDER:

[...]

2) That the aesthetic, rhythmic and plastic values so typical of female life are contemplated in modern female educational gymnastics, being therefore, and given the lack of previous basis, inadvisable to introduce purely rhythmic, plastic and expressive forms of workout. Example: Works by DALCROZE; LABAN; BODE; MEDAU; STEBBIS; IDLA; JALKANEN; etc.

3) That it is IMPOSSIBLE TO THINK AT PRESENT OF FEMALE WORKOUT IN LARGE APPARATUSES, even in its most attenuated forms. That, on the other hand, only in those countries

⁹² Herrera, "Untitled", 6.

⁹³ Herrera, "Untitled", 6.

which have intense political-social problems, where the action of women must in many cases equal and replace that of men, has gymnastics on large apparatus had any development. Example: Germany, Russia and some of their rudiments in countries which have been in intimate contact with them.

4) That as far as Women's Gymnastics Championships are concerned, their organization will be possible when the voluntary movement of women's gymnastics reaches greater dissemination. [...]

5) That educational dances and folkloric dances have an unquestionable value in women's physical education. [...]⁹⁴

In agreement with Herrera, Rey de Langlade⁹⁵ does not recommend gymnastics on large apparatus but explains the reasons why: it is practised in European countries where, due to political problems, women's actions have replaced men's actions. It then seems that what she proposes in the fourth point, for when educational gymnastics become more disseminated, does not refer to the practice of gymnastics with apparatus (despite having expressed that it was suitable for women). Instead, she would be referring to the skills involved in educational gymnastics and folkloric dances.⁹⁶ These two, together with educational dances, are the only advisable corporal practices within the field of gymnastics to be taught to the whole Uruguayan female population. Rhythmic gymnastics is reserved for small groups and only after a good basis of educational gymnastics, stressing formative and corrective-postural aspects over rhythmic ones.

⁹⁴ Rey de Langlade, "Untitled", 29-30.

⁹⁵ According to Dogliotti, Herrera and Rey de Langlade considered that gymnastics should be suited to the biotypical characteristics of Uruguayan women. Aspects such as differences in biotype, race and even material conditions between Uruguayan and European and Nordic women led these authors to recommend gymnastics without apparatus for Uruguayan women. For a detailed analysis on the subject, see: Paola Dogliotti, "Sexuality and Eugenics in Female Gymnastics in the Mid-Twentieth Century in Uruguay", 7

⁹⁶ The professor sees herself as a disciple of Dr. Juan Manuel Herrera, in a place of subordination in terms of her thinking when she expresses "Receive my admiration and this overwhelming satisfaction, seeing that I coincide in everything which was reported by the Head of the Physical Sports Education Section of the Medical Office of this National Commission, Dr. Juan Manuel Herrera, of whom I am honoured to be a pupil". Rey de Langlade, "Untitled", 29-30. The differences in the places occupied by men and women are reflected in this comment, which is not made in either Langlade's or Herrera's article.

FINAL CONSIDERATIONS

In this article, we sought to understand key aspects about the female sex and the effects of gymnastics on their bodies according to the work of Alberto Langlade, and two other Uruguayan scholars who were speakers at the Third Pan-American Congress of Physical Education. These lectures were published by the National Commission of Physical Education and integrated the bibliography of the Teacher Training Course at the Higher Institute of Physical Education.

The lectures show how, in this period, physical education teacher training was based on a discourse which was still marked by elements of biotypology: it sought to create normality standards for men and women in terms of organic parameters as well as other elements, including morality and sexuality. In a country that was considered the “Switzerland of South America” and a progressive land regarding women’s rights, there was a struggle to keep this “virtuous society” from behaviours that could threaten its development, and homosexuality was considered a threat to this process.⁹⁷ In the 1950s, even though homosexuality was not sanctioned by Uruguayan law, it was considered a threat to society since it jeopardized masculinity and manhood – considered key elements for this society.⁹⁸ Uruguayan psychiatrists were starting to consider homosexuality as a product of socio-contextual factor rather than being a physical issue,⁹⁹ but these changes in perspective did not mean a more positive view over sex-generic dissidences.¹⁰⁰ Among other things, this meant creating normality standards for men and women, and Langlade’s work on gymnastics for women expressed these parameters. Even though his writings and lectures did not explicitly mention homosexuality, they did reflect an idea that was present in Uruguayan society of the 1950s, that is: any individual had the “risk” of becoming homosexual if

⁹⁷ Leandro Kierszenbaum, “La defensa del orden; construcción de amenazas sociales y su neutralización en Uruguay (1945-1968)”, *E.I.A.L.* 25(2), 2014: 59-70.

⁹⁸ Kierszenbaum, *La defensa del orden*.

⁹⁹ Sempol, “Homosexual”.

¹⁰⁰ As Diego Sempol has demonstrated in his research, LGBTQ+ organizations in Uruguay only started to gain public visibility in the 1980’s, after the end of the dictatorship period. However, the results from their political engagement only started to appear after the 2000’s, when leftist *Frente Amplio* took office. See: Diego Sempol, *De los baños a la calle.*; Diego Sempol, “Homosexual: entre el insulto y el orgullo”.

exposed to “subversive” or “pervert” environments. In this sense, physical education teachers should be trained in the sense of risks and guaranteeing that, physical exercises, especially those addressed to women, would contribute to the “correct” education of the body, preventing women from developing an ambiguous corporality, marked by characteristics usually attributed to men.

The teacher training process in Uruguay exhibited some traits of sexism that established an ideal body based on a male, white and heterosexual model, while the only *other* possible type of body would be that of an equally white and heterosexual woman, yet naturally weaker and less agile. These models were to be copied by physical education students and subsequently cultivated by them in the professional field. Based on these models, when becoming professionals, their actions would probably seek to prevent any bodily ambiguity (however small), as well as any behaviour that deviated from the expected norm. Thus, the lectures given by these Uruguayan scholars at that congress in 1950 allow us to affirm that the field of physical education has been marked by the rejection of everything that might escape this model: effeminate men, virile women, “bibelot” or “effeminate” women, hysterics, transvestites, homosexuals. Physical education has therefore been constructed in the country as a place for the normalization of bodies and behaviours and as a stronghold of intolerance towards those who escape the binary and heterosexual ideal.

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FROM CHASTITY EDUCATION TO THE INCLUSION OF SEXUAL MINORITIES? TEXTBOOKS ON ETHICS (*DŌTOKU*) AND HYGIENE (*HOKEN*) IN CONTEMPORARY JAPAN

¿De la educación para la castidad a la inclusión de las minorías sexuales? Libros de texto sobre ética (dōtoku) e higiene (hoken) en el Japón contemporáneo

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Abstract. UNESCO recommends that textbooks should be used to help students dismiss stereotypes. By containing stories that give prominence to multiple gender categories (men, women, transgender, for example) and various sexual orientations, such as lesbian, gay, and bisexual, textbooks can show the prejudicial effect of the division of humankind into two sexes and the imposition of heterosexuality. However, even today, schoolbooks in many countries provide very little space for this topic. Japan is not an exception. Since the emergence of the modern school system in the nineteenth century, sexual education, especially topics related to sexual minorities, has been absent from schoolbooks. Due to the international and national gay rights movement and several legal changes regarding sex reassignment surgery, the situation started to change in the late 1990s. In this article we overview the changes in curriculum guidelines relating to sexualities from 1958 to 2017 and critically analyse the latest school textbooks (issued after 2017) on hygiene (grade 4) and on ethics (grade 7-8). We discuss whether sex education in Japan, which

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was called “chastity education” (junketsu kyōiku) until 1972 and has previously been dominated by heteronormative values, has indeed transformed into “progressive” education that embraces sexual diversities. Referencing official documents of the Ministry of Education, we will argue that the Ministry of Education is medicalizing sex change surgery and labelling transgender children as “children with special needs”, while still imposing existing heteronormative gender norms on other non-minority children.

Keywords: Japan; Sexual minority; School; Textbooks.

Resumen. *La UNESCO recomienda que los libros de texto se utilicen para ayudar a los alumnos a descartar los estereotipos. Al contener historias que dan protagonismo a múltiples categorías de género (hombres, mujeres, transexuales, por ejemplo) y a diversas orientaciones sexuales, como lesbiana, gay y bisexual, los libros de texto pueden mostrar el efecto perjudicial de la división de la humanidad en dos sexos y la imposición de la heterosexualidad. Sin embargo, aún hoy, los libros de texto de muchos países dedican muy poco espacio a este tema. Japón no es una excepción. Desde la aparición del sistema escolar moderno en el siglo XIX, la educación sexual, especialmente los temas relacionados con las minorías sexuales, ha estado ausente de los libros de texto. Debido al movimiento internacional y nacional por los derechos de los homosexuales y a varios cambios legales relacionados con la cirugía de reasignación de sexo, la situación empezó a cambiar a finales de la década de 1990. En este artículo hacemos un repaso de los cambios en las directrices curriculares relacionadas con las sexualidades desde 1958 hasta 2017 y analizamos críticamente los últimos libros de texto escolares (publicados después de 2017) sobre higiene (cuarto curso) y sobre ética (séptimo y octavo curso). Debatisimos si la educación sexual en Japón, que se denominó “educación para la castidad” (junketsu kyōiku) hasta 1972 y que anteriormente ha estado dominada por valores heteronormativos, se ha transformado realmente en una educación “progresista” que abarca las diversidades sexuales. Haciendo referencia a documentos oficiales del Ministerio de Educación, argumentaremos que este está medicalizando la cirugía de cambio de sexo y etiquetando a los niños transexuales como “niños con necesidades especiales”, mientras sigue imponiendo las normas de género heteronormativas existentes a otros niños no pertenecientes a minorías.*

Palabras clave: *Japón; Minoría sexual; Escuela; Libros de texto.*

INTRODUCTION

UNESCO regards school curricula and textbooks as a crucial means for promoting human rights and ending discrimination in all its forms.

This vision of education is at the very heart of the United Nation's Sustainable Development Goal. In order to prevent the reproduction of stereotypes and prejudices in all societies, UNESCO underlines the importance of learning to live together on the basis of respect for diversity. Along this line it suggests that the modes of representation within textbooks and curricula should appropriately reflect the diversity of different groups of individual students including, amongst others, sexual minorities.¹

Relating examples from past societies and telling stories that give prominence to other gender categories (besides men and women) and other sexual orientations (besides heterosexuality) can show the prejudicial effect of the division of humankind into two sexes and the imposition of heterosexuality.²

However, in many countries, topics related to sexual minorities have been absent from schoolbooks. For instance, even in the countries like France and Germany, where same-sex marriage has been legalized, schoolbooks give little attention to sexual minorities.³ A number of textbooks do not refer to sexual minorities at all or describe them as "special cases".⁴ In Japan, some of the latest textbooks reference sexual minorities, although neither same-sex marriage nor partnership laws for sexual minorities have been legalised. Japanese and international media reported this curricular change positively without detailed analysis of the relevant textbook contents. Although there are a number of publications on historical and contemporary textbooks, research focusing on gender issues, especially on sexual minorities, is very limited.⁵ Thus, the aim of

¹ UNESCO, "Making Textbook Content Inclusive". <https://www.unesco.de/sites/default/files/2018-09/Making%20textbook%20content%20inclusive.pdf> (accessed December 26, 2021)

² UNESCO, "International Teaching Guidance on Sexuality Education". <https://www.unfpa.org/sites/default/files/pub-pdf/ITGSE.pdf> (accessed December 26, 2021).

³ Autonomes Lesben- und Schwulenreferat an der Universität zu Köln, "Und das ist Homostadt. Schwulesbische Lebensweisen in NRWs Schulbüchern: Eine Studie im Rahmen der Aktionswoche gegen Sexismus und Homophobie an der Universität zu Köln, 2011". <http://lusk.de/wp-content/uploads/studie-schulbuecher.pdf> (accessed December 26, 2021).

⁴ Melanie Bittner, *Geschlechterkonstruktionen und die Darstellung von Lesben, Schwulen, Bisexuellen, Trans* und Inter* (LSBTI) in Schulbüchern* (Frankfurt: Gewerkschaft Erziehung und Wissenschaft, 2011), 57; Fanny Gallot et Gaël Pasquier, "L'école à l'épreuve de la théorie du genre", *Cahiers du genre*, 65 (2) (2018): 5-16.

⁵ While previous historical research has focused on the nationalistic and militaristic contents of textbooks, few have focused on the issues of sexual minorities. As far as we are aware, only Fujikawa

this article is to critically examine these latest textbooks by applying qualitative content analysis and investigate whether these textbooks actually embrace “progressive” values and celebrate sexual diversities. In our analysis we follow the UNESCO guidelines in UNESCO guidebook on textbook research (2010).⁶ First, based on secondary literature, ministerial documents and curriculum guidelines issued from 1958 to 2017, we review social and historical changes related to sexualities in post-war Japan, so that we can examine how sexual minorities were labelled differently with the course of time. Then we analyse the latest school textbooks on Hygiene (third grade) and on Ethics (seventh and eighth grades) by contrasting their contents with the “sex education” in Japan prior to 1972, which had been called “chastity education” (*junketsu kyōiku*) and was dominated by heteronormative values. These two subjects are the first subjects to include topics regarding sexual minorities. Some of the latest high school textbooks for home economics, society, and history also contain sexual minority issues, but in this article we will focus on the textbooks for the compulsory education. Although the official teaching guidelines of these subjects do not refer to sexual minorities, the aforementioned textbooks were approved by the Ministry of Education. Considering that the school attendance rate has been 99.98% since 1996⁷, one should not underestimate the impact schoolbooks might have on nurturing positive notions regarding diversity and inclusion.⁸

has examined the topic within in the broader context of his research into minorities. Hironari Saga, *Kōkokushikan to Kokutei Kyōkasho* (Kyoto: Kamogawa, 1993); Shinobu Anzai, “Interpellating children as imperial subjects: a content analysis of government-produced moral education textbooks (1903-1942)”, *Paedagogica Historica* (2023), DOI: 10.1080/00309230.2022.2155978; Ami Kobayashi, “Helden ohne Erfolg: Kriegshelden und das Heldentum in japanischen Schulbüchern (1910-1945)”, in *Helden und Heldenmythen als soziale und kulturelle Konstruktion: Deutschland, Frankreich und Japan*, ed. Steffen Höhne, Gérard Siary and Philippe Wellnitz (Leipzig: Leipziger Universitätsverlag, 2017): 147-162; Daisuke Fujikawa, “Consideration on the Treatment of Minors in Junior High School Moral Textbook”, *Jugyo jissen Kaihatsu Kenkyu* 12 (2019): 1-6.

⁶ UNESCO, “Guidebook on textbook research and textbook revision”, <https://unesdoc.unesco.org/ark:/48223/pf0000117188> (accessed April 6, 2023).

⁷ National Statistics Database of Japan, “Evolution of attendance rate and school inscription-chart 8- (shūgakuritsu shingakuritsu no suii)”. <https://www.e-stat.go.jp/stat-search/files?page=1&layout=datalist&toukei=00400001&tstat=000001011528&cycle=0&tclass1=000001021812> (accessed December 26, 2021).

⁸ Jun Oba, “L’organisation du système éducatif japonais”, *Revue internationale d’éducation de Sèvres* 42 (2006): 145-154.

HISTORICAL OVERVIEW OF JAPANESE SEX EDUCATION

From nineteenth century sexology to post-war sex education

According to the historian Gary P. Leupp, pre-modern Japanese society embraced a certain kind of homosexual relationships:

It is no secret to any careful student of Japanese society in the Tokugawa period (1603-1868) that during these two and a half centuries male homosexual behavior was extremely common, at least in towns and cities. Sex between males was not only widely tolerated among the articulate classes but positively celebrated in popular art and literature.⁹

This situation changed with the Meiji restoration (*Meiji Ishin*), the restoration of imperial rule to the Empire of Japan in 1868. The new Japanese government undertook a wide range of political and social reforms to strengthen Japan against the threat represented by the colonial powers of the day.¹⁰ The German civil code and the French model of a centralised state broadly fed the alteration of the new Japanese Constitution and Civil Code. In order to control the state population, the newly formed government introduced the household family system (*ie seido*). In this context, when married couples became the prescribed social norm, other sexualities and behaviours became marginalised. Homosexual behaviour was labelled with the modern term “homosexuality” (*dō-seiai*), translated from Richard von Krafft-Ebin’s 1894 publication, *Psychopathia sexualis*. In the process of importing the Western study of sexology, homosexuality and transgenderism gradually came to be considered deviant and abnormal.¹¹ Consequently, the modern school system which emerged in the late-nineteenth century considered married couples the sole parenting model.

In the early 1900s, the first domestic scientific discourses on sexuality emerged in Japan with specialists such as Sawada Junjirō (1863-1936)

⁹ Gary P. Leupp, *Male Colors, The Construction of Homosexuality in Tokugawa Japan* (Berkeley: University of California Press, 1997), 1.

¹⁰ Yoshiya Soeda, *Kyōiku-Chokugo no Shakaishi*. (Tokyo: Yusindo kōbunsha, 1997), 8.

¹¹ Aline Henninger, “Le dénigrement politique envers l’éducation gender free dans les années 2000”, *Japon Pluriel 11, Actes du colloque de la Société Française des Etudes Japonaises*, 2016.

and Yamamoto Senji (1889-1929) as well as reformist politicians like Abe Isō (1865-1949) promoting sex education.¹² The dominant perspective at the time, to which Abe and Sawada belonged, was based on eugenics. It viewed physical education and hygiene as a way to improve fertility rates, prevent infant mortality and pregnancy loss, and strengthen the national body. Unlike his contemporaries, Yamamoto underlined the importance of sexual intercourse not only as a means for reproduction but also as a form of pleasure.¹³ Inspired by the American birth control activist and sex educator, Margaret Higgins Sanger (1879-1966), Yamamoto held lectures on sexual education and also published the magazine “*Sexual Education*”. He acknowledged the right of homosexuals and those who had hereditary disease to enjoy sex as a form of pleasure. Yamamoto was, however, murdered by a right-wing nationalist in 1929. Besides sex education, Yamamoto was engaged in various social activities such as peace and labor movements and for that reason he was black-listed by the authorities.¹⁴ His assassination is generally associated with his harsh criticism against the Maintenance of the Public Order Act, but it can be also be seen as a symptom of the growing momentum for restricting social movements and ideas of any kind against the state ideology, including the ideology regarding sexual rights. From the 1930s onwards sexual education was offered only in limited contexts and for certain audiences; for instance, sexual education in the military was promoted for prevention of venereal diseases. Most girls had no access to secondary and tertiary education and received little formal information about sexuality, yet the importance of becoming “a good wife and wise mother” (*ryōsai kenbo*) was continuously underlined for girls in all social classes.¹⁵

¹² Mark Driscoll, “Seed and (nest) eggs of empire: sexology manuals/manual sexology”, in eds. Barbara Molony and Kathleen Uno *Gendering Modern Japanese History* (Cambridge: Harvard University Press, 2005), 193-197; Sabine Frühstück, “Managing the truth of sex in Imperial Japan”, *The Journal of Asian Studies* 59, no. 2 (2000): 333.

¹³ Emi Shibamoto, “The aim of human sexuality education theories during the 1920s in Japan: On the argument of Senji Yamamoto”, *Kyoto University Research Studies in Education* 51 (2005): 290-301.

¹⁴ Sookyung Yi, “Senji Yamamoto and Inosuke Nakanishi: two pacifists who were brought up in Uji: memory of the peace that Yoon Dongjoo left”, *Ritsumeikan-sangkyōsakai-ronshū* 46 (2010): 105-122.

¹⁵ Shizuko Koyama, “Ryōsai kenbo shisō to kōkyōikuseido (Good wife and wise mother idea and public school system)”, in ed. Ryōko Kimura *Jendā to Kyōiku (Gender and Education)* (Tokyo: Nihon Toshō Sentā, 2009), 262; Noriko Hashimoto, *Danjōkyōgakusei no rekishiteki kenkyū (Research on history of coeducation in school)* (Tokyo: Otsuki Shoten, 1995), 30.

Heterosexuality as a premise

After the Second World War the US occupation force, directed by General Douglas MacArthur, implemented educational reforms for the demilitarisation of Japanese education. The Division for Education and Public Information worked in consultation with Japanese officials in the Ministry of Education¹⁶ and the Japanese government issued the Basic Law on Education (*Kyōiku kihon hō*) in 1947. This Law underscored the importance of education for peace and democracy. It stipulated the 6-3-3-4¹⁷ education system and nine years of compulsory education, modelled on schooling in the United States.¹⁸ While teaching guidelines (*gakushū shidō yōryō*) issued in 1947 and 1951 under American tutelage were merely suggestive, the guidelines issued after 1958 strictly regulated the content of courses and textbooks.¹⁹

When the number of sex workers and those infected by venereal diseases increased in the aftermath of World War II, the Ministry of Education issued a notice in 1947 regarding “chastity education” (their term for sexual education) as a general guideline. More specific guidelines for chastity education were issued in 1949 to give teachers and local education boards detailed instructions for the teaching of chastity education. These documents regarded “chastity” as a prerequisite for sexual health, claimed that sexual intercourse should only be performed by married couples, and directed that one should avoid sexual intercourse before marriage.²⁰ The texts emphasized ethical aspects of sexual education while biological knowledge about sex and sexuality were given less

¹⁶ Until 2001 the official name of the Ministry was Ministry of Education, Science and Culture (*Monbushō*). The ministry was restructured and renamed as the Ministry of Education, Culture, Sports, Science and Technology (MEXT, *Monbu Kagaku shō* in 2001. For this article we use “the Ministry of Education” for all time periods we investigate.

¹⁷ The 6-3-3-4 system stands for six years of primary school, three years of junior high school, three years of high school and four years of university.

¹⁸ Gary H. Tsuchimochi, *Education reform in postwar Japan. The 1946 U.S. education mission* (Tokyo: University of Tokyo Press, 1993), 123-125.

¹⁹ The teaching guidelines were amended in 1968, 1977, 1989, 1998, and 2008 as well as in 2016.

²⁰ Nobuhiro Yamamoto et al., “Seikyōiku no rekishiteki henshen no bunkenteki kōsatsu” (Study on the historic change of the literature in sex education), *Memoirs of Osaka Kyoiku University. V, Curricula and Methods of Education and Allied Subjects* 39, no. 2 (1991): 203-215.

attention.²¹ Beginning in the 1960s, official education guidelines included more biological aspects like physiology, maturity and development of the body. However, ethical values including heteronormative gender norms continued to be stressed.²² While women were to be responsible for sexual hygiene, birth control, and children's sex education, the role of the father was not highlighted in the educational context. This "chastity education" encouraged youths to restrain their sexual desire until marriage and tied romantic relationships, marriage, and reproduction together.²³ In these documents neither heterosexuality nor homosexuality were explicitly mentioned. However, considering that sexual intercourse was strongly related to reproduction and marriage, and that marriage was only permitted for heterosexual couples at the time, it follows that the curriculum writers regarded heterosexuality as a fundamental premise.

Homosexuality as deviant behaviour

In the 1950s and 1960s discussions of LGBTQ+ issues and representations of LGBTQ+ people emerged in the popular press.²⁴ However, probably because the Ministry regarded heterosexuality as a basic premise, sexual minorities remained absent in official documents of the Ministry of Education. This changed in 1979 when the Ministry released a document that used the terms heterosexuality, homosexuality, and sexual abnormality. Tellingly, this was a document about deviant behaviour of pupils in junior high schools and high schools. Categorizing homosexuality as deviant behaviour, the Ministry provided statistical information and measures to be taken in order to prevent the various types of behaviours they regard as problematic, namely theft, violence, sexual misconduct, alcohol consumption, smoking, drugs, motorcycle gang membership, running away from home, and suicide. Homosexuality and behaviours

²¹ Mieko Tashiro, "Seikyōikukenkū jissen no seika to kadai, junketsukyōiku kara seikyōiku e" (Sex education research: from chastity education to sex education), *Minshu kyōikukenkūjō nenpō (Bulletin of Democratic Education Research Center)* 5 (2004): 106-126.

²² Haruo Asai, *Kodomo to sei (Children and sex)* (Tokyo: Nihon Tosho Sentā, 2007), 6.

²³ Hisao Ikeya, "Education for chastity (Junketstu Kyōiku) and sexuality-gender in the family", *The Japanese Journal of Educational Research* 68, no. 3 (2001): 274-285.

²⁴ Mark McLelland, *Queer Japan from the Pacific War to the Internet Age* (Oxford: Rowman & Littlefield, 2005), 59-100.

that may be understood as an expression of transsexuality were regarded as a form of “sexual perversion” or “sexual abnormality” and categorized under the sexual misconduct section.²⁵ Here, the Ministry of Education categorized the following acts as sexual perversion: stealing women’s underwear, playing Peeping Tom, committing incest, homosexuality, *fujogiri* (slashing women with a knife) and *fujoyogoshi* (dirtying women with semen, bodily fluids or excrement), exposing one’s genitals, wearing female clothes or female underwear.²⁶ The Ministry of Education explained that these acts were an abnormal expression of interest in females, even arguing that male youths sometimes tried to satisfy their sexual desire by hurting or dirtying females on the street. Interestingly enough, the section on sexual perversion only discussed “the case of youths” – a term limited to males; female students were absent. In the section on sexual misconduct and prostitution, however, only female students were addressed. In general, the Ministry of Education regarded “sexual perversion” of (male) youths as transitory behaviour in adolescence. While admitting that there were a very small number of “sexually perverse” or “sexually abnormal” youths, the Ministry added that those male behaviours were, in most cases, a kind of compensatory act. According to the Ministry of Education at the time, male youths might exhibit homosexual or transsexual behavior during adolescence if they had difficulties fitting into society or restraining their sexual desire.²⁷

In many cases those pupils become normal when they grow up, but some of them continue to be homosexual even if they become adults. Although one can observe a civil rights movement regarding homosexuality in the United States, generally speaking, it may disturb the healthy development of heterosexuality. At the same time, it is against healthy social morals and may destroy the sexual order. Therefore, it is unacceptable in this modern society.²⁸

In other words, the Ministry of Education claimed that youths who seemed to be homosexual or transsexual were actually heterosexuals

²⁵ Monbushō, *Seito no mondaikōdō ni kansuru kihon shiryō* (Basic data about problematic behaviours of pupils) (Tokyo: Monbushō, 1979), 58.

²⁶ Monbushō, *Basic data about problematic behaviours of pupils*, 63.

²⁷ Monbushō, *Basic data about problematic behaviours of pupils*, 63.

²⁸ Monbushō, *Basic data about problematic behaviours of pupils*, 62-63.

who expressed their heterosexuality in a deviant way. Moreover, the Ministry seems to have been aware of the existence of sexual minorities as well as the gay rights movements abroad.

From the 1980 to the 2000s: from the end of chastity education to the broadening contents of sex education

International and Japanese context from the 1980s

There were several changes regarding Japanese sex education in the late 1980s that corresponded to international changes regarding sexual rights and sexual health. In the United States and European countries, sexual health became highly politicized with the onset of the HIV epidemic. Japan officially recognised the first AIDs cases in the archipelago in 1985. During the last years of the 1980s Japan saw the rise of the so-called “HIV panic” (*eizu panikku*). Without providing clear information about HIV transmission, except that it was incurable, fear of HIV spread among the whole population. The Ministry of Health was, in fact, highly concerned by the transmission of the AIDS virus. At the beginning of the HIV panic, gays were targeted as being responsible for the spread of HIV.²⁹ However, in 1985 after admitting that transmission was not only linked to male homosexuality, the Japanese Ministry of Health set up information and prevention centres for all. In this context, the Ministry of Health was forced to rethink sex education courses, at least by explaining prevention of HIV and sexually transmitted infections.³⁰ However, the information published by the Ministry of Health was not immediately included within Ministry of Education-approved teaching materials. It was only in 1988 that the Ministry of Education started to provide information brochures for teachers, and it took until 1992 for them to provide a booklet about AIDS for high school students. However, prevention of infectious sexually transmitted diseases only became part of the official teaching plan in 1999.³¹

²⁹ Takashi Kazama and Kazuya Kawaguchi, *Dōseiai to iseiai (Homosexuality and heterosexuality)* (Tokyo: Iwanami, 2010), 1-3.

³⁰ Hisashi Sekiguchi, “Seikyōiku basshingu sono nerai to haikai” (Context and scope of sex education bashing), *Minshu kyōikukenkkyūjo nenpō (Bulletin of Democratic Education Research Center)* 5 (2004): 60-61.

³¹ Japanese Ministry of Education, “Kōtōgakkō gakushu shidōyōryō, Heisei 11” (High school guidelines of 1999). https://www.mext.go.jp/a_menu/shotou/cs/1320221.htm. (accessed May 15, 2022).

This official consideration for an “efficient” sex education was reinforced by the emergence of concerns for children’s sexual rights (*kodomo no sekushuaru raitsu*). Beginning in the 1990s, growing international considerations for children’s rights led to an international legal framework that takes children’s sexual rights into account. Internationally, sexual rights are seen as a way to better protect children, especially in relation to issues of abuse, prostitution and pornography – issues that also concerned the Japanese government and media.³² UNESCO has been promoting “Comprehensive sexuality education (CSE)”, defined as education about human rights, human sexuality, gender equality, puberty, relationships and sexual and reproductive health.³³ In reaction, the Japanese government started to take gender equality issues more seriously. In 1996 the Japanese government published an ambitious policy project aimed at reducing gender inequality. This document and its subsequent applications, which are embodied in the Basic Law for Gender Equality (1999) and the Basic Plan for Gender Equality (2000), seem to have gained consensus among political parties and elected officials. However, some politicians questioned the reforms undertaken in the field of education and, in the early 2000s, triggered a conservative media assault against all the initiatives promoting non-sexist education or gender-free education. Japanese feminists called this phenomenon “denigration of gender-free education” (*jendā furī kyōiku basshingu*).

In this context sex education was also targeted by conservative politicians and newspapers.³⁴ For example, an affiliated organization of the Ministry of Health published a booklet titled “Love and Body Book for Adolescence” (*shishunki no tameno labu ando bodi bukku*). The Ministry distributed 130,000 copies to ninth grade pupils in 2002. This booklet contained information about sexual health, birth control and homosexuality, among other topics. Conservative politicians claimed during one session at the national Parliament (Japanese Diet) that the booklet promoted “excessive sex education” (*kagekina seikyōiku*). Encouraged by the attitude of governing Prime Minister Koizumi Junichiro, who officially

³² Asai, *Kodomo to sei*, 130.

³³ UNESCO, “HIV and Sexuality Education”. <https://en.unesco.org/themes/health-education/hiv-sexuality-education> (accessed December 26, 2021).

³⁴ Aline Henninger, “Le dénigrement politique envers l’éducation gender free dans les années 2000”, *Japon Pluriel 11, Actes du colloque de la Société Française des Etudes Japonaises*, 2016.

said during a Diet session that he did not see the point of publishing such detailed books, some deputies and local politicians asked local education boards to recall the booklet.³⁵ This is an example of how conservative politicians, primarily from the ruling Liberal Democratic Party (LDP), tried to strengthen state control over sexuality and sex education for the purpose of revitalizing “traditional” values. Although the Koizumi government (2001-2006) and the following Abe government (2007 and 2012-2020) are known as neo-liberal governments, they also worked together with neo-conservative groups so to gain more support from conservative voters.³⁶ The recall of the booklet “Love and Body Book for Adolescence” ignited further attacks on sex education. In Summer 2003 conservative politicians and members of the education board of Tokyo accused the Nanao School, a special support school (1st to 12th grade), of offering “excessive sex education”. Even though school officials aligned their curriculum with ministerial guidelines, teaching materials for sex education were confiscated and several teachers were punished with salary cuts and forced school transfers. This so-called “Nanao school affair” left a long-lasting effect on sex education in schools. Still, some conservative politicians, especially those close to the former Prime Minister Abe Shinzo (PM 2012 to 2020), raised debates questioning the legitimacy of sexual education or gender equality at schools.

New guidelines dedicated to sex education

The Ministry of Education sex education program reflected changing societal conditions of the late-1980s as school guidelines were modified. Hygiene (*hoken*) textbooks added elements about sexuality.³⁷ For instance, one can find the explicit description of heterosexuality in the curriculum issued in 1989 for elementary schools. The official guidelines for hygiene in fifth class issued in 1977 aim to teach children the following point: “the body changes with age. In addition, during adolescence, the

³⁵ Satoshi Kodama, “Rinrigakuteki shiten kara mita seikyoiku no mondaiten (Problems of sexuality education from an ethical perspective)”, *FINE (Foundation of Information Ethics) Newsletter*, 13 (2002). <http://www.ethics.bun.kyoto-u.ac.jp/fine/newsletter/n13a2.html> (accessed December 26, 2021).

³⁶ For more on the political background please read the following: Christian Galan, Yves Cadot and Aline Henninger, *Loyauté et patriotisme (le retour) Education et néo-conservatisme dans le Japon du XXIe siècle* (Rennes: PUR, 2023), 297-322.

³⁷ Mikako Sawayama, “Rekisho no naka no sei to seishoku” (History of sexuality and reproduction), *Kyōikugaku kenkyū (The Japanese journal of Educational Research)* 72, no. 2 (2005): 193-196.

body's appearance changes, and the body becomes that of an adult, with phenomena such as the first menstruation or moulting". However, the guideline issued in 1989 aims to explain the growth of the body and psychological development through the following steps:

The body changes with age. In addition, during adolescence, the body's appearance changes, and the body becomes that of an adult, with phenomena such as the first menstruation or the first ejaculations.

The mind develops through several experiences in everyday life with each passing year. Also in adolescence, interest in **the opposite sex** is born.³⁸

From 1998 onwards, this content was taught in the fourth grade instead of fifth grade, but the content itself remained similar in guideline revisions in 1998, 2008 and 2017. The persistent emphasis on heterosexuality, "one becomes interested in the opposite sex", is striking. In the school curriculum issued after the Second World War (1947) there was no explicit narration about heterosexuality, though one can clearly see fixed gender roles. Researcher and primary school teacher Yutaka Mano assumes that it was not because the Ministry of Education at the time was tolerant towards sexual minorities but rather because they just took heterosexuality for granted. Thus, the increased use of expressions regarding "the opposite sex" from 1989 onwards probably reflects the social context at that time; namely, that the Ministry of Education was forced to reaffirm his normative vision (i.e., pupils are heterosexuals and should be heterosexuals). It was a way to oppose the discourse of Japanese feminism movements from the 1970s, which criticized the different treatment of pupils based on gender in school as reaffirming a patriarchal gender hierarchy. Feminist groups, such as the Federation of Women's Organisations (*Fudanren*) and the New Women group (*Shinfujin*), started to criticize gender discrimination in Japan.³⁹ On the occasion of the International Women's Year in 1975 and the Women's Decade, they

³⁸ Monbushō, "Shōgakkō shidōyōryō Heisei gannen sangatsu" (Directives of March 1989 for primary schools), www.mext.go.jp/a_menu/shotou/old-cs/1322235.htm, with hoken (hygiene) on www.mext.go.jp/a_menu/shotou/old-cs/1322451.htm (last access 13/04/2022).

³⁹ Takako Iida and Keiko Itani (eds.), *Supōtsu jendāgaku e no shōtai (Gender studies and sport)* (Tokyo: Akashi shoten, 2009), 175.

submitted reports to the UN that emphasised the need for gender equality in education, which led only to the gradual change tackling gender discriminations in Japan.⁴⁰

In the 1980s the gay right movements gained momentum in Japan and several organizations were established that provided information on such topics as sexual minorities and fighting against sexuality-based discrimination.⁴¹ For example JILGA, the Japanese branch of the International Lesbian and Gay association, was founded in 1984 and OCCUR, the first politically active Japanese gay organization, was founded in 1986. In 1994, soon after primary school hygiene textbooks began emphasizing heterosexuality, the Ministry of Education removed homosexuality from the list of deviant behaviours. But since the existence of sexual minorities was completely absent in official documents and school curriculum, this cannot be seen as a sign of normalization of homosexuality. As Watanabe and Komiya explained, Japanese school curricula have long been based on the assumption that all children are cisgender and heterosexual.⁴² The interest in the “opposite” sex is still mentioned without explicitly mentioning homosexuality or asexuality or any reference to sexual minorities.⁴³ In addition to changing guidelines in 1989, the Ministry of Education published a reference text about sex education in 1999. *Argumentation and Operating Procedures for Sex Education in Schools (Gakkō ni okeru seikyōiku no kangaekata susumekata)*⁴⁴ distances itself from the old ideology of chastity education, but it still contains the idea that sex education should be taught together with hygiene, morals, science, and domestic education for preventative and

⁴⁰ Hidenori Fujita (eds), *Jendā to kyōiku (Gender and Education)* (Yokohama: Seorishobo, 1999), 114.

⁴¹ Yutaka Mano, *Tayō na sei no shiten de tsukuru gakkō kyōiku sekushuariti ni yoru sabetsu o nakusu tameno manabi e (Towards knowledge for erasing gender discrimination using school education with an inclusive viewpoint of sexual diversity)* (Kyoto: Shoraisha, 2020), 176-182.

⁴² Akihiko Komiya, “kakureta karikyuramu to sekushuariti - kouzoteki boryoku/ sabetsu toshite no iseiaisyugiteki gakkobunka” (hidden curriculum and sexuality - structural violence/ heterosexual school culture as discrimination), *Annals of the Institute of Nutrition Sciences Kagawa Nutrition University* 15 (2008): 101-107. Also see Daisuke Watanabe, “Gakko ni okeru doseiai no <kesarekata> <arawarekata>” (How homosexuals are made <invisible> <visible> in schools), *Rekihaku- National Museum of Japanese History* 137 (2006): 11-14.

⁴³ Japanese Ministry of Education, “Shōgakkō gakushu shidōyōryō, Heisei 29” (Primary School Guidelines of 2008).

⁴⁴ Japanese Ministry of Education, *Gakkō ni okeru seikyōiku no kangaekata susumekata (Thinking and Developing sex education in school)* (Tokyo: Gyōsei, 1999), 105.

moralizing purposes. No amendments were made to this reference text when the guidelines were changed in 2008. This was likely due to the aforementioned political “denigration of gender-free education”.

From the 2010s: sex education changing along with social change

Introduction of Gender Identity Disorder diagnosis

The 2010s seems to have been a turning point for the Ministry of Education concerning sex education, since the Ministry started to recognise sexual minorities to a limited degree in some of their publications. This change occurred against the backdrop of legal recognition of sexual minorities increasing during the 2000s and 2010s, parallel to the rampant conservative backlash which peaked between 2003 and 2008. The first of these recognitions was the promulgation of a law allowing sex change in 2003, called the Gender Identity Disorder Special Cases Act (or Act 111), which increased public awareness of transsexuality.⁴⁵ With its adoption in 2004 the law enabled one to change their sex designation in the civil registry with certain preconditions, such as removing the gonads through medical surgery. In this sense, the law did not recognise gender identities outside binary boundaries, but regarded them rather as an “anomaly” to be corrected.⁴⁶ While the government had previously regarded transsexuality as a “temporary perversion of adolescence”, they now started to refer to transsexuality with the official term “gender identity handicap” (*seidōitsusei shōgai*).⁴⁷ Regarding lesbian and gay couples, in 2009 the Japanese Ministry of Justice recognized the marriages of Japanese citizens with foreign nationals whose countries legalized same-sex marriage. Since 2015 individual districts have issue a special type of attestation of living together (*pātonāshippu shōmeisho*) for

⁴⁵ Koichi Taniguchi, “Seidōitsuseishōgai no seibetsu no toriatsukai no tokurei ni kan suru hōritsu no hōritsu katei ni kan suru ikkōsatsu (Considering the new law about sex change for people with Gender Identity Disorder)”, *The Quarterly of Legal Philosophy*, 226 (2004): 212-220.

⁴⁶ Hiroyuki Taniguchi, “Japan’s 2003 Gender Identity Disorder Act: The sex reassignment surgery, no marriage and no child requirements as perpetuations of norms in Japan”, *Asian-Pacific Law and Policy Journal* 14 (2013): 108-117.

⁴⁷ In order to remove the stigma associated with the term disorder, the diagnostic label “Gender Identity Disorder (GID)” was renamed to Gender Dysphoria (GD) in 2013 with the release of the DSM-5. Official documents issued by the Japanese Ministries, however, still use the label “Gender Identity Disorder (GID)”. In this article, we use “trans” when we refer to transsexual persons but in quotes we use the term GID.

same-sex couples, though these attestations do not have legal effects. At the same time, the legalization of same-sex marriage has gradually become visible on the political level.

The Ministry of Education started to promote a dedicated status for transgender pupils from the 2010s onwards, but not by directly changing the contents of textbooks. In April 2010 the Japanese Ministry of Education published a note on measures to be taken to solve the various problems that “students with “gender identity disorders” (*seidōitsusei shōgai no aru jidō seitō*) “, i.e. transgender students, may encounter.⁴⁸ This cumulated in the *Survey to Assess Measures for Counselling Students with Gender Identity Disorders*, made public in June 2014.⁴⁹ This survey was followed by the publication of a series of measures to be implemented in elementary, middle, and high schools through instructions dedicated to teachers, issued in 2015⁵⁰ and 2016.⁵¹ At the same time, the international organisation, Human Rights Watch, published a critical report on Japanese schools that asserted the existence of a disparity between the official discourse of the Ministry of Education and the daily life of pupils.⁵² In 2017, when the guidelines on bullying prevention (*ijime*) were updated, specific mention of transsexuality (*seidōitusei shōgai*), sexual orientation (*seiteki shikō*), and gender identity (*sei jinin*) were

⁴⁸ Japanese Ministry of Education, “Jidōseito ga kakaeru mondai ni taishite no kyōikusōdan no tettei ni tsuite (*About consulting at school to solve problems that pupils can encounter*)”, 23 April 2010. http://www.mext.go.jp/a_menu/shotou/jinken/sankosiryō/1348938.htm (accessed December 26, 2021)

⁴⁹ Japanese Ministry of Education, “Gakkō ni okeru seidōitsusei shōgai ni kakaru taiō ni kan suru jōkyō chōsa ni tsuite” (A Survey about the situation related to implemented measures for people with Gender Identity Disorder at School), 13 June 2014. http://www.mext.go.jp/component/a_menu/education/micro_detail/_icsFiles/afieldfile/2016/06/02/1322368_01.pdf (accessed December 26, 2021)

⁵⁰ Japanese Ministry of Education, “Seidōitsusei shōgai ni kakaru jidōseito ni taisuru kimekomakana taiō no jisshitō ni tsuite” (Implementation of detailed measures relative to pupils with Gender Identity Disorder), 30 April 2015. http://www.mext.go.jp/b_menu/houdou/27/04/1357468.htm (accessed December 26, 2021)

⁵¹ Japanese Ministry of Education, “Seidōitsusei shōgai ya seiteki shikō seijinjin ni kakaru jidōseito ni taisuru kimekomakana taiō no jisshitō ni tsuite kyōshokuin muke (Guide for teachers teaching detailed measures relative to pupils with Gender Identity Disorder), 1 April. 2016. http://www.mext.go.jp/b_menu/houdou/28/04/_icsFiles/afieldfile/2016/04/01/1369211_01.pdf (accessed December 26, 2021)

⁵² Human Rights Watch, “The nail that sticks out gets hammered down, LGBT bullying and exclusion at Japanese school”. <https://www.hrw.org/report/2016/05/05/nail-sticks-out-gets-hammered-down/lgbt-bullying-and-exclusion-japanese-schools> (accessed December 26, 2021); Human Rights Watch, “Japan: anti-bullying policy to protect LGBT students”. <https://www.hrw.org/news/2017/03/24/japan-anti-bullying-policy-protect-lgbt-students> (accessed December 26, 2021)

added as elements to be taken into account to prevent bullying.⁵³ At first glance, one might think that the Japanese Ministry of Education was concerned with issues facing transsexual students; however, our detailed analysis of the documents shows that they do not question the binary of gender identities. Instead, they underline the importance of medical care and of creating an environment where students can “easily seek advice” without being discriminated against or taunted. Transgender children are portrayed as a sick population to be offered treatment, namely medical transition to the opposite sex. In a similar way “sexual minority” children are seen as potential victims of harassment. The documents do not refer to the relationship between bullying and non-binary genders, sexism, homophobia, and transphobia. Thus, as LGBT activists such as Torai Masae and some academics argue, the Ministry of Education does not seem to challenge the sexist and homophobic reality of schools, but rather reinforces the existing gender dichotomy.

SCHOOL TEXTBOOK ANALYSIS

The approval system of school textbooks in Japan

State control over textbooks in Japan can be traced back to the late-1800s when the Ministry of Education introduced the schoolbook authorization system in order to ensure the quality of school textbooks as well as to prevent corruption relating to the choice of schoolbooks. In order to tighten control over compulsory school education and to promote political ideologies in schools, the Ministry of Education started to publish state textbooks (*Kokute Kyōkasho*), which were used in all schools from 1904 onward. Although American occupation officials gave schools discretion in choosing textbooks for a brief period, the Ministry of Education reintroduced the textbook authorization system in the 1950s. The Ministry of Education has continued to exert firm control over textbook content.

As mentioned previously, the official teaching guidelines issued by the Japanese Ministry of Education regulate the contents of the school

⁵³ Japanese Ministry of Education, “Ijime no bōshitō no tame no kihonteki na hōshin” (Principles to implement to prevent bullying), 14 March 2017. http://www.mext.go.jp/component/a_menu/education/detail/_icsFiles/afieldfile/2017/04/05/1304156_02_2.pdf (accessed December 26, 2021)

curriculum. All regions must follow the guidelines and all schools, including private schools, may only use Ministry of Education approved textbooks whose content has been verified.⁵⁴ Moreover, the publishing houses authorised to publish textbooks for compulsory education in grades 1-9 are required to create content in strict accordance with the teaching guidelines. As a result, the textbooks of major publishing houses have generally become very similar in content.⁵⁵

In Japanese schoolbooks, as far as we investigated, there are no explicit homophobic expressions. However, not mentioning homosexuality at all in official school curriculums can be regarded as a form of discrimination and exclusion.⁵⁶ Scholars have shown that since 2001 the Ministry of Education started to form a tactical alliance with hawkish LDP politicians to push its own political agenda and to maintain its central administrative control over education.⁵⁷ Therefore, it is presumable to think that any content delivered by the Ministry of Education has been basically in line with the demands of conservative politicians. For instance, since the 2000s conservative politicians, especially those of the LDP, have been trying to revitalize traditional family values – such as separate social roles for boys and girls – and this led to the revision of the Basic Law on Education in 2006.⁵⁸

Hygiene textbooks

Healthcare and Hygiene classes (referred to as *hoken*) were introduced to high schools and middle schools in 1949, and to primary schools in 1951.⁵⁹ Content about anatomy and sex related information can be

⁵⁴ Christian Galan, “Contrôle scolaire, censure d’Etat, le cas du Japon”, *Japon Pluriel* 11, *Actes du colloque de la Société Française des Etudes Japonaises*, 4 (2010): 235-236.

⁵⁵ Eric Seizelet, “Les manuels scolaires au Japon”, *Savoir éducation formation*, 4 (1991): 699-718.

⁵⁶ Mano, *Towards knowledge in order to erase gender discrimination*, 33.

⁵⁷ Keita Takayama, “Japan’s Ministry of Education ‘becoming the Right’: neo-liberal restructuring and the Ministry’s struggles for political legitimacy”, *Globalisation Societies and Education* 6, no. 2 (2008): 141-142, consulted on 25 March 2023, doi: <https://doi.org/10.1080/14767720802061439>.

⁵⁸ Yuki Tsuji, “Abe seiken to josei seisaku” (Abe government and measures concerning women), *Hōgaku ronsō (Kyoto Law Review)* 176, no. 5/6 (2015): 348-379.

⁵⁹ Eiko Kaneda, “Kyōka to shiteno ‘hokentaiku’ no shiteki kosatsu” (Historical study of health and physical education in school curriculums), *Toyohogaku* 56, no. 3 (2013): 326-309.

found in the hygiene classes for primary schools. As previously mentioned, the official 2017 guidelines of the Ministry of Education for the hygiene curriculum focus on objectives that address “growth of the body and body development” at the end of the fourth grade and “how pupils should deal with psychological changes, discomfort and anxiety” during the sixth grade.

In the following analysis we take a closer look at the hygiene textbooks that teachers are required to follow, focusing on the 2020 teacher’s manuals for hygiene released by textbook publishers after the 2017 general guidelines revision and the 2019 Ministry of Education manual for teaching hygiene in primary schools.⁶⁰ We chose the following publishing houses: Gakken, Tokyo shoseki and Kōbun sho.in, which are widely used by primary schools.⁶¹ The respective textbooks divide the lesson into three or four parts with similar titles. The titles are:

1. My body began to change, 2. A body becoming an adult one, 3. Changes occurring in my body, 4. Develop in a healthy way the body (Gakken).

1. My changing body, 2. Changes of body during adolescence, 3. How can I make my body healthy? (Kobun Sho.in).

1. My body began to change, 2.1. Changes that took place during adolescence, 2.2. Changes that took place during adolescence, 3. Daily life to make my body grow in a healthy way⁶². (Tokyo shoseki)

In all three textbooks, the first session is dedicated to growth: for this purpose, the textbooks present pupils with a reference picture of physical

⁶⁰ Japanese Ministry of Education, “Ikiru chikara o hagukumu shōgakkō hoken kyōiku no tebiki” (Guide on hygiene for primary schools: raise “the power of live”). https://www.mext.go.jp/a_menu/kenko/hoken/_icsFiles/afieldfile/2019/07/12/1334052_2.pdf (accessed December 26, 2021).

⁶¹ For instance, 52% of districts in Tokyo use the textbooks of Gakken, 24% Kōbun sho.in, 20% Tokyo shoseki. Tokyo Metropolitan Board of Education, “Reiwa 2-5 nendo shiyo kyokasyo saitaku chikubetsu no saitaku kekka, koritsu shogakko (Choices of textbooks in districts 2020-2024, public elementary schools)”. https://www.kyoiku.metro.tokyo.lg.jp/school/textbook/adoption_policy_other/adoption_result/results_2020_public.html (accessed December 26, 2021).

⁶² Toshio Kunugi, “Sei no tayōsei to shōgakkō hoken kyōkasho genjō to tenbō” (Hygiene textbooks in primary school and diversity of sexuality: Actuality and perspective), *Kyōiku shisutemu kenkyū (Research on Education System)* 13 (2018): 194.

development expected in adolescence. The teacher should explain growth and emphasise that it can be irregular. The teacher then gives pupils their school health booklet and instructs them to record their height measurements on the sheet.

For the second session (point 2 for Kobun sho.in, point 2.1 and 2.2 for Tokyo Shoseki, and 2. and 3. for Gakken) the teacher should talk about the difference between adult and child bodies. To do this, the teacher can ask about the difference between him/her and the pupils. The teacher also emphasises the discomfort that puberty can cause. The teacher may do the following exercise: make the pupils write letters to themselves, which the teacher will then correct for the following session. During the second session, teachers should also name the female and male genitalia and point out how menstruation and ejaculation work, in parallel. To ensure that the children remember the names, the teacher can give them the anatomical section image to fill in as the teacher did on the blackboard, or as it is presented in the textbooks. At the end of the lesson, the teacher leads pupils to discuss male-female relationships, and the “interest in the other sex” that occurs during adolescence. The illustrations in the different textbooks show children (girls and boys) from the ages of six to twelve studying or playing together or arguing together. The texts alongside the illustrations focus on the fact that boys and girls begin to grow interested in each other, but also that they tend to quarrel. In this way, they depict difficulties in the relationships between girls and boys and the social separation of the sexes as natural, in a similar fashion to the stereotypes portrayed in John Gray’s best-selling 1992 book, *Men Are from Mars, Women Are from Venus*. The 2015 Kobun sho.in textbook below with its five pictures and accompanying text serve as a typical example. The phases of sexual development, as characterized by the interaction of the sexes, are categorized into the three different age groups shown in red and are accompanied by descriptions of general tendencies. The images and their captions are intended as characteristic examples.

The first phase, “*Until about age six: interest towards the opposite sex is weak*”, is accompanied by an image of girls and boys playing in a sandbox with the caption, “Boys and girls play together”. The second phase, “*Approximately age 7-9: Interest towards the opposite sex is born*”, depicts two situations. The upper image of boys playing basketball and

girls reading a book is subtitled, “It becomes more common for boys and girls to play among themselves”. The lower image contains the caption, “Boys and girls often quarrel”. In the third phase, “*Approximately 10-12: Interest in the opposite sex grows*”, a girl is shown reading in the background, while two boys chat in the foreground. This image is entitled, “One gossips about the opposite sex, intentionally pretends not to have interest, and so on”. In the final image a girl is shown having passed by a boy and experiencing a reaction to him, the caption reads, “Your heart beats wildly”.

Figure 1. Girls and boys relations



Source: Kobun sho.in 2015.

In Ministry of Education guidelines concerning the growth and development of the body, as in the case above, there is little difference between the 2008 and 2017 guidelines. They both stipulate that the following content should be taught:

(1) *The body is gradually changing with age. In addition, concerning the growth and development of the body, there are individual differences.*

(2) *The body, from adolescence, is becoming close to an adult body, it changes, you have first menstruations or ejaculations for example. In addition, interest in the opposite sex is emerging.*⁶³

However, there are changes to a separate document entitled “Explanation of Guidelines”. The main differences between the two versions are that the 2008 guideline mentions individual differences (*kojinsa*) in regard to the **timing** with which people develop secondary sex characteristics and interest in the opposite sex; also the guideline emphasizes that it “**occurs for everyone**”, while the 2017 guidelines just mention individual differences in this regard without any reference to timing or “everyone”:

Make pupils understand that during puberty, first menstruations, ejaculation, voice change, hair growth are occurring and interest in the opposite sex is emerging. In addition, concerning these changes, **it occurs for everyone**, but it can be early or late, and it is the phenomenon of getting an adult body, **although there are individual differences in the primary and secondary growth characteristics** (2008 guidelines).

Make pupils understand that during puberty, first menstruations, ejaculation, voice change, hair growth are occurring, and secondary growth characteristics will occur and that, in addition, interest in the opposite sex is emerging. Concerning these changes, **there are individual differences**, and this the phenomenon of getting an adult body⁶⁴ (2017 guidelines).

The aim of the MEXT using the expression “individual differences” is not clear, but we would argue that this expression allows teachers and publishers to interpret it as respect for sexual minorities. On the other

⁶³ Japanese Ministry of Education, “2008 Gakushu shidōyōryō” (2008 Teaching Guidelines). www.mext.go.jp/a_menu/shotou/new-cs/youryou/syo/tai.htm and “Shōgakkō gakushu shidōyōryō, Heisei 29” (Primary school teaching guidelines of 2017) https://www.mext.go.jp/content/1413522_001.pdf (accessed April 13, 2022).

⁶⁴ Japanese Ministry of Education, “Primary school guidelines of 2017”.

side, the Ministry can dodge complaints from conservatives since the expression can be also interpreted as there being individual differences in the development of secondary sexual characteristics. While the 2008 guidelines depict cisgender secondary growth characteristics and interest in the opposite sex as inevitable, the 2017 version leaves some, albeit small, room for interpretation. Thus, publishers can decide whether to mention that not everyone is interested in the opposite sex or only that the body changes differ from one person to another. In reality, the three textbooks we surveyed contain very little information in regard to sexual minorities: Gakken textbooks do not mention anything, except that changes can occur early or late (more in accordance with the 2008 guidelines). Tokyo shoseki mentions that “There are individual differences” without elucidating further, and Kobunsha mentions that “it depends on the person” (there are individual differences). In addition, Kobun sho.in publishing house’s textbook is the only textbook containing both texts and images for a heading entitled “Doubts About Your Sexuality” (*sei ni tsuite no nayami*). Two short paragraphs are dedicated to the topic. The speech bubble in the accompanying image reads, “This topic of femininity/being like a woman, masculinity/being like a man is somehow not my cup of tea”. Notably, the passage is followed by a section containing the number of Yorisoi telephone hotline with “Expert advice for people with worries regarding their sex or sexuality”.

Kobun sho.in has explained that the additional textbook page is to suit “contemporary topics”.⁶⁵ The Kobun sho.in textbook makes the 2008 guideline change about the non-heterosexual component most visible. In a 2019 article by Asahi Shinbun the above image was in fact used as evidence to show that the Ministry of Education was taking into account sexual minorities.⁶⁶ However, another article that appeared in a Japanese LGBT media outlet is more precise: it depicts changes in the visibility of non-heterosexuals as being far more a result of the Kobun sho.in fourth grade textbook and Bunkyoisha sixth grade textbooks than the Ministry’s

⁶⁵ Kobun, “Guide and reference materials to contribute to the important points of learning activities”. <https://www.kobun.co.jp/teaching-plan-2020/> (accessed December 26, 2021).

⁶⁶ Asahi Shinbun, “Kawaru shōgakkō no taiiku kyōkasho” (Physical education textbooks in changing primary school). https://www.asahi.com/articles/DA3S14058754.html?iref=pc_photo_gallery_breadcrumb (accessed December 26, 2021).

new guidelines.⁶⁷ This information about “inclusion of sexual minorities in primary school textbooks in Japan” was also reported in international media; however, the content is too vague, claiming that “LGBT inclusive information” has been added, which gives the impression that it is part of a general trend.⁶⁸ Other media focus on the publication of two books dedicated to children: *Living proud! growing up LGBTQ* (*Watashirashiku, LG-BTQ*), published in 2017 by Otsuki Shoten and the popular illustrated series *Different sex, different ways of living* (*Iro-iro na Sei, Iro-iro na Ikikata*) published by Poplar Publishing Co. in 2016.⁶⁹ Although media coverage in Japan and abroad was positive, noting that LGBT issues were included in primary school textbooks, the content of the guideline explanations and textbooks are ambiguous. In reality, new textbooks in 2020 still focus on “interest for opposite sex” and when they mention that some pupils will not follow this pattern, they never mention words such as “homosexuality”, “LGBT”, “transsexuality”, “normality”, “diversity”, or “sexual minorities”. Rather, they focus on disorders that occur in adolescence, including behaviour not fitting “interest for opposite sex”. Once again, the description gives an image of pathos, as expressed by the non-happy faces of the two kids in the image of Kobun sho.in textbook. The sole idea expressed about doubting one’s sexual identity or sexual orientation is to ask adults for advice, for instance at the Yoriso Hotline, a free hotline associated with the Ministry of Health and dedicated to advice regarding many of the worst problems one might encounter in life. It is uncertain whether this is helpful for queer pupils to think about themselves in a positive way.

In sum, after 2017 guideline revisions some of the new *hoken* textbooks in primary schools are mentioning the possibility of not feeling changes such as “interest for opposite sex”. However, the content remains

⁶⁷ Out Japan, “From next spring for the first time sexual minorities will be mentioned in primary school textbooks”. https://www.outjapan.co.jp/pride_japan/news/2019/3/21.html (accessed December 26, 2021).

⁶⁸ Gay Star News, “First LGBT-inclusive textbooks for elementary schools in Japan”. <https://www.gaystarnews.com/article/first-lgbt-inclusive-textbooks-for-elementary-schools-in-japan/> (accessed December 26, 2021) and Equal Eyes, “Japan: first LGBT-inclusive textbooks for elementary schools in Japan”. <https://equal-eyes.org/database/2019/3/31/japan-first-lgbt-inclusive-textbooks-for-elementary-schools-in-japan> (accessed December 26, 2021).

⁶⁹ Otras voces en educación, “Presentaron libros sobre transexuales para niños en Japón”. <https://otrasvoceseneducacion.org/archivos/235386> and Les Univers du Livre, actualitte, “Japon : prévenir les préjugés LGBT chez les élèves par les livres”. <https://actualitte.com/article/23820/international/japon-prevenir-les-prejuges-lgbt-chez-les-eleves-par-les-livres> (accessed December 26, 2021).

vague and official guidelines can be interpreted in a narrow way by teachers, who are often uneasy when dealing about sex education. As the 2008 and 2017 guidelines are almost the same concerning “adolescence”, 2008 and 2017 textbooks look similar, despite the wording around “individual difference” being a significant change for the Ministry of Education. In fact, when the Ministry of Education was asked at the House of Representatives in March 2017 why the guidelines didn’t cover sexual minorities, the Ministry’s response was simply that it was “difficult” to include elements about “sexual minorities”.⁷⁰

Ethics textbooks

Some ethics textbooks for the seventh to ninth grade started to include topics on sexual minorities for the first time in 2019.⁷¹ The ethics curriculum does not explicitly mention discrimination against sexual minorities; however, it is possible to integrate the topic of sexual minorities into ethics classes in connection with general themes like discrimination, prejudice, diversity and tolerance.⁷² Indeed, Yutaka Mano, who was an openly gay middle school teacher and is now giving lectures on sexual minorities in various institutions, reported that lectures on sexual diversities he offered have been mostly integrated into the ethics class.⁷³

The study of ethics (*shūshin*) was introduced to schools in 1872 for the first time, and in pre-war Japan it played a distinctive role for nationalistic moral education. The ethics class conveyed the image of the modern Japanese nation as a patriarchal family ruled by the emperor. The lives of Japanese people were protected by the emperor, the head of this family, and thus all his children should show filial piety to the emperor in order to return his kindness.⁷⁴ In this context, the virtue of chastity

⁷⁰ House of Representatives, “Public comment of the new guidelines”. https://www.shugiin.go.jp/internet/itdb_shitsumon.nsf/html/shitsumon/a193235.htm or access via https://www.mext.go.jp/a_menu/shotou/new-cs/1383995.htm (accessed April 13, 2022).

⁷¹ These textbooks were approved by the Japanese Ministry of Education (MEXT) in 2018 and started to be used in schools from 2019 onwards.

⁷² Mano, *Towards knowledge in order to erase gender discrimination*, 211.

⁷³ Mano, *Towards knowledge in order to erase gender discrimination*, 206.

⁷⁴ Seikou Toyozumi, “A study of the history of moral education (1): From the establishment of Shushin to the times of government-designed textbooks”, *Annual Report of The Faculty of Education* 49 (2015): 27-38.

was regarded as one of the essential moral values taught in ethics class, especially for female pupils.

Under U.S. occupation after the Second World War the subject *shūshin* was abolished, together with other subjects and school ceremonies which contributed to the indoctrination of children towards ultra-nationalism. The National Diet officially abolished the Imperial Rescript on Education in 1948; however, its heteronormative gender norms remained unchanged after the reintroduction of ethic class (*Dōtoku*) in the 1950s.⁷⁵ Until recently there were no schoolbooks for ethics, and classroom teachers were charged with teaching this subject.⁷⁶ In 2002 the Ministry of Education started to distribute teaching material for ethics classes entitled *Note of my Heart* (*Kokoro no Nōto*). This teaching material mentions nothing about sexual minorities; instead, the material contains sentences like “It is natural to be attracted to the opposite sex”. This tendency of ignoring sexual minorities and underlining heterosexuality remain even after the publication of new teaching materials in 2014 entitled “Our Ethics” (*watashitachi no dōtoku*). In 2015 the Ministry stipulated that the ethics class was to be taught as a regular school subject on a weekly basis. Along this line, from 2019 onwards, junior high schools started to use the newly published ethics textbooks. Different from teaching materials published by the Ministry of Education in 2002 and 2014, these new textbooks were published by private companies after the Ministry of Education approved the content.

In 2019 eight new ethics textbooks were approved by the Ministry of Education. Among them, three textbooks refer to sexual minorities, although only about 28% of junior high schools used one of these three textbooks.⁷⁷ The publisher Nihon-Bunkyo claims 25.3% of the market share and its ethic textbooks for the eighth and ninth grade refer to sexual minorities briefly. For the eighth grade, the textbook discusses human rights problems which need to be solved in Japan. Among other

⁷⁵ The Ministry of Education stipulated 34 hours of ethics class per year for the first grade and at least 35 hours for the 2d-9th grades.

⁷⁶ Seikou Toyozumi, “A study of the history of moral education (2)”, *Annual Report of the Faculty of Education* 50 (2016): 243-254.

⁷⁷ Sankei Newspaper, “Chūgakkō dōtoku kyōkasho shea, Tokyo shoseki ga sanwari de toppu” (Tokyo Shoseki claims top share, 30%, of textbooks for ethics in junior high school). <https://www.sankei.com/article/20181109-AETIY2ZS4BP3JBDIJVAB7NUPLM/> (accessed December 26, 2021).

topics, discrimination due to sexual orientations and sexual identities are mentioned.⁷⁸ The textbooks for the ninth grade published by Nihonbunkyo spare one page to briefly describe concepts related to sexuality; these include biological sex, gender identity, sexual orientation, and gender expression.⁷⁹ At the bottom of the page the textbook denies the clear dichotomization of male and female. Instead, it underlines the complexity and variety of sexuality and suggests that it is important to be oneself.⁸⁰

The ethics textbooks of Gakkō Tosho claim 2.4% of the market share and the textbooks for the eighth grade allow six pages for sexual minorities.⁸¹ Tagged with keywords like fairness, social justice, coexistence and prevention of bullying, the chapter underlines the importance of diversity. In the first two pages related terms like sexuality, Lesbian, Gay, Bisexual and Transgender are explained and difficulties sexual minorities face are mentioned. The next four pages introduce personal experiences, namely those of a lesbian woman, a transgender man, and a school nurse who supported transgender pupils. At the end, the textbook suggests pupils reflect upon and discuss the following point: prejudices one has towards sexual minorities, how to tackle the discrimination against sexual minorities, and how different types of people can live together.⁸²

The ethics textbooks of Nihon Kyokasho claim only 0.3 % of the market share and the ethics textbook for the eighth grade includes a four-page story about a pupil with “gender identity disorder” who loves singing.⁸³ According to the publisher, the aim of this chapter is to think about diversity and how one can develop one’s individuality and ability.⁸⁴ In the story the protagonist, obviously a transgender girl, explains the difficulties of being bullied by classmates, her brother and sister, and the resulting

⁷⁸ *Ethics for Junior High School: Asu o ikiru 2.* (Tokyo: Nihon bunkyo, 2018), 47.

⁷⁹ *Ethics for Junior High School: Asu o ikiru 3* (Tokyo: Nihon bunkyo, 2018), 145.

⁸⁰ *Ethics for Junior High School: Asu o ikiru 3*, 145.

⁸¹ *Ethics for Junior High School: kagayake mirai* (Tokyo: Gakkō Tosho, 2018), 172-177.

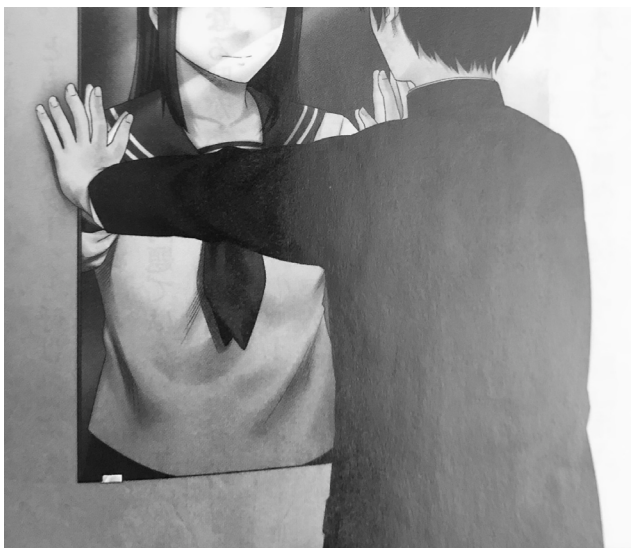
⁸² *Ethics for Junior High School: kagayake mirai*, 177.

⁸³ Sankei Newspaper, “Among textbooks for moral in junior high school”.

⁸⁴ *Ethics for Junior High School: ikikata wo mitsumeru* (Tokyo: Nihon Kyokasho, 2018), 64-67.

school phobia. For her, singing songs was the only way to escape from such a severe reality. However, during the eighth grade, her voice changed and she stopped singing. For her, singing with a deep voice was accepting that she is male and she could not stand it. She told her homeroom teacher about her problems and the teacher suggested that she keep playing music until she can sing again. Shortly before graduation, the student's homeroom teacher took her to town and showed her street musicians. The teacher told her that the street musicians are trying to express their feelings and thoughts and thus their songs are encouraging, although they are not necessarily skilled. After hearing this comment, the protagonist feels something is going to change. The story ends here and the textbook suggests pupils discuss the following points: the way the classroom teacher accepted the protagonist, the teacher's message to the protagonist, and the possible change of the protagonist in future.⁸⁵

Figure 2. Illustration of "So I keep singing"



Source: Eighth grade ethics textbook of Nihon Kyokasho, 2018 p. 64.

Different from the first two examples, which explain concepts related to sexuality or report personal experiences, it is not clear what kind of

⁸⁵ *Ethics for Junior High School: ikikata wo mitsumeru*, 67.

information or message the transgender story aimed to convey. The story is indicative of the current challenges transgender pupils face in school, which is reflected in the manner in which the protagonist describes her sexuality (transsexuality) as “Gender Identity Disorder” and “handicaps” (*shōgai*). This resonates with the discourse mentioned previously regarding transgender pupils, namely that transsexuality is still pathologized and transsexual pupils are regarded as “children with special needs”. Secondly, though the homeroom teacher shows understanding for the student, there is no evidence that the teacher or the student’s classmates changed something to make their school comfortable for her. Instead, the teacher took her to a station outside of the school to show street musicians playing in front of the station. The teacher admired the musicians for expressing their feeling honestly despite their lack of skills. The intention of the teacher here is not clear, but it is indicating that this how the student should think about herself, rather than suggesting that conditions in the school might change. This point aligns with the fact that the Ministry of Education recommends special care for transgender pupils but does not question heteronormativity.⁸⁶

CONCLUSION

Our study indicates that the Ministry of Education has been reluctant to acknowledge the need for comprehensive sexual education that departs from the abstinence-oriented sex education and that includes individual sexual rights. It even largely avoids using the proper word for sex education (*seikyōiku*) in official documents. However, content related to gender roles, anatomy and sexuality can be found in contemporary hygiene and morals texts for compulsory education. The Ministry of Education has imposed heteronormative gender norms on pupils through these subjects. After sexual minorities issues became more visible in the 1990s, LGBTQ+ pupils were no longer regarded as heterosexual pupils who express their heterosexual interest and love in a deviant way, and allusions to sexual minorities disappeared from school documents.

⁸⁶ Iwamoto Takeyoshi, “Gakkō kyōkasho de no seitēki mainoriti no toriatsukai o meguru genjō to kadai seibetsu iwa o motsukodomo no dō taiō suru ka” (Situation and questions about the inclusion of sexual minority in the textbooks (for third grade) which kind of measures for children having gender identity disorder), *GID gakkai zasshi* (*The Journal of the Japanese Society of Gender Identity Disorder*) 12, no. 1 (2019): 229-233.

Since the 2010s, sexual minorities have come to be regarded as vulnerable pupils who are targets of bullying and thus need special care and special attention, as indicated by the term “Gender Identity Disorder diagnosed”. Even today, notes issued by the Ministry of Education medicalize sex change surgery and label transgender children as “children with special needs” while still imposing existing heteronormative gender norms on other non-minority children.

Yet, as we showed with the example of hygiene and ethic textbooks edited after general guidelines reforms, some textbooks started to include sexual minority issues. Although the 2017 teaching guideline does not refer to minorities, we can see that over a long period of time textbooks began to include the question of non-heteronormative sexuality. Some primary school textbook publishers explicitly mention the case of children who do not fit their anatomical sex. The number of junior high school textbooks that refer to sexual minorities increased significantly in the two years from 2019 to 2021, from four to seventeen.⁸⁷ Most of those textbooks, however, do not directly refer to sexual minorities, while those that do include LGBTQ+ issues provide only a limited space for these topics. In some cases, there are misleading expressions (e.g., transsexuality as handicap).

This situation is mainly due to the approval system of school textbooks. As we mentioned previously, publishing houses are required to create textbook content in strict accordance with the teaching guidelines. If the teaching guidelines do not refer to sexual minorities, there is automatically little space left for this topic. As a result, a few publishing houses, whose editorial teams do believe topics related to sexual minorities is indispensable to avoid discrimination, took an initiative to include such information as “additional information”.⁸⁸ Another difficulty is that individual public schools are not permitted to choose such textbooks, even if the school staffs are interested in sexual minority issues.

⁸⁷ PRIDE JAPAN “Raishun kara no Chūgaku Kyōkasho de “Sē no Tayōse” ni tsuite no Kijutsu ga ōhaba ni fueru koto ga akirakani” (From next spring textbooks for junior high schools include more contents about “sexual diversity”). https://www.outjapan.co.jp/pride_japan/news/2020/3/31.html (accessed April 23, 2022).

⁸⁸ Asahi Shinbun, “Dōnaru? Kyōkasyo Sei no Tayōsei Sabetsu kaisyō he Manabu” (How textbooks will change? Sexual diversity and learning for tackling discriminations). https://www.asahi.com/articles/DA3S14563064.html?ref=mor_mail_newspaper (accessed April 30, 2022).

While each private school can choose its own textbooks, public schools must use textbooks chosen by their municipal or prefectural board of education.⁸⁹

On the political level, the difficulties in making changes to textbook content related to sex education are likely to continue, since the Ministry of Education only aligns itself with the conservative wing of the ruling party, the Liberal-Democratic Party (LDP). For the most conservative members of the LDP, education remains a means to achieve the ideal of the family where gendered social roles are fixed. This idea remains central to the rhetoric of LDP conservatives who continue, even after the denigration of gender free education and sex education, to propose different education for girls and boys. In this light, sex education is particularly targeted and is an easy target after the media coverage of the Nanao special school. In March 2018, Koga Toshiaki, a local elected official in the Tokyo Metropolitan Assembly, attempted to cause a scandal by again criticizing a hygiene course containing sex education. He used exactly the same approximations as in the summer of 2003 with the Nanao special school case even though the Supreme Court had condemned him for defamation against the Nanao special school and sentenced him to compensate the Nanao teachers in 2013. This is probably because Koga is convinced of the importance of sexist education and chastity education, and found support for his position in the political context marked by the second Abe government (2012-2020).

However, we can see a positive tendency here. Namely, Koga's campaign was not as successful in 2013 as it was in 2003. The media coverage of Koga's criticism was brief, as the local education committee of the Adachi district simply pointed out that the sex education courses mentioned were perfectly in line with the official curriculum. The Japanese press stopped reporting on this topic within a month. Furthermore, the media coverage of the sex education contents was balanced: the press consistently illuminated political tensions between the officials of the Ministry of Education (who advocate the minimum of sex education), the officials of the Ministry of Health (who only note problems caused by

⁸⁹ Japanese Ministry of Education, "Kyōkasho Saitaku no Hōhō" (How to choose textbooks). https://www.mext.go.jp/a_menu/shotou/kyoukasho/gaiyou/04060901/1235091.htm (accessed April 30, 2022).

the lack of knowledge about contraception, gender equality and sexual minorities), teachers, and LPD conservative politicians (who claim boys and girls should have distinct social roles). Moreover, most of the debates in the press from April 2018 onwards have been about teaching contraception, and not whether there is a need for sex education. Except for the most conservative politicians, most actors in the educational field seem to agree on the need for sex education, though each actor has its own objectives.

We need to keep carefully observing current changes of textbooks as well as the implication or reaction of the Ministry of Education to this latest trend. Even with minor changes in some textbooks, we argue that both the Ministry of Education and textbook publisher in general still teach heteronormativity. Heterosexual behaviour is persistently presented as the central pattern, and explicit description of boys' and girls' relations are cast in terms of "the opposite sex". Moreover, terms such as "gay", "lesbian", "LGBTQ" or "sexual minorities" never appear. Instead, transgender pupils are presented as "children with special needs", and they are "diagnosed" and expected "to be cured" of "Gender Identity Disorder" (GID). Other ministries, such as Ministry of Justice and Ministry of Health, barely use the term "sexual minority" (*seiteki mainoriti*) and "transgender" (*toransujendā*) either. Instead they use the term "gender dysphoria syndrome" (*seidōitsusei shōgai*).⁹⁰ This shows that the Japanese authorities' general attitude on sexual minorities is to label them as medically challenged individuals who require special support. This attitude clearly fails to align with UNESCO's vision for Sustainable Development aiming to end discrimination in all its forms. If we consider UNESCO's objective to tackle all biased and inaccurate representations of people through schoolbooks, there are still many things to do in the field of Japanese textbooks.

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⁹⁰ See, for example, the Ministry of Justice website explanation about sexual orientation discrimination (https://www.moj.go.jp/JINKEN/jinken04_00126.html) or the Ministry of Health orientations for the prevention of suicide, with a sub-section related to sexual minorities discrimination (<https://www.mhlw.go.jp/content/h30h-s5-1.pdf>) accessed April 14, 2022.

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THEY WANT TO AUTHORIZE HOMOSEXUALITY! (HETERO)SEX(UAL) EDUCATION AND GENDER IN DISPUTE, ARGENTINA, 1991-1997*


*¡Quieren autorizar la homosexualidad! La educación
(hetero)sexual y el género en disputa, Argentina, 1991-1997*

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Abstract. As at other times in the recent history of education in Argentina, sex education created strong and tense conflicts between modernizing forces and conservative ones. In this article we are interested in concentrating on studying the tensions between these two forces, focusing on the disputes around the inclusion of sexuality and the gender perspective within teacher training and the national curriculum during the 1990s. For this we explore positions, initiatives, and conflicts that took place in the orbit of the Ministry of Culture and Education (MCyE). We first address the formation of a commission established in 1991 for the writing of materials on AIDS and “sexuality education”, made up of religious “specialists” with recognition in the field of sex education. Second, we focus on the inclusion of gender perspectives, driven by the Program for Equal Opportunities for Women (PRIOM, 1991-1995). In a third section, we focus on the context of curriculum reform (1994-1997), in which the PRIOM included the word “gender” in the initial versions of the Common Basic Contents (CBC) for Basic General Education (EGB) and the Polimodal levels. Subsequently, we reconstruct the criticisms of Catholic agents to the initial versions of the curricular change. Finally, we analyse the final versions of the curricular texts to indicate the hegemony of conservative discourses.

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Keywords: Sex education; Cis-heteronormative system; Gender perspective in educational field; Feminism; Religious agents.

Resumen. *Como en otros momentos de la historia reciente de la educación argentina, la educación sexual generó fuertes y tensos conflictos entre fuerzas modernizadoras y conservadoras. En este artículo nos interesa concentrarnos en estudiar las tensiones entre estas dos tendencias, centrándonos en las disputas en torno a la inclusión de la sexualidad y la perspectiva de género en la formación docente y el currículo nacional durante la década de 1990. Para ello exploramos posiciones, iniciativas y conflictos que se dieron en la órbita del Ministerio de Cultura y Educación (MCyE). Abordamos, en primer lugar, la formación de una comisión establecida en 1991 para la redacción de materiales sobre el SIDA y la «educación sexual», integrada por religiosos “especialistas” con reconocimiento en el campo de la educación sexual. En segundo lugar, abordamos la inclusión de la perspectiva de género, impulsada por el Programa de Igualdad de Oportunidades para la Mujer (PRIOM, 1991-1995). En un tercer apartado, nos centramos en el contexto de la reforma curricular (1994-1997), en el que el PRIOM incluyó la palabra «género» en las versiones iniciales de los Contenidos Básicos Comunes (CBC) para la Educación General Básica (EGB) y el Nivel Polimodal. Posteriormente, reconstruimos las críticas de los agentes católicos a las versiones iniciales del cambio curricular. Finalmente, analizamos las versiones finales de los textos curriculares para señalar la hegemonía de los discursos conservadores.*

Palabras clave: *Educación sexual; Sistema cis-heteronormativo; Perspectiva de género en el campo educativo; Feminismo, Agentes religioso.*

INTRODUCTION

Since the beginning of the twentieth century in Argentina people with sexual- and gender-diverse identities have remained on the margin of what is morally acceptable, through the pathologicalization of scientific disciplines and exclusion of civil and political recognition. They were pigeonholed using terms such as “abnormal”, “amoral”, “sexual inverts”, “sissy children”, “men dressed as women”, “hysterical”, “fetishists”, and “uranists”.¹ The Argentine school, from its founding at that time, also

¹ Jorge Salessi, *Médicos maleantes y maricas. Higiene, criminología y homosexualidad en la construcción de la nación Argentina. (Buenos Aires: 1871-1914)* (Rosario: Biblioteca Estudios Culturales, 1995). Santiago Zemaitis, “¿Y antes de la ESI qué...? Moral, biologicismo y sanitarismo en las tradiciones de la educación sexual en la Argentina del siglo XX”, in *Ensamblajes de género, sexualidad(es) y educación. Intervenciones críticas entre el activismo y la academia*, comp. Gisella Giamberardino

contributed to this marginalization; from its beginnings, it was concerned with the sexual and gender education of children and young people, following the strong cis-heteronormative perspective. There were, for example, educational and psychological debates about the possible “masculinization of some and feminization of others” due to the daily contact between girls and boys in “mixed schools”, as well as “the risks” that coeducation brought. In this line, some educators questioned the expansion of “unisex schools” (“schools for boys” and “schools for girls”), fearing these could become propitious environments for the awakening of homoerotic desires. There were recurrent discourses that encouraged a normalizing sexual pedagogy to “avoid homosexuality”, and those that encouraged children to embrace heterosexuality so that they could “identify” with their “opposites”. Homosexuality was seen as a moment of “gender confusion” during sexual development.²

Educational prescriptions were also deployed with the objective that infants and young people identify with “their sex”: man and woman, and thus learn “their appropriate sexual role” and feel attraction to their “opposite”. All this was intended to ensure a future family/marital life for reproductive purposes, as an effect of the presumed natural complement of bodies. As a consequence, the history of sex education has had a strong cisheteronormative tendency to make visible and legitimize certain types of bodies, sexes, gender identities, and sexual orientations, omitting and silencing most sex-gender diversity or dissident identities of the LGBTQI+ collective. That is why researching historical pedagogical discourses –their silences, their presence, their operations of inclusion and exclusion– enhances our understanding of the institutional mechanisms of heteronormativity³ as the only sexual culture worth living and, with it, the gendered collective productions that have legitimized the school as a device for mass education.

and Matías Álvarez (Tandil: Editorial UNICEN, 2021), 27-46. Pablo Scharagrodsky y Santiago Zemaitis, “De vicios y extrañas perversiones durante la adolescencia. Sexualidades, sexos y relaciones de género en la paidología de Víctor Mercante (Argentina, principios del siglo XX)”, in *Discursos, prácticas e instituciones educativas*, comp. Ricardo Baquero, Pablo Scharagrodsky and Silvia Porro (Buenos Aires: Editorial Prometeo, 2020), 105-132.

² Louis-Georges Tin, *La invención de la cultural heterosexual*. (Buenos Aires: El Cuenco del Plata, 2012).

³ Judith Butler, *Los cuerpos que importan. Sobre los límites materiales y discursivos del “sexo”*. (Buenos Aires: Paidós, 2008). Eve Sedgwick. *Epistemología del armario*. (Barcelona: Ediciones de La Tempestad, 1998).

From the 1980s sex education was included as a subject of special interest within some states educational policies. This was possible after the end of the last civic-military dictatorship that began in March 1976 and culminated in 1983 with the inauguration of President Raúl Ricardo Alfonsín (1983-1989). The context of political, social, and cultural reopening allowed the development of some state programs for training in sexuality, such as workshops and educational experiences for teachers, young students, and families. In addition, the AIDS emergency and a growing increase in pregnancies were also historical conditions of possibility for the development of these sexual education initiatives (from a predominantly preventive approach focused on “risks” of sexuality) implemented by the national ministry of education and other provincial ministries.⁴

In this article we delve into some of the bids to, ultimately, define what subjects, what sexualities, and what sexual orientations could have visibility in public education. The work focuses on the 1990s in Argentina, which, as in other Latin American countries, was marked by a political, social, and economic situation with a strong neoliberal imprint. The Argentine case was due to the implementation of the policies instituted by the governments of Carlos Saúl Menem (1989-1995/1995-1999).⁵ This implied the alignment of the government with economic policies dictated by international financial organizations such as the International Monetary Fund and the World Bank.

In the educational sphere the menemist policy within the framework of the liberal economic program consisted of reducing the responsibility of the State as a financier and provider of public education. It established fees or private subsidies at all levels, starting with the universities, and reduced the public education system to as little as possible, among several other measures.⁶ Specifically, the set of educational reforms enacted through the Educational Resources Transfer Law in 1992, the Federal Education Law in 1993, and the Higher Education Law in 1995

⁴ Santiago Zemaitis, “Historia de la educación sexual en la Argentina contemporánea. Agentes, discursos y experiencias en torno a un significante en disputa (1960-1997)” (PhD. diss., Universidad Nacional de La Plata, 2021).

⁵ In 1995 Menem was re-elected as President by the Justicialista party. His re-election was possible due to constitutional reform in 1994. This enabled, among other things, the possibility of immediate re-election of the President and the reduction of the presidential term (from six to four years).

⁶ Adriana Puiggrós, *¿Qué pasó en la educación argentina?* (Buenos Aires: Kapeluz, 1996).

involved restructuring the educational system, especially at the primary and secondary levels. The so-called Basic General School would extend to nine years and Polimodal Education to three years. This profound change brought with it the need to update the federal curriculum. In this article we situate the initiatives and disputes regarding sexuality and gender perspective in this curricular reform. To do this, we analyze positions, initiatives, and conflicts that took place in the orbit of the Ministry of Culture and Education (MCyE).

In this essay we are interested in concentrating on studying the tensions between two forces⁷, focusing on the disputes around the inclusion of sexuality and the gender perspective within teacher training and the national curriculum during the 1990s. We first address the formation of a commission established in 1991 for the writing of materials on AIDS and “sexuality education”, made up of religious “specialists” with recognition in the field, such as Orlando Martín, Encarnación Madrid, Enrique Fabbri, and Luis Parrilla. Second, we focus on the inclusion of gender perspectives, driven by the Program for Equal Opportunities for Women (PRIOM, 1991-1995). Due to the feminist leadership of its main promoters such as Gloria Bonder and Graciela Morgade, the first “sensitization” training in gender perspective within Teacher Training began at the national level. In a third section, we focus on the context of curriculum reform (1994-1997), in which the PRIOM included the word “gender” in the initial versions of the Common Basic Contents (CBC) for Basic General Education (EGB) and the Polimodal in 1994. However, as other studies have shown, due to the close political relations between the Menem government and the Catholic Church, the inclusion of gender was strongly opposed in Catholic discourse, resulting in the exclusion of this term, among others, in the final versions of the federal curriculum intended for the EGB in 1995.

SEX EDUCATION FROM THE “RELIGIOUS PLURALITY” 1991-1992

Sex education was already installed as a health and educational need in Argentine society before the emergence of neoliberal reform. Since

⁷ Santiago Zemaitis, Carolina Ojeda and Myriam Southwell, “Democracia, sensibilidades y educación sexual en la Argentina: derivas de la clandestinidad (1984-1989)”, in *Educação Clandestina: dimensões conceituais e novas interlocuções*, ed. Éder Silveira Almeida, Diego Orgel dal Bosco and Marcos Vilella (Curitiba: EDIPUC, 2021), 143.

the 1980s, the Ministry of Education had already specified training proposals on issues of sexuality and AIDS for teachers and families. However, due to the complementary relationship between the Menem government and the Catholic Church,⁸ the approach to sex education, like education regarding AIDS, was fraught with tension within the Ministry. This resulted in Catholic hegemony in the definition of these issues and their inclusion in the national curriculum.

The first education minister of Carlos Menem's government, Antonio Salonia (1989-1992), was particularly interested in including sex education in Argentine schools. According to the testimony of Orlando Martín, Salonia proclaimed: "Something has to be done about sexual education, but it is difficult... so we are going to try to summon all religious creeds". Martín took this to mean that Salonia "had to provide sex education but did not want to have problems with religions".⁹ The minister was under pressure, "not so much from the circles of the Menemist government itself, but from society", since "the issue of sex education was already installed and was being implemented in several countries" and also because "there were many sex education lines everywhere".¹⁰

Given this social need and the concern for religious positions, Salonia organized a meeting with the country's most important religious authorities to anticipate his intention to found a Sex Education Program. At this meeting, the approach to two issues was defined: sex education and AIDS education. Starting in 1991 work began on a special commission to carry out this objective. Although the program was not able to be implemented in the long term not generate actions within the educational system, two texts were produced by the commission that addressed these issues. The person in charge of the Social Policies Program of the MCyE, Beatriz Balian de Tagtachian, coordinated these publications and invited editors for the texts.

⁸ For a more detailed reading on these processes, see Germán Torres, *Educación pública, Estado e Iglesia en la Argentina democrática (1984-2013)* (Bernal: Ediciones UNQ, 2019). Sandra Ziegler, "Los docentes y la política curricular en los años 90", *Cadernos de Pesquisa* 38, no. 134 (2008): 393-411. Eiros, Nélica, "Las iglesias y los contenidos escolares". *Práxis Educativa* 2, no. 1 (2007): 75-84

⁹ Orlando Martín, "Personal interview", interview by Santiago Zemaitis, August 19, 2017.

¹⁰ Martín, interview.

The convened commission was made up of different profiles of specialists. Luis Parrilla was a renowned Protestant pastor of the Emanuel Evangelical Parish, educator and sex educator at the Orientation Center for Family and Community Life (COVIFAC) and director of the “Laura y Henry Fishbach” primary school in Villa Mitre, an institution where he had developed pedagogical plans since the mid-1960s. The psychiatrist and psychoanalyst Carlos Robles Gorriti was Head of Pediatric Mental Health of the Italian Hospital of Buenos Aires. Alicia Pochelu was professor at the Argentine Catholic University and the University of Buenos Aires. The Jesuit priest Enrique Fabbri held a doctorate in Theology and was a specialist in anthropology of sexuality; he directed the Center for Research and Social Action (CIAS), was a founder of the Center for Family Studies (CEF), and also wrote about sex education in childhood and adolescence.¹¹ Rabbin Rubén Nisenbom was founder and director of the Sanctuary “Center for Universal and Ecumenical Spiritual Judaism”; Encarnación Madrid de Martín was a social worker and education inspector in the city of Buenos Aires and, as we mentioned, Orlando Martín was a theologian and professor of philosophy, well known for disseminating sex education issues in Catholic educational institutions belonging to the Superior Council of Catholic Education (CONSUDEC) and author of the first book on Didactics of sexual education published in 1985 (co-authored with his wife, Encarnación Madrid).

The group met fortnightly from April to June to prepare two documents published by the Ministry of Culture and Education in 1992. *AIDS: responsibility education of all* was a compilation of articles from national and international documents written during the 1980s and early 1990s. It included speeches from the World Health Organization, the Vatican, the World Council of Churches, the Argentine Episcopate Commission, the Central Council of Israelite Education of the Argentine Republic, and other complementary religious texts. The other document for teachers was *Education of sexuality*, a compilation of articles from the different members of the commission.

¹¹ Enrique Fabbri, *Pastoral de la realidad sexual* (Buenos Aires: CIAS, 1979). Enrique Fabbri, *Amor, familia, sexualidad* (Buenos Aires: Latinoamericana Libros, 1985).

In the opening words of this Series, Antonio Salonia pointed out:

Convinced of the importance of the integral development of man and that it deserves attention in all its facets: corporal, psychological, affective, spiritual, and also social, the Ministry of Culture and Education advanced in its treatment [...] In this frame of scientific seriousness and religious pluralism, this management convened specialists on the subject [...].¹²

The notions of “religious pluralism” and “integrality” were key to the religious discourse in the disputes over public education. The pluralism that Salonia points out came from the previous decade and functioned as a discursive strategy on the part of Catholic agents in the debates on public education. Specifically, this notion functioned hegemonically within the II National Pedagogical Congress, held between 1986 and 1987. According to Myriam Southwell, at this event the Catholic Church and conservative groups managed to organize the field of their arguments around the idea of “religious pluralism”, “[...] invoking the notion of plurality (which he did not exercise) to dispute with what he understood to be the state monopoly in educational matters [...] [the church] participated in a dispute over the signifier democracy charging it with the sense of plurality that made it possible to check the presence of the State”.¹³

Through the contributions of these participants, the concept of sex education was articulated in language within the Catholic tradition, such as “transcendence” and “spirituality”, justifying it under the notion of religious plurality. For this reason, Salonia insisted on the importance of the “integral development of man”.¹⁴ According to Martín, once again, the sexual education perspective agreed upon by this “religious conservative” group was an “integral approach” that differed from other approaches, which they called “partial”: biological, hygienic, socio-cultural, and moralistic. In Martín’s words: “Both Parilla and Pochelu,

¹² Antonio Salonia, “Respuesta educativa necesaria e impostergable”, in *Educación de la sexualidad*, comp. Ministerio de Cultura y Educación (Buenos Aires: Ministerio de Cultura y Educación, 1992), 10-11.

¹³ Myriam Southwell, “Postdictadura y política educativa: Una relocalización de viejos imaginarios en pugna”, *Políticas públicas* 1 (2007): 62.

¹⁴ Salonia, “Respuesta educativa necesaria...”, 9.

the rabbi and us, agreed that the religions were not opposed; on the contrary, we wanted an integral development, not an approach... let's call it hedonistic".¹⁵

In the chapter by Martín and Madrid, the authors proposed a "integral approach" or "integral-holistic personalist" approach that focused on "the gendered person and their integral development of sexuality as an integrating and qualifying area of the person".¹⁶ Each article dealt with a different aspect of sexuality and sexual education, although there were some identifiable limits: sexuality linked to "spirituality", to "transcendence", to "love", to the idea of "complementarity" but also of "completeness of being". It is worth saying that complementarity referred to the union between "man and woman". In his chapter "Love and education of sexuality", Enrique Fabbri pointed out, for example: "The man and the woman fulfill each other by reciprocally committing themselves. One is oneself for the other, and that is what fundamentally expresses sexuality".¹⁷

In the texts, heterosexuality is not explicitly mentioned (as the naturalization of the heterosexual norm was not made explicit), but we do find references to homosexuality and its visibility as part of social change and problems. Luis Parrilla, for example, pointed out a series of social changes that had occurred in previous decades. Among them he notes:

The consolidation of individual rights over those of the community group and that of sectorized groups (such as homosexuals and lesbians) are evident [...] AIDS exposes a sexuality that is not culturally manifest. Homosexuality occupies thought and opinion, both scientific and popular. Other forms of sexual life are exposed and their right to be lived is raised.¹⁸

¹⁵ Martín, interview.

¹⁶ Orlando Martín and Encarnación Madrid, "Educación de la sexualidad: consideraciones metodológicas", in *Educación de la sexualidad*, comp. Ministerio de Cultura y Educación (Buenos Aires: Ministerio de Cultura y Educación, 1992), 58-59.

¹⁷ Enrique Fabbri, "Amor y Educación de la sexualidad", in *Educación de la sexualidad*, comp. Ministerio de Cultura y Educación (Buenos Aires: Ministerio de Cultura y Educación, 1992), 45.

¹⁸ Luis Parrilla, "Sexualidad humana y nuestro tiempo", in *Educación de la sexualidad*, comp. Ministerio de Cultura y Educación (Buenos Aires: Ministerio de Cultura y Educación, 1992), 16.

For their part, Martín and Madrid described homosexuality and families that were not nuclear or traditional as some “problems linked to sexuality”:

a) Problems associated with the expression of adolescent youth sexuality:

- Anticipated teen relationships.
- Unwanted pregnancies.
- Abortion/newborn abandonment/incomplete families (single mothers), separation, domestic violence.

b) Problems from the private to the public:

- Existing situations that transcended the public, among which it is worth mentioning: the crisis of the institution of marriage, of family life, conflicts of ties.
- Homosexuality / feminism / gay / transvestism / lesbianism [...].¹⁹

The “specialists” and producers of these discourses were opposed to a “reduced or limited” sex education that focused on teaching genital aspects, since this meant linking sex education to “preventive issues”.²⁰ Even Martín tells us that on some occasions they had disputes with “the homosexuals”, “because they demanded a very reduced gaze from us. They had a more hygienist approach, more preventive...”.²¹

In almost all the articles in *Education of sexuality*, reference is made to the need to differentiate sexuality and genitalia and this can also be read through the silences, the omissions that the text in question contained. For example, consider the omission of methods to prevent sexually transmitted infections and methods to prevent teenage pregnancy. During the 1980s, these two issues became central to many proposals on sex education, due to the emergence of AIDS and the increase in pregnancy for young women. Those topics would be part of that “partial” approach that these authors wanted to get away from. These were the

¹⁹ Martín and Madrid, “Educación de la...”, 60.

²⁰ Martín, interview.

²¹ Martín, interview.

“preventive approaches”, traditional models of sexual education that included teaching about genital anatomy and physiology, about the prevention of sexually transmitted diseases and contraceptive methods.

At this point it is important to remark that until the 1960s religious institutions and actors defended the freedom of families regarding the formation of sexuality, excluding the school as an area that could take up this social teaching. In 1965, the Second Vatican Council (1962-1963), approved the document *Gravissimum Educationis Momentum*, for the first time expressing support for teaching sex education in schools.²² “Education for Love” or “sexual education with a[n] integral approach” was how the Catholic discourse generated meanings associated with the formation of children and young people who insisted on the importance of sexual abstinence in youth, the conformation of the nuclear family, marriage and procreation as the ultimate ends of all human existence. The term “integral” thus functioned as a discursive strategy to avoid mentioning sexual practices or contraceptive methods.

The 1992 publication *Education of sexuality* was financed by the pharmaceutical company Laboratorios Bagó and 20,000 copies were printed to be distributed in schools throughout the country. However, this objective was not fully realized as most of the printed materials were removed when Minister Jorge Alberto Rodríguez (1992-1996) succeeded Salonia at the MCyE.²³

The close relationships that the MCyE initially maintained with religious sectors, especially regarding pedagogical approaches to sexuality, continued in a sustained way in the curricular reform proposed by Menem’s government after 1992. At the same time, the publication in question reflects dominant ideas within religious discourse about the normalization of heterosexuality and the dismissal of LGBTQI identities and movements as part of “the problems of sexuality”.

Due to its strong sexual moralism, the interest of the Catholic religion in the legitimization of some social identities (the heterosexual, such as the naturalization of “being a woman” and “being a man”) and

²² Juan Cruz Esquivel, *Cuestión de educación (sexual): pujas y negociaciones político-religiosas en la Argentina democrática* (Ciudad Autónoma de Buenos Aires: CLACSO, 2013).

²³ Martín, interview.

the invisibility of others (not heteronormative), continued in disputes over public education regarding the curricular reform initiated in 1995. But to understand the resistance to these issues, we must first locate another ministerial initiative that promoted the inclusion of the gender perspective for the first time in teacher training, and then in the preliminary versions of the curricular reform.

THE INCLUSION OF “GENDER” IN TEACHER TRAINING AND CURRICULUM REFORM, 1991-1995

Salonia was not only motivated to develop sex education. During his tenure, he also put forward an initiative for the inclusion of the gender perspective, parallel to the formation of that Sexual Education Commission. The National Program for the Promotion of Equal Opportunities for Women (PRIOM) worked within the MCyE from 1991 to 1995, led by two feminist scholars: the psychologist Gloria Bonder and the pedagogue Graciela Morgade.

PRIOM began in the previous decade during the government of Raúl Alfonsín (1983-1989) as an institutional means to promote greater visibility of women’s political situation, particularly concerning their participation in public policies. In 1983, the year of the return to democratic life after the last civic-military dictatorship (1976-1983), the Women’s Equality Program (1983-1987) was founded. This Program worked within the Secretariat of Human Development and Family of the Ministry of Health and Social Action. In 1987, it became the Undersecretary for Women within the same Ministry (1987-1989). Then in 1991, a group of women graduates from the School of Psychology and Letters of the University of Buenos Aires created the National Council for Women (CNM) which was dependent on the national government. This Council was charged with promoting, coordinating, and evaluating equal opportunity policies for women in all areas of the state. Among its first institutional actions, the Council created PRIOM.²⁴

²⁴ Gloria Bonder, “El PRIOM en el Área Educativa. 1991-1995”, in *Panel: La ESI y la perspectiva de género en educación: antecedentes, debates y negociaciones*, Prosecretaría de Géneros y Feminismos. Facultad de Humanidades y Ciencias de la Educación. Universidad Nacional de La Plata (La Plata: September 28, 2020).

Because of her academic relationships and her feminist militancy, Gloria Bonder was summoned to form part of this new program within the CNM, that is, the PRIOM. Quickly, the program was assigned to the Ministry of Educational Planning and Evaluation within the MCyE.²⁵ From its beginnings until its completion in 1995 (for reasons that will be explained later), Bonder was the Technical Coordinator and main promoter. As Operational Coordinator, Bonder invited her former intern at the National Council for Scientific and Technical Research (CONICET), Graciela Morgade, to join the effort. Morgade was a pedagogue who specialized in gender and education issues.²⁶

In its first years of development, PRIOM organized teacher training programs on gender issues and non-sexist education in different teacher training institutes in more than 20 provinces of the country. As Morgade recalls, “it was very difficult in the beginning, because we did not come from a strong tradition in matters of education and gender. We came from being women sensitized with feminism, with training in education, so, basically, those sensitization actions were what we did to carry out and then leave the material and then continue working on it”.²⁷

In these spaces for teacher training, the PRIOM teams brought new topics to the Argentine teachers, such as the contributions of Gender Studies and with it, the possibilities of the concept of gender to make social inequalities visible, the importance of equal opportunities for women and the existence of heteronormative presumption in the representations

²⁵ In 1966 she graduated with a degree in Psychology from the University of Buenos Aires. Her training in Women’s Studies and Gender theories was abroad, when she began traveling to the US in the 1970s. In 1979, during the dictatorship, she founded the Center for Women’s Studies (CEM). Bonder was also the creator of Postgraduate Specialization and Women’s Studies at the Faculty of Psychology, a pioneering experience in the Argentine university. With the return to democracy in 1983, Bonder already defined herself as “a militant of feminism”. Gloria Bonder, “Personal interview”, interview by Santiago Zemaitis, July 27, 2020.

²⁶ In the 1990s, Morgade earned a degree in Educational Sciences from the Faculty of Philosophy and Letters of the UBA and in 1990 she obtained her Master’s degree in Social Sciences from the Latin American Faculty of Social Sciences (FLACSO). Morgade would also focus her academic activity in educational research and gender, inaugurating at the beginning of the 1990s an emerging field on the intersections between gender, feminist studies, education and pedagogical reflection. In 1992 she published *La determinación del género en el trabajo docente* [*The determinant of gender in teaching work*], edited by Miño and Dávila. In 1997, she compiled *Mujeres en la Educación* [Women in education] for the same publisher. Graciela Morgade, “Personal interview”, interview by Santiago Zemaitis, June 20, 2020.

²⁷ Morgade, interview.

of social identities. They discussed perspectives on how gender functioned in school life, the operations of androcentricity in scientific and school disciplines, reviews of discriminatory and/or sexist practices against women within schools, the elimination of gender stereotypes, contributions of the feminist movement to pedagogy, critiques of the historical associations between the teaching profession and the identity construction of women as “natural educators”, among other topics.²⁸

In the materials written by PRIOM for these training spaces, they also invited teachers to reflect on the opposition that gender approaches brought, the fear that these changes caused, in some sectors:

Another of the most common fears is that changes in male and female roles affect people’s sexual-genital orientation. Specifically, homosexuality is feared [...] In this way, other fears or misunderstandings will also go away: the change in the roles of men and women as a threat to the family, the contradiction between these new approaches and other knowledge learned in previous training (for example, some stereotyped notions within of psychology or pedagogy), feminism is understood as opposition to men...²⁹

Those fears identified by PRIOM would be the same ones expressed by sectors of Catholicism in their questioning of new theoretical and pedagogical perspectives for the educational system, a certain danger about the entry of “social constructivism” to the detriment of essentialist views on the genders that characterized the discursive strategies coming from these conservative groups.

That is why Bonder and Morgade were aware that they should also take strategic positions for the inclusion of this new perspective. The concept of “equal opportunities for women” turned out to be a strategic expression, “a gateway to the public meta-agenda of that moment”.³⁰

²⁸ Gloria Bonder, “Programa Nacional de Promoción de la Igualdad de Oportunidades para la Mujer en el Área Educativa”, in *Educando a mujeres y varones del siglo XXI. Nuevas perspectivas para la formación docente*, edit. Gloria Bonder and Graciela Morgade (Buenos Aires: Ministerio de Cultura y Educación, 1993), 47.

²⁹ Bonder, “Programa Nacional de...”, 22 y 23.

³⁰ Bonder, “El PRIOM en...”.

According to Bonder, “this was all a tactical question [...] who was going to oppose equal educational opportunities for women?”³¹ This strategy was key to including the gender perspective, especially the visibility of the condition of women within the public policies of the State. This allowed them to include the gender perspective, both within the Ministry of Education and in the teacher training instances they organized.

In any case, it is interesting to note that the objectives and core ideas of work centered on “women” were later expanded in 1993 when PRIOM modified its central tenet of work from “equal opportunities” to a focus on equity in gender relations. As mentioned before, Minister Salonia had given free rein to the development of PRIOM after conversations with Bonder: “[Salonia] was very much in agreement with the functions of the PRIOM [...] [Between conversations] he told me: “What do you want to do?” And I tell him: “Well, I think people need to be made aware of this issue [...]”. He looked at me and said: “Look, Gloria, what isn’t in the curriculum isn’t in the school”. And I understood... and then I knew that the great challenge was to incorporate the theme [the gender approach] in the curriculum reform”.³² In this way, and unlike what happened with the Sex Education Commission, both during the Salonia administration and his predecessor, Minister Jorge Alberto Rodríguez (1992-1996), the intention to include the gender perspective did not stop.

In the XII Extraordinary Assembly of the Federal Council of Education (resolution 26/92) of the MCyE, the need to replace the old Common Basic Curriculum Guidelines (LCBC) with the Common Basic Contents (CBC) for initial, primary, and secondary education was established. Because of the inclusion of gender in the reform that was being planned, PRIOM held a series of conversations with Cecilia Braslavsky, who was in charge of technical coordination of the curriculum reform process. By 1993, according to Bonder, “We had already included gender... well we didn’t put “gender” on it, but we explained what we meant by that and how it was an expression that referred to “gender inequality” in a patriarchal system. There we go much further. And we made recommendations for all primary school subjects [EGB], all curriculum content recommendations”.

³¹ Bonder, interview.

³² Bonder, interview.

This process relied on dialogues with all the curriculum teams that were working on drafting of the contents and tenets of said reform. According to Morgade, the curriculum area that was most open to this inclusion was Ethics and Citizenship Training, which was led by Daniel Pinkas and Carlos Cullen. Despite this, according to Morgade, “We would have wanted much more themes... But well, we also understood that politically it was what he could achieve and it was a lot. To such an extent it was precisely what finally ended up being the key in the discussion with the Catholic Church”.³³

GENDER AND SEX EDUCATION IN DISPUTE DURING CURRICULAR REFORM, 1994-1997

The Federal Law of Education was promoted by Menem in 1993 and, with a strong neoliberal imprint, replaced the first educational law of Argentina, the Common Education Law 1420, passed in 1884. The new law established a new structure for the educational system that had to be adapted in each of the country’s provinces.³⁴ This restructuring, accompanied by a strong process of educational decentralization, included a revision of the curriculum contents for the different levels of the national educational system.³⁵ In this way, the curriculum reform process began with a public consultation carried out in 1994. In this initial reform process, a wide variety of social actors from all over the country participated through forums, surveys, and opinion interviews aimed at the public, families, educational communities, teachers, provincial educational authorities, youth, government organizations, businessmen, economic sectors, academic specialists, among others.

³³ Morgade, interview.

³⁴ In general terms, the law proposed redesigning the structure of the educational system by extending primary education from 7 to 9 years, thus producing not only a cut in the first two years of schooling at the former secondary level, but also incorporating these years into primary schooling (two-year primary education at the secondary level). Secondary education was reduced to only three years, under the name of “Middle School” or “Polimodal”. Another of the key points of the reform was linked to the processes of administrative decentralization of the establishments, without financial support to the provinces. Finally, it should be noted that this regulation was accompanied by a battery of targeted policies (the Educational Social Plan, the Retention Scholarships, among others) aimed at improving the equity of those less favored sectors.

³⁵ Adriana Puiggrós, *Luchas por una democracia educativa (1995-2018)* (Buenos Aires: Galerna, 2019).

Throughout November, the Ministry of Programming and Educational Evaluation of the MCyE worked with provincial authorities to reconcile all the contributions collected during the consultation process. As a final result, that same month, the XXII Assembly of the Federal Council of Education approved a first version of the Common Basic Contents (CBC) for the initial education level and the Basic General School (EGB) through resolution 39/94. This regulation also expressed the need to start an evaluation process of this first version “to introduce pertinent modifications” for the definitive curriculum design.

Thanks to the consensus achieved by PRIOM, the term “gender” was then included in a novel way in EGB subjects such as Social Sciences and Ethics and Citizenship Training. At the same time, mention was made within the Natural Sciences of content on “sexuality” and “AIDS”.³⁶

One of the sectors most interested in reading and reviewing the content that had been reached by consensus and synthesized during that consultation process was the Catholic Church. The revision proposed by this sector was carried out by the Catholic University of La Plata (UCALP). In its Report on the CBC of Argentine education, the UCALP (1995) reviewed the contents of all subjects. Regarding the contents of this analysis, for example, they criticized the Ethical and Citizen Education proposal, since according to this review: “The family –natural and primary agent of education according to the FEDERAL Law– is totally minimized and relativized [...]”.³⁷ They continued: “Relativized, in relation to the family and all its contents, the reference to marriage is completely omitted as if it were an unimportant topic to Argentines, and without personal and social relevance”.³⁸

Aware of the imminent development of the Fourth World Conference on Women in Beijing in September of that year, the text was published in May and already projected the discussions that the ecclesiastical leaders gave in the event and in the framework of the conservative intellectual

³⁶ Consejo Federal de Educación, Resolution 39/94. (Buenos Aires: Ministerio de Cultura y Educación, 1994).

³⁷ Universidad Católica de La Plata, in *Informe de los Contenidos Básicos Comunes de la Educación Argentina*, ed. Universidad Católica de La Plata (La Plata: Facultad de Ciencias de la Educación, 1995).

³⁸ Universidad Católica de La Plata, *Informe de los...*, 50.

lobby: opposition to the term “gender”, what would be called “gender ideology”. The UCALP document warned: “The integration of the “gender” perspective in the new Basic Contents is already planned [...] It is planned to overcome the “biologist” conception that considers that the roles of men and women are based on natural order, teaching that they are specific to each culture and present innumerable variations”.³⁹

About “sex education”, UCALP pointed out that this term “is referred to in a large part of the Natural Sciences, and on the moral plane the relationship between sex and love does not include the slightest allusion to the constitution of the family”. The treatment of AIDS in the preliminary version was also under suspicion since “concerning health it can easily be used to induce sexual permissiveness, through recommendations on the use of condoms”. In an articulation strategy pejoratively combining gender-AIDS-sex education-homosexuality, the document concludes:

In light of what has been seen [...] on the theme of “gender”, the insistence on “education in the recognition of basic human rights for social life, full and without discrimination for reasons... of gender...”. This supposes a frankly permissive sexual education regarding homosexuality.⁴⁰

Within the Report issued by UCALP, in an annex entitled “The common basic contents against the Federal Education Law” signed by the parish priest Jorge Luis Lona, a call is made “with concern” about the approval of said contents. According to this parish priest, “What is decided will depend on whether our children and young people receive an authentic education, or whether they are subjected, along with their teachers, to a process of ideological deformation”.⁴¹

Even with the previous criticisms, the issues of gender and sexuality turn out to be addressed again in this annex with a strong tone of denunciation. It refers to the definition that, according to the document that Argentina defended at the International Conference on Population and

³⁹ Universidad Católica de La Plata, *Informe de los...*

⁴⁰ Universidad Católica de La Plata, *Informe de los...*, 52-53.

⁴¹ Universidad Católica de La Plata, *Informe de los...*, 53.

Development held in Cairo (Egypt)⁴² in 1994: “The family, understood as the union of man and woman with a tendency to endure, [is the place] from which children are derived.” Lona adds that these CBCs violate that very definition and that with this “[...] our country opposed the aberrant models of family, derived precisely from “social constructionism” in their sexological versions that were proposed at the UN”.⁴³ It also refers to “the natural order”, a concept that “those responsible for the CBC always rejected,⁴⁴ despite requests made previously by the Catholic Church through the Superior Council of Catholic Education (CONSUDEC). According to Lona “sex education refers largely to Natural Sciences as if it were basically a zoological subject. Coincidentally, on the ethical plane, the relationship between sex and love is not referred to the constitution of the family”.⁴⁵ “The family” would be unrelated to marriage, a “banned term” in the contents. The document also goes on to warn that “despite the objections of CONSUDEC”, the CBC included “the new content of gender”, and defines it as follows:

The concept of “gender”, understood in a completely different way than currently normal, aims to relativize the characteristics between the sexes [...] From there, the concept of “equal opportunities” between both sexes is understood in a new way [...] Following this line of reasoning, one last necessary consequence is reached: full equality of opportunity must include the possibility of choosing one’s sexual identity. It is obvious that in this way, the concept of “family” and “family roles” is completely relativized.⁴⁶

⁴² It was an international conference organized by the UN. In this event, the commitment of the States to ensure “gender equality”, the “empowerment” of women was raised and, above all, the control of reproduction and reproductive health were raised as central aspects as fundamental human rights of women. Argentina’s position at this meeting was (together with Guatemala, El Salvador, Ecuador and Malta) to persistently oppose the most liberal proposals of the most developed countries, focusing its opposition on the recognition of abortion as a means of regulating fertility. The representatives of Argentina also defended themselves that the right to life begins from the very moment of conception. Thus, Argentina abstained on most of the points agreed upon in the conclusions of the meeting.

⁴³ Universidad Católica de La Plata, *Informe de los...*, 71.

⁴⁴ Universidad Católica de La Plata, *Informe de los...*

⁴⁵ Universidad Católica de La Plata, *Informe de los...*, 72.

⁴⁶ Universidad Católica de La Plata, *Informe de los...*, 74.

Lona mentions that the “projected curricular development in this regard [on the term gender] by the Ministry of Education and Culture can be estimated by the proposals presented by Gloria Bonder and Graciela Morgade, about the inclusion of the topic in teacher training and curriculum designs. To affirm that said inclusion of the (gender) perspective is contradictory, it refers again to the event in Beijing and argues that Argentina has objected to “the relativistic link between gender and family model”,⁴⁷ even earlier in a previous meeting held in Santiago, Chile in 1994, in line with what was already presented that same year in International Conference on Population and Development in Cairo.

From Gender to Sex: Catholic Curriculum Modifications and the Resignation of Curriculum Teams

On June 22, 1995, the XXIII Assembly of the CFCE approved resolution 40/95, by which the second edition and definitive version of the CBC for the initial level and the EGB were approved.⁴⁸ In this resolution, the curriculum modifications proposed by technicians, officials, teachers, and also “monotheistic religious confessions” are made explicit. Among the changes, it mentioned “the rejection of ideologies and fundamentalisms, as forms of cultural relativism”.⁴⁹

Let us then observe how the contents in question were expressed comparatively between the first version of 1994 and the final version of 1995, after religious interference. In Ethics and Citizenship Training, mention was made of “types of families” or “the family group”, broadening the views on the different and diverse social forms of family organization. But in the final version, that amplitude was reduced to “the family”. It is even referred to as the “basic cell”, “as a natural and fundamental element of society [...]”.⁵⁰

⁴⁷ Universidad Católica de La Plata, *Informe de los...*, 75.

⁴⁸ Germán Torres, “Una lectura de las relaciones entre Iglesia católica, Estado y educación en 30 años de democracia”, *Propuesta Educativa* 23, no. 42 (2014): 77-85. http://www.scielo.org.ar/scielo.php?pid=S1995-77852014000200009&script=sci_abstract&tlng=en

⁴⁹ Consejo Federal de Cultura y Educación, “Resolución n° 40/95”, in *Contenidos básicos comunes para la educación general básica*. (Buenos Aires: Ministerio de Cultura y Educación, 1995), 13.

⁵⁰ Ministerio de Cultura y Educación, “Formación Ética y Ciudadana”, in *Contenidos básicos comunes para la educación general básica*, ed. Ministerio de Cultura y Educación (Buenos Aires: Ministerio de Cultura y Educación, 1995), 351.

“The family” is mentioned eleven times as a social organization, against a single mention of “families in the block “Human activities and family organization in Social Sciences in the Third Cycle”.⁵¹ Also within this subject it is proposed to teach “The roles assigned to men and women [...]”. The teaching of “identity” (“boys” and “girls”) and “social” models (“the feminine” and “the masculine”).⁵² These premises renew an old pedagogical objective of modern sexual education: that children learn to identify with (only) two sexual roles based on genitalia. That is, the supposed “natural” coherence between the sex assigned at birth and the display of gender identity and expression.

Consistent with the criticism received, sex education would be linked to the concept of “love” and the “integral” vision, within the Natural Sciences subject. In the initial version it read: “Contribute to satisfying needs linked to the development of sexuality”, while in the final version:

[...] meet needs related to health maintenance and the understanding of the integral development of sexuality [...] The knowledge of the reproductive system is deepened and this work is linked to the treatment of issues related to the love and sexuality of the human being as a person.⁵³

It is noteworthy how quickly the Catholic lobby managed to effect these changes. The documents produced by UCALP were published in May 1995 and the final version of the CBC was approved the following month. In addition, during the time that the review of the first version lasted, other Church agents made public statements and also held private interviews with Minister Jorge Rodríguez to include changes in the document.⁵⁴ Bonder remembers this episode: “And in one night, the reform that had been approved by the Council [CFE] was changed. And they turned it back, they wanted to remove the theories of evolution and

⁵¹ Ministerio de Cultura y Educación, “Ciencias Sociales”, in *Contenidos básicos comunes para la educación general básica*, ed. Ministerio de Cultura y Educación (Buenos Aires: Ministerio de Cultura y Educación, 1995), 349.

⁵² Ministerio de Cultura y Educación, “Ciencias Sociales”.

⁵³ Ministerio de Cultura y Educación, “Ciencias Naturales”, in *Contenidos básicos comunes para la educación general básica*, ed. Ministerio de Cultura y Educación (Buenos Aires: Ministerio de Cultura y Educación, 1995), 115-116.

⁵⁴ Torres, *Educación pública*, 302.

of course, they removed everything we had put on gender... well, all that was done in one night, in one night all that was removed...”⁵⁵

The consequence of these changes introduced in the CBC between July 8th and 14th, 1995, was that both Gloria Bonder and Graciela Morgade and the entire group of people who were part of the PRIOM presented their resignation as an act of opposition to the changes. These resignations meant the end of PRIOM as a ministerial program. But they were not the only ones. Other groups that had been part of the writing of the contents of the first version of 1994 also resigned, presenting their disagreement with said modifications. Among them were: the coordinator of the Ethics and Citizenship Training area, Carlos Cullen; the deputy coordinators of the Natural Sciences area, Marcelo Leonardo Levinas; two heads of the Social Sciences area, María Dolores Béjar and Adriana Villa; and the national coordinator of Kindergarten, Ana María Malajovich.⁵⁶

Those changes weren't just about face value. They had to do with the disputes around the meanings that were played out in the process of producing curriculum on topics that were strongly questioned. For example, the replacement of the gender category ignored the initiatives and advances that Bonder and the team had been carrying out since PRIOM. With the resignation of that team, PRIOM definitively ceased its activity.

The conflict over the collective resignation of the national experts and scholars did not only have repercussions within MCyE. The most important graphic media in the country echoed the conflict and followed it for several weeks. The press showed how these and other changes made to the curriculum content (the evolutionary theories of Darwin and Lamarck had also been eliminated) were repudiated by broad social sectors. In several journalistic notes in newspapers such as *Página 12*, *Clarín* and *La Nación*, criticism of the Carlos Menem government was levied for its links with the Catholic Church, the Ministry of Education, and even the figure of Minister Rodríguez about the aforementioned events.

⁵⁵ Bonder, interview.

⁵⁶ Carlos Alberto Estévez, “Nos critican por sectarismo, o por desconocimiento”, *La Nación*, 18 July, 1995.

Criticisms were also pronounced by the most important representatives of teacher unions such as the Union of Education Workers (UTE),⁵⁷ the Confederation of State Workers of the Argentine Republic (CTERA),⁵⁸ and the Confederation of Argentine Educators (CEA).⁵⁹ Political leaders from the Socialist, the Radical Civic Union (UCR) and the Front for a Country in Solidarity (FREPASO) also spoke out and asked Minister Rodríguez for explanations.⁶⁰ The specialists who had resigned, such as Béjar and Cullen, questioned that those who were part of the drafting of the consultation versions had not been part of the curriculum debate, nor had they received an explanation of how and why the contents had been modified.⁶¹ At the same time, different sectors of other religions, such as the Bet-El Judaism community and representatives of the Latin American Rabbinical Seminary, also maligned the change in the press.⁶²

Even though Minister Rodríguez had initially taken an interest in PRIOM and its goals, he did not oppose the changes proposed by academic Catholicism. On the contrary, when the national press asked him the reasons for replacing the concept of “gender” with that of “sex”, he echoed the arguments of UCALP:

The term “sex” is clearer for anyone -he told the *Clarín* newspaper- I hope they don't accuse me of being “sexist”. Article 37 of the new National Constitution speaks of “men and women” and about the type of discrimination.⁶³

For Graciela Morgade, that collective resignation, and the press coverage that followed the whole episode, “[...] did a lot to spread the gender perspective and also to, in quotes, “convince” the male and female

⁵⁷ Jorge Rouillon, “Sigue el debate sobre contenidos educativos”, *La Nación*, 17 July, 1995.

⁵⁸ Nora Vieiras, “Críticas a los cambios en los CBC”, *Página 12*, 13 July, 1995. Santiago Rodríguez, “Cambios entre gallos y medianoche en los CBC”, *Página 12*, 14 July, 1995.

⁵⁹ Carlos Alberto Estévez, “Análisis crítico de los contenidos educativos”, *La Nación*, 20 July, 1995.

⁶⁰ “Desmienten renuncias por los contenidos”, *La Nación*, 15 July, 1995. “Pedido de informes”, *Página 12*, 14 July, 1995.

⁶¹ “Desmienten renuncias...”.

⁶² “Apoyo judío a los contenidos educativos”, *Página 12*, 13 July, 1995. Sergio Bergman “Opinión. Los contenidos de la reforma educativa”, *Página 12*, 20 July, 1995.

⁶³ “Cambios en los contenidos educativos”, *Clarín*, 8 July, 1995.

colleagues, especially in the field of education of that what we were doing was not proposing a concern of petty-bourgeois women who had their daily life resolved [...] Minister Rodríguez did not say anything, he let us resign [...] the definition was not made by Rodríguez alone [...]”.⁶⁴

The most conservative sectors had seen Bonder and Morgade as agents of a certain danger insofar as they represented the entry of an “ideology” that “attacked” their fundamental dogmatic principles. The UCALP intervention was an example of this. So much so that, after the conflict of mass resignations, Opus Dei published a book in which, according to Bonder, they said: “Gloria Bonder wants to destroy paternal authority in the family”... They also said that we wanted to authorize homosexuality!”.⁶⁵

Religious Modifications in the CBC of the Polimodal Level, 1995-1997

In December 1995, the Federal Council of Culture and Education of the National Ministry, in its XXV Extraordinary Assembly, issued a resolution that enabled public discussion on the contents of the Common Basic Contents and the Oriented Basic Contents of the document “Polimodal education. Framework Agreement”. In this section we are interested in indicating in which curricular areas of these proposals sex education was included in order to later analyze the readings and criticisms made by the Catholic sectors.

In the area of Natural Sciences, in Block 1, “Life and its properties”, sex education is mentioned immediately among the first contents: “with the promotion of health and sex education of young people from an integral approach [...] It should be noted that health education and sex education are cross-cutting issues, and therefore require multiple approaches that integrate strictly biological aspects with others of a social, cultural, moral nature, etc.”.⁶⁶

⁶⁴ Morgade, interview.

⁶⁵ Bonder, interview.

⁶⁶ Ministerio de Cultura y Educación, “Ciencias Naturales”, in *La educación polimodal. Acuerdo marco. Contenidos básicos para la educación polimodal. Versión para consulta*, ed. Ministerio de Cultura y Educación (Buenos Aires: Ministerio de Cultura y Educación, 1996), 78.

In the proposal of the conceptual contents, it was suggested for this block, among other contents: “Reproductive health: conception and contraception. Pregnancy. Embryonic development. Birth. Preventive measures against sexually transmitted diseases [...] Addictions, nutrition, and food [...] Alterations of the immune system, AIDS”.⁶⁷

In the area of Social Sciences, in thematic Block 2 “The contemporary historical cycle. Change and diversity, for the contents of the topic “Society and politics: the construction of democratic systems” is where the highly problematic inclusion of the gender perspective is mentioned:

Contemporary political and social traditions: liberalism, socialism, the Social Doctrine of the Church, social democracy, among others. Social movements and political change towards political and social citizenship (suffragists, the social question, and feminist movements, among others) [...] Tolerance and coexistence of minorities, public freedoms and gender perspectives.⁶⁸

For its part, in “Gymnastics”, one of the blocks in the Physical Education area, the following are also referenced among the first Conceptual Contents: “Exercise, health, and quality of life: role of bodily and motor activity in the sex education of children”.⁶⁹

The mainstreaming of the theme continues in the area of Humanities, in the thematic block “Psychological approach of the individual and groups” and within the section “The body, sexuality, affections”, it is proposed: “[...] analyze the stages of human sexual development. Based on this knowledge, the concept of sexual identity and the different conceptions of what is feminine and what is masculine will be analyzed”.⁷⁰

⁶⁷ Ministerio de Cultura y Educación, “Ciencias Naturales”, 108.

⁶⁸ Ministerio de Cultura y Educación, “Ciencias Sociales”, in *La educación polimodal. Acuerdo marco. Contenidos básicos para la educación polimodal. Versión para consulta*, ed. Ministerio de Cultura y Educación (Buenos Aires: Ministerio de Cultura y Educación, 1996), 108.

⁶⁹ Ministerio de Cultura y Educación, “Gimnasia” in *La educación polimodal. Acuerdo marco. Contenidos básicos para la educación polimodal. Versión para consulta*, ed. Ministerio de Cultura y Educación (Buenos Aires: Ministerio de Cultura y Educación, 1996), 158.

⁷⁰ Ministerio de Cultura y Educación, “Humanidades”, in *La educación polimodal. Acuerdo marco. Contenidos básicos para la educación polimodal. Versión para consulta*, ed. Ministerio de Cultura y Educación (Buenos Aires: Ministerio de Cultura y Educación, 1996), 193.

Within the CBO (Guided Basic Content), only in the Natural Sciences, Health, and Environmental Orientation is the subject addressed within the area “Health, person and Community”. There, Block 4, “Health and the immune system”, is developed, which aims to deepen the notions of immunity and knowledge of the immune system mentioned in Natural Sciences. Among the conceptual contents, it is detailed: “Diseases of the immune system. Autoimmune diseases. Congenital and acquired immunodeficiency syndromes. AIDS: preventive measures; psychological, family and social aspects of the disease”.⁷¹

The Catholic University of La Plata (UCALP), together with the Center for Research in Philosophical and Cultural Anthropology (CIAFIC), issued, due to the opening of the opportunity to consult the guidelines for the Polimodal previously reviewed, two documents in which they revised the contents and fundamentals. The document *Analysis of the basic documents for Polimodal education* is also a publication with observations and recommendations for the revision of the curriculum proposal. In this reading of the contents and themes of the different modalities, which contain these curriculum designs in their preliminary versions, the inclusion of contents linked to sex education was one of the aspects reviewed by professors and researchers. At that time, UCALP was led by the former minister of education during the last civic-military dictatorship (1976-1983) Cayetano Licciardo, who, together with Monsignor Juan Rodolfo Laise, was in charge of defending the position of UCALP with the technical team in charge of drafting the CBC.

In general terms, it was again a critical reading by the UCALP of the national curricular proposal for secondary education that insisted on the need for “an education understood as part of the process of integral formation of the person”. In this sense, we read in the development of the entire document, the need to understand education from an “integral perspective”, the claim of “the person” and the “spiritual dimension” to complete the Catholic anthropological definition. The same occurs in the observations on the definitions and articulations of meaning around the significant sex education and human sexuality, in the areas of Natural

⁷¹ Ministerio de Cultura y Educación, “Orientación em Ciencias Naturales, Salud y Medio ambiente” in *La educación polimodal. Acuerdo marco. Contenidos básicos para la educación polimodal. Versión para consulta*, ed. Ministerio de Cultura y Educación (Buenos Aires: Ministerio de Cultura y Educación, 1996), 253.

Sciences, Social Sciences, Physical Education, and Humanities in the CBC and the Natural Sciences, Health, and CBO Environment.

Thus, in the block “Life and its properties”, in the area of Natural Sciences, it is criticized that there is an “insistence that health is related to the sexual education of young people almost exclusively [which] demonstrates a partial vision and erroneous understanding of what it means to protect health”,⁷² and that this could lead to “the legality of certain practices that harm the right to life”.⁷³ Regarding “the proposal to mainstream sex education for young people”, it is questioned that “its integration with philosophical or religious aspects is not taken into account, curtailing the operational scope of said integration and discriminating against said approaches [...]”.⁷⁴ Content on “contraceptives”, is criticized because is not clarified if these were artificial or natural.⁷⁵

It is important to point out that these were not arguments that insisted on eliminating the proposal to include sex education. It is even made explicit:

There can be no doubt about the inclusion of sex education as **one** of the cross-cutting themes, but there should not be any doubt about the fact that it loses effectiveness [...] if it is not undertaken within the broader problem of education for love, since in man sexuality is not only a biological reality since the spirit formalizes the body as a **human** body and integrates all its functions within the **purpose** of human life [the highlight is from the original text].⁷⁶

In the subject of Physical Education, it is questioned that:

sex education is part of education for love because human sexuality is integral to the act, it is an expression of human love

⁷² Universidad Católica de La Plata, “Ciencias Naturales”, in *Análisis de los Contenidos Básicos Comunes para la Educación Polimodal*, ed. Universidad Católica de La Plata (La Plata: Universidad Católica de La Plata, 1996), 49.

⁷³ Universidad Católica de La Plata, “Ciencias Naturales”.

⁷⁴ Universidad Católica de La Plata, “Ciencias Naturales”, 52.

⁷⁵ Universidad Católica de La Plata, “Ciencias Naturales”.

⁷⁶ Universidad Católica de La Plata, “Ciencias Naturales”.

between man and woman, as a mutual donation, open to the procreation of new life [...].⁷⁷

Without denying the importance of the inclusion of sexual education, this signifier is understood as an “education for love”. This expression is equivalent, in turn, to the integral sex education, which within the worldview of Catholicism includes the physical and spiritual dimension. However, at the same time, it is about a love and a notion of “integral” that only legitimizes the unions of heterosexual couples and for reproductive purposes. The association between “sex education” and “integral education” can be thought of as a strategic discursive movement used in conservative pedagogical discourses to generate exclusions of certain people or social groups. This then leads us to think that in this discourse not all subjects are recipients of school sex education.

For another hand, and once again, the gender perspective is questioned within the subject of Social Sciences. On this occasion, the articulation between “human rights, tolerance and coexistence of minorities” with “public freedoms and gender perspectives” is affirmed as “unacceptable”.⁷⁸ For another school subject such as Humanities, within the section “Psychological approach of the individual and groups”, the UCALP document accepts the approach of contents linked to the “stages of sexual development of the human being”,⁷⁹ but it warns that this is “totally separate from affectivity and love and the development of other capacities, which is adopted in an evolutionary perspective”.⁸⁰

Finally, the last criticism of the Framework Document by Catholic academics was in the area of Natural Sciences. From the “Health and Society” block, it is questioned that in the topics of “dependency and addiction”, a more detailed analysis of both the behavior and the risk group is

⁷⁷ Universidad Católica de La Plata, “Educación Física” in *Análisis de los Contenidos Básicos Comunes para la Educación Polimodal*, ed. Universidad Católica de La Plata (La Plata: Universidad Católica de La Plata, 1996), 114.

⁷⁸ Universidad Católica de La Plata, “Ciencias Sociales”, in *Análisis de los Contenidos Básicos Comunes para la Educación Polimodal*, ed. Universidad Católica de La Plata (La Plata: Universidad Católica de La Plata, 1996), 78.

⁷⁹ Universidad Católica de La Plata, “Humanidades”, in *Análisis de los Contenidos Básicos Comunes para la Educación Polimodal*, ed. Universidad Católica de La Plata (La Plata: Universidad Católica de La Plata, 1996), 147.

⁸⁰ Universidad Católica de La Plata, “Humanidades”.

lacking and noted the differences between them. Nor is the relationship between disordered sexuality and increased risk of addictive behaviors marked.⁸¹ In this way, the Catholic discourse not only reinforced the concept of a “risk group” –typical of the epidemiological discourse of the 1980s during the AIDS emergency– but also linked “sexual problems” with “addiction”. Concerning AIDS, it is requested to differentiate “prevention, protection and cure”, especially on the first aspect. The Catholic Church has called for preventive measures such as abstinence since it has always opposed contraceptive methods such as condoms. It is suggested, then, that the approach to AIDS “requires a very intense prevention process [...] to avoid risky behaviors”.⁸²

DEFINITIVE VERSION OF THE CBC FOR THE POLIMODAL LEVEL

After the conflict of resignations, in February 1997 the CBC for Polimodal Education was published, although it was on December 9, 1998, when the CFE officially approved the same contents through resolution 2336/98. There we read again a series of changes and/or additions based on the criticisms previously stated by UCALP, changes that were in line with the modifications established by the Federal Council of Education in 1995 with the CBC for the EGB.

In the area of Natural Sciences, the need to consider sex education as transversal⁸³ curriculum content was maintained without major modifications, although with a new clarification: that it must also be addressed in other areas such as Humanities, Ethics, and Citizenship Training and in Social Sciences. In the “Reproductive Health” aspect in Natural Sciences, the mention of contraception was eliminated: “Preventive measures against sexually transmitted diseases [...] conception and planning of

⁸¹ Universidad Católica de La Plata, “Ciencias Naturales”, in *Análisis de los Contenidos Básicos Comunes para la Educación Polimodal*, ed. Universidad Católica de La Plata (La Plata: Universidad Católica de La Plata, 1996), 174.

⁸² Universidad Católica de La Plata, “Ciencias Naturales”, 175.

⁸³ “Transversality” or transversal curriculum refers to the inclusion of social problems that present a certain urgency in a particular historical context. Cross-curricular themes, which are beginning to be included in Argentina in this context of curricular reform, represent a strong demand towards the school and are present in various subjects within the curriculum. At the same time, it is expected that these are not reduced to a single subject in particular; but can be taught from the different subjects that make up a curriculum (for example: the education for peace, the environmental problems or the human rights).

reproduction, sterility, assisted reproduction techniques, and preventive measures against sexually transmitted diseases [...]. Assisted reproductive techniques. Reproduction planning. Prevention of sexually transmitted disease, bioethical implications”.⁸⁴

The notion of “integrality” was present in the Expectations of Achievement where once again, it referred to the spiritual dimension, responsibility, and the balanced development of sexuality: “Understand and appreciate the importance of the affective, social and spiritual aspects of people, and ethical principles and norms, for responsible care of oneself and an integral and balanced development of sexuality”.⁸⁵ So as we have been demonstrating, in this “integral” discursive position is used to reify the Catholic norms and denigrate LGBTQ+ sexualities.

Following the pronatalist tradition of Catholic discourses, the contents of “new technologies of sexuality” such as assisted reproduction techniques were included. “Preventive measures” against sexually transmitted diseases are mentioned, although condoms or “contraceptive methods” or “abortion” are not mentioned. In this way, the preventive approach of sexual education appears linked to diseases, but not to forms of birth control.

We notice the same in Social Sciences. In the final version excluded mentions of: “the Social Doctrine of the Church”, “social-democracy”, “Social movements and political change towards political and social citizenship”, “suffrage”, “feminist movements”, as well as “human rights”, “Tolerance and coexistence of minorities”, “public freedoms” and “gender perspectives”.⁸⁶

For Physical Education, “[...] the role of bodily and motor activity in the sexual education of young people” was removed from the document.⁸⁷ Strategically, only in the case of Humanities would the original

⁸⁴ Ministerio de Cultura y Educación, “Ciencias Naturales”, in *Contenidos Básicos Comunes para la Educación Polimodal*, ed. Ministerio de Cultura y Educación de la Nación (Buenos Aires: Ministerio de Cultura y Educación, 1997), 4.

⁸⁵ Ministerio de Cultura y Educación de la Nación, “Ciencias Naturales”.

⁸⁶ Ministerio de Cultura y Educación de la Nación, “Ciencias Sociales”, in *Contenidos Básicos Comunes para la Educación Polimodal*, ed. Ministerio de Cultura y Educación de la Nación (Buenos Aires: Ministerio de Cultura y Educación, 1997), 10.

⁸⁷ Ministerio de Cultura y Educación de la Nación, “Educación Física”, in *Contenidos Básicos Comunes para la Educación Polimodal*, ed. Ministerio de Cultura y Educación de la Nación (Buenos Aires: Ministerio de Cultura y Educación, 1997), 35.

text remain unchanged: “On the other hand, it is proposed to analyze the stages of sexual development of the human being. Based on this knowledge, the concept of sexual identity and the different conceptions of what is feminine and what is masculine will be analyzed”.⁸⁸

TOWARDS A DISSIDENT PERSPECTIVE IN THE HISTORY OF EDUCATION

In this article we reconstructed a series of discursive positions around controversial issues for society and for the educational system: sex and gender education. At the end of the twentieth century the Ministry of Culture and Education of Argentina is a site for examining a place to look at how these issues opened strong disputes regarding their inclusion in the curriculum.

The actors involved in disputes regarding topics within the national curriculum aligned in two forces of thought that are contrary due to their ideological foundations. On the one hand, we recover those religious positions which, under the protection of preserving “religious pluralism”, MyCE covertly adopted from Catholic agents in order to influence the sex education programming and curricular reform. The complementary relationship between the Menem government and the Catholic Church is demonstrated in these gestures of always counting on the approval of these sectors for the pedagogical orientations regarding the proposals of sex education as well as the contents of the profound curriculum reform in the mid-1990s. “Integral” education became the adjective that religious sectors insisted on to include their central concepts and traditional definitions in discourse on topics such as “education for love”, “family”, transcendence, spirituality, among others.

We also analyze the other force causing tension, an approach more linked to gender equality, more critical of the essential assumptions of “being a woman” and being “male” and concerned with social inequalities. PRIOM was the program that institutionally supported a curricular perspective that enabled questioning of gender norms within school life.

⁸⁸ Ministerio de Cultura y Educación de la Nación, “Humanidades”, in *Contenidos Básicos Comunes para la Educación Polimodal*, ed. Ministerio de Cultura y Educación de la Nación (Buenos Aires: Ministerio de Cultura y Educación, 1997), 193.

As we also explored, PRIOM found its action limited regarding the mainstreaming of the gender approach in the context of the curriculum reform for primary and secondary education. This was because the conservative Catholic force managed to impose its hegemony on the meanings attributed to sexuality and “sex”.

The trend towards a cis-heterosexual education is visible in the supremacy that has been granted to certain bodies (binary, heterosexual, cis-gender, with reproductive capacity). This normative sexual regime also works because of what it does not name but ends up defining. The history of silencing other identities beyond “man” and “woman” is precisely the history of the empire of heteronormativity.

Explorations on the dissident movements and the processes of educational inclusion and discrimination in the history of education in Argentina are scarce and do not yet have sufficient development as a line of research within this discipline. This study affirms that researching pedagogical discourses, their silences and presences, their operations of inclusion and exclusion, increases our understanding of the history of the social mechanisms of heteronormativity, understood as the only sexual culture worth living. While there is still much to investigate in this regard this essay offers an opening to new lines of research, dissident lines that focus on the experiences, memories, and local histories of LG-BTQI+ movements and their relationships with the educational system and with hegemonic pedagogical discourses. Maybe telling these stories in the present can help make schools more liveable spaces for all people.

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INVESTIGACIONES HISTÓRICAS


PERONISMO, INGENIEROS Y ESTUDIANTES. EL CONFLICTO ENTRE LA UNIVERSIDAD OBRERA NACIONAL Y LAS INSTITUCIONES DE INGENIERÍA EN ARGENTINA (1955-1959)

*Peronism, Engineers and Students. The Conflict Between
the National workers' University and the Engineering
Institutions in Argentina (1955-1959)*

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Resumen. El presente trabajo tiene como finalidad analizar las tensiones acontecidas entre el conjunto de la comunidad académica de la Universidad Obrera Nacional (UON) y las diversas instituciones de la profesión ingenieril durante la denominada «lucha por la autonomía y jerarquización de la Universidad Tecnológica Nacional (UTN)», iniciada con la irrupción de la autodenominada «Revolución Libertadora» (1955) en el poder y culminada con la sanción de la ley 14.855 (1959) que estableció el cambio de denominación, estructura y funcionamiento de la UON. En este sentido, el artículo buscará dar cuenta del desarrollo de este conflicto y de la posición política de las distintas asociaciones profesionales en el marco del mismo. A modo de hipótesis, sostenemos que el factor gravitante en la irresolución del problema en torno a la UON durante el gobierno militar que sucedió al peronismo fue que la fuerte presión sostenida por ambos bloques –asociaciones profesionales y partidarios de la «UTN»– conformaron un «juego de suma cero» en el cual ninguno de los mismos pudo imponer su posición por sobre el otro. Este conflicto finalmente encontraría su desenlace con la llegada del gobierno de Frondizi, que incluía a la «UTN» dentro de su agenda política. Por último, cabe

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destacar que este estudio se realizará recurriendo a distintas fuentes documentales no trabajadas hasta el momento, entre las que se destacan la prensa de la época y documentación de diversas instituciones.

Palabras clave: Universidad obrera; Peronismo; Ingenieros; Estudiantes.

Abstract. *The purpose of this paper is to analyze the confrontation that occurred between the entire academic community of the Universidad Obrera Nacional (National workers' University, UON) and the various institutions of the engineering profession during the so-called "struggle for autonomy and hierarchization of the National Technological University (UTN)". This conflict began with the emergence of the self-styled "Liberating Revolution" (1955) in power and culminated with the passing of Law 14,855 (1959) that established the change of name, structure and operation of the UON. In this sense, the article will seek to trace the development of this conflict and the political positions of the different professional associations within its framework. By way of hypothesis, we maintain that the central factor in the failure to resolve the problem involving the UON during the military government that succeeded Peronism was the considerable pressure exerted by both blocs –professional associations and supporters of the "UTN"– which led to a "zero sum game" in which neither side could impose its position over the other. This conflict would finally find its outcome with the arrival of the Frondizi government, which included the "UTN" within its political agenda. Finally, it should be noted that this study will be carried out using different documentary sources not worked on until now, among which the press of the time and documentation from various institutions stand out.*

Keywords: *Workers university; Peronism; Engineers; Students.*

INTRODUCCIÓN

El peronismo constituye un fenómeno político que ha suscitado la atención de diversos autores nacionales e internacionales. Asimismo, ha sido estudiado desde diversas perspectivas y se ha trabajado sobre distintos aspectos del mismo, entre los que cabe resaltarse aquellos trabajos que analizan la relación que se consolidó entre Perón y el movimiento obrero,¹ aquellos estudios que se centraron en la relación entre el caudillo

¹ Juan Carlos Torre, *La vieja guardia sindical. Sobre los orígenes del peronismo* (Buenos Aires: EDUNTREF, 2006); Miguel Murrís y Juan Carlos Portantiero, *Estudios sobre los orígenes del peronismo* (Buenos Aires: Siglo XXI, 2013); Hugo Del Campo, *Sindicalismo y peronismo. Los comienzos de un vínculo perdurable* (Buenos Aires: Siglo XXI, 2012) y Daniel James, *Resistencia e integración. El peronismo y la clase trabajadora argentina 1946-1976* (Buenos Aires: Siglo XXI, 2013).

militar y la Iglesia Católica,² la relación entre este movimiento político y el Ejército³ y trabajos que centraron su análisis en las figuras del mencionado presidente argentino⁴ y su esposa Eva Duarte.⁵ Por último, cabe destacar una nueva línea de trabajos recientemente publicados sobre las denominadas «segundas líneas» de liderazgo peronista,⁶ en la que los autores se centran en el análisis de diversos cuadros políticos que participaron del mencionado gobierno (1946-1955).

Sin embargo, y a pesar de ese importante acervo bibliográfico, existen aspectos e instituciones de este período que aún no han sido lo suficientemente estudiadas. Este es el caso de la Universidad Obrera Nacional (UON), casa de altos estudios caracterizada, entre otras cosas, por haber sido la única universidad fundada por este movimiento político a lo largo de su primer periodo de gobierno y, si bien existe una importante cantidad de trabajos sobre la misma, el conjunto de estos estudios presenta un alto grado de discontinuidad y fragmentación relacionadas con la falta de diálogo entre los mismos. En este sentido, la mayoría de los textos abordan a la UON de manera tangencial, en el marco de estudios más generales en torno a la educación durante el primer peronismo,⁷ de

² Susana Bianchi, *Catolicismo y Peronismo. Religión y Política en la Argentina (1943-1955)* (Tandil: Instituto de Estudios Históricos-Sociales, 2001); Lila Caimari, *Perón y la Iglesia Católica. Religión, Estado y sociedad en la Argentina (1943-1955)* (Buenos Aires: Emecé, 2010) y Loris Zanatta, *Perón y el mito de la Nación católica. Iglesia y Ejército en los orígenes del peronismo (1943-1946)* (Tres de Febrero: EDUNTREF, 2013).

³ Robert Potash, *El ejército y la política en la Argentina 1945-1962. De Perón a Frondizi* (Buenos Aires: Sudamericana, 1980) y Alain Rouquié, *Poder militar y sociedad política en la Argentina. Tomo II* (Buenos Aires: Hyspamérica, 1986).

⁴ Joseph Page, *Perón* (Buenos Aires: Javier Vergara, 1984) y Norberto Galasso, *Perón* (Buenos Aires: Colihue, 2005).

⁵ Marysa Navarro, *Evita* (Buenos Aires: Planeta, 1997) y Loris Zanatta, *Eva Perón. Una biografía política* (Buenos Aires: Sudamericana, 2011).

⁶ Raanan Rein y Claudio Panella, *La segunda línea. Liderazgo peronista 1945-1955* (Buenos Aires: EDUNTREF, 2013) y Raanan Rein y Claudio Panella, *Los indispensables* (Buenos Aires: UNSAM edita, 2017).

⁷ Juan Carlos Tedesco, «La educación argentina (1930-1955)», *Primera historia integral* 57, (1980): 112-140; Mariano Plotkin, *Mañana es San Perón* (Buenos Aires: Ariel, 1993); Inés Dussel y Pablo Pineau, «De cuando la clase obrera entró al paraíso: la educación técnica estatal en el primer peronismo», en *Historia de la educación en Argentina Tomo VI. Discursos pedagógicos e imaginario social durante el primer peronismo (1945-1955)*, dir. Adriana Puiggrós (Buenos Aires: Galerna, 1995), 107-173; Marcela Pronko, *Las Universidades del trabajo en Argentina y Brasil. Una historia de las propuestas de su creación. Entre el mito y el olvido* (Montevideo: CINTERFOR/OIT, 2003) y Marcela Mollis, «En busca de una genealogía de las misiones universitarias reformistas», *Revista del IICE* 44, (2018): 51-65.

trabajos institucionales de carácter descriptivo,⁸ o centrados en analizar solamente al movimiento estudiantil de algunas de sus facultades regionales.⁹ El caudal historiográfico es mucho más exiguo si se considera el periodo inmediatamente posterior al derrocamiento de Perón, periodo institucional que ha sido escasamente abordado por la bibliografía especializada y del que solo existen algunas memorias publicadas por ex estudiantes de esta universidad.¹⁰

El presente estudio buscará analizar el mencionado periodo histórico, centrándose en un aspecto hasta ahora no trabajado: la conflictiva relación entre lo que hemos denominado como la «comunidad académica de la UON» –conformada por los estudiantes, los docentes y las autoridades interventoras nombradas por la «Revolución Libertadora»– por un lado; y las corporaciones ingenieriles, entre las que se incluyen los distintos centros de ingenieros, centros de graduados, y los directivos y centro de estudiantes de la Facultad de Ingeniería de la Universidad de Buenos Aires (FIUBA).¹¹

A modo de hipótesis, sostenemos que el factor gravitante en la irresolución del conflicto en torno a la UON –durante el gobierno militar

⁸ Delia Álvarez de Tomassone, *Universidad Obrera Nacional-Universidad Tecnológica Nacional. La génesis de una universidad (1948-1962)* (Buenos Aires: edUTecNe, 2000); Fernando Nápoli, *Política Educativa y Organización Académica en el período fundacional de la Universidad Tecnológica Nacional (1948-1962)* (Buenos Aires: edUTecNe, 2004) y Angélica Malatesta, *La creación de la Universidad Obrera Nacional y la hora de la industria. La conexión universitaria entre el aula y el trabajo* (Córdoba: Universidad de Ciencias empresariales y sociales, 2010).

⁹ Norma Novelli, «Movimientos estudiantiles en la Universidad Tecnológica Nacional (1953-1958)» (Tesis de licenciatura, Facultad de Derecho y Ciencias Sociales de la UCA, Rosario, 1986); Inés Dussel, «El movimiento estudiantil en el surgimiento de la Universidad Tecnológica Nacional: Los casos de la UBA y la UTN (1945-1966)» (Informe final de investigación, FLACSO Buenos Aires, 1990); Marcela Mollis «La historia de la Universidad Tecnológica Nacional: una Universidad para hombres y mujeres que trabajan», *Realidad Económica* 99 (1991): 91-108 y Mariana Facio, «La Cenicienta de las Universidades. De la Universidad Obrera Nacional a la Universidad Tecnológica Nacional. El caso de la Facultad Regional Avellaneda (1943-1963)» (Tesis de maestría, Universidad de Buenos Aires, 2014).

¹⁰ Francisco Aristeguieta, *UTN Mi colaboración* (Buenos Aires: Dunken, 1999) y Víctor Vilella, *Memorias. Documentos desde la creación de la Universidad Obrera a la Universidad Tecnológica Nacional. Relevamiento y decodificación de las circunstancias* (Córdoba: Búho Blanco, 2015).

¹¹ Cabe señalar que, durante la presente pesquisa no pudieron ser relevados los diarios de circulación local, los cuales seguramente podrían contribuir con un caudal mayor de información al que aparece en la prensa relevada. En este sentido, el artículo está más bien circunscripto a lo acontecido en la Facultad Regional Buenos Aires de la UON y a aquello que pudo ser relevado sobre las diferentes facultades regionales a través de los diarios de alcance nacional, como *La Nación* y *La Prensa*.

que sucedió al peronismo– fue que la fuerte presión sostenida por ambos bloques conformaron un «juego de suma cero», en el cual ninguno de estos pudo imponer su posición por sobre el otro. A diferencia de lo que acontecía en otros ámbitos de la sociedad, este conflicto no estuvo atravesado por la tensión peronismo/antiperonismo debido a que, tanto el bloque constituido por las distintas entidades ingenieriles, como la comunidad académica de la UON no se identificaban con este movimiento político. El equilibrio entre las fuerzas en pugna finalmente se quebró con la llegada del nuevo gobierno constitucional presidido por Arturo Frondizi, que incluía las reivindicaciones de los partidarios de la «UTN» dentro de su agenda política.

METODOLOGÍA

El análisis en torno al conflicto anteriormente señalado se realizará sobre la base de una estrategia metodológica cualitativa, basada en la investigación documental o «documentación». Tal como sostiene Valles,¹² en la investigación social los documentos pueden ser utilizados, entre otras cosas, para apuntalar la reconstrucción histórica de determinados sucesos que muchas veces es escasa, como en este caso particular. El corpus documental analizado está compuesto por las memorias sobre aquellos sucesos publicadas por los ex estudiantes de la UON, a las que se sumará documentación institucional y la información registrada en la prensa escrita.

Asimismo, existe un acuerdo generalizado en la literatura consultada en afirmar que, en el transcurso de los últimos años, la historia política ha comenzado a estudiarse a través de distintas empresas culturales. En este sentido, han adquirido gran preeminencia las investigaciones que analizan los procesos políticos a través de diarios y revistas. Así, los análisis y estudios sobre publicaciones periódicas de cierta relevancia política e histórica están adquiriendo cada vez mayor jerarquía en la historiografía, en razón de la representación que el periodismo contiene del clima de cada momento histórico.¹³

¹² Miguel Valles, *Técnicas cualitativas de investigación social. Reflexión metodológica y práctica profesional* (Madrid: Síntesis, 1999).

¹³ Noemí Girbal-Blacha y Diana Quatrocchi-Woisson, *Cuando opinar es actuar. Revistas argentinas del siglo XX*, Buenos Aires, Academia Nacional de la Historia (Buenos Aires: Academia Nacional de Historia, 1999), 17.

En el contexto específico argentino, si bien a partir de los años sesenta se ha ido consolidando un campo de estudios altamente fructífero que gira en torno al análisis de distintos aspectos de la cultura popular rural o urbana y de las diversas formas de producción simbólica vinculadas con la industria cultural, el examen pormenorizado de la prensa escrita del siglo XX es todavía incipiente. En esta dirección, los trabajos de Jorge Rivera y Carlos Magnone sobre los suplementos culturales de la prensa masiva y el estudio de Ricardo Sidicaro sobre las ideas políticas del diario *La Nación*, constituyen un notable avance en un campo difícil de encuadrar dentro del marco de una disciplina o metodología definida.¹⁴

Los diarios relevados en el presente trabajo fueron *La Prensa* y *La Nación*, dos de los más importantes de la Argentina del periodo analizado. En este sentido, y tal como sostiene Sidicaro, el primero de estos matutinos, que asumía una postura más combativa, conoció el rigor de la clausura impuesta por el peronismo: fue expropiado y le costó luego abandonar una óptica cargada del enojo dejado por sus propias peripecias. El segundo, por su parte, tomó una posición mucho más mesurada respecto a aquel gobierno, llegando incluso a defender la política de Perón durante sus últimos meses al frente del Poder Ejecutivo.¹⁵

Por otra parte, cabe destacar que –a partir de 1909– *La Nación* buscó convertirse en expresión y educador de la clase dirigente de la época, colocándose por encima de sus fraccionamientos. En sus editoriales pueden apreciarse las clásicas dimensiones de todo pensamiento político: el papel del Estado y su relación con la sociedad; la caracterización de los distintos sectores sociales y de las relaciones que estos mantienen entre sí; la conformación del sistema de representación política y la legitimidad de sus actores. En efecto, y tal como nos advierte el autor sobre este matutino,

En tanto todo punto de vista sobre lo social está necesariamente condicionado por el entramado de relaciones materiales y simbólicas del que participa el autor que lo enuncia, su visión no puede ser sino ideológica. Esto supone que, aún a pesar suyo,

¹⁴ Sylvia Sáitza, *Regueros de tinta. El diario Crítica de la década de 1920* (Buenos Aires: Sudamericana, 1998), 18.

¹⁵ Ricardo Sidicaro, «Consideraciones a propósito de las ideas del diario *La Nación*», en *La Trastienda de la Investigación*, comp. Catalina Wainerman y Ruth Sautu (Buenos Aires: Manantial, 2011), 79.

esclarece algunos aspectos y oculta otros. El componente normativo propio de los discursos políticos pone de manifiesto de manera inmediata el sentido ideológico de su propuesta. Pero cuando esos discursos están combinados muy sólidamente con una estrategia pedagógica orientada a explicar lo que sucede en la sociedad con la pretensión de hacerlo desde una perspectiva objetiva, lo tendencioso se liga de tal modo con lo supuestamente neutro que son mayores sus posibilidades de retener a los sujetos en la ideología allí desplegada. Es decir, de dotarlos de un reticulado de categorías interpretativas cuyo efecto es hacer ver la realidad de un modo determinado y movilizarlos en grados diversos a la acción. Las reflexiones de *La Nación* ejercitaron permanentemente esa combinación entre la explicación y lo normativo.¹⁶

Pese a los reparos a tener en cuenta a la hora de relevar este matutino –señalados por Sidicaro–, consideramos que dicha publicación periódica es una significativa fuente de información, debido a que ha registrado de manera pormenorizada el conflicto entre los estudiantes y directivos de la UON y las corporaciones ingenieriles. Más aún, si se tiene en cuenta que –durante los primeros meses de gobierno de la «Revolución Libertadora»– un importante caudal de documentación relacionada al gobierno peronista fue destruido.¹⁷

LA UNIVERSIDAD OBRERA NACIONAL: CARACTERÍSTICAS GENERALES

La UON fue una casa de altos estudios creada por la ley 13.229 de 1948, durante el primer gobierno peronista, y se constituyó como el ciclo universitario de un circuito diferenciado de educación técnica dirigido por la Comisión Nacional de Aprendizaje y Orientación Profesional (CNAOP), en el marco de una acción más general del Estado en torno a la regulación del trabajo y educación de los jóvenes menores de edad.¹⁸

¹⁶ Ricardo Sidicaro, *La política mirada desde arriba. Las ideas del diario La Nación 1909-1989* (Buenos Aires: Sudamericana, 1993), 8.

¹⁷ Héctor Cucuzza, «Peronismo y Educación: el problema historiográfico de las fuentes», *Revista del Instituto de Investigaciones en Ciencias de la Educación* 8 (1996): 41-49.

¹⁸ Daniel Weinberg, *La enseñanza técnica industrial en la Argentina 1936-1965* (Buenos Aires: Centro de Investigaciones Económicas del Instituto Torcuato Di Tella, 1967), 12.

Entre sus principales finalidades se destacan «la formación integral de profesionales de origen obrero destinados a satisfacer las necesidades de la industria nacional», «asesorar en la organización, dirección y fomento de la industria, con especial consideración de los intereses nacionales» y «promover y facilitar las investigaciones y experiencias necesarias para el mejoramiento e incremento de la industria nacional».¹⁹ Asimismo, esta novel institución poseía un conjunto de características particulares que la distinguía de sus contemporáneas como ser: un sistema de enseñanza que combinaba la asistencia obligatoria a clases en horario vespertino con la experimentación en los laboratorios los días sábado por la tarde, lo cual permitía la integración al sistema universitario de aquellos trabajadores que realizaban sus actividades laborales en las diversas industrias; una estructura universitaria federal constituida por distintas facultades regionales a lo largo del país (rasgo distintivo respecto a las universidades reformistas cuyas universidades estaban divididas en facultades que representaban las distintas ramas del conocimiento); una modalidad didáctica denominada «clase activa», definida como una clase de «tipo seminario, no conferencial» en la que se busca que el educando tenga un papel activo dentro del dictado de la misma; la obligatoriedad de acreditar la condición de «obrero» – bajo certificación de la Confederación General del Trabajo²⁰ (CGT) – en la rama industrial cuya especialidad se ajuste a la carrera universitaria cursada y, por último, un gobierno institucional ejercido por distintos agregados obreros de la CGT: tanto el rector como los decanos de las distintas facultades regionales debían ser obreros sindicalizados de esta Confederación.²¹

Si bien la ley de creación de la UON data de 1948, la institución abrió sus puertas recién en marzo de 1953. Durante de su funcionamiento bajo

¹⁹ Ley 13.229/48. *Boletín Oficial de la República Argentina*.

²⁰ La Confederación General del Trabajo es la principal central sindical en Argentina. En el contexto de encarcelamiento de Perón en octubre de 1945, esta organización llamó a un paro general para el 18 de ese mes. Un día antes, el 17 de octubre de 1945, una importante manifestación popular en la Plaza de Mayo logró su liberación y el llamado a elecciones democráticas. Luego, el sindicalismo organizó el Partido Laborista que resultó decisivo para la victoria de Perón en los comicios. Una vez en el poder, Perón unificó al conjunto de los partidos políticos que lo apoyaron –incluido el Laborista– y constituyó el Partido Peronista. Desde ese momento, la CGT se convirtió en «la columna vertebral» del movimiento peronista. Hugo Del Campo, *Sindicalismo y Peronismo. los comienzos de un vínculo perdurable* (Buenos Aires: Siglo XXI, 2012), 325-360.

²¹ Comisión Nacional de Aprendizaje y Orientación Profesional. *Reglamento de organización y funcionamiento de la Universidad Obrera Nacional* (1953), 18.

la órbita del gobierno peronista (1953-1955), la institución ofreció un total de 16 especialidades y el título que eventualmente recibirían sus egresados sería el de «Ingeniero de Fábrica» en la especialización cursada. Asimismo, a lo largo del periodo señalado, la institución inauguró un total de nueve facultades regionales: Buenos Aires, Córdoba, Santa Fe, Rosario, Mendoza, Bahía Blanca, Tucumán, Eva Perón (La Plata) y Avellaneda. El criterio bajo el cual fueron seleccionadas estas ciudades estuvo basado en la fuerte actividad industrial de las mismas, lo cual marca el claro perfil industrialista que el peronismo buscó imprimirle a esta nueva casa de estudios técnicos superiores.²²

La UON nació bajo el auspicio del peronismo y fue la única institución de tipo universitaria creada durante este período, convirtiéndose así en una casa de estudios fuertemente asociada a este movimiento político y objeto de fuertes críticas y estigmatización por parte de los sectores antiperonistas, como por ejemplo las asociaciones profesionales representativas de los ingenieros y la FIUBA. En este sentido, durante el debate parlamentario –en el que se discutió la sanción de la ley 13.229/48– la nueva universidad a crearse fue duramente cuestionada por la bancada opositora. Estos diputados propiciaron toda una serie de objeciones sobre la UON, entre las que se destacan que no sería una «verdadera universidad», por no tener educandos universales ni conocimientos universales; que educaría con un sentido «de clase», sin «cultura general» y de manera «unilateral en la técnica», por ser «obrero»; que propiciaba que un hombre que nacía en su clase muriera en la misma y, por esta razón, sería una institución «reaccionaria» y «medieval»; que era una «creación demagógica» del peronismo y que no tenía «jerarquía universitaria», entre otras.²³

En suma, la UON se constituyó como una de las más importantes creaciones educativas del peronismo y, al mismo tiempo, como una de las instituciones más cuestionadas por el reformismo universitario argentino.

²² Álvaro Sebastián Koc Muñoz, «De la Universidad Obrera Nacional a la Universidad Tecnológica Nacional (1948-1959): Organización, funcionamiento y “reformización” del modelo institucional» (Tesis doctoral, Universidad Nacional de La Plata, 2021), 103.

²³ Koc Muñoz, «De la Universidad», 99.

INGENIEROS Y PERONISMO: LA GÉNESIS DE UNA RELACIÓN CONFLICTIVA

Uno de los enfrentamientos que sostuvo el peronismo a lo largo de su gobierno fue aquel protagonizado con las entidades del campo de la Ingeniería: el Centro Argentino de Ingenieros (CAI) y los estudiantes de la FIUBA²⁴ nucleados en el Centro de Estudiantes (CEI) de dicha casa de estudios.

El primero de los organismos en ser intervenidos por el gobierno peronista fue el CAI, en 1946. Las motivaciones nunca aparecieron explicitadas por los interventores, pero algunos de sus integrantes recuerdan que se acusó a esta entidad de participar del intento de golpe de Estado de septiembre de 1945. En efecto, la relación con este movimiento político era conflictiva incluso antes de la asunción de Perón como presidente en 1946, constituyéndose en una férrea oposición a lo largo de este periodo. Tal es así, que la actitud frente a la creación de la UON fue la misma que tuvo frente a cada paso de aquel gobierno: rechazo absoluto. Esta nueva universidad era considerada un «engendro demagógico» más de Perón para combatir a la universidad tradicional, que era un fuerte núcleo opositor. Asimismo, era concebida como «un abaratamiento, una desjerarquización de la universidad oficial, para permitir la entrada de gente que tenía menor grado cultural». El CAI integró la alianza que derrocó al mencionado presidente en 1955 y dedicaría un amplio espacio en sus publicaciones a la importancia de la ingeniería en las «tareas de reconstrucción», haciendo referencia en sus editoriales a mantener viva la memoria sobre los «horrores de la tiranía», en clara alusión al gobierno peronista.²⁵

Por otra parte, a comienzos de octubre de 1945, la Facultad de Ciencias Exactas de la UBA había sido escenario de un enfrentamiento con el gobierno militar –del que Perón formaba parte–, pidiendo «el derrocamiento de la

²⁴ En 1952 por decreto nacional se divide la Facultad de Ciencias Exactas, Físicas y Naturales en dos: Facultad de Ciencias Exactas y Naturales y Facultad de Ingeniería. Catalina Rotunno y Eduardo Díaz de Guijarro, *La construcción de lo posible. La universidad de Buenos Aires de 1955 a 1966* (Buenos Aires: Libros del Zorzal, 2003), 209-228.

²⁵ Por su parte, algunos dirigentes estudiantiles de la FIUBA, caracterizaban a la UON como una institución creada para formar un tipo de ingeniero con un «saber limitado», un ingeniero que «no pensara», «barato» y apolítico. Según expresaban, «los empresarios preferían esto, un ingeniero que no les creara problemas, que no compitiera con él». Dussel, «El movimiento», 34.

tiranía». Allí estuvieron presentes profesores, estudiantes y también las autoridades, quienes fueron desalojados por la policía.²⁶ La tensión fue mayor debido a la presencia de grupos civiles armados, partidarios del coronel Perón, que dispararon contra las ventanas y, con el auxilio de una escalera municipal, rompieron carteles, vidrios y puertas. Los impactos de balas provocaron varios heridos entre los estudiantes. El 4 de octubre de aquel año, durante una manifestación estudiantil, fue asesinado en la esquina de Avenida de Mayo y Perú el joven Aarón Salmún Feijóo, quien cursaba el ingreso a la carrera de Química en la UBA. Este hecho sucedió cuando, junto a su hermano Tito, se acercaba a la calle Perú a llevar alimentos a los estudiantes que habían tomado la Facultad.²⁷ Tales acontecimientos, según las crónicas del CAI y del CEI, afirmaron el sentimiento de comunidad amenazada por un gobierno «despótico y demagógico». La participación de ambas instituciones en la campaña de la Unión Democrática en las elecciones de 1946, que se enfrentaba a Perón, fue abierta y decidida. Pasadas las elecciones, en general, tomaron partido por una oposición intransigente, plena de conspiración y golpista, como lo denuncian otros militantes reformistas opositores.²⁸

El segundo mandato presidencial de Perón comenzó con la intervención, clausura y prohibición de actividades del CEI. Asimismo, la recientemente creada Confederación General Universitaria²⁹ (CGU) intentó organizar en la FIUBA un Centro de Estudiantes paralelo, con el propósito de quebrar la hegemonía del CEI. El acto de inauguración, realizado en la propia Facultad careció de adhesión estudiantil, pero los miembros de la CGU habían convocado a integrantes de los grupos de choque y contaron con el apoyo de la policía de civil. En esa ocasión, los estudiantes reformistas repartieron volantes denunciando la presencia de «matones en la Facultad». En septiembre, las autoridades decidieron

²⁶ Dussel, «El movimiento», 63.

²⁷ Roberto Almaraz, Manuel Corchon y Rómulo Zemborain, *¡Aquí FUBA! Las luchas estudiantiles en tiempos de Perón (1943-1955)* (Buenos Aires: Planeta, 2001), 68.

²⁸ Dussel, «El movimiento», 32.

²⁹ La CGU fue una central de estudiantes universitarios promulgada abiertamente desde el gobierno peronista. Asimismo, esta Confederación fue fundada a fines de noviembre de 1950 con la finalidad de contrarrestar el accionar de la FUA. La CGU se proclamaba «sindical, federal, asistencial, antiliberal, cristiana y revolucionaria» y su «idealismo» era «jerárquico y no disolvente» como el de la FUA, ubicándose así en las antípodas del reformismo universitario. Omar Acha, *Los muchachos peronistas. Orígenes olvidados de la Juventud Peronista (1945-1955)* (Buenos Aires: Planeta, 2011), 79.

retirar la personería jurídica al Centro de Estudiantes y censuraron sus actividades luego de que accedan a la conducción del mismo los socialistas y radicales.³⁰ El CEI era entonces el centro más representativo y organizado del movimiento estudiantil porteño, con cinco mil afiliados. La protesta solidaria con esta entidad se extendió a todas las facultades porteñas, que fueron sumándose a las huelgas resueltas por la Federación Universitaria de Buenos Aires (FUBA) y la Federación Universitaria Argentina (FUA) en el mes de octubre. La Federación Universitaria del Litoral (FUL) también dispuso un paro en adhesión. Al perder la personería, se produjo la disolución del CEI como entidad legal, adoptó el antiguo nombre de «La Línea Recta» y tuvo que adquirir un departamento particular donde funcionó en forma semiclandestina.

El 5 de octubre de 1954, en la UBA se desencadenó el inicio de una nueva etapa signada por una vertiginosa rebeldía. Ese día, el CEI debía realizar la entrega de medallas a los egresados en el patio de la Facultad, acto que no contaba con el permiso de las autoridades y tenía como antecedente la suspensión del tradicional «Baile anual de los egresados». A poco de iniciado el mitín que reunió a 2.000 personas, la policía irrumpió enérgicamente. Se iniciaron corridas y enfrentamientos que dieron por saldo varios heridos y dos alumnos detenidos. No obstante, el desafío estudiantil perduró con la huelga dispuesta de conjunto por el CEI y el Centro de Estudiantes del Doctorado de Química (CEDQ) hasta el 8 de octubre de 1954, a la que se sumaron los otros centros de estudiantes universitarios porteños. El gobierno, por su parte, dos días antes de que este paro finalizara, allanó los locales estudiantiles y custodió firmemente las facultades, procediendo luego a detener en sus domicilios a varios militantes. Las protestas y los detenidos se incrementaron con el paso de los días. El 22 de octubre la lucha adquirió carácter nacional al sumarse universitarios de Bahía Blanca, La Plata, Rosario y Santa Fe. El conflicto finalizó con más de 250 detenidos entre la UBA y la Univesidad Nacional de La Plata (UNLP), un exiliado, 14 estudiantes peruanos a los que se los expulsó del país y, sobre todo, con un enérgico activismo estudiantil. Si bien a fines de marzo de 1955 prácticamente todos habían recuperado su libertad, la conflictividad

³⁰ Dussel, «El movimiento», 60.

con estos estudiantes ahora semiclandestinos, muchos de ellos expulsados de la UBA, perduró hasta la caída del peronismo.³¹

El conflicto acontecido entre estas entidades, especialmente las universitarias, y el peronismo puede pensarse en términos de continuidad del enfrentamiento con el gobierno militar de la «Revolución de Junio» de 1943. En este sentido, y tal como sostiene Silvia Sigal,³² los años transcurridos entre 1943 y 1945 fueron decisivos para la separación entre estos sectores y los sectores populares identificados con el peronismo. En efecto, el antiperonismo de los universitarios fue anterior a la aparición pública de Perón y tiene su origen en aquel gobierno militar, en el cual prevalecieron grupos ultracatólicos y conservadores que ocuparon puestos centrales dentro de los espacios culturales y educativos. Esta presencia cada vez más predominante de los «enemigos históricos» de La Reforma de 1918, sumado a medidas concretas como las intervenciones universitarias de 1943 y la ilegalización de la FUA y de los centros de estudiantes, marcaron fuertemente al reformismo universitario durante el periodo señalado. En suma, y tal como señala Pis Diez,³³ el gobierno peronista vino a incrustarse en un sistema de oposiciones «preconstituido» entre los años 1943 y 1945 que, a su vez, configuró una suerte de «círculo vicioso» que definió de antemano posiciones para ambos bloques. Según la autora, una vez que Perón asume la presidencia en 1946, la irrectuctibilidad de la oposición y aquel «circulo vicioso» del antagonismo no dejarán espacios libres ni posibilidad alguna de «vuelta atrás»³⁴ o autocrítica.

LA UNIVERSIDAD OBRERA NACIONAL FRENTE A LA «REVOLUCIÓN LIBERTADORA»

El 16 de septiembre de 1955 se sublevó un sector de las fuerzas armadas argentinas contra el gobierno peronista, comenzando un proceso

³¹ Juan Califa, *Reforma y Revolución. La radicalización política del movimiento estudiantil de la UBA 1943-1966* (Buenos Aires: EUDEBA, 2014), 64.

³² Silvia Sigal, «Intelectuales y peronismo», en *Los años peronistas (1943-1955). Nueva Historia Argentina. Tomo VIII*, comp. Juan Carlos Torre (Buenos Aires: Sudamericana, 2002), 481-522.

³³ Nayla Pis Diez, «La política universitaria peronista y el movimiento estudiantil reformista: actores, conflictos y visiones opuestas (1943-1955)», en *Los trabajos y los días* 4, no. 3, (2012): 41-63.

³⁴ Pis Diez, «La política», 50.

denominado por quienes lo protagonizaron como «Revolución Libertadora». Este levantamiento armado se extendió hasta el 23 de septiembre, día en el que finalmente el general Eduardo Lonardi se hizo cargo de la suma del poder público. Una vez asentado el nuevo «gobierno provisional», el 27 de septiembre de 1955 los estudiantes de la Facultad Regional Buenos Aires de la UON (FRBA) se presentaron en el edificio de la Facultad y, luego de enfrentarse a la abiertamente peronista Federación Argentina de Estudiantes de la Universidad Obrera (FADEUO),³⁵ constituyeron la «Junta Provisional de Estudiantes de la Facultad Regional Buenos Aires» (JPE). Las primeras medidas llevadas adelante consistieron en desconocer a las autoridades universitarias nombradas por el gobierno recientemente derrocado, realizar la ocupación de las dependencias del establecimiento y solicitar la autonomía de la institución y el cambio de nombre por el de «Universidad Técnica Nacional», siendo la primera denominación que recibió la universidad por parte de los estudiantes.³⁶ No obstante, después de varias deliberaciones en asamblea, finalmente fue adoptado el nombre de «Universidad Tecnológica Nacional» (UTN). Una vez renombrada, los estudiantes de la FRBA establecieron contacto con el resto de las facultades regionales con la finalidad de unificar criterios y organizar una entidad estudiantil a nivel nacional. Asimismo, se resolvió solicitar una entrevista al ministro de Educación para manifestarle su preocupación por las reacciones negativas en torno a las distintas creaciones del gobierno peronista, señalando el aspecto demagógico del nombre que aún regía para la universidad. Finalmente, asumieron el gobierno de la casa, comenzando lo que sus protagonistas denominaron como la «lucha por la autonomía y jerarquía de la UTN».³⁷

³⁵ La Universidad Obrera Nacional contó, durante sus dos primeros años de funcionamiento, con una única organización estudiantil reconocida por el rectorado: la Federación Argentina de Estudiantes de la Universidad Obrera (FADEUO) y solamente logró este reconocimiento luego de haberse declarado afín a la «Doctrina Nacional Peronista» y a las directivas del denominado «Líder de la argentinidad», el general Juan Domingo Perón. Cabe destacar que, luego del golpe de Estado de 1955, los ex integrantes de esta organización no fueron objeto de persecución por parte del resto del estudiantado de la UON, ni fueron expulsados de la universidad, como tampoco tuvieron prohibida la participación en la nueva organización estudiantil surgida con posterioridad a la «Revolución Libertadora», tal como ocurría en otras casas de altos estudios. Sin embargo, quedaron totalmente desplazados de la dirección del movimiento estudiantil. Koc Muñoz, «De la Universidad», 172.

³⁶ *La Nación*, «En la Universidad Obrera Nacional», 28 de septiembre de 1955. Buenos Aires.

³⁷ Aristeguieta, *UTN*, 30.

A la lucha de los estudiantes se sumó la abierta solidaridad de los docentes de la mencionada Facultad, quienes realizaron una asamblea y –a través de un comunicado– expresaron que veían «con agrado los anhelos y las legítimas aspiraciones de los estudiantes que conduzcan a encauzar las actividades de la universidad para su progreso y jerarquización», considerando «un deber destacar la disciplina y el espíritu de trabajo evidenciado por aquellos que ha permitido continuar normalmente con las actividades docentes».³⁸ A su vez, también se sumaron los estudiantes de las distintas facultades regionales, a través la ocupación de los establecimientos de Rosario,³⁹ Avellaneda,⁴⁰ Mendoza,⁴¹ Córdoba⁴² y La Plata.⁴³

La Junta estudiantil de Buenos Aires, en ejercicio del gobierno de la universidad, le retiró el título de «Primer Profesor Honorario» de la UON a Perón, haciendo extensiva esta medida al ex gobernador de la provincia de Buenos Aires, Carlos Aloé. Asimismo, los estudiantes desconocieron la validez de las libretas universitarias por la propaganda peronista contenida en las mismas⁴⁴ y modificaron el nombre del Aula Magna de la universidad, que pasó de llamarse «Juan Perón» a denominarse «Libertad».⁴⁵ En suma, con la llegada de la «Revolución Libertadora» el estudiantado de esa facultad regional llevó adelante una serie de medidas tendientes a desprenderse de todo legado, vestigio o referencia del peronismo.

Finalmente, el 17 de octubre de aquel año asumieron las autoridades interventoras nombradas por la dictadura militar. Una de las primeras

³⁸ *La Prensa*, «Los profesores de la Universidad Obrera apoyan al alumnado», 9 de octubre de 1955. Buenos Aires.

³⁹ Novelli, «Movimientos estudiantiles», 9-11.

⁴⁰ Facio, «La Cenicienta», 79-85.

⁴¹ *La Nación*, «En la Facultad Regional de la Universidad Obrera», 4 de octubre de 1955. Buenos Aires.

⁴² *La Nación*, «Alumnos tomaron posesión de la Universidad Obrera», 5 de octubre de 1955. Buenos Aires.

⁴³ *La Nación*, «Ocuparon los alumnos la Universidad Obrera», 6 de octubre de 1955. Buenos Aires.

⁴⁴ *La Nación*, «Universidad Tecnológica Nacional», 16 de octubre de 1955. Buenos Aires.

⁴⁵ *La Prensa*, «La Universidad Obrera modificó varias medidas», 26 de noviembre de 1955. Buenos Aires.

medidas adoptadas por los nuevos funcionarios fue la de elevar un proyecto de decreto-ley a la CNAOP proponiendo el cambio de nombre de la universidad. El rector interventor destacaba que fue posible comprobar que, durante los tres primeros años de funcionamiento de la universidad en la época del gobierno peronista, los cursos se habían desarrollado con una «ponderable seriedad», pese al ambiente de «propaganda ideológica y demagógica» que imperaba en aquel momento.⁴⁶ De esta manera, las nuevas autoridades se plegaron y apoyaron, al igual que los profesores, las reivindicaciones de los estudiantes, constituyéndose el bloque al que hemos denominado como «comunidad académica de la UON».

LAS TENSIONES ENTRE LA UON Y LOS INGENIEROS EN EL CONTEXTO DE LA «REVOLUCIÓN LIBERTADORA»

Sobre la base de este contexto, distintas asociaciones profesionales ingenieriles realizaron una serie de objeciones sobre la UON. Estas impugnaciones quedaron materializadas en circulares, cartas y notas, muchas de las cuales fueron publicadas por la prensa de la época obteniendo, a su vez, respuesta inmediata por parte de las autoridades interventoras, docentes y alumnos de la institución. Asimismo, algunas de estas entidades –en el marco de la «Revolución Libertadora»– encontraron la oportunidad para bregar por la desaparición de la UON. La primera de estas instituciones fue la Asociación de Ingenieros de Rosario la cual, a través de su comisión directiva, reclamó abiertamente «la supresión de la Universidad Obrera Nacional», invitando a sus socios a retirarse de los concursos que se estaban realizando en la UON.⁴⁷

Esta solicitud fue caracterizada por Alberto Mainieri –profesor de la Facultad Regional Rosario– como un pedido «fundado por mezquinos intereses de grupos y sin ninguna clase de argumentos». Al mismo tiempo, añadía que una institución educativa que cuenta con el apoyo de los estudiantes adquiere el suficiente derecho para subsistir y que la opinión de la comisión directiva de aquella entidad profesional no debió

⁴⁶ Aristeguieta, *UTN*, 34.

⁴⁷ Aristeguieta, *UTN*, 185.

apresurarse, sin antes conocer la posición de los propios sostenedores de esas casas de estudios que son los industriales del país.⁴⁸

Por otra parte –en una nota remitida al ministro de Educación de la Nación–, el Colegio de Graduados de la Facultad de Ingeniería de Buenos Aires (CG-FIUBA) cuestionaba de manera categórica el carácter universitario de los estudios cursados en la UON y la jerarquía del título que sería otorgado a sus egresados. Además, afirmaba que la existencia de esta universidad no aparece justificada de manera clara, tanto desde el punto de vista de los estudios que se imparten, como de la función social que desempeñarían sus graduados, frente al carácter de los estudios y nivel de los egresados de las demás facultades de ingeniería de las universidades clásicas.⁴⁹ En una carta enviada al diario *La Nación* esta organización destacaba que, sobre la base de un estudio que habían realizado, no había razones suficientes para justificar la existencia de instituciones como la UON. Según ese relevamiento, debido a las características de enseñanza impartida en esta casa de estudios técnicos «carente de cultura general» los profesionales que egresarían no podrían ser considerados de «nivel universitario». En efecto, por «carecer de la visión de conjunto» y de la «eficiencia de gobierno» que el país exige a los ingenieros –dadas por el estudio de asignaturas humanísticas– sus egresados estarían en un nivel intermedio entre el egresado de las escuelas industriales y los ingenieros graduados de las universidades nacionales. Debido a ello, la UON no debería ser más que un Instituto Técnico o un Politécnico. Por último, el citado relevamiento destaca que en la UON no existía, en general, la base integral necesaria para emprender el estudio de las carreras que allí se cursaban, debido a que sus planes de estudio no representaban un nivel superior de jerarquía universitaria y que se pretendía hacer con «urgencia y sobrada limitación una rígida especialización», dejando «el problema humano» de lado, lo que resultaba opuesto al criterio que estima inseparables y simultáneas la formación del hombre y la formación profesional.⁵⁰

⁴⁸ Aristeguieta, *UTN*, 187.

⁴⁹ Colegio de Graduados Facultad de Ingeniería de la UBA «El problema de la Universidad Obrera» (Documento mimeografiado). 30 de marzo de 1956. Archivo privado del ingeniero Víctor Vilella, Villa Carlos Paz.

⁵⁰ *La Nación*, «El problema de la Universidad Obrera Nacional», 15 de julio de 1956. Buenos Aires.

En una carta dirigida a ese mismo periódico, el rector interventor de la UON refutó punto por punto estas objeciones, aseverando que la preocupación de aquella entidad por la «falta de cultura» de los egresados de las escuelas industriales es selectiva; es decir que solo constituye una preocupación al Colegio de Graduados de la FIUBA cuando concierne a los ingresantes de la «Universidad Tecnológica». Asimismo, este funcionario reconoció que la «falta de cultura» era un hecho real debido a que la UON fue una de las instituciones más afectadas por la «demagogia» imperante durante «el gobierno depuesto», destacando que la «UTN» apuntaba a ser una universidad para la formación de ingenieros especialistas y, para tal finalidad, los departamentos de didáctica de la institución estaban revisando y reajustando los programas. Por último, en relación a la «función social» y al «problema humano» señalados por aquella entidad, el rector de la UON afirmaba que una universidad con las características pedagógicas que ostentaba la «UTN» y que, por sobre todo, contemplaba a quienes tenían la necesidad de trabajar mientras estaban estudiando, llenaba una función social y consideraba el problema humano de quienes se encontraban en tales condiciones.⁵¹

Otra de las instituciones que impugnó la existencia de la UON fue el Centro de Graduados de la Facultad de Ciencias Físico Matemáticas de la Universidad Nacional de La Plata (CGFCFM-UNLP). En una extensa nota, esta organización afirmaba que aquella universidad fue creada por la necesidad del régimen peronista de contraponer al egresado de la universidad tradicional un «nuevo universitario» que «convenientemente adocenado» respondiera a sus orientaciones, ya que veía con desagrado que pese a sus «intentos demagógicos», la juventud universitaria constituía uno de los centros cuyo sometimiento era incapaz de lograr. Asimismo, en una férrea defensa de los principios de La Reforma de 1918, esta entidad repudiaba las diferenciaciones fundadas en motivos económicos, reivindicando el ingreso irrestricto de cualquier estudiante, sin distinciones sociales. Por otra parte, sostenía que la UON no debería otorgar un título equiparable al de las demás universidades ya que no suministraba las condiciones que requiere un ingeniero, debido al aspecto de sus planes de estudio y a que el estado de los estudiantes luego de una jornada de ocho horas laborales no era el más adecuado para contraerse

⁵¹ *La Nación*, «La Universidad y la Tecnología», 20 de julio de 1956. Buenos Aires.

al estudio de temas físico-matemáticos y técnicos durante cuatro horas de clases diarias. En cuanto a la currícula de la UON, resaltaba que la excesiva «unilateralidad» de la formación técnica de sus estudiantes no los habilitaba para un desempeño eficiente dentro de las fábricas y empresas y que la especialización en sus planes de estudio no era «real», debido a que eran los mismos que regían en las universidades clásicas, con la eliminación de algunos temas y sin profundizar en aquellos que sirven de base para la formación de un especialista.

La nota aludida también destaca que «ateniéndose al concepto de universidad no se puede concebir como tal la que no tienda, entre otros fines, a la formación humanística de los profesionales» y que la ausencia de un «clima universitario» daría cuenta de que quienes egresen de la UON no alcanzarían el nivel cultural brindado por la universidad estatal clásica, debido a que carecerían tanto de la integración cultural aparejada como de la idoneidad técnica. Por último, esta asociación de graduados expresaba que por haber nacido bajo «inspiraciones demagógicas y autoritarias» y por su incapacidad para atender las exigencias de la paulatina industrialización del país no se justificaba la existencia de la UON, y su estudiantado había sido inducido al engaño. La solución que desde esta entidad se proponía era que, por única vez, las universidades tradicionales elaboren planes de equivalencia para la inclusión de los estudiantes de la UON, cuyos contenidos contemplarían las asignaturas de contenido humanístico, consideradas esenciales para una completa formación integral.⁵²

En una carta dirigida al rector de la UON fechada el 25 de mayo de 1956, el profesor de metalografía Eduardo Dubox, refutó las distintas impugnaciones realizadas por la entidad arriba citada. En la misma, destacaba que tanto los ingenieros formados en las universidades clásicas a los cuales denominaba como «no orientados», como aquellos que estaban en proceso de formación dentro de la «UTN» –denominados «orientados»–, eran requeridos por las necesidades del país, lo que hacía a su coexistencia necesaria. Asimismo sostenía que, independientemente del nombre que se le otorgue a la «UTN» y de la dependencia administrativa que esta tenga, la misma debía ser una casa de altos estudios,

⁵² Centro de Graduados de la Facultad de Ciencias Físico-Matemáticas de la UNLP, (Documento sin título), 24 de abril de 1956. Archivo privado del ingeniero Víctor Vilella, Villa Carlos Paz.

donde el valor de sus títulos no esté regido por ninguna disposición legal sino por la competencia de sus egresados (Dubox, 1956). Este docente fue uno de los pocos integrantes –sino el único– perteneciente a la UON que no consideraba trascendente que esta institución sea denominada «universidad».

Otra de las asociaciones profesionales que se opuso férreamente a la existencia de la UON fue el CAI –organización que fue intervenida por el peronismo– y que hizo explícita su posición en una nota enviada al ministro de Educación, reproducida por *La Nación* el 3 de agosto de 1956. Según esta entidad, la UON no era una universidad, sino un instituto técnico, destacando que sus egresados no serían ingenieros debido a que en Argentina la formación de este profesional tiene carácter universitario y su actividad dentro de la sociedad es la de dirección;⁵³ en cambio, de la UON solamente surgirían técnicos intermedios entre la ejecución manual y la dirección. Por otra parte, expresaba que no debían expedirse los títulos de Ingeniero de Fábrica ya que no satisfacen «necesidades reales», no colman las aspiraciones de los estudiantes y posteriormente generarán «controversias», proponiéndose que esta casa de estudios se denomine «Instituto Tecnológico Nacional». Por último, el CAI manifestaba que no encontraba ningún inconveniente en que los ingenieros sean formados en distintos ámbitos educativos, siempre y cuando estos sean de «carácter universitario».⁵⁴

La réplica al CAI no se hizo esperar por parte de los estudiantes de la UON, cuya respuesta fue publicada nueve días después en el mismo matutino. En la nota, la Junta estudiantil le reprochaba al CAI no haber hecho ningún tipo de crítica constructiva, ya que en ninguna parte de su

⁵³ El entonces decano de la Facultad de Ingeniería de la Universidad de Buenos Aires, Ing. Malvicino, sostenía –en línea con el CAI– que «el ingeniero no debe ser solamente un técnico, sino en primer término un hombre, que debe tener la adecuada ubicación en el medio social en que actúa y ser además un hombre de gobierno, ya que la técnica de esa especialización es en el presente preponderante en la conducción de la cosa pública, con influencia en la modalidad de vida de la sociedad moderna» (*La Nación*, «Labor cumplida en la Facultad de Ingeniería», 10 de enero de 1957). Asimismo, en ocasión del cierre de sesiones del Consejo Superior de la Universidad de Buenos Aires, Malvicino había expresado «el deseo de profesores, egresados y estudiantes de que el próximo Consejo Superior estudie el alcance profesional de los títulos universitarios de ingenieros y en especial modo la resolución de la interferencia que en ese aspecto provoca la subsistencia de la Universidad Obrera Nacional, dependiente de la Comisión Nacional de Aprendizaje». *La Prensa*, «El Consejo de la Universidad realizó ayer su última sesión», 14 de noviembre de 1957. Buenos Aires.

⁵⁴ *La Nación*, «Aspectos de Problema de la Enseñanza Técnica», 3 de agosto de 1956. Buenos Aires.

manifiesto dejó asentado cuáles deberían ser las condiciones para adecuar los planes de estudio, a fin de cumplir con la aspiración del estudiantado de egresar con el título de ingeniero con el sentido jerárquico que en el país se da a ese grado académico. Asimismo, manifestaban que quienes estudian en la «UTN» tienen la misma base de cultura general que otros ingenieros diplomados en el país y que esta condición no les produjo ningún impedimento en su posterior desempeño profesional.⁵⁵

Por último, en una nota de diciembre de 1956, el Centro de Ingenieros de la Provincia de Buenos Aires (CIPBA), destacaba que casi todas las instituciones vinculadas al ambiente universitario argentino habían ya manifestado su desaprobación ante la existencia y creación «demagógica» de la UON. Asimismo, resaltaba que las universidades nacionales, con el correr del tiempo, fueron permitiendo el ingreso de los egresados de las escuelas industriales y se empezó a pensar en una formación puramente tecnológica para los futuros ingenieros: la UON constituía –según esta asociación profesional– una «poco feliz» culminación de este concepto. Por último, el CIPBA afirmaba de manera categórica que el ingeniero «más útil» es aquel que formaba la universidad nacional, sobre la base de una formación de cultura integral técnico-humanística. En este sentido, aseveraba que la UON debía cesar en su funcionamiento debido a que «no respondía a las necesidades del país» y que –en línea con lo que proponía el CAI– las universidades nacionales debían permitir la incorporación de sus alumnos, con los recaudos y requisitos que cada de ellas considere necesarios, creando cursos nocturnos de carácter permanente para los mismos y para aquellos imposibilitados de concurrir a los cursos diurnos.⁵⁶

LA DISCUSIÓN EN TORNO A LA «UTN» EN EL PARLAMENTO ARGENTINO POSPERONISTA

Finalmente, y a pesar de las presiones de las distintas asociaciones profesionales, el gobierno provisional de la «Revolución Libertadora»

⁵⁵ *La Nación*, «La Universidad de Tecnología», 12 de agosto de 1956. Buenos Aires.

⁵⁶ Revista del Centro de Ingenieros de la Provincia de Buenos Aires, «La llamada Universidad Obrera Nacional no responde a las necesidades argentinas» IV, no. 15 (1956): 17.

no adoptó ninguna resolución definitiva sobre el problema de la «UTN», trasladando este problema al siguiente gobierno constitucional.

El 23 de febrero de 1958 Arturo Frondizi derrotó en las urnas a Ricardo Balbín en las elecciones nacionales, lo cual constituyó una victoria para los partidarios de la «UTN» debido a que durante su campaña presidencial había manifestado que esta institución era fundamental para el desarrollo industrial como base del desarrollo nacional, resaltando asimismo la importancia que para ese programa de gobierno significaba contar con esta casa de altos estudios técnicos.⁵⁷ En este contexto, la comunidad académica de la UON consensuó un proyecto de ley que fue recibido por el senador Dávila, el cual fue presentado y aprobado por la Cámara de Senadores el 28 de septiembre de 1958.⁵⁸

El 9 de octubre de 1959 la Cámara de Diputados comenzó el debate en torno a la ley de cambio de denominación, estructura y funcionamiento de la UON, mediante la cual se le otorgaba autarquía a la casa de estudios.⁵⁹ En el recinto, el diputado Uzal manifestaba la necesidad de que Argentina contara con capitales y equipos extranjeros y, sobre todo, con hombres capaces de manejarlos, destacando así la función que desempeñaría esta institución. También resaltaba que quienes se oponían al proyecto lo hacían sobre la base de que la «UTN» no podía denominarse «universidad», debido a que no se adecuaba a este concepto del siglo XII. En este sentido, consideraba que dicha institución había tenido que transformarse y ya no podía ser aquella de esa «cultura superior», de especulación abstracta. En efecto, la «UTN» constituiría una universidad debido a que «lo contiene todo en la especie de que se trata», es decir, que contiene todas las disciplinas en lo que a tecnología refiere y que todas las ramas de la misma estarán diseminadas a lo largo de todo el país. Asimismo, añadía que los conocimientos que impartiría serían parciales y no pretendían ser de carácter general, reivindicando una educación menos enciclopedista y más práctica. Por último, recalca que la «UTN» sería una universidad por ser la continuación del ciclo de enseñanza media y debido a ello tendría el derecho a denominarse de tal

⁵⁷ Vilella, *Memorias*, 224.

⁵⁸ Koc Muñoz, «De la Universidad», 292.

⁵⁹ A diferencia de 1948, el peronismo no pudo participar del debate parlamentario debido a que este movimiento político estaba proscripto.

manera. También sería un establecimiento de enseñanza superior para los jóvenes que trabajan, ya que sus horarios serían adecuados para quienes realizan ambas actividades y no tendría un sentido clasista, debido a que no se exigiría la condición de ser obrero para ingresar a ella, como tampoco se establecería la obligación de trabajar en una industria afín a la especialidad que se cursa.⁶⁰

En esta misma línea, el diputado Oreja expresaba en el recinto que la UON había sido una «creación demagógica del régimen peronista» y que su nombre representaba «un enfrentamiento de tipo clasista con la universidad clásica», destacando, al mismo tiempo, que la «UTN» era un hecho «real y positivo», que ya estaba incorporado al país y que no se debía desestimar por el solo hecho de haber sido una creación del peronismo, ya que, luego de un decenio de experiencia acumulada y con la reforma ya vigente en base a la nueva ley –que se estaba por sancionar– quedaban subsanadas todas las objeciones realizadas por los legisladores opositores en 1948.⁶¹

Por su parte, la diputada Baigorria resaltaba que la universidad debía conservar, transmitir y desarrollar los conocimientos y que los fines de esta institución debían ser básicamente tres: la investigación básica, la formación de la personalidad del hombre sobre la base de la cultura general y la función social –definida por los principios de La Reforma de 1918– de integrar los cuadros superiores de la Nación para servir a la solución de los problemas nacionales. Para cumplir con la formación del futuro dirigente de la sociedad, la universidad debía constituir una formación paralela tanto en el aspecto humanístico como el científico: debía «enseñar a pensar». Por ello, debido a que la «UTN» no contendría entre sus facultades a disciplinas que no sean del orden de la técnica, esta institución nunca podrá cumplir con los fines de la integralidad, razón por la cual no debería denominarse «universidad». En efecto, la institución, que aún seguía denominándose oficialmente UON, debía transformarse en un instituto superior de tecnología y, por lo tanto, debía constituirse en un estrato intermedio entre las escuelas industriales o de orientación profesional y la universidad.⁶²

⁶⁰ Universidad Tecnológica Nacional, *Orígenes de la UTN, El debate* (Buenos Aires, Departamento de Estadística de la Universidad Tecnológica Nacional: 1984), 38.

⁶¹ Universidad Tecnológica Nacional, *Orígenes*, 72.

⁶² Universidad Tecnológica Nacional, *Orígenes*, 129.

En la misma línea que Baigorria, el diputado Pitto exponía su punto de vista en base a un proyecto que había presentado en el año 1958, mediante el cual proponía que en las universidades nacionales se crearan facultades de tecnología sobre la base de las facultades regionales de la UON. En su disertación, sostenía que la universidad debía abrir sus puertas a la enseñanza técnica y a la juventud obrera: su proyecto apuntaba a la creación de facultades de tecnología en las universidades clásicas, que sería la forma de hacer lugar a las aspiraciones de los estudiantes de la UON. La universidad debía apuntar a la unicidad de la enseñanza, en un doble sentido pedagógico: una enseñanza universalista orientada a la formación técnica profesional y a la formación humanista en lo pedagógico, sin diferenciaciones ni discriminaciones en el aspecto social.⁶³

En efecto, tanto la diputada Baigorria como este último legislador fueron quienes representaron, dentro del recinto parlamentario, la posición política de las diversas corporaciones profesionales.⁶⁴ A pesar de esta oposición, la ley 14.855/59 quedó finalmente aprobada por abrumadora mayoría –con 95 votos a favor sobre un total de 101– el 14 de octubre de 1959 consagrándose, de esta manera, los anhelos de la comunidad académica de la UON. Esta normativa establecía que la universidad quedaba formalmente separada de la CNAOP, funcionando dentro del régimen jurídico de autarquía, bajo la denominación de Universidad Tecnológica Nacional. Asimismo, prescribía que el Estatuto que la institución confeccionaría para su propio funcionamiento debía contemplar el ingreso irrestricto a cualquier egresado de la enseñanza secundaria y debía garantizar –en sus organismos directivos– la representación de los tres claustros: profesores, estudiantes y egresados.

CONCLUSIONES

Una vez consolidado el triunfo de la «Revolución Libertadora» los estudiantes de la UON ejercieron el gobierno de la universidad durante

⁶³ Universidad Tecnológica Nacional, *Orígenes*, 172.

⁶⁴ Cabe destacar que también existió una propuesta –expresada por el diputado Isaac Breyter– en la que se solicitaba la vuelta del proyecto a la comisión correspondiente para su reformulación en el marco de una reforma educacional más amplia, que tenía como base las recomendaciones de organismos internacionales como la UNESCO y la OIT. Pronko, *Las Universidades*, 209.

20 días. En este lapso de tiempo, modificaron el nombre de la institución por el de «Universidad Tecnológica Nacional», retiraron el título de «Primer Profesor Honorario» a Perón y al ex gobernador Aloé y también desconocieron la validez de las libretas universitarias debido a la propaganda peronista que contenían las mismas, buscando eliminar todo vestigio de peronismo de esta institución. Por su parte, los docentes dieron su apoyo explícito a esta organización estudiantil y a sus demandas. Este gobierno finalizó al ser nombradas las nuevas autoridades interventoras las cuales, al constatar que la casa de estudios no era una universidad de «peronistas» pese a lo «demagógico de su nombre», brindaron también su apoyo a la «lucha por la autonomía y jerarquización de la UTN». En efecto, el estudiantado de la UON, desde el primer momento del nuevo gobierno militar, buscó poner de manifiesto que no adscribía al peronismo y que tampoco buscaba organizar una defensa de su universidad basada en la defensa de este movimiento político.

Asimismo, luego de la consolidación de la «Revolución Libertadora», las diversas asociaciones profesionales que se opusieron a la existencia de esta universidad desde sus inicios, pasaron a la ofensiva, proponiendo a través de distintos medios la supresión de esta institución, o su transformación en un instituto técnico, tecnológico o politécnico. Estas organizaciones sostenían que la UON debía concluir sus actividades en cuanto universidad debido a que, al ser una «creación demagógica» y por lo tanto carente de «cultura general», no ofrecía estudios de «carácter universitario» como tampoco satisfacía «necesidades reales». En este sentido, la comunidad académica de la UON salió al cruce de las distintas asociaciones con la finalidad de defender la existencia de la universidad. La disputa protagonizada por ambos bloques constituyó una suerte de «juego de suma cero», en el que ninguno logró imponer su proyecto y en el que el gobierno dictatorial decidió no inclinar la balanza hacia ninguno lado, trasladando este problema al nuevo gobierno constitucional, que a partir de 1958 sería presidido por Arturo Frondizi.

Por otra parte, cabe destacar que, a pesar de que los integrantes de la comunidad académica de la UON –y en especial los estudiantes– no organizaron una defensa de la institución en torno a la defensa del peronismo, el bloque constituido por las entidades ingenieriles mantuvo una férrea posición en torno al problema de la UON. Creemos que la constante búsqueda de la desaparición de esta universidad encuentra su explicación en el

acentuado antiperonismo de estas instituciones, cuyo origen se remonta –tal como señalan Sigal y Pis Diez– al periodo 1943-1945 y que atraviesa todo el período del gobierno peronista. En este sentido, el bloque ingenieril quedó anclado en una lógica de irreductibilidad en la que no había espacio para ningún tipo de autocritica ni revisión acerca de las políticas de ese gobierno: todo aquello cuyo origen remitía al peronismo debía ser eliminado por el solo hecho de ser producto de ese movimiento político.

Por último, resta señalar que este conflicto tuvo su expresión parlamentaria en la Cámara de Diputados, al tratarse la ley de autarquía para la «UTN». Durante el debate, la posición política de las asociaciones profesionales fue defendida por los diputados Baigorria y Pitto: la Universidad Obrera debía ser disuelta y las distintas universidades nacionales debían crear facultades de tecnología sobre la base de las facultades regionales de la UON o, en su defecto, debía ser transformada en un instituto superior de tecnología, un estrato intermedio entre las escuelas industriales o de orientación profesional y la universidad. A pesar de la oposición de los mencionados legisladores, finalmente la ley 14.855/59 fue aprobada por abrumadora mayoría, resolviéndose así el conflicto que se extendió durante más de cuatro años en torno a la UON, siendo el gobierno de Frondizi el que finalmente inclinó la balanza a favor de los partidarios de la «UTN». Creemos que este hecho encuentra su explicación en la necesidad de contar con una universidad capaz de formar una mano de obra altamente calificada, capacitada para operar las nuevas tecnologías que ingresarían al país a lo largo de su periodo presidencial.

Nota sobre el autor

Álvaro Sebastián Koc Muñoz nació en la ciudad de La Plata, provincia de Buenos Aires, Argentina, en 1984. Es Doctor en Ciencias de la Educación por la Universidad Nacional de La Plata y Profesor y Licenciado en Sociología por esa misma casa de estudios. Asimismo, se desempeña como Profesor Adjunto en la cátedra de Problemáticas Educativas Contemporáneas de la Universidad de la Ciudad Autónoma de Buenos Aires (UniCABA) y como becario posdoctoral en el Instituto de Investigaciones de Humanidades y Ciencias Sociales, Facultad de Humanidades y Ciencias de la Educación, Consejo Nacional de Investigaciones Científicas (IdIHCS-CONICET-UNLP). Actualmente, sus principales líneas de

investigación giran en torno a los usos de herramientas digitales y consumos culturales de los docentes de escuelas secundarias públicas en la Ciudad Autónoma de Buenos Aires durante el período de la emergencia sanitaria (2020-2022) y sobre la constitución y consolidación institucional de la Universidad Tecnológica Nacional en el contexto del desarrollismo en Argentina (1959-1962). Por último, resta señalar que es miembro activo de la Sociedad Argentina de Investigación en Educación (SAIE), participando en la organización de diferentes eventos académicos sobre la temática educativa en Argentina.

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EDUCACIÓN INTERCULTURAL EN ESPAÑA: DEL ASIMILACIONISMO FRANQUISTA A LA DÉCADA DE 1990

*Intercultural Education in Spain: from the Assimilationism
in Francos' Regime to the Decade of 1990*


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Resumen. Este estudio, articulado a través de la legislación educativa, analiza la evolución en la forma de abordar el respeto hacia otras culturas en la escuela española desde el final del franquismo hasta la década de 1990. La metodología empleada es el análisis de contenido de los textos legislativos a nivel nacional desde la Ley General de Educación (LGE) de 1970 hasta la Ley de Ordenación General del Sistema Educativo (LOGSE) de 1990. En un posterior nivel de análisis, los conceptos sobre el respeto a otras culturas desarrollados por la legislación educativa son analizados mediante fuentes secundarias, exponiéndose ambos resultados de forma narrativa. El texto muestra cómo el modelo asimilacionista y etnocéntrico característico de la época franquista fue dejando paso progresivamente a planteamientos más respetuosos con otras culturas. La Ley General de Educación de 1970 fue un primer paso hacia ese cambio de mentalidad. Con la llegada de la democracia, la necesidad de una educación intercultural se hizo explícita, si bien, sus postulados no llegarían a concretarse hasta la década de 1990. Sin embargo, las buenas intenciones de la ley se vieron lastradas por la formación de los profesores en este sentido.

Palabras clave: Educación intercultural; Democracia; Identidad cultural; Educación ciudadana.

Abstract. *Through educational legislation, this study analyses the evolution of the concept of respect for others' cultures in the Spanish school from Franco's regime to the decade of 1990. We use content analysis as our methodology*

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for examining the educational laws spanning from the General Education Law of 1970 to the General Organic Law of the Educational System (LOGSE) in 1990. At another level of analysis, the concepts related to the respect for others' cultures and developed by the law are analyzed through secondary sources, presenting both analyses in a narrative fashion. The text shows how the ethnocentric and assimilationist framework during Franco's regime changed progressively to a more respectful model toward others' cultures. LGE was a first step in this change of mentality. With the arrival of democracy, the need for an intercultural education became explicit. However, this new approach only took shape with the LOGSE of 1990. Furthermore, a lag in teacher training proved to be a handicap for the application of the law's positive objectives regarding intercultural education.

Keywords: *Intercultural education; Democracy; Cultural identity; Civic education.*

INTRODUCCIÓN

La formación de ciudadanos críticos y tolerantes de cara a la diversidad cultural es uno de los retos más importantes a los que se enfrenta la democracia y la educación del siglo XXI. La capacidad de respeto de una sociedad hacia las culturas minoritarias o, en general, hacia cualquier cultura varía con el paso del tiempo. Este cambio de mentalidad no siempre es a mejor, ya que a veces se producen regresiones en lo que a tolerancia se refiere. No obstante, la evolución del tratamiento de la diversidad en la escuela española ha avanzado positivamente en las últimas décadas.

Desarrollar una educación intercultural hoy en día pasa por un análisis riguroso de la sociedad en la que vivimos. Como afirma Jagdish Gundara,

la relevancia de la educación intercultural no debe ser vista como una consecuencia de la reciente inmigración hacia Europa. El continente europeo posee un largo y complejo legado multicultural. Ello implica que la interculturalidad y la educación intercultural deben ser conscientes de las complejidades surgidas tanto de su pasado como de los aspectos de la diversidad social actual.¹

¹ Jagdish S. Gundara, *Intercultural Education and Inclusion* (Londres: Paul Chapman, 2000), 105.

En el caso de nuestro país, hay que destacar que vivimos en un estado pluricultural y plurilingüístico. Esta diversidad no solo se refiere a las identidades nacionales llamadas históricas, sino también a grupos culturales como los gitanos y al gran flujo de inmigración que ha tenido España durante las tres últimas décadas. Ante esta pluralidad, la educación intercultural debe tener en cuenta a todos los grupos sociales, sin importar su cultura, clase social, religión o raza.² Es decir, la educación intercultural pretende preparar a todo el alumnado para convivir en una sociedad culturalmente diversa.³

A dicha variedad se suma el hecho de que –según la Organización de las Naciones Unidas para la Educación, la Ciencia y la Cultura (UNESCO)⁴– la identidad cultural es un proceso orgánico que se transforma constantemente, por lo que hay que realizar un esfuerzo considerable para que la realidad de la escuela no se aleje de aquella de la sociedad. Kenneth Cushner, en un estudio a nivel internacional sobre educación intercultural identifica cinco cuestiones capitales que han de ser tenidas en cuenta para el desarrollo de estrategias en el aula: la tensión cultural generada entre la población mayoritaria y las minorías en la escuela (indígenas, refugiados, minorías étnicas o inmigrantes); la preservación de la diversidad lingüística; el desarrollo de prácticas curriculares etnocentristas; la predisposición del profesorado y su preparación en estos temas; la legislación educativa.⁵

Estas cinco cuestiones han influido de forma decisiva en el desarrollo de la educación intercultural en España. Aunque pueda parecer que nuestro país no ha tenido grandes problemas de integración racial y cultural, lo cierto es que durante mucho tiempo el sistema educativo ignoró las tres primeras cuestiones: relaciones entre la población

² Auxiliadora Sales y Rafaela García, «The Challenge of Intercultural Education in Spain», en *International Perspectives on Intercultural Education*, ed. Kenneth Cushner (Mahwah: Lawrence Erlbaum Associates, 1998), 146-168.

³ Jordi Garreta-Bochaca, Angels Torrelles-Montanuy y Héctor Cárcamo-Vásquez, «La educación primaria en España y la diversidad cultural», *Psicoperspectivas*, 21, no. 1 (2022): 1-11.

⁴ UNESCO, *Informe mundial de la UNESCO. Invertir en la diversidad cultural y el diálogo intercultural* (París: UNESCO, 2009).

⁵ Kenneth Cushner «Intercultural Education from an International Perspective: Commonalities and Future Prospects», en *International Perspectives on Intercultural Education*, ed. Kenneth Cushner (Mahwah: Lawrence Erlbaum Associates, 1998), 353-370.

mayoritaria y la minoritaria –en el caso de los niños gitanos o de los alumnos inmigrantes– preservación de la diversidad lingüística –tema que solo se tomó en serio a partir de la década de 1990– y prácticas curriculares etnocentristas, que aún hoy se siguen practicando.

En este sentido, el objetivo principal del presente estudio es analizar la evolución en la forma de abordar el respeto hacia otras culturas en la escuela española desde el final del franquismo hasta la década de 1990. El segundo objetivo es estudiar en qué medida los progresos hechos a nivel legislativo pudieron llegar a las aulas durante dicho periodo.

LA DIVERSIDAD ÉTNICA Y CULTURAL DURANTE LA ESCUELA TARDOFRANQUISTA

La Declaración de los Derechos Humanos, de 1948, es uno de los primeros textos internacionales en los que se destaca la necesidad de una educación intercultural:

la educación tendrá por objeto el pleno desarrollo de la personalidad humana y el fortalecimiento del respeto a los derechos humanos y a las libertades fundamentales; favorecerá la comprensión, la tolerancia y la amistad entre todas las naciones y todos los grupos étnicos o religiosos; y promoverá el desarrollo de las actividades de las Naciones Unidas para el mantenimiento de la paz.⁶

Esta clara alusión por parte de Naciones Unidas al desarrollo de lo que hoy se conoce como educación intercultural, estaba muy lejos de los planteamientos del sistema educativo español de la época. La Ley de Ordenación de la Enseñanza Media de 1953,⁷ de carácter confesional y que seguía la línea de la Ley de la Enseñanza Media de 1938,⁸ se situaba en las antípodas de una enseñanza que tuviera en cuenta cualquier tipo de diversidad, ya fuera cultural, étnica o lingüística: «la enseñanza media

⁶ Naciones Unidas. *Declaración Universal de los Derechos Humanos* (Nueva York: Naciones Unidas, 1948), artículo 26-2.

⁷ Ley, de 26 de febrero, de 1953 sobre Ordenación de la Enseñanza Media. Boletín Oficial del Estado, núm. 58, de 27 de febrero de 1953, 1119-1130.

⁸ Ley, de 20 de septiembre, de 1938 sobre la reforma de la Enseñanza Media. Boletín Oficial del Estado, núm. 85, de 23 de septiembre de 1938, 1385-1395.

se ajustará a las normas del Dogma y de la Moral católica y a los principios fundamentales del Movimiento Nacional».⁹

Durante la escuela franquista la diversidad étnica y cultural no solo era ignorada sino que, además, se subrayaban las diferencias relativas a cualquier tipo de otredad: «todos nosotros somos españoles –se podía leer en un libro de educación primaria– En cambio los moros no son españoles, ni los negritos, ni los chinos, ni los franceses... Somos españoles todos los que hemos nacido en este territorio que se llama España».¹⁰

Al igual que en otros ámbitos, la política franquista no cambió prácticamente durante las dos primeras décadas de la dictadura. La mentalidad etnocentrista, expresada en textos como el precedente, tardaría mucho tiempo en salir de las aulas y el cambio no se daría de un día para otro, sino a través de pequeños pasos.

Como señala Salvador Cayuela,¹¹ desde mediados de los años cincuenta, y sobre todo a partir de principios de los sesenta, el optimismo generalizado entre los dirigentes franquistas –debido al despegue económico– permitió una cierta relajación en el aparato represivo y censor del régimen. Este aperturismo dio como resultado la promulgación de la Ley General de Educación del año 1970,¹² que puso punto y final a la política educativa plenamente fascista.

Los legisladores, asesorados por la UNESCO y la OCDE y con un préstamo generoso del Banco Mundial, fueron conscientes que el grado de incultura del país dificultaba en gran medida su desarrollo económico: el texto perseguía una mayor integración en el contexto europeo y la formación de mano de obra cualificada. Como sugieren algunos autores:

no se alfabetizó con más intensidad porque cambiaran los principios ideológicos de la clase dominante; no se potenció la

⁹ Ley, de 26 de febrero, de 1953, Artículo segundo.

¹⁰ Juan Navarro Higuera, *Lecciones amenas. Primer libro* (Barcelona: Editorial Miguel Ángel Salvatella, 1965), 29.

¹¹ Salvador Cayuela, «La biopolítica del franquismo desarrollista: hacia una nueva forma de gobernar (1959-1975)», *Revista de filosofía* 38, no. 1 (2013): 159-179.

¹² La Ley General de Educación y Financiamiento de la Reforma Educativa (LGE) de 4 de agosto de 1970. Boletín Oficial del Estado, núm. 187, de 6 de agosto de 1970, 12525-12546.

enseñanza primaria porque el bloque de poder tuviera interés en la cultura popular. Se hizo porque el sistema imponía sus condiciones si se deseaba el apoyo financiero a la economía española, y porque dijo alguien al régimen que ésta no podía funcionar sin una mano de obra especializada.¹³

En cualquier caso, con la LGE de 1970, desarrollada a partir del Libro Blanco «La educación en España. Bases para una política educativa»,¹⁴ se observa un cambio importante en muchas cuestiones básicas sobre educación: «esta ley viene precedida como pocas del clamoroso deseo popular de dotar a nuestro país de un sistema educativo más justo, más eficaz, más acorde con las aspiraciones y con el ritmo dinámico y creador de la España actual».¹⁵

La nueva manera de entender el sistema educativo permite la entrada de conceptos que habían permanecido al margen de los programas escolares hasta entonces. Se reconoce de forma explícita la diversidad como fuente de riqueza cultural, abogando por «la incorporación de las peculiaridades regionales, que enriquecen la unidad y el patrimonio cultural de España, así como el fomento del espíritu de comprensión y de cooperación internacional».¹⁶

Las orientaciones pedagógicas que el Ministerio presenta el 2 de diciembre de ese mismo año,¹⁷ introducen también conceptos interculturales, aunque de una forma aislada. En el área de Lenguaje-Lengua Extranjera, por ejemplo, se pretende el «acercamiento a una segunda cultura, [lo] que supone la adquisición de valores de comprensión y respeto hacia otros pueblos (su forma de vida, de pensar, de reaccionar)»; esos «otros pueblos», sin embargo, hacen referencia a culturas dominantes como la francesa y la anglo-americana.

¹³ Ramón Navarro, *La enseñanza primaria durante el franquismo (1939-1975)* (Barcelona: Promociones y Publicaciones Universitarias, 1990), 202.

¹⁴ «La educación en España. Bases para una política educativa» (1969). Madrid: Ministerio de Educación y Ciencia.

¹⁵ LGE, 1970, Introducción.

¹⁶ LGE, 1970, artículo primero.

¹⁷ Orden Ministerial, de 2 de diciembre, de 1970 dirigida a los Directores Generales de Enseñanza Primaria y Enseñanza Media y Profesional. Boletín Oficial del Estado, núm. 293, de 8 de diciembre de 1970, 19966-19966.

Los libros de texto fruto de estas directrices legislativas presentaron, durante la década de 1970 y principios de la de 1980, temas sobre lenguas y territorio, movimientos migratorios, población mundial y razas. Sin embargo, en la mayoría de los casos el tratamiento que se hizo fue desde una perspectiva demográfica y no tanto cultural. Además, muchos de los planteamientos que exponían aún no habían superado un pensamiento colonialista:¹⁸

elegir los estados en donde abunda la población mestiza –afirmaba el libro de texto «Mundo y Sociedad» para 6º de EGB– es elegir estados de cultura hispánica. Se debe con esto destacar cómo los españoles y portugueses no buscaron la extinción de los pueblos indígenas, sino que no tuvieron inconveniente en unirse a ellos.¹⁹

El incipiente desarrollo de conceptos interculturales se vio frenado por la deficiente formación del profesorado, que respondió de forma tardía a las nuevas necesidades generadas a partir de la LGE de 1970. En diversos campos, la falta de formación de los docentes impidió el desarrollo de ámbitos que la nueva ley había contemplado de forma seria.²⁰ En el caso de la educación intercultural, es difícil analizar hasta qué punto estos conceptos formaban parte de los estudios universitarios de los maestros. Sin embargo, hay un hecho que puede darnos una idea sobre la renovación teórica que existía en esa época en las nuevas escuelas universitarias de formación del profesorado: la inclusión de las escuelas normales en la universidad fue progresiva y hasta 1978 no se pudieron organizar los departamentos, lo que unido a la escasez de doctores y de medios (dotación de bibliotecas, recursos económicos, exceso de horas de docencia, etc.) inhabilitó al profesorado, en la práctica, para la investigación.²¹ Resulta evidente que los primeros trabajos académicos sobre el tema –que llegarían a Europa a principios de 1970 bajo la etiqueta

¹⁸ No hay que olvidar que las teorías poscoloniales comenzarán a aparecer a partir de 1978 en el ámbito anglosajón –con la publicación del libro *Orientalism* de Edward Said (1978)– aunque existen muchos precursores de estas teorías en el ámbito latinoamericano como Aimé Césaire o Fernando Ortiz.

¹⁹ Luis Coronas, *Mundo y Sociedad. Sexto Curso. Libro del profesor* (Madrid: Editorial Magisterio Español, 1972), 79.

²⁰ Pablo Ramos, *Education musicale à l'école élémentaire espagnole et formation des maîtres. Mémoire de Master* (Paris : Université de Paris IV- Sorbonne, 2008).

²¹ Miguel Beas, «Formación del Magisterio y reformas educativas en España: 1960-1970», *Profesorado: Revista de curriculum y formación del profesorado* 14, no. 1 (2010): 397-414.

todavía de educación multicultural—²² tardarían en ser asimilados por la universidad española.

Por otra parte, la sociedad española de la época no se enfrentaba a un cambio sociodemográfico tan importante como para solicitar una educación basada en la interculturalidad: España tenía un saldo migratorio negativo en 1970 del 1,7%, mientras que, en países como Francia, por ejemplo, la población inmigrante se incrementó ese mismo año en dos puntos porcentuales.²³ Los verdaderos problemas relacionados con la diversidad cultural llevaban mucho tiempo sin solucionarse y afectaban principalmente al colectivo gitano y a las zonas no castellanoparlantes.

En el primer caso, ninguna ley educativa había hecho mención de los gitanos dentro del contexto escolar general.²⁴ Sin embargo, a partir de la década de 1970 los movimientos asociativos comenzarán a desarrollar el trabajo de inclusión social que el Régimen no realiza. Los secretariados diocesanos progitanos pondrán los cimientos para la creación, ya en 1975, de asociaciones gitanas laicas. Todo ello dará como resultado la creación de las Escuelas Puente en 1978. Estos centros especiales de transición en régimen especial nacen de un convenio entre el Secretariado Nacional Gitano (Iglesia Católica) y el Ministerio de Educación para escolarizar a niños gitanos en situaciones de extrema marginalidad, con el fin de que puedan incorporarse a la escuela ordinaria.

El segundo caso que demuestra la negación de la diversidad por parte de los gobiernos tardofranquistas es el relativo a la diversidad lingüística. Al igual que en el caso del colectivo gitano, fue gracias al asociacionismo que la escuela pudo avanzar hacia postulados más respetuosos hacia la diversidad cultural. Como señalan Rosa Ortiz de Santos, Luis Torrego y Noelia Santamaría,²⁵ el final de la dictadura supuso el surgimiento de

²² Agostino Portera, «Intercultural education in Europe: epistemological and semantic aspects», *Intercultural Education* 19, no. 6, (2008): 481-491.

²³ Datos de Naciones Unidas, obtenidas a partir del Instituto Nacional de Estadística, accesible desde http://www.ine.es/inebmenu/mnu_dinamicapob.htm [consultado le 18/01/2022]

²⁴ Jesús Salinas, *Políticas Educativas con los gitanos españoles* (Madrid: Centro de Observación y Discriminación del Racismo de la Comunidad Europea, 2004).

²⁵ Rosa Ortiz de Santos, Luis Torrego y Noelia Santamaría, «La Democracia en Educación y los Movimientos de Renovación Pedagógica: Evaluación de Prácticas Educativas Democráticas», *Revista Internacional de Educación para la Justicia Social* 7, no. 1 (2018): 197-213.

numerosos colectivos de renovación pedagógica, siendo su nexo de unión su interés por transformar la escuela, estableciendo la democracia y la igualdad de oportunidades como sus principios fundamentales.

Una de las figuras clave en la renovación pedagógica durante el franquismo y la transición fue Rosa Sensat, cuya asociación inició en 1964 la formación permanente de los maestros y en 1965 retomó las Escuelas de Verano, de espíritu republicano. Estos encuentros estivales supusieron una renovación indirecta de la escuela española. En 1968 se realizó la primera *Escola d'Estiu* fuera de Barcelona, concretamente en Mallorca. Ya en 1976, llegaría la *Escola d'Estiu del País Valencià*, organizada por el *Moviment de Renovació Pedagògica* (MRP). Como afirma Salomó Marquès,²⁶ en 1969, estos círculos de docentes iniciaron una campaña pública por la incorporación del catalán en las escuelas públicas con el lema «Català a l'escola».

En Madrid, por su parte, el ideal de las escuelas de Rosa Sensat cristalizó en dos importantes movimientos de renovación pedagógica: Acción educativa (1975) y Escuela Abierta (1980). Estos movimientos comenzarían a extenderse por toda la península, especialmente en aquellas regiones que contaban con lengua propia: en el País Vasco con escuelas como la *Ikastola Langile* (1970), o en Galicia la escuela *O Pelouro* (1972).²⁷

Todos estos movimientos sociales y pedagógicos no hicieron sino impulsar a la comunidad escolar hacia un planteamiento mucho más moderno y adaptado a la realidad española, cada vez más plural y diversa.

LA DEMOCRACIA COMO MOTOR DE CAMBIO EDUCATIVO

Con la llegada de la democracia, la comunidad educativa española comenzó a abrirse verdaderamente a planteamientos pedagógicos más modernos, muchos de los cuales ya llevaban tiempo funcionando en países de Europa y América. La visión de una España plural en la que las

²⁶ Salomó Marquès, «Els mestres públics gironins i la renovació pedagògica: de la dictadura a la democràcia (1971-1994)», *Educació i Història: Revista d'Història de l'Educació* 18, no. julio-diciembre (2011): 137-159.

²⁷ Francisco Javier Pericacho Gómez, «Pasado y presente de la renovación pedagógica en España (de finales del Siglo XIX a nuestros días). Un recorrido a través de escuelas emblemáticas», *Revista Complutense de Educación*, 25, no. (2013): 47-67.

minorías étnicas y culturales debían ser conservadas y destacadas se refleja desde los primeros momentos de la nueva etapa: «la riqueza de las distintas modalidades lingüísticas de España es un patrimonio cultural que será objeto de especial respeto y protección».²⁸

Sin embargo, los ideales democráticos no llegan de la noche a la mañana al sistema educativo. Como señala Alejandro Ruiz-Huerta,²⁹ ya desde la LGE de 1970, el sistema educativo español se va abriendo poco a poco hacia planteamientos más democráticos. En los años previos a la promulgación de la Constitución la legislación educativa deja entrever cuáles serán los puntos de referencia de la educación en la España democrática.

Una orden ministerial de 1976,³⁰ por ejemplo, relativa a nuevos contenidos para la EGB, incide en el desarrollo de la ciudadanía y de una conciencia mundial. Dos años más tarde, otra orden ministerial³¹ establece orientaciones pedagógicas para una Educación Ética y Cívica. Uno de los objetivos de este último texto es «fomentar actitudes de apertura, respeto, comprensión y solidaridad hacia los distintos pueblos y grupos socioculturales y religiosos de España y de la comunidad internacional»,³² es decir, la educación intercultural llega por fin de forma explícita a los textos legislativos.

Por primera vez desde el fin de la Segunda República, el sistema educativo español anhela verdaderamente alcanzar los planteamientos de otros países europeos. Sin embargo, los cambios se irán produciendo poco a poco. Hasta la primera gran ley educativa en democracia –la Ley del Derecho a la Educación (LODE) de 1985–³³ se suceden una serie de

²⁸ Constitución Española. Boletín Oficial del Estado, 29 de diciembre de 1978, núm. 311, Artículo 3.3.

²⁹ Alejandro Ruiz-Huerta, «La enseñanza de la Constitución en España: por una cultura constitucional», *Revista jurídica de Castilla y León* 1 (2004): 239-298.

³⁰ Orden, de 29 de noviembre de 1976, por la que se establecen nuevos contenidos en las orientaciones pedagógicas del área social en la segunda etapa de la Educación General Básica. Boletín Oficial del Estado, núm. 290, de 3 de diciembre de 1976, 24093-24094.

³¹ Orden, de 6 de octubre de 1978, sobre nuevos contenidos en las orientaciones pedagógicas del área social en la segunda etapa de la Educación General Básica. Boletín Oficial del Estado, núm. 245, de 13 de octubre de 1978, 23736-23738.

³² Orden, de 6 de octubre de 1978, objetivos generales.

³³ Ley Orgánica 8/1985, de 3 de julio, reguladora del Derecho a la Educación. Boletín Oficial del Estado, núm. 159, de 4 de julio, de 1985, 21015-21022.

circulares y órdenes ministeriales que desarrollan tanto valores constitucionales como ideales interculturales.

Tras la promulgación de la Constitución, las autoridades reparan en la necesidad de una educación democrática para mantener la cohesión social. En 1979, el Ministerio de Educación y Ciencia, contempla por primera vez el conocimiento del ordenamiento constitucional para Bachillerato y Formación Profesional.³⁴ Sin embargo, en ninguno de los dos casos se establece una asignatura específica al respecto, por lo que dichos contenidos son asumidos por el Área de Ciencias Sociales. En la Educación General Básica (EGB), también se fija como objetivo del área de Ciencias Sociales el «conocer, valorar y respetar la Constitución como norma superior de convivencia de los españoles. Deberes y derechos fundamentales establecidos en la Constitución».³⁵

Durante la década de 1980, los contenidos relacionados con los valores constitucionales son asumidos por el área de Sociales en la EGB y en sexto, séptimo y octavo curso aparecen dentro del bloque temático «Comportamiento Cívico-Social».³⁶ La orden ministerial concreta dichos contenidos al aludir a «actitudes de respeto, comprensión, tolerancia, solidaridad y responsabilidad en las relaciones personales y en las diversas manifestaciones culturales, religiosas y políticas de los distintos pueblos de la comunidad nacional e internacional».³⁷ A partir de ahí, los libros de texto incluirán conceptos –segregación racial, subdesarrollo, igualdad, comunidad...– y nombres propios –Luther King, Albert Schweiter, Bartolomé de las Casas...– que unos años antes eran totalmente desconocidos para los escolares.

No obstante, la primera gran ley que recoge el nuevo espíritu democrático es, como hemos dicho anteriormente, la LODE de 1985. Este

³⁴ Ley 19/1979, de 3 de octubre, por la que se regula el conocimiento del ordenamiento constitucional en Bachillerato y en Formación Profesional de primer grado. Boletín Oficial del Estado, núm. 240, de 6 de octubre de 1979, 23283-23283.

³⁵ Real Decreto 710/1982, de 12 de febrero, por el que se fijan las enseñanzas mínimas para el ciclo medio de la Educación General Básica. Boletín Oficial del Estado, núm. 90, de 15 de abril de 1982. Apartado Ciencias sociales, bloque temático 6.

³⁶ Orden de 25 de noviembre de 1982 por la que se regulan las enseñanzas del Ciclo Superior de la Educación General Básica. Boletín Oficial del Estado, núm. 291, de 4 de diciembre de 1982, 33446-33466.

³⁷ Orden de 25 de noviembre de 1982, Bloque temático 3.1.

texto legislativo lleva los preceptos democráticos a las estructuras del sistema educativo y, aunque no desarrolla contenidos, es importante de cara a la educación intercultural ya que, por primera, se garantiza el derecho a la educación de menores extranjeros. Todo ello en el contexto de la promulgación de la Ley de Derechos y Libertades de Extranjeros en España de 1985³⁸ y de la entrada de España en la Comunidad Económica Europea en 1986.

Como señala el Colectivo IOÉ,³⁹ otro paso importante en el reconocimiento de la diversidad en la escuela fue la firma de convenios entre el Estado y varias confesiones religiosas. La Ley Orgánica de Libertad Religiosa, de 1980 –que desarrollaba el principio de aconfesionalidad del estado definido en la Constitución– estableció la posibilidad de desarrollar convenios con comunidades religiosas implantadas de forma sólida en España. La década siguiente a la promulgación de la LORL, el Estado llegó a acuerdos con las comunidades judía (15.000 ciudadanos), protestante (60.000) y, la más numerosa, musulmana (con 250.000 miembros).⁴⁰

De forma general, podemos afirmar que el énfasis que se pone en el desarrollo de actitudes democráticas hace que, por primera vez, se desarrollen de manera extensa temas de contenido intercultural, es decir, es gracias al conocimiento de los valores democráticos que la educación intercultural entra en el sistema educativo español.

Por otra parte, durante los últimos años de la década de 1980 la investigación sobre interculturalidad empieza a cobrar importancia en España. De esta forma, el Ministerio de Educación organiza, en 1987 en Madrid, el seminario sobre Interculturalismo y Educación, en el que se presentaron los resultados del proyecto n.º 7 del Consejo de Cooperación Cultural del Consejo de Europa. En 1989, se celebra el VIII Seminario Interuniversitario de Teoría de la Educación sobre Educación Multicultural en un Estado de Autonomías y, tres años más tarde, Salamanca

³⁸ Ley Orgánica 7/1985, de 1 de julio, sobre derechos y libertades de los extranjeros en España. Boletín Oficial del Estado, núm. 158, de 3 de julio de 1985, 20824-20829.

³⁹ Colectivo IOÉ, *La diversidad cultural y la escuela. Discursos sobre atención a la diversidad con referencia especial a las minorías étnicas de origen extranjero* (Madrid: Colectivo IOÉ, 1997).

⁴⁰ Colectivo IOÉ, *La diversidad cultural y la escuela*.

acogería el X Congreso Nacional de Pedagogía, que llevaría por título «Interculturalismo y Educación en la perspectiva Europea». Estos encuentros vinieron a subsanar la falta la investigación en educación intercultural –que a excepción de los trabajos realizados sobre el pueblo gitano– existía en nuestro país.⁴¹

No obstante, esto no son sino los primeros pasos en el desarrollo de una educación sensible a la multiculturalidad. No hay que olvidar que, en esa misma época, algunos países ya cuentan con políticas sólidas al respecto. Durante la década de 1980 la legislación educativa de muchos estados hace de la educación intercultural uno de sus pilares fundamentales: Australia crea el *National Advisory Committee on Multicultural Education*, que ayuda a desarrollar la interculturalidad en el currículum;⁴² en Gran Bretaña se presenta el *Swan Report*,⁴³ estudio que analizaba los problemas de los niños de minorías étnicas y que supone un impulso importante a la educación intercultural en el país⁴⁴; Francia, por su parte, que había centrado sus esfuerzos durante la década de 1970 en los alumnos inmigrantes,⁴⁵ amplía, a partir de 1980, su visión de la educación intercultural gracias a la construcción europea, los crecientes intercambios culturales internacionales y el renovado interés por las culturas regionales.⁴⁶

⁴¹ Francisco Javier Murillo, Montserrat Grañeras, Amalia Segalerva y Elena Vázquez, «Investigación española en Educación Intercultural», *Revista de educación*, 307 (1995): 199-216.

⁴² Bob Hill y Rod Allan, «Intercultural Education in Australia», en *International Perspectives on Intercultural Education*, ed. Kenneth Cushner (Mahwah: Lawrence Erlbaum Associates, 1998), 16-69.

⁴³ Department of Education and Science, *Education for All* (Londres: Department of Education and Science, 1985).

⁴⁴ Pedro Figueroa, «Intercultural Education in Britain», en *International Perspectives on Intercultural Education*, ed. Kenneth Cushner (Mahwah: Lawrence Erlbaum Associates, 1998), 122-144.

⁴⁵ En 1975, Francia instaura las Enseñanzas de Lengua y Cultura de Origen dentro del marco de la política de reagrupamiento familiar de los inmigrantes. La idea principal era que el conocimiento de la lengua y la cultura de origen no suponía un factor negativo en los hijos de inmigrantes sino, por el contrario, un valor positivo de cara a su integración escolar.

⁴⁶ Olivier Meunier, «Les approches interculturelles dans le système scolaire français: vers une ouverture de la forme scolaire à la pluralité culturelle?» *Socio-logos. Revue de l'association française de sociologie*, 3 (2008).

LA LEY DE ORDENACIÓN GENERAL DEL SISTEMA EDUCATIVO DE 1990⁴⁷

Durante los últimos años del franquismo, el sistema educativo español se había ido abriendo poco a poco a planteamientos más democráticos. Este proceso paulatino culminó con la promulgación de la Constitución. En el ámbito educativo, diversas leyes comenzaron a desarrollar aspectos de calado democrático, sin embargo, habría que esperar hasta 1990 para ver una ley general que recogiera de forma global las preocupaciones de la nueva sociedad española.

La Ley de Ordenación General del Sistema Educativo (LOGSE) de 1990 hacía hincapié en la necesidad de una

reforma global que ordenase el conjunto del sistema, que lo adaptase en su estructura y funcionamiento a las grandes transformaciones producidas en estos últimos veinte años. En este período de nuestra historia reciente, se han acelerado los cambios en nuestro entorno cultural, tecnológico y productivo y la sociedad española, organizada democráticamente en la Constitución de 1978, ha alcanzado su plena integración en las Comunidades Europeas.⁴⁸

La LOGSE continúa con el carácter democrático de la LODE de 1985 y adopta los mismos fines –citándolos textualmente– entre los que destacamos «la formación en el respeto de los derechos y libertades fundamentales y en el ejercicio de la tolerancia y de la libertad dentro de los principios democráticos de convivencia», «la formación en el respeto de la pluralidad lingüística y cultural de España» y «la formación para la paz, la cooperación y la solidaridad entre los pueblos».

El currículo para la Educación Primaria de la nueva ley⁴⁹ deja muy claro desde el principio los valores democráticos sobre los que debe sustentarse nuestro sistema educativo. Entre los objetivos de etapa encontramos

⁴⁷ Ley Orgánica 1/1990, de 3 de octubre de 1990, de Ordenación General del Sistema Educativo. Boletín Oficial del Estado, núm. 238, de 4 de octubre de 1990, 28927-28942.

⁴⁸ Ley Orgánica 1/1990, de 3 de octubre de 1990, Preámbulo.

⁴⁹ Real Decreto 1006/1991, de 14 de junio, por el que se establecen las enseñanzas mínimas correspondientes a la Educación Primaria. Boletín Oficial del Estado, núm. 152, de 26 de junio de 1991, 21191-21193.

el «establecer relaciones equilibradas y constructivas con las personas en situaciones sociales conocidas, comportarse de manera solidaria, reconociendo y valorando críticamente las diferencias de tipo social y rechazando cualquier discriminación basada en diferencias de sexo, clase social, creencias, raza y otras características individuales y sociales».⁵⁰

Además de destacar la importancia de la construcción de actitudes democráticas en los ciudadanos, la LOGSE también hacía mención –por primera vez en la historia de la legislación educativa española– de la noción de identidad en un sentido amplio y a diversos niveles. Así, uno de los objetivos del área de Conocimiento del Medio para la Educación Primaria señalaba la importancia del

desarrollo de la identificación con los grupos sociales de pertenencia y de referencia, en círculos que, a partir de la propia familia y escuela, van extendiéndose a través del barrio o la localidad, a colectividades o agrupaciones más amplias y consecuentemente también más abstractas [...] en las que se recogen e integran, sin anularse, las diferencias entre los humanos. Son de especial importancia en esta línea las capacidades de participación responsable y crítica en la actividad social, de valoración de las costumbres, tradiciones y formas culturales, sea de los propios grupos de pertenencia, sea de otros [...].⁵¹

En este sentido, es de especial importancia el reconocimiento de las lenguas oficiales distintas al castellano como lengua vehicular en la escuela. El artículo número 4 de la LOGSE establecía que las Comunidades Autónomas con lengua oficial distinta del castellano podrían disponer, en relación con los horarios de las enseñanzas mínimas, de las áreas del ámbito lingüístico, del 10% de horario escolar total que se derivaba del Anexo I de la propia ley.

Otra de las novedades que aporta la LOGSE en lo relativo al tratamiento de la diversidad cultural y de los valores democráticos es que estos temas, además de tener un hueco específico en el currículum de

⁵⁰ Real Decreto 1006/1991, de 14 de junio, Artículo 2.

⁵¹ Real Decreto 1006/1991, de 14 de junio, Anexo I.

Conocimiento del Medio –con el bloque Organización Social– irán apareciendo en todas las asignaturas de la etapa de forma transversal.

Por ejemplo, en el área de Educación Artística dentro del bloque de «Artes y Cultura»⁵² se cita la necesidad de valorar el «patrimonio artístico de la comunidad y de otros pueblos y grupos, respecto a sus manifestaciones y disfrute con su contemplación». También desde el área de Lengua castellana y Literatura se remarcaba la importancia de apreciar las «diferentes variedades lingüísticas, tanto las existentes entre diferentes lenguas, como las de distintos grupos en el uso de una misma lengua, apreciando incluso aquellas variedades que acaso están culturalmente desvalorizadas».⁵³ Además, entre los objetivos generales destacaba el «reflexionar sobre el uso de la lengua como vehículo de valores y prejuicios clasistas, racistas, sexistas, etc., con el fin de introducir las autocorrecciones pertinentes».⁵⁴

El área de Lenguas Extranjeras, por su parte, aporta nuevos puntos de vista en cuanto a la necesidad de aprender una lengua extranjera: «entrar en contacto con otras culturas a través del canal de la lengua favorece la comprensión y el respeto hacia otras formas de pensar y actuar, y depara una visión más amplia y rica de la realidad».⁵⁵ Es decir, el aprendizaje de otra lengua no solo haría a una persona más sensible hacia la realidad social en la cual se desarrolla, sino que también la predispondría a ser más tolerante de cara a otros idiomas y culturas.

En cuanto al desarrollo del currículum de la nueva Educación Secundaria Obligatoria, la ley disemina la noción de respeto hacia la diversidad social y cultural a lo largo de todo el texto. Al igual que en su equivalente para la educación primaria, el real decreto que regula las enseñanzas mínimas en la ESO⁵⁶ cita como uno de los doce objetivos de la etapa el «relacionarse con otras personas y participar en actividades

⁵² Anexo I del Real Decreto 1006/1991, p. 12.

⁵³ Real Decreto 1006/1991, p. 17.

⁵⁴ Real Decreto 1006/1991, p.18.

⁵⁵ Real Decreto 1006/1991, p. 25.

⁵⁶ Real Decreto 1007/1991, de 14 de junio, por el que se establecen las enseñanzas mínimas correspondientes a la Educación Secundaria Obligatoria. Boletín Oficial del Estado, núm. 152, de 26 de junio de 1991, 21193-21195.

de grupo con actitudes solidarias y tolerantes, superando inhibiciones y prejuicios, reconociendo y valorando críticamente las diferencias de tipo social y rechazando cualquier discriminación basada en diferencias de raza, sexo, clase social, creencias y otras características individuales y sociales».

El discurso intercultural desarrollado en la Educación Secundaria Obligatoria a través de diferentes asignaturas enlaza casi siempre con los valores democráticos y la noción de identidad. En uno de los objetivos del área de Ciencias Sociales, Geografía e Historia, se recoge muy bien esta idea: «consolidar y desarrollar en los alumnos las actitudes y hábitos característicos del humanismo y de la democracia, adquiriendo independencia de criterio y juicio crítico para valorar con rigor y ponderación hechos, acciones y opiniones, desarrollando actitudes de tolerancia y valoración de otras culturas [...]».⁵⁷

Como se puede observar, existe una ordenación transversal de los contenidos relativos a la interculturalidad. Esta transversalidad se concretará, durante los años posteriores a la promulgación de la ley, en lo que ha venido a llamarse educación en valores.

Diversidad socio-cultural, educación en valores y transversalidad

La educación intercultural y la educación en valores son temas que, aunque hacen referencia a marcos teóricos diferentes, están interconectados, hasta el punto de difuminarse uno con otro en ciertos momentos. Desde luego, la apuesta que hizo la LOGSE en educación en valores y en transversalidad fue una apuesta también en cuanto al respeto de la diversidad cultural y social desde un punto de vista democrático. Como sugiere Fernando González-Lucini «los temas transversales están relacionados con los valores, ya que hablar de transversalidad es hablar de valores»,⁵⁸ a lo que podríamos añadir que hablar de temas transversales es también hablar de interculturalidad.

⁵⁷ Real Decreto 1007/1991, de 14 de junio, Anexo I.

⁵⁸ Fernando González-Lucini, *Temas transversales y educación en valores* (Madrid: Alauda, 1993). Cit. en René González y Belén Tabernero, «Los temas transversales y la educación en valores dentro del nuevo marco legislativo estatal» (Valencia: *III Congreso de la Asociación Española de Ciencias del Deporte*, 2004), 2.

Aunque la LOGSE, ya desde su preámbulo, habla de educación en valores, el tratamiento transversal de la misma resulta un poco ambiguo, tanto en el texto principal de la ley como en las diversas órdenes ministeriales que desarrollan el currículum en primaria y secundaria. Una de las pocas referencias explícitas al trabajo transversal de la educación en valores se produce dentro del currículum del área de Ciencias Sociales, Geografía e Historia en la ESO:

Dentro de esta área se han incluido unos contenidos, referidos a la reflexión ética, con características específicas respecto al resto de contenidos del área y de toda la Educación Obligatoria porque en el planteamiento curricular propio de las enseñanzas mínimas aquí reguladas la educación moral no constituye un área específica, sino una dimensión transversal a todas las áreas, dimensión presente, aunque no exclusiva, en los contenidos de actitudes.⁵⁹

Habrá que esperar unos años para que las autoridades educativas clarifiquen el tratamiento transversal de la educación en valores en nuestro sistema educativo. Dicha clarificación se realizó mediante órdenes promulgadas por las diferentes comunidades autónomas.

La Conselleria d'Educació de la Generalitat Valenciana, por ejemplo, dictó las instrucciones para el desarrollo de la educación en valores por medio de una orden en 1994⁶⁰. Se fijaban como temas transversales para la educación en valores la educación moral y cívica, la educación para la paz, la educación para la igualdad de oportunidades entre los sexos, la educación ambiental, la educación sexual, la educación para la salud, la educación del consumidor y la educación vial.

Dentro de esta corriente, que integra los valores morales en el sistema educativo de una forma transversal, la Generalitat Valenciana editó manuales teóricos y prácticos dirigidos a los docentes. Entre ellos destacan el *Plan de Educación Intercultural. Guía Didáctica. Programa de Educación*

⁵⁹ Real Decreto 1007/1991, de 14 de junio, por el que se establecen las enseñanzas mínimas correspondientes a la Educación Secundaria Obligatoria, Anexo I, p. 41.

⁶⁰ Orden, de 20 de diciembre de 1994, del Conseller de Educación y Ciencia por la que se dictan instrucciones para el desarrollo de la educación en valores en las actividades educativas de los centros docentes.

en *Valores III*, de Xavier Lluch y Jesús Salinas,⁶¹ en el que se establece muy claramente la relación entre interculturalidad y educación en valores y, en el plano teórico, el libro *Un mundo de valores*, de Adela Cortina, Juan Escámez y Esteban Pérez,⁶² en el que, desde la ética práctica, se aclaran una serie de cuestiones básicas sobre valores y educación.

Este último texto destaca el «respeto activo» como uno de los valores que hay que fomentar en la escuela democrática. Según los autores, en la democracia no puede haber convivencia sin tolerancia, sin embargo, la sola tolerancia puede convertirse fácilmente en indiferencia, es decir, más que frente a un interés por que el otro pueda vivir según sus convicciones estaríamos frente a un desinterés manifiesto. De ahí que la tolerancia, entendida de esta forma, sea un valor inferior al verdaderamente positivo, que es el respeto activo.

Por tanto, la adquisición de valores democráticos debía ser un proceso en el que el alumno participara activamente y en el que, además, se involucrara a todo el contexto escolar. Como señala Adela Franzé,⁶³ frente a las concepciones que hacían hincapié en la asimilación de conocimientos culturalmente dados, en los que el individuo estaba subordinado al aprendizaje, la LOGSE trató de integrar los procesos de aprendizaje y desarrollo con el de socialización. Es decir, con la nueva ley se concibe la educación como una *interacción* entre la escuela y el resto de agentes sociales comunitarios.

La educación compensatoria

Otra de las apuestas de la LOGSE, que influía directamente en las estrategias de una educación intercultural, fue el desarrollo de acciones compensatorias para una mejor integración de los alumnos inmigrantes recién llegados.

⁶¹ Xavier Lluch y Jesús Salinas, *Plan de Educación Intercultural. Guía Didáctica. Programa de Educación en Valores III* (Valencia: Conselleria d'Educació i Ciència, 1995).

⁶² Adela Cortina, Juan Escámez y Esteban Pérez. *Un mundo de valores* (Valencia: Generalitat Valenciana, 1996).

⁶³ Adela Franzé, *Lo que sabía no valía. Escuela, diversidad e inmigración* (Madrid: Consejo Económico y Social, Comunidad de Madrid, 2002).

En el Capítulo V de la ley, «De la educación especial», se señala la necesidad de disponer de los recursos necesarios para que los alumnos con necesidades educativas especiales, temporales o permanentes, puedan alcanzar dentro del mismo sistema los objetivos establecidos con carácter general para todos los alumnos. En este caso se habla de «educación especial» en sentido laxo, es decir, el término hace referencia a cualquier tipo de apoyo que necesite un alumno para seguir el normal desarrollo de las clases. No en vano, el Preámbulo –al citar este Capítulo V– hace referencia a la «compensación de desigualdades educativas» como medio para reducir la injusta y la desigualdad social.

Así, la LOGSE plantea por primera vez la integración de los grupos desfavorecidos en la escuela y en ella se hace explícito el rechazo a cualquier tipo de discriminación ya sea por raza, religión o ideología. El modelo de atención a la diversidad que propugna la ley se desarrolla en tres frentes: en primer lugar, la educación compensatoria, que de forma temporal o permanente se basa en la diversificación curricular adaptativa; en segundo lugar, los programas de garantía social, que están destinados a los estudiantes en riesgo de abandono escolar y que se encuentran en situación desfavorecida; por último, el mantenimiento de los idiomas y culturas de origen según los derechos de pluralidad lingüística.⁶⁴

En 1996, se da otro paso en este sentido con la promulgación del Real Decreto de ordenación de las acciones dirigidas a la compensación de desigualdades en educación,⁶⁵ que alude a las «minorías étnicas o culturales en situaciones sociales de desventaja» (art. 3.b) y tiene como objetivo la difusión de las culturas de estos grupos, contrarrestando los procesos de exclusión social por medio de actitudes de comunicación y de respeto mutuo (art. 4.2 y 4.3).

Además, estas acciones de inclusión del alumno inmigrante se plantearon dentro de un sistema educativo «comprensivo», en el que el centro participaba en una estrategia de desarrollo social a mayor escala. Como señala Franzé (2002), las reformas educativas en democracia

⁶⁴ Teresa Aguado Odina, Inés Gil-Jaurena y Patricia Mata Benito, *Educación intercultural. Una propuesta para la transformación en la escuela* (Madrid: Los Libros de la Catarata, 2005).

⁶⁵ Real Decreto 299/1996, de 28 de febrero, de ordenación de las acciones dirigidas a la compensación de desigualdades en educación. Boletín Oficial del Estado, núm. 62, de 12 de marzo de 1996, 9902-9909.

tuvieron como referencia un nuevo marco en materia de protección social, en el que la relación del sistema escolar con el sistema social global era imprescindible: la noción de una interdependencia entre ambos sistemas, frente a la autonomía funcional que había caracterizado al sistema educativo, presuponía que la educación en sí misma no bastaba para corregir las desigualdades.

El problema de la formación del profesorado

A pesar del avance que supuso el reconocimiento de la diversidad social y cultural y de las experiencias que comenzaron a desarrollarse en algunos centros, la práctica de la educación intercultural durante la época posterior a la aplicación de la LOGSE estuvo a merced de la voluntad de cada profesor, no existiendo planes de aplicación real por parte de las autoridades educativas.

Como señala el Colectivo IOÉ, al analizar el estado de la educación intercultural en la Comunidad de Madrid durante esta época:

en cuanto a la elaboración de material pedagógico y desarrollos curriculares no existe una línea definida desde la Dirección Provincial acerca de la enseñanza en la diversidad o la educación intercultural. Existen materiales que pueden servir como guía al profesorado pero que no tienen el marchamo de *orientación oficial*.⁶⁶

Esta situación da como resultado que el tratamiento del tema se haga por parte de profesores interesados en el mismo, es decir, que el no estandarizar una serie de prácticas impide al grueso de profesores del Estado español desarrollar actuaciones en este sentido. Así, si la educación intercultural estaba a merced de la buena intención de los profesores, resulta obvio que su formación inicial y continua era la clave en su proceso de implantación.

Uno de los principales problemas a los que se enfrentó la educación intercultural durante la década de 1990 fue la falta de preparación y motivación de los profesores en ese aspecto. Los profesores tenían una percepción escasa de las implicaciones educativas de una realidad multicultural

⁶⁶ Colectivo IOÉ, *La diversidad cultural y la escuela*, 20.

en el aula, por lo que no desarrollaban innovaciones curriculares o metodológicas. Como mucho, se proyectaban actividades puntuales relacionadas con los folklores de las diferentes minorías étnicas que integraban la escuela. Además, se concebía la diferencia cultural como un «déficit» que impedía el acceso a la cultura mayoritaria, por lo que la occidentalización era entendida como un factor integrador.⁶⁷

En esta época de cambio, las escuelas universitarias de Magisterio comenzaron a ser conscientes de la necesidad de una educación intercultural y, poco a poco, se fueron presentando propuestas para incluir la multiculturalidad en la formación del profesorado de EGB.⁶⁸ Además, instituciones como la Generalitat de Cataluña, por ejemplo, también realizaron un esfuerzo en cuanto a la formación continua del profesorado en interculturalidad.⁶⁹

Como hemos observado, la primera ley general de educación en democracia situó el respeto hacia la diversidad cultural y social en el centro de su discurso. Sin embargo, la década que seguiría a la promulgación de la LOGSE sería testigo de, por una parte, un despegue económico nunca visto hasta entonces y, por otra, la verdadera llegada a la sociedad española de lo que Zygmunt Bauman⁷⁰ vino a denominar modernidad líquida –realidad caracterizada por un continuo cambio en las relaciones entre individuos y entre individuos y sociedad–. En esta época de cambios, económicos y sociológicos, la educación intercultural se vio enfrentada a la misión para la que había sido concebida, a saber: afianzar una sociedad democrática cimentada en la diversidad.

CONCLUSIONES

Como se ha mostrado en el presente texto, la llegada de la educación intercultural a España fue lenta y progresiva. El modelo asimilacionista y etnocéntrico, característico de la época franquista, comenzó a derrumbarse

⁶⁷ Murillo, Grañeras y Vázquez, «Investigación española en Educación Intercultural».

⁶⁸ María José Cueva y Norma Tarrow, «Propuesta para incluir educación multicultural en la formación de profesorado de EGB», *Revista Interuniversitaria de Formación del Profesorado* 6, (1989): 401-408.

⁶⁹ Ferran Ferrer y Abdeljalil Akkari, «La educación intercultural en España y en Suiza: un enfoque comparativo», *Revista española de educación comparada*, 6 (2000): 285-316.

⁷⁰ Zygmunt Bauman, *Modernidad líquida* (México DF: Fondo de Cultura Económica, 2004).

durante los últimos años de la década de 1960 y, a partir de ahí, el respeto por la diversidad cultural y social fue ganado terreno en el sistema educativo.

La LGE de 1970 fue el primer texto legislativo que incluyó –de forma restringida– conceptos interculturales y de respeto hacia otros pueblos. Sin embargo, si bien el cambio de mentalidad fue remarcable, el planteamiento de algunos temas, sobre todo de carácter histórico, no había superado todavía un pensamiento colonialista. Por otra parte, la falta de una formación del profesorado al respecto frenó de forma considerable la inclusión de elementos interculturales en la práctica educativa.

Ante la necesidad de avanzar en el respeto de las diversas culturas e identidades y la imposibilidad de su desarrollo generalizado en las aulas, los movimientos asociativos tomaron la iniciativa. Las instituciones ciudadanas permitieron una apertura hacia postulados educativos más democráticos, sobre todo en lo que concierne a la variedad lingüística y a la integración de los niños y adolescentes gitanos en el sistema educativo.

Habrà que esperar a la llegada de la Democracia para ver una voluntad explícita por parte de las autoridades en la comprensión de las culturas diferentes a la mayoritaria. En la Carta Magna se recoge el carácter plural de España y se reconoce la necesidad de proteger esta diversidad. De esta forma, es gracias a la necesidad de llevar la democracia a la escuela que los primeros signos de una educación verdaderamente preocupada por la interculturalidad llegan a nuestro país.

Sin embargo, la renovación legislativa de la España constitucional será un proceso lento que no acabará hasta la promulgación de la primera ley general educativa de carácter plenamente democrático en 1990. Así, durante la década de 1980, se suceden una serie de leyes que van poco a poco democratizando la escuela española y, por consiguiente, la dotan de las características necesarias para desarrollar una educación intercultural.

La LOGSE de 1990 recogió una gran cantidad de contenidos en los que se ahondaba en el respeto a la diversidad cultural y social. Estos contenidos se insertaron de forma transversal en lo que vino a llamarse educación en valores. A pesar de las buenas intenciones de la ley, no se plantearon estrategias prácticas para desarrollar una educación intercultural. El mayor logro de la LOGSE en el terreno de la interculturalidad

fue la implantación de la educación compensatoria, que hizo frente al creciente número de alumnos de origen inmigrante.

Al igual que pasó con la LGE de 1970, el principal problema a la hora de llevar a la práctica los nuevos valores que se exponían en la LOGSE de 1990 –en este caso, educación democrática y respeto a la diversidad– fue la falta de una formación adecuada del profesorado. Tanto la predisposición y preparación del profesorado, como la legislación educativa hicieron que los contenidos de carácter intercultural tardasen mucho tiempo en llegar a las aulas españolas. Así, la educación intercultural quedó a merced de la buena voluntad de los docentes durante la década de 1990. En este sentido, habrá que esperar a la convergencia universitaria europea para que los postulados interculturales calasen en el curso de la educación superior y la formación de maestros.⁷¹ Sin embargo y al igual que pasó en el periodo estudiado, el profesorado todavía no tiene una formación inicial sólida en cuando a currículos interculturales.^{72, 73}

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⁷¹ Alicia Peñalva Vélez y Juan José Leiva Olivencia, «La interculturalidad en el contexto universitario: necesidades en la formación inicial de los futuros profesionales de la educación», *Educar*, 55, no. 1 (2019): 141-158.

⁷² Miguel Ángel Santos Rego, Francisco X. Cernadas Ríos y María del Mar Lorenzo Moledo, «La inclusión educativa de la inmigración y la formación intercultural del profesorado», *Revista Electrónica Interuniversitaria de Formación del Profesorado* 17, no. 2 (2014): 123-137.

⁷³ Tatiana Íñiguez-Berrozpe, Carmen Elboj, Ainhoa Flecha y Ariadna Munté Pascual, «Validación de una Escala para Medir el Índice de Eficacia Intercultural del Profesorado», *Acciones e Investigaciones Sociales* 41, (2020): 297-326.

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EDUCACIÓN Y CIUDADANÍA EN ALEXIS DE TOCQUEVILLE

Education and Citizenship in Alexis de Tocqueville

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Resumen. La educación en Alexis de Tocqueville constituye una herramienta fundamental para contrarrestar los riesgos propios del individualismo en las sociedades democráticas. Ante la pérdida de los lazos sociales, la educación tendrá como objetivos forjar identidades cívicas fuertes y desarrollar una participación activa en el entramado social y político.

Tocqueville considera indispensable para el mantenimiento de la democracia liberal una educación para la libertad que cultive las capacidades intelectuales y morales de los varones y las mujeres por igual. Sin embargo, al mismo tiempo, firme defensor de una férrea división sexual del trabajo, encierra a las mujeres en los estrechos límites del hogar.

Al propio tiempo, el tratamiento que Tocqueville otorga a la educación permite trascender las interpretaciones neoliberales de su pensamiento. Por una parte, la igualdad no aparece como una amenaza a la libertad, sino que, al contrario, ha de venir en su ayuda para construir una organización política y social justa, que permita el libre desenvolvimiento de los individuos, facilite la solidaridad social y traiga el progreso material e intelectual. Al propio tiempo, el Estado ocupa un lugar protagonista como responsable en definir y llevar adelante una política educativa que contribuya a formar una ciudadanía más libre, crítica y con menos desigualdades.

Así pues, Tocqueville no es un liberal al uso. Considera necesaria la intervención del Estado en el campo educativo, social y económico. El Estado debe asegurar la solidaridad con vistas al interés general y, al mismo tiempo, favorecer el protagonismo de la sociedad civil. Y todo ello en y desde la libertad.

Palabras clave: Alexis de Tocqueville; Democracia; Educación; Género; Ciudadanía.

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Abstract. *Education, to Alexis de Tocqueville, constitutes a fundamental tool for counteracting the inherent risks of individualism in democratic societies. Given the loss of social connections, the objective of education is to forge strong civic identities and to encourage active participation in the social fabric.*

Tocqueville considers essential for the maintenance of liberal democracy an education for freedom that cultivates the intellectual and moral capacities of men and women alike. At the same time, being a staunch advocate of a harsh sexual division of labor, he would have women locked within the narrow confines of the home.

At the same time, Tocqueville's approach to education enables a perspective that goes beyond neoliberal interpretations of his thinking. On the one hand, equality does not appear as a threat to freedom, but, on the contrary, it helps to construct fair political and social organization that allows the free development of individuals while facilitating social solidarity and fostering material and intellectual progress. At the same time, the state plays a major role through its responsibility for defining and implementing an educational policy that contributes to forming a populace that is freer, more critical and less subject to inequalities.

Therefore, Tocqueville is not a standard liberal. He considers it necessary for the state to intervene in the educational, social and economic fields. The state must ensure solidarity with a view towards general interest and, at the same time, foster the protagonism of civil society. And all this, in and from a position of freedom.

Keywords: *Alexis de Tocqueville; Democracy; Education; Gender; Citizenship.*

INTRODUCCIÓN

El punto de mira que guía toda la obra de Alexis de Tocqueville –incluso podríamos decir su propia vida– es conocer las tendencias del proceso democrático en marcha para instruirlo y orientarlo, de cara a la construcción de una sociedad que permita el pleno desenvolvimiento y desarrollo material y moral del ser humano. Tocqueville, que rechaza todo movimiento lineal de la historia, es consciente de que las sociedades modernas están sometidas a fuertes tensiones y ambivalencias, y que, para articular los valores igualitarios y la libertad política, se necesita sacar a la luz todas las formas posibles de poder que pueden acabar con la libertad. Su originalidad estriba en que detecta los peligros en las propias características que, en su opinión, estructuran la democracia, siendo el individualismo, proceso caracterizador de la democracia como

estado social, el eje sobre el que se despliegan los riesgos más extremos de las sociedades modernas.¹ Cercado por una ciencia social que engullía al individuo en la colectividad, su gran aportación a la teoría social y política es haber descubierto la simbiosis entre modernidad e individualización.²

El individuo –desde la perspectiva tocquevilliana– es enemigo del ciudadano: el individuo democrático se aísla de los otros en su búsqueda incesante de bienestar y, enfrascado en su enfrentamiento solitario a los problemas cotidianos de la vida, no mira más allá de su círculo íntimo y se vuelve indiferente a los demás.³ Así, rompe y se aleja de la noción de ciudadanía tocquevilliana: no busca su bienestar y felicidad a través del bienestar general de su sociedad, sino que es escéptico a todo lo que suene a «bien común» y/o «sociedad justa». Juzga las tareas comunitarias y ciudadanas como una restricción de su libertad para procurarse los beneficios que cada uno considere ventajosos para él mismo, fundamentalmente de carácter consumista y materialista.⁴ Esto es, la idea de libertad como libertad política, como participación en la *res publica*, como compromiso con los otros en la construcción de una «sociedad buena», deja de tener sentido.

Para nuestro autor, las sociedades democráticas se caracterizan por lo que, en términos modernos, podría llamarse «la liberación de los individuos de la férrea jaula de las instituciones», es decir, lo que se conoce en la sociología actual como proceso de desinstitucionalización.⁵ Esta liberación tiene un doble filo: por una parte, permite la emergencia de la individualidad y la asunción de una subjetividad libre de los prejuicios tradicionales, y abierta a la crítica, así como el nacimiento de una sociedad más móvil e igualitaria. Pero, al mismo tiempo, implica la pérdida de lazos sociales, la soledad del hombre ante el mundo, el agotamiento del papel de la tradición, la aparición del riesgo y la inseguridad en la

¹ Claude Lefort, *Écrire. À l'épreuve du politique* (París: Calmann-Lévy, 1992).

² Ulrich Beck, «Los padres de la libertad», en *Los hijos de la libertad*, comp. Ulrich Beck (Buenos Aires: Fondo de Cultura Económica, 1999), 309-360.

³ Alexis de Tocqueville, *La democracia en América. Edición crítica II* (Madrid: Aguilar, 1989), 136-138.

⁴ Laurence Guellec, *Tocqueville et l'esprit de la démocratie* (París: Presses de la Fondation Nationale des Sciences Politiques, 2005).

⁵ François Dubet, *El declive de la institución* (Barcelona: Gedisa, 2006).

vida social y en la experiencia de cada individuo singular. Al romperse los eslabones de las cadenas, el individuo se encuentra solo ante sí mismo, ante los demás y ante el Estado.⁶

Desde esta óptica, de acuerdo con Tocqueville, el problema que plantea la democracia a través del individualismo es el sentido que los hombres dan al actuar conjuntamente.⁷ El riesgo que el individualismo pone en la palestra es que los hombres se limiten a relacionarse a través de intercambios puramente materiales. Así pues, la noción tocquevilliana de individualismo coloca como problema central de las sociedades modernas encontrar un ideal, una meta común, una referencia, que ayude a consolidar y reforzar la dimensión espiritual del vínculo social. El destino y la propia identidad de los individuos dejan de ser un hecho subjetiva y objetivamente dado para convertirse en un proceso de elaboración personal. A medida que el individuo se encierra en la soledad de su corazón, el propio espíritu humano está en peligro.

El atomismo social, el consumismo, el materialismo, la disolución de la clase social, la mutabilidad de la pirámide social, el conformismo y la apatía social, la hegemonía de lo privado sobre lo público, y el vacío de compromiso ciudadano, disolvente del sentido de la solidaridad y la responsabilidad social, acompañantes todos ellos del proceso democrático, favorecen situaciones de incertidumbre e inseguridad.

No es de extrañar entonces que, deshechos los lazos comunitarios, y abandonado el individuo a sus propias y limitadas fuerzas, el riesgo de las sociedades democráticas reside, para Tocqueville, en la aparición de nuevas servidumbres, que arrastrarían al ser humano a su deshumanización radical y, a la sociedad, a una parálisis de su dimensión innovadora y de progreso.⁸

La pérdida, por parte de los individuos, del espíritu participativo en los asuntos públicos termina apagándoles el deseo mismo de ser libres. Se comprende entonces que Tocqueville describa como «un rebaño de

⁶ Tocqueville, *La democracia en América*, 382.

⁷ Roger Boesche, «Hedonism and Nihilism: The Predictions of Tocqueville and Nietzsche», *The Tocqueville Review/ La Revue Tocqueville*, 8 (1987):165-184.

⁸ Tocqueville, *La democracia en América*, 354-391.

animales tímidos e industriosos cuyo gobierno es el pastor»⁹ a esa sociedad democrática tranquila y pacífica, donde todos han caído bajo el yugo de todos. Y aquí nos encontramos con la gran paradoja de la modernidad: las sociedades modernas, profetas y adalides de la individualidad y del sujeto, acaban engullendo ambas realidades y destruyendo el corazón mismo de la humanidad del hombre, su propia condición de posibilidad de ser sujeto: su libertad.

Sin embargo, aunque en ocasiones la melancolía y cierta nostalgia de tiempos pasados parezcan oscurecer su mirada, Tocqueville nunca cae en la desesperación y en la impotencia, pues toda su obra, esa nueva ciencia política que pretende construir, se encamina a «hacer salir la libertad del seno de la sociedad en la que Dios nos ha hecho vivir».¹⁰ Es decir, la tendencia deshumanizadora y aniquiladora de la libertad no constituye la esencia de la democracia, no es producto ni se deriva de una naturaleza originaria y constituyente.¹¹

Así, buscará —para una democracia que considera ineludible— las modalidades de organización, y de autoorganización más portadoras de libertad. La cuestión tocquevilliana no es saber cómo salvar la libertad contra la igualdad (reducida a igualitarismo), sino cómo permitir a la pasión-igualdad instituirse cívica e institucionalmente para resistirse a su propia parte maldita, a su propia sombra.¹²

Tocqueville tiene una especial sensibilidad para captar las potencialidades perversas de toda instancia de poder, de percibir que la mejor de las instituciones políticas, sociales o económicas puede convertirse en un momento dado en instancia deshumanizadora y tiránica. Por eso, su obsesión es construir y extender en el espacio social y político una pluralidad de poderes y sus correspondientes contrapoderes que impidan su

⁹ Tocqueville, *La democracia en América*, 136-138.

¹⁰ Alexis de Tocqueville, *De la Démocratie en Amérique. Œuvres complètes*, I (2) (París: Gallimard, 1961), 328.

¹¹ «Si la democracia es “naturaleza ciega”, también es “espacio esclarecido” que ella misma abre, para su propia salvaguardia, al arte de la libertad» (Enrique Aguilar, *Alexis de Tocqueville. Una lectura introductoria* (Buenos Aires: Sudamericana, 2008), 71).

¹² Anne Roviello, «La démocratie selon Tocqueville: entre pente naturelle et art de la liberté», en *Tocqueville. La démocratie en questions*, ed. Robert Legros, (Caen: Presses Universitaires de Caen, 2008), 61.

tendencia natural al acrecentamiento y que, por el contrario, favorezcan su (también) tendencia natural a la libertad.¹³ Es decir, que mantengan despiertos a los ciudadanos, les inciten a la resistencia y desarrollen en ellos la pasión por la libertad, porque son los propios ciudadanos democráticos quienes tienen que alzarse por encima de ellos, salir del círculo de sus intereses privados, asumir su responsabilidad individual, política y social frente a la masa, escuchar y dejarse llevar por su deseo innato de libertad y hacer surgir de la igualdad, y nunca contra ella, la libertad.

Este es el telón de fondo desde donde hay que entender los remedios que propone Tocqueville para contrarrestar las tendencias perversas de la democracia, sacar lo mejor de ella misma y ponerla al servicio del desarrollo integral del ser humano. Y entre esos remedios la educación tiene un papel protagonista.¹⁴ Es la herramienta adecuada para forjar identidades cívicas fuertes y desarrollar una participación activa en el entramado político, para, de este modo, arrancar a los ciudadanos de las garras del individualismo democrático.¹⁵

Ciertamente no hay consenso entre los estudiosos del pensamiento de Alexis de Tocqueville a la hora de valorar el lugar de la educación en el conjunto de su obra y en las preocupaciones de nuestro autor. Una vez más, cuando nos acercamos a nuestro autor, nos encontramos con una significativa heterogeneidad de criterios y puntos de vista contradictorios. No faltan opiniones para las cuales la educación constituye una temática de segundo rango, que puede obviarse sin grandes problemas o, como mucho, tratarla y analizarla someramente, y siempre subordinada a la religión. Otros aportan un punto de vista diferente, acentúan su importancia y hacen de la actitud de Tocqueville hacia la educación un ejemplo notable de su búsqueda de posiciones intermedias, es decir, de cómo se aleja de todas las posiciones ideológicas de la época –tradicionalistas, liberales y radicales–, al defender tanto la libertad de enseñanza como la extensión de la educación a todas las clases sociales.

¹³ Tocqueville, *De la Démocratie en Amérique*, 296.

¹⁴ Sonia Chabot, «Education civique, instruction publique et liberté de l'enseignement dans l'oeuvre de Tocqueville», en *Tocqueville et l'esprit de la démocratie*, comp. Laurence Guellec (París: Presses de la Fondation Nationale des Sciences Politiques, 2005), 241-293.

¹⁵ Jan H. Blits, «Tocqueville on democratic education: The problem of public passivity», *Educational Theory*, 47, no. 1 (2005): 15-30.

Finalmente, están aquellos analistas que, dando centralidad a esto último, insisten en la importancia atribuida por nuestro autor a la educación cívica.

Esta amalgama de opiniones contrapuestas indica ya que la educación no es un tema baladí en nuestro autor, constituye una herramienta imprescindible en la defensa de la libertad democrática,¹⁶ dado que el ejercicio de esta exige ciudadanos instruidos y educados cívicamente.¹⁷ Esta centralidad de la educación en la construcción de una democracia liberal está presente a lo largo de toda su obra y también en su actividad política.

Así pues, a pesar de que «la cuestión educativa» en Tocqueville no ocupa un lugar central entre los/as especialistas de la obra tocquevilliana, el presente artículo tiene como objetivo principal mostrar el protagonismo que nuestro autor concede a la educación a la hora de llevar adelante una sociedad democrática liberal. Para alcanzar dicho objetivo, hemos creído conveniente centrar nuestro análisis en los cinco grandes ejes temáticos que –a nuestro parecer– conforman las preocupaciones de Tocqueville en el tema educativo: el sentido de la educación, la educación en democracia, la educación para la ciudadanía, el derecho de las mujeres a la educación y el lugar de la libertad de enseñanza. A través de estas cinco grandes cuestiones, podemos comprobar que Tocqueville se aleja mucho de ser un liberal al uso –y, mucho menos, un conservador reaccionario–, ya que concede un papel fundamental al Estado a la hora de definir y llevar adelante una política educativa que contribuya a formar ciudadanos críticos, libres, solidarios y con los mismos derechos y deberes.

EL SENTIDO DE LA EDUCACIÓN

Tocqueville desconfía de la corriente de pensamiento que desde los fisiócratas y los economistas considera a la enseñanza pública como la

¹⁶ Alan S. Kahan, «Tocqueville and Liberal Education», *The Tocqueville Review/ La Revue Tocqueville*, 34, no. 2 (2013): 159-168.

¹⁷ Aránzazu Albertos San José, *La educación del ciudadano democrático* (Pamplona: EUNSA, 2011).

mejor, y casi única, garantía de la libertad individual frente a los abusos del poder.¹⁸

Es indudable que, en los Estados Unidos, la instrucción del pueblo constituye una poderosa ayuda para el mantenimiento de la república democrática [...] No obstante, no doy un valor exagerado a esta ventaja y aún estoy más lejos de creer, como muchos en Europa, que baste con enseñar a los hombres a leer y a escribir para convertirlos, sin más, en verdaderos ciudadanos. La verdadera ilustración nace principalmente de la experiencia y si no se hubieran acostumbrado poco a poco los americanos a gobernarse por sí mismos, los conocimientos literarios que poseen no les servirían hoy de mucha utilidad para hacerlo con éxito.¹⁹

En su opinión conformar una democracia liberal requiere cambios profundos en todos los ámbitos que estructuran la sociedad, es decir, se requieren medidas múltiples y polivalentes, desde la descentralización y desburocratización del aparato estatal a la moralización cívico-ética de la sociedad a través de la teoría del interés bien entendido y la religión, pasando por herramientas que ayuden a la formación de una ciudadanía crítica, donde a la educación deberán acompañar el asociacionismo, la libertad de prensa y de partidos políticos.²⁰

Sin embargo, la relación de la educación con la libertad y la igualdad preocupa a Tocqueville bien pronto, desde su asistencia a los cursos de Guizot sobre la historia de la civilización, como prueba su carta a su amigo Stöffels fechada el 21 de abril de 1830, donde describe los rasgos de un «pueblo instruido».²¹

¹⁸ Alexis de Tocqueville, *L'Ancien Régime et la Révolution. Œuvres complètes*, II (1 y 2) (París: Gallimard, 1952), 211.

¹⁹ Tocqueville, *De la Démocratie en Amérique*, 318. En el reformatorio de Boston, Tocqueville y Beaumont observan que los jóvenes tienen una experiencia directa de la libertad: eligen jueces y monitores entre ellos y componen los jurados para juzgar a quienes han infringido las normas. «*Peut-être ces impressions d'enfance et cet usage précoce de la liberté contribueront-ils plus tard à rendre les jeunes délinquants plus obéissants aux lois. Et sans nous préoccuper de ce résultat politique, un tel système est au moins puissant comme moyen d'éducation morale*» (Alexis de Tocqueville, *Ecrits sur le système pénitentiaire en France et à l'étranger. Œuvres Complètes*, IV (1) (París: Gallimard, 1984), 257-258).

²⁰ Darío Roldán, *Lecturas de Tocqueville* (Madrid: Siglo XXI, 2007).

²¹ «Chez celui-là [un pueblo instruido] le corps social a tout prévu; l'individu se donne la peine de naître; du reste la Société le prend dans les bras de sa nourrice; elle le soutient dans sa marche, écarte de sa tête les périls, et il s'avance en paix sous les yeux de cette seconde providence; ce pouvoir

Este interés por la función social de la educación aparece asimismo en *El sistema penitenciario en Francia*. En el propio proyecto de la investigación correlaciona la ignorancia de las clases bajas con conductas delictivas, que, consecuentemente, se podrían prevenir con la generalización de la instrucción primaria a todas las capas sociales.²² Una vez en los Estados Unidos, Tocqueville se preocupa por el papel de la educación en la regeneración de los jóvenes delincuentes²³ y la cuestión educativa ocupa un lugar central en la batería de preguntas que sobre diferentes cuestiones dirige a diversas y variadas personalidades americanas.²⁴ En sus notas de viaje ofrece un resumen de sus investigaciones en esta cuestión:

Instrucción pública. Todas las personas que he visto hasta ahora, independientemente del rango de la sociedad al que pertenecían, me parecían no dudar de las ventajas de la educación. Nunca dejan de sonreír cuando se les dice que la opinión no es unánime en este punto en Europa. Están de acuerdo en que la difusión de las luces, útil para todos los pueblos, es una necesidad absoluta para un pueblo libre como el suyo, donde no hay un censo electoral ni un censo de posibles elegibles. Esta es una idea que me pareció presente en cada cabeza. Así, todos estos estados defienden ardientemente la existencia de una instrucción pública.²⁵

De su experiencia americana extraerá como conclusión la contribución positiva de la educación al desarrollo del estado social democrático

tutéaire qui l'a protégé pendant sa vie vieille encore sur les repos de ses cendres: voilà le sort de l'homme civilisé. Le sentiment et le spectacle du bonheur amollissent bientôt la sauvage âpreté de sa nature; il devient doux, sociable, ses passions se calment [...], les crimes deviennent rares, malheureusement aussi les vertus, [...] c'est le règne de l'égoïsme, les convictions s'ébranlent à la fois [...], il a peu de fanatisme, mais il a peu de croyances [...], le monde entier finit par être un problème insoluble pour l'homme qui s'accroche aux objets les plus sensibles et finit par se coucher à plat ventre contre ventre de peur que le sol ne vienne à lui manquer à son tour [...] l'État le diriger, de prodiguer lui-même l'instruction pour être sur qu'elle ne deviendra pas dans d'autres mains une arme meurtrière» (Alexis de Tocqueville, *Lettres Choisies. Souvenirs* (París: Quarto Gallimard, 2002), 146-148).

²² Tocqueville, *Ecrits sur le système pénitentiaire*, 51.

²³ Tocqueville, *Ecrits sur le système pénitentiaire*, 60.

²⁴ Alexis de Tocqueville, *Correspondance étrangère. Œuvres complètes*, VII (París: Gallimard, 1986), 32.

²⁵ Alexis de Tocqueville, *Voyages en Sicile et aux États-Unis. Œuvres complètes*, V (1) (París: Gallimard, 1957), 220-221. Esta temática aparece también en una carta a su amigo Kergorlay: Alexis de Tocqueville, *Correspondance d'Alexis de Tocqueville et de Louis de Kergorlay. Oeuvres Complètes*, 226.

y a la libertad política en los Estados Unidos.²⁶ En este sentido, no es de extrañar que, al comentar la estrecha relación entre educación y libertad en los Estados Unidos, estén ya presentes argumentos que Tocqueville desarrollará años más tarde en la disputa sobre la libertad de enseñanza. Un buen ejemplo es la carta que escribe a su amigo el filósofo Brouchitté durante su estancia americana:

[En los EEUU] el principio general en materia de instrucción pública es que cada uno es libre de fundar una escuela y de dirigirla según su criterio. Es un negocio como cualquier otro, donde los consumidores son los únicos jueces y el Estado no interfiere de ningún modo. Me preguntáis si esta libertad ilimitada provoca efectos nocivos. Yo creo que no produce sino buenos. Pero tened en cuenta que aquí no tiene lugar ninguna de las pasiones antirreligiosas que a nosotros nos atormentan. Ninguno de los peligros a los que nos puede llevar la libertad de enseñanza en Francia se dan aquí. Dejados a sus personales preferencias, los hombres prefieren siempre escuelas morales y religiosas. Un hecho singular es que en esta América, donde no se da en absoluto una religión de Estado, la educación está casi exclusivamente en manos del clero, o, mejor dicho, de los clérigos; ellos dominan totalmente y dirigen la instrucción de la juventud.²⁷

Resumiendo, a lo largo del *Sistema penitenciario*, Beaumont y Tocqueville reconocen en numerosas ocasiones la necesidad política de la instrucción pública, pues «sus ventajas son infinitamente superiores a sus inconvenientes».²⁸

En lo que respecta a la *Democracia en América*, el espacio y el sentido concedido a la educación va variando a medida que progresa su

²⁶ Dana R. Villa, *Teachers of the People: Political Education in Rousseau, Hegel, Tocqueville and Mill*. (Chicago: University of Chicago Press, 2019).

²⁷ Alexis de Tocqueville *Œuvres complètes publiées par Madame de Tocqueville*, VII (París: Michel Lévy frères, 1866), 77-78. Sin embargo, líneas más adelante, Tocqueville comenta –y aprueba– que el Estado se reserva el derecho de vigilancia, 78-79.

²⁸ Tocqueville, *Ecrits sur le système pénitentiaire...*, 198. En la misma obra podemos encontrar referencias con el mismo espíritu en las páginas 210-211, 251-255, 257-258. 313-318.

composición. Como señala Nolla en la «Introducción del editor»²⁹ a la edición crítica, en la primera *Democracia* Tocqueville tenía el proyecto de dedicar dos capítulos a la cuestión educativa. Sin embargo, en la redacción final, aunque su libro «está repleto de metáforas escolares», dichos capítulos desaparecen y las alusiones al tema –aunque numerosas– están diseminadas a lo largo de los capítulos. Hacen referencia fundamentalmente a la libertad de enseñanza, a la necesidad de generalizar la educación, a la conveniencia de unirla a la moral y a la religión, a la necesaria vigilancia del Estado sobre los centros escolares, aunque siempre oponiéndose a cualquier intromisión en la vida y en la organización de estos. Posteriormente, en la segunda *Democracia*, la educación adquiere definitivamente una dimensión radicalmente política y se convierte en un instrumento privilegiado en la defensa de la libertad en democracia.

Ahora bien, no hay ruptura alguna en las dos Democracias de las funciones concedidas a la educación. Es un *continuum* de atribuciones entrelazadas entre sí. De hecho, únicamente si aunamos ambas obras, se puede sintetizar la visión tocquevilliana de la educación en las sociedades democráticas, que se construye sobre dos potentes pilares, la igualdad y la libertad.

LA EDUCACIÓN EN DEMOCRACIA

Educación e igualdad

En las sociedades democráticas, la tríada instrucción, igualdad y libertad entra en un juego de dependencia y condicionamiento mutuo,³⁰

²⁹ Eduardo Nolla, «Introducción del Editor», en Alexis de Tocqueville, *La democracia en América. Edición crítica* I, XLVI, XLVII. En sus borradores de la segunda *Democracia* aparece lo siguiente: «Il y aurait bien de choses à dire sur ce sujet, mais j'ai déjà tant de choses pour le livre qu'il faudra je crois laissez celle-ci de côté. L'influence de la démocratie sur l'éducation des hommes ou plutôt sur l'instruction est un chapitre nécessaire. La direction utile et pratique qu'elle donne, le changement de méthodes qu'elle amène. L'étude des langues anciennes, des sciences théoriques, des études spéculatives qu'elles subordonnent (sic) à d'autres études. À placer quelque part dans les chapitres d'idées» (Alexis de Tocqueville, en Sonia Chabot, «Education civique, instruction publique et liberté de l'enseignement dans l'oeuvre de Tocqueville», 269).

³⁰ Steven Connolly y Rune S. Hausstätter, «Tocqueville on democracy and inclusive education: A more ardent and enduring love of equality than of liberty», *European Journal of Special Needs Education* 24, no. 3 (2009): 231-243.

de tal modo que la libertad, que no sabría sostenerse sin la educación,³¹ al mismo tiempo favorece la instrucción, siendo la igualdad el sostén último de ambas.³²

En el estado social democrático, caracterizado por la igualdad de condiciones, la sociedad aparece ante los ojos de los ciudadanos como un sistema meritocrático, y la instrucción escolar como un instrumento de movilidad social, como la instancia reproductora de una creciente diferenciación social, solo que cada vez más justa y tolerable, de tal manera que se les hace evidente a los individuos la correlación cada vez más precisa entre los méritos de los ciudadanos y su condición social. Así, la escuela aparece como la única instancia social justa, la gran samaritana que no excluye a nadie, sino que otorga a los individuos la única oportunidad de movilidad social. Todos ponen en la instrucción sus esperanzas de ascenso social y esta les acoge con los brazos abiertos y les ayuda desinteresadamente en su lucha por promocionarse socialmente e integrarse dignamente en la sociedad. En democracia, esta imagen de la escuela está firmemente asentada en el corazón y en la razón de los ciudadanos y conlleva un aumento de las personas cultivadas y un crecimiento del sistema educativo.

La utilidad del saber se revela con gran claridad incluso a los ojos de las masas. Los que no gustan de sus encantos aprecian sus efectos y hacen algunos esfuerzos por alcanzarlo [...] Tan pronto como las masas empiezan a interesarse en las tareas del espíritu, se descubre que un gran medio para adquirir gloria, poder o riquezas consiste en sobresalir en alguna de ellas. La inquieta ambición que origina la igualdad, tanto se vuelve hacia ese lado como hacia los otros, y el número de los que cultivan las ciencias, las letras y las artes se hace inmenso. Una actividad prodigiosa aparece en el mundo de la inteligencia; cada uno trata de abrirse camino y se esfuerza por atraer la atención del público hacia él.³³

³¹ «Un despote peut trouver son intérêt à rendre ses sujets égaux et à les laissez ignorants, afin de les tenir plus aisément esclaves» (Tocqueville, *De la Démocratie en Amérique*, 43).

³² Luke Foster, «Tocqueville on the Mixed Blessing of Liberal Learning: Higher Education as Subversive Antidote», en *Exploring the Social and Political Economy of Alexis de Tocqueville*, ed. Peter J. Boettke y Adam Martin (London, New York: Palgrave Macmillan, 2020), 63-82.

³³ Tocqueville, *De la Démocratie en Amérique*, 44-45.

De ahí que en las sociedades democráticas la generalización de la educación venga demandada por la propia sociedad. En las sociedades aristocráticas solamente las minorías privilegiadas tienen la posibilidad de instruirse y acceder a los más altos placeres intelectuales; la gran masa de la población permanece en una ignorancia total. Desde el momento en el que la igualdad y la soberanía del pueblo se convierten en los principios rectores de la sociedad, se impone la necesidad de llevar la instrucción a la generalidad de la población.³⁴ Sin duda alguna, los niños no se convierten en buenos ciudadanos por el hecho de asistir a la escuela, pero, tal como le muestra la experiencia americana, la instrucción escolar tiene una influencia decisiva en ello, pues la libertad y la participación política son más completas en aquellos estados donde el nivel de instrucción es mayor.³⁵

Así pues, la libertad cívica implica y exige una sociedad cultivada, en la que el conocimiento y la educación se hayan extendido al conjunto de la población, hasta el punto de que la ilustración *–les lumières–* viene a ocupar el lugar que Montesquieu otorgaba a la virtud como motor y sostenimiento de la república.

Otro punto que demuestra América es que la virtud no es como se ha pretendido mucho tiempo la única cosa que puede mantener las repúblicas, sino que las luces facilitan más que toda otra cosa ese estado social. Los americanos no son en absoluto más virtuosos que otros; pero son infinitamente más instruidos (yo hablo de la masa) que cualquiera de los pueblos que conozco; no digo solamente que entre ellos se encuentren más hombres que sepan leer y escribir [...], pero la masa de los que conocen los asuntos públicos, el conocimiento de las leyes y precedentes, el sentimiento de los intereses bien entendidos de la nación y la facultad de comprenderlos, es mucho más grande que en cualquier lugar del mundo.³⁶

³⁴ Luke Foster, «Can the Great Books Serve the Common Good? Tocqueville on Aristocratic Education in a Democratic Age», *The Tocqueville Review/ La Revue Tocqueville*, 43, no. 1 (2022): 181-201.

³⁵ Tocqueville, *De la Démocratie en Amérique*, 316.

³⁶ Tocqueville, *Voyages en Sicile et aux États-Unis*, 278.

Ahora bien, subyace en nuestro autor un «pesimismo realista», un convencimiento profundo de que la educación no es la solución a la pobreza intrínseca del desarrollo industrial capitalista. La pobreza y la quiebra de los lazos sociales entre los capitalistas industriales y el proletariado son fenómenos endémicos a la sociedad industrial capitalista.

Dentro de su noción de ciudadanía como ejercicio activo y responsable de la libertad, el proletariado no es sujeto de ciudadanía, ya que únicamente posee su fuerza de trabajo y carece de libertad en sentido estricto, es decir, no participa de una vida propiamente moral y humana. Entre las diversas medidas propuestas por nuestro autor para posibilitarle el ejercicio de la ciudadanía,³⁷ ocupa un lugar significativo facilitarle el acceso a la propiedad, siendo el medio más eficaz una participación en la empresa. Sin embargo, los obreros no tienen la preparación material para llevar por sí mismos la dirección de las empresas. Tocqueville, fiel a sus presupuestos teóricos, confía en las posibilidades de las asociaciones obreras como medios eficaces para superar y prevenir el pauperismo. Su defensa de la extensión de la educación a todas las capas sociales, toma aquí su sentido pleno: el desarrollo de las capacidades morales e intelectuales de los obreros para poder promover y llevar adelante eficazmente cooperativas obreras.

A medida que nuestros obreros adquieran conocimientos más amplios y que el arte de asociarse con fines honestos y pacíficos progrese entre nosotros, cuando la política no se mezcle con las asociaciones industriales y el gobierno, tranquilizado en cuanto a su objeto, no niegue a estas su benevolencia y apoyo, se las verá multiplicarse y prosperar. Pienso que, en siglos democráticos como los nuestros, la asociación en todos los aspectos debe sustituir poco a poco, la acción preponderante de algunos individuos poderosos.³⁸

Sin embargo, esta defensa tocquevilliana de la educación como herramienta idónea para la formación de ciudadanos plenos, se acompaña en ocasiones de algún que otro texto de tintes bastante alejados de un republicanismo cívico:

³⁷ Alexis de Tocqueville, *Memoria sobre el pauperismo* (Madrid: Tecnos, 2003).

³⁸ Tocqueville, *Memoria sobre el pauperismo*, 54-55.

Fiel a su origen popular [el gobierno] hace esfuerzos sobrehumanos para satisfacer las necesidades de las clases inferiores de la sociedad, para abrirles el camino al poder y extender en su interior el bienestar y las luces. Mantiene a los pobres, asigna cada año millones a las escuelas, paga todos los servicios y retribuye generosamente a todos sus agentes. Si semejante manera de actuar me parece útil y razonable, estoy obligado también a reconocer que ella es costosísima.³⁹

Educación y libertad

Para que la educación cumpla sus promesas, las iniciativas privadas tienen que poder emerger y desarrollarse. Esto es –como veremos más adelante–, debe darse la libertad de enseñanza.

Ahora bien, el Estado no tiene que estar ausente, sino que tiene la obligación y la responsabilidad de intervenir para hacer respetar todos los derechos y los intereses comunes, infundir el amor a la patria, cuidar la calidad de la instrucción y estimular aquellos sectores que de otro modo las tendencias propias de la democracia no dejarían salir adelante.

Si los que están llamados a dirigir las naciones de nuestros días percibieran claramente con anticipación estos instintos nuevos que pronto serán irresistibles, comprenderán que, con cultura y con libertad, los hombres que viven en los siglos democráticos no pueden dejar de perfeccionar la parte industrial de las ciencias y que, en adelante, todo esfuerzo del poder social deberá dirigirse a sostener los estudios avanzados y a crear grandes pasiones científicas.⁴⁰

Las sociedades democráticas corren el peligro de estancarse en el plano intelectual, pues al igual que lo que ocurre a nivel social, tienden a lo que podríamos llamar un aburguesamiento intelectual. Es decir, son cerradas e impermeables al cambio y al progreso intelectual. Toda teoría nueva y toda innovación en el campo de las ideas tiene enormes dificultades para hacerse oír, sobre todo, porque los individuos democráticos

³⁹ Tocqueville, *Memoria sobre el pauperismo*, 171.

⁴⁰ Tocqueville, *De la Démocratie en Amérique*, 51.

están inmersos en un activismo constante, «no escuchan las cosas que se les dice, porque están siempre muy preocupados por las cosas que hacen».41 Además, una especie de igualitarismo de las inteligencias hace difícil que la masa acepte la superioridad intelectual que un hombre cualquiera pueda adquirir sobre otro y, por ello, que sus ideas, si innovan y trastocan las existentes, sean aceptadas por la masa. Así pues, la democracia dejada a sus instintos básicos tiende hacia la unidad de opiniones y hacia esa paz fría de los cementerios que Tocqueville nos describe detalladamente. La tiranía de la opinión pública fortalece ese aburguesamiento intelectual, inserto en el corazón del individualismo y del materialismo del hombre democrático, que la igualdad engendra y que conduce a una repetición sin fin de las ideas recibidas.42

El riesgo de caer en la mediocridad intelectual lleva a nuestro autor a defender la iniciativa y la libertad personal frente a la burocratización estatal. De la misma manera que el desarrollo acelerado de los procesos de racionalización instrumental, en detrimento de la racionalidad valorativa, origina una creciente, poderosa e impersonal administración burocrática, sin metas y valores, más allá de la eficacia instrumental, que acaba ahogando las iniciativas individuales y favoreciendo el crecimiento del aparato estatal, una excesiva reglamentación y burocratización del sistema de enseñanza entraña la pérdida de la diversidad y de la riqueza, apagando la creatividad de los jóvenes y, por tanto, la capacidad de innovación de la sociedad.

Por odio al privilegio y por la dificultad que ofrece la selección se acaba obligando a todos los hombres, sea cual sea su tamaño, a pasar por el mismo cedazo, y se les somete a todos indistintamente a un sinnúmero de pequeños ejercicios preparatorios en los que pierden su juventud y se apaga su imaginación; de suerte que estos hombres desesperan de gozar plenamente de los bienes apetecidos y, cuando al fin se les permite lograr cosas extraordinarias, ya no las ansían.43

41 Tocqueville, *De la Démocratie en Amérique*, 306.

42 Tocqueville, *La democracia en América*, 304-305.

43 Tocqueville, *De la Démocratie en Amérique*, 253.

Frente a ello se requiere una educación que fomente la libertad y abierta al cambio y a la innovación, reacia a encorsetarse en prácticas burocratizadas paralizantes. Y al Estado le compete velar para que el sistema de enseñanza trabaje la excelencia. Deberá sostener los *hautes études* y *grandes passions scientifiques*, facilitando el logro de sus metas a todos aquellos cuya capacidad y mérito les encamina hacia el cultivo de los grandes estudios teóricos, sea de índole científica o filosófica o adquirir una cultura clásica.⁴⁴ La presencia de una élite cultural fuerte frena la tendencia individualista de las sociedades democráticas, preserva la libertad y salvaguarda de la presión de la opinión pública sobre las inteligencias.

De lo contrario, el estancamiento intelectual puede llevar a los hombres a la servidumbre en el campo político. Así, cuando el Estado, en su «afán de agrandar la esfera del poder central y a encerrar cada día en límites más estrechos la independencia individual»,⁴⁵ acapara las funciones educativas y lo que hoy llamaríamos las políticas sociales, comienza a fraguarse una sociedad uniforme, gris, mediocre, presa fácil de un poder autoritario, aceptado e, incluso, elegido «libremente» por unos ciudadanos, a los que se les ha ido apartando suavemente en las pequeñas cosas de cada día del ejercicio de la libertad y de la responsabilidad. De este modo, la intervención del Estado en educación no tiene en muchas ocasiones como objetivo asegurar la transmisión de unos valores liberales y/o la construcción de una moral cívica, sino asegurarse el control y el poder sobre sus ciudadanos, que, al ser despojados de su libertad, han caído de nuevo en la condición de súbditos.

La educación, así como la caridad, se ha convertido en un asunto nacional en la mayor parte de los pueblos de nuestros días. El Estado recibe y, a menudo toma al niño de los brazos de su madre para confiarlo a sus agentes. Es él quien se encarga de inspirar sentimientos cada generación y de proporcionarle ideas. La uniformidad reina en los estudios como en todo lo demás. La diversidad, como la libertad, desaparecen en ella cada día.⁴⁶

⁴⁴ Tocqueville, *De la Démocratie en Amérique*, 68.

⁴⁵ Tocqueville, *De la Démocratie en Amérique*, 365.

⁴⁶ Tocqueville, *De la Démocratie en Amérique*, 355.

Esta forma totalitaria del poder no utilizará la fuerza física, sino que se presentará como un padre protector preocupado por el bienestar de sus hijos, vigilante de su seguridad, buscando su diversión y entretenimiento, y siempre avizor para que no salgan de una infancia eterna de dependencia e inferioridad. El despotismo moderno priva a los individuos de su interioridad y de su responsabilidad. Les descarga de su libertad y les despoja del esfuerzo y del riesgo de construirse a sí mismos erigiendo su mundo, es decir, les alivia del miedo al fracaso, pero les quita su capacidad creadora.⁴⁷

Aunque suene paradójico es un poder que se instala porque no utiliza su violencia, su paternalismo es su fuerza, su suavidad su opresión, su invisibilidad sus cadenas.⁴⁸ Arranca la libertad destruyendo las voluntades y convirtiendo a los individuos en marionetas a su servicio. Las antiguas tiranías dominando los cuerpos habían dejado escapar dimensiones esenciales de la libertad; el despotismo democrático no busca tanto dominar los cuerpos como apoderarse profunda y radicalmente del alma de sus súbditos. Para ello, y poder eliminar así la mínima resistencia, ayudado por el poder de la opinión pública, buscará que estos no tengan conocimiento alguno de su servidumbre.

Una vez más, Tocqueville descubre en un fenómeno social –la educación, en este caso– una ambivalencia radical: herramienta indispensable en la construcción de sujetos libres e iguales e instrumento de dominación y alienación. Y una vez más, los hombres se ven obligados a optar para ser libres, los hombres devienen libres en el ejercicio de su libertad.

EDUCACIÓN PARA LA CIUDADANÍA

En todo caso y con sus contradicciones, la sociedad a través de la educación otorga a los americanos las luces necesarias para poder actuar como ciudadanos, para poder efectuar elecciones políticas racionales y acertadas. En este sentido, Enrique Serrano, en su Prefacio al *Antiguo*

⁴⁷ «Le nouveau pouvoir agit primordialement au niveau intellectuel et immatériel. Sa force est tout entière dans le conditionnement des consciences, dans sa capacité à modeler l'intériorité sur des stéréotypes de pensées et de comportements flattant les deux grandes tendances naturelles de l'homme: auto-conservation et sens de l'intérêt» (Jean-Michel Heimonet, *Tocqueville et le devenir de la démocratie. La perversion de l'idéal* (París: L'Harmattan, 1999), 125.

⁴⁸ David Carrión Morillo, *La libertad política en el estado social* (Madrid: Delta, 2009), 147.

Régimen y la Revolución, interpreta la noción tocquevilliana de educación como «la creación de las condiciones que hagan posible mantener el policentrismo del poder y, con ellas, de los factores que inducen a los ciudadanos a participar en la vida política de la nación». ⁴⁹ Es decir, Tocqueville nos está hablando de una educación orientada a la política, de una noción de educación que recoge en buena parte el núcleo de la *paideia* clásica. ⁵⁰

En los Estados Unidos, el conjunto de la educación de los hombres está dirigido hacia la política. En Europa, su objetivo principal es el de preparar para la vida privada. [...] En Europa a menudo hacemos entrar las ideas y los hábitos de la existencia privada en la vida pública, y como nos sucede que pasamos de repente del interior de la familia al gobierno del Estado, se nos ve a menudo discutir los grandes intereses de la sociedad de la misma manera que conversamos con nuestros amigos. Por el contrario, son los hábitos de la vida pública los que los americanos trasladan casi siempre a la vida privada. En ellos la idea del jurado se descubre entre juegos escolares y las formas parlamentarias se manifiestan hasta en el orden de un banquete. ⁵¹

Se trata, pues, de una educación que trata de imbuir a las nuevas generaciones la necesaria síntesis entre el espíritu de libertad y el espíritu religioso, compromete a los hombres en el destino de su país, inculca en cada uno de los ciudadanos el amor a la patria, le liga a los intereses de la nación con la misma fuerza que a los propios, le identifica y le hace alegrarse con la gloria y la prosperidad de su país y se regocija, de este modo, al reconocer su propia obra en los éxitos que este obtiene, en definitiva, logra que cada uno de los ciudadanos tenga por su patria y por los asuntos públicos un sentimiento y una dedicación semejante al que siente y tiene por su familia. ⁵² Se comprende entonces que un gobierno y una libertad democráticos exijan una sociedad muy civilizada y «muy

⁴⁹ Enrique Serrano, «Prefacio», en *El antiguo Régimen y la Revolución*, Alexis de Tocqueville (México: FCE, 1998), 18.

⁵⁰ Werner Jaeger, *Paideia: los ideales de la cultura griega* (México: FCE, 2008).

⁵¹ Tocqueville, *De la Démocratie en Amérique*, 319.

⁵² Ver el capítulo VI de la segunda parte de la primera *Democracia*.

sabia», que el gobierno democrático solamente pueda darse con la civilización y la experiencia.

Hay otro [amor a la patria], más racional que ese [un amor a la patria irreflexivo y ardiente], menos generoso, puede que menos ardiente, pero más fecundo y duradero, que nace de la ilustración, se desarrolla con la ayuda de las leyes, crece con el ejercicio de los derechos y acaba, en cierta manera, confundándose con el interés personal. Si un hombre confunde la influencia que tiene el bienestar del país sobre el suyo propio, si sabe que la ley le permite contribuir a producir ese bienestar, se interesa por la prosperidad de su país, primero como una cosa que le es útil y después como obra suya.⁵³

Esta necesidad de la instrucción aumenta a medida que se extienden los derechos políticos, pero ello no nos debe hacer olvidar que jamás puede remplazar a la experiencia política práctica. Así, cuando nos habla de las comunas, Tocqueville comenta sin vacilación alguna:

Por tanto, es el municipio donde reside la fuerza de los pueblos libres. Las instituciones municipales son a la libertad lo que las escuelas primarias a la ciencia; ellas son las que la ponen al alcance del pueblo: le hacen gustar de su uso pacífico y lo habilitan a servirse de ella. Sin instituciones municipales, una nación puede darse un gobierno libre, pero carecerá del espíritu de la libertad. Pasiones fugaces, intereses del momento o el azar de las circunstancias, pueden darle formas aparentes de independencia; pero el despotismo arrinconado en el fondo del cuerpo social, tarde o temprano reaparece en la superficie.⁵⁴

El ejercicio de la libertad política neutraliza la tendencia excesiva de los filósofos a las ideas generales y abstractas en materia de gobierno y limita la influencia de los hombres de letras en la política. En América, los ciudadanos están tan absorbidos en intentar solucionar los problemas cotidianos concretos, participan en tantas asambleas y cuerpos

⁵³ Tocqueville, *De la Démocratie en Amérique*, 232.

⁵⁴ Tocqueville, *De la Démocratie en Amérique*, 59.

deliberativos, que no tienen tiempo para dedicarse a elaborar grandes sistemas teóricos.⁵⁵

En todo caso, la libertad cívica, objetivo último de la educación, carecería de sentido si no se plasmara y tomara cuerpo en un conjunto de libertades particulares que le den cuerpo y la doten de realidad. De ahí que, junto a la libertad de enseñanza, la libertad económica, la libertad religiosa, la libertad electoral, la libertad de prensa, la libertad comunal, la libertad de asociación son, entre otras, esas libertades que dan a las instituciones democráticas su impulso y vitalidad. Libertades que ningún gobierno ni mayoría social pueden violar sin que la libertad como realidad global quede herida de muerte. Libertades que exigen del individuo tenacidad y coraje para no sucumbir a los cantos de sirena de los igualitarismos populistas, impregnados la mayoría de las veces de tintes cesaristas.

A su vez, estas libertades requieren un conjunto de instituciones políticas que permitan su realización y desarrollo, en las que los hombres democráticos han de participar activamente para dotarles de sentido, así como unas costumbres y una moralidad social adecuadas, configuradas ambas en el planteamiento tocquevilliano fundamentalmente por la Teoría del interés bien entendido y la religión.

Ahora bien, como dice Meuwly⁵⁶, Tocqueville no lanza al aire promesas vanas, no cree en soluciones milagrosas; por el contrario, advierte a sus interlocutores que cada una de estas libertades presenta sus riesgos y peligros para la cohesión social y la dignidad del ser humano, es decir, la ambivalencia también está presente en las propias entrañas de la libertad y en las herramientas para hacerla posible y mantenerla.

⁵⁵ «Lors donc qu'il y a un sujet sur lequel il est particulièrement dangereux que les peuples démocratiques se livrent aveuglément et outre mesure aux idées générales, le meilleur correctif qu'on puisse employer, c'est de faire qu'ils s'en occupent tous les jours et d'une manière pratique; il faudra bien alors qu'ils entrent forcément dans les détails, et les détails leur feront apercevoir les côtés faibles de la théorie [...] C'est ainsi que les institutions démocratiques, qui forcent chaque citoyen de s'occuper pratiquement du gouvernement, modèrent le goût excessif des théories générales en matière politique, que l'égalité suggère» (Tocqueville, *De la Démocratie en Amérique*, 40).

⁵⁶ Tocqueville, *Lettres Choisies*, 185.

Sociedad moderna y currículum escolar

Tocqueville, en sus escritos y en sus intervenciones en la Cámara muestra una profunda preocupación por los contenidos de los *curricula* escolares. Pensaba que Francia necesitaba diseñar un sistema de enseñanza acorde con las necesidades científicas y políticas de su época. Estaba convencido de que la educación clásica debía estar reservada para una pequeña elite intelectual, pero que la sociedad moderna estaba exigiendo un cambio profundo en los programas y en la orientación de los niveles de secundaria.⁵⁷

Cuestiona un sistema escolar nada comprensivo, excesivamente anclado en el pasado, con un nivel secundario desmedidamente clásico y humanista, sin apenas referencias a la realidad histórica y social francesa. En resumen, la escuela francesa de la época es vista desde la óptica tocquevilliana como una auténtica rémora para el avance y el progreso científico:

A pesar de nuestra revolución, somos más científicos, más arcaicos, que el resto de Europa. Pues en el resto de Europa, aunque hayan conservado el sistema de estudios clásicos, al menos no han puesto a continuación la Filosofía, de manera que después de haber estudiado el mundo clásico, queda tiempo para hacer otra cosa...⁵⁸

Por el contrario, la sociedad democrática exige que la educación básica sea científica, comercial e industrial más que literaria. Tocqueville está convencido que una instrucción útil, accesible a la gran mayoría de los ciudadanos, enfocada a su inserción laboral, vale más que enseñanzas evanescentes, fábricas de *demi-savants* eternamente insatisfechos e incapaces de adaptarse a las realidades concretas.

Si, en una sociedad en la que cada uno se vea obligado a realizar violentos esfuerzos para aumentar su fortuna o mantenerla, se enseñasen sólo las artes literarias, habría ciudadanos muy cultos y muy peligrosos al mismo tiempo; pues dado que el estado social y político despertaría en ellos necesidades que la educación

⁵⁷ Tocqueville, *Écrits et discours politiques*, 642-644.

⁵⁸ Tocqueville, *Écrits et discours politiques*, 644.

no enseñaría cómo satisfacer, perturbarían al estado por culpa de griegos y romanos, en lugar de fecundarlo con su trabajo.

Es evidente que, en las sociedades democráticas, el interés de los individuos, así como la seguridad del Estado, exige que la educación de la mayoría sea científica, comercial e industrial, más que literaria.⁵⁹

Ambiciona para el sistema escolar francés la misma variedad de conocimientos y materias que el sistema alemán proporcionaba a sus estudiantes. Pretendía una escuela francesa que hiciera especial hincapié, por un lado, en los conocimientos de la historia moderna francesa, precisos para frenar el individualismo y fortalecer la cohesión social, fomentando el amor a la nación en los jóvenes, y, por otro, en introducir en los programas las materias indispensables para el progreso científico, industrial y comercial, es decir, desde su punto de vista, para el bienestar material de la sociedad.

TOCQUEVILLE Y LA DISPUTA DE LA LIBERTAD DE ENSEÑANZA

La función social que Alexis de Tocqueville concede a la educación en las sociedades democráticas explica su posicionamiento en el debate que se produce en Francia a lo largo de 1844 en torno a la cuestión de la libertad de enseñanza y las relaciones entre la Universidad y la Iglesia.

La libertad de enseñanza parecía asegurada para la enseñanza primaria por medio de la Ley Guizot de 1833. Además, con el paso de los años, el número de establecimientos religiosos se había multiplicado, sin una vigilancia excesiva por parte de la autoridad, cuyos controles los obispos los obviaban cotidianamente. Sin embargo, en secundaria había un punto de fricción entre la Iglesia y el Estado: la universidad revalidaba los estudios por medio del examen del bachillerato, pero para entrar en ella los candidatos debían haber realizado los dos últimos años de escolaridad en un establecimiento dependiente de la universidad.

Aunque la Iglesia francesa vivía una situación inmejorable, el partido clerical, animado entre otros por Veuillot, que utiliza su periódico *L'Univers*

⁵⁹ Tocqueville, *De la Démocratie en Amérique*, 68.

como arma arrojadiza e ideológica contra el gobierno, emprende la contienda escolar. No hay día en el que desde *L'Univers* no se lancen continuos ataques contra el monopolio universitario, llegando a acusar de inmoralidad a los universitarios más prestigiosos del momento. La Iglesia intentando conseguir una libertad de enseñanza total, emprendía una cruzada en la que, de forma exagerada, a partir de casos excepcionales, calumniaba a toda la Universidad.

Como respuesta se produce una reacción violenta y masiva en los medios universitarios o simplemente laicos: Quinet y Michelet dirigen un curso sobre y contra los jesuitas en el Colegio de Francia que alcanza una enorme repercusión; periódicos, no solamente de izquierdas como *Le Courrier*, *Le Siècle* o *Le Constitutionnel*, sino también gubernamentales, como el *Journal des Débats*, emprenden una campaña contra la Iglesia, caricaturizando al partido clerical, ridiculizando al clero y sus costumbres licenciosas, burlándose de las prácticas religiosas y atacando, incluso, los propios dogmas católicos. Es decir, la guerra entre la Iglesia y la modernidad vuelve a resurgir.

Tocqueville, al que América había enseñado la necesidad de unir libertad y religión en aras de construir una democracia liberal, no podía menos que sentirse defraudado y triste ante tal situación.⁶⁰ Este enfrentamiento tocaba la raíz misma de los planteamientos tocquevillianos. Desde la *Democracia* venía defendiendo con pasión que un pueblo sin principios morales y religiosos estaba destinado a caer en la tiranía, que la religión era la única garantía de la libertad democrática, que el mal de Francia era no haber sabido unir el espíritu de libertad y el espíritu religioso. Pero, al mismo tiempo, se declara abiertamente partidario de la enseñanza pública⁶¹ y laica, como única garantía de la libertad de pensamiento y de la igualdad social.⁶²

Es decir, la fidelidad a sus principios le coloca en una postura equidistante entre las partes contendientes, que no dejará satisfechos plenamente

⁶⁰ Alexis de Tocqueville, *Correspondance familiale. Oeuvres Complètes*. XIV (París: Gallimard, 1998), 236-238.

⁶¹ Tocqueville, *Correspondance d'Alexis de Tocqueville*, 432.

⁶² Tocqueville, *Lettres Choisies*, 546.

a ninguno de los bandos, y que desde la izquierda es vista como marcadamente clerical y ultramontana.

La libertad de enseñanza ha sido sin duda la primera causa, el pretexto de esta guerra, pero la guerra se ha extendido mucho más allá de estos límites. Escuchad a los partidos ¿Es que algunos solamente exigen la libertad de enseñanza? ¿Sus palabras no atacan la libertad misma de pensar, la propia educación laica en Francia, que es su garantía? Escuchad a los demás y veréis que no solo están hablando de la Universidad y de sus reglas, sino que atacan a la religión misma, a los principios generales, a sus principios, a las normas generales en las que reposa.⁶³

Tocqueville quería llevar adelante un liberalismo laico difícil de entender en un ambiente tan radicalizado y enfrentado como el francés en aquellos momentos.⁶⁴ Es partidario de la libertad de enseñanza y la relaciona con los principios liberales de 1789, que reconocían y proclamaban en el hombre derechos anteriores y superiores a los del Estado.⁶⁵ Una enseñanza libre recoge, por tanto, los principios de libertad, igualdad y solidaridad que encabezaron los inicios de la Revolución francesa en su búsqueda y construcción de una sociedad de ciudadanos libres e iguales. De una sociedad, por tanto, en la que la libertad dejaba de ser el monopolio de un sector de la sociedad para convertirse en el estandarte de todas las clases sociales, de todos los partidos políticos y de cada uno de los individuos que integraban la nación francesa.

Y, además, la libertad de enseñanza tiene para Tocqueville un fuerte componente social, como lo recoge la siguiente cita:

¿Sobre quién caerá todo el peso de esta tiranía? Sobre el pobre que no tendrá ni los medios ni el tiempo de educar él mismo a su hijo o bajo sus ojos ¿Quién se librará? El rico, que tendrá un instructor privado o tiempo disponible. Esta desigualdad os chocha ¿Cuál es su remedio? Forzar a todos los niños a asistir a los colegios del Estado. Y así estamos: estamos en Esparta ¡Por qué

⁶³ Tocqueville, *Écrits et discours politiques*, 488.

⁶⁴ Tocqueville, *Écrits et discours politiques*, 570-571. Una síntesis sobre su concepción de la libertad de enseñanza también puede encontrarse en las páginas 525-526 de la misma obra.

⁶⁵ Tocqueville, *Écrits et discours politiques*, 573.

no lo decís antes! Todos los que como el *National* comienzan por negar el derecho al individuo de dejarse enseñar a su gusto, son arrastrados invenciblemente hacia allá; querrán pararse en el camino, la lógica les precipita.⁶⁶

Sin embargo, la libertad de enseñanza no representa para Tocqueville solamente el derecho de los padres para educar a sus hijos según sus principios religiosos y morales. Además, está convencido que la pérdida del monopolio y una competencia leal entre todos los establecimientos educativos traerá consigo un enriquecimiento de la propia Universidad. Está convencido que el desafío que la libertad de enseñanza representa para la Universidad será un acicate para que esta se decida a entrar en caminos de renovación e innovación.⁶⁷

Así, aunque su desconfianza en los jesuitas es manifiesta,⁶⁸ aunque culpabiliza a los sacerdotes y a la Iglesia de haber empezado la guerra,⁶⁹ aunque critica a los obispos su afán desmedido de poder terrenal,⁷⁰ aunque considera que haya que arrancar a los seminarios y colegios religiosos de la dirección arbitraria de los obispos y someterles al derecho común,⁷¹ Tocqueville emprende una defensa tenaz y enérgica de la libertad de enseñanza, intentando conciliar una enseñanza laica y los derechos de las familias a una enseñanza religiosa libre.

Por otra parte, los enfrentamientos religiosos y universitarios provocaron la vuelta de su enemigo político Thiers al primer plano de la escena política. No es que se hubiera distinguido con anterioridad en la defensa de la Universidad, pero era la oportunidad perfecta para volver al gobierno y poder aglutinar y encabezar bajo la bandera del anticlericalismo una mayoría parlamentaria. Al percatarse de la maniobra, y disgustado por la actitud de Barrot –jefe de filas de la izquierda en la Asamblea– y de la izquierda dinástica de no conceder más que una libertad precaria a los establecimientos no universitarios, Tocqueville, en el

⁶⁶ Tocqueville, *Écrits et discours politiques*, 584.

⁶⁷ Tocqueville, *Lettres Choisies*, 547.

⁶⁸ Tocqueville, *Lettres Choisies*, 593, 610-611, 645.

⁶⁹ Tocqueville, *Lettres Choisies*, 579.

⁷⁰ Tocqueville, *Lettres Choisies*, 579-580.

⁷¹ Tocqueville, *Lettres Choisies*, 525-526.

periódico *Le Commerce* y en la Cámara, interpreta la guerra escolar como una sutil y gigantesca maniobra de despiste por parte del gobierno, para ocultar a la opinión pública los problemas reales de la nación.⁷²

Así, para nuestro autor, no es la actitud reaccionaria de parte de un sector de la Iglesia, ni el oscurantismo de los jesuitas, el peligro mayor de la sociedad francesa. Es la acción de un gobierno que confunde la paz social con la somnolencia y el letargo social, es la desaparición de todas las virtudes cívicas que hacen de la libertad y la participación social las bases de la ciudadanía, es la decadencia del gobierno representativo y el debilitamiento de las instituciones, es el ocaso del patriotismo y la ruina de la nación. Ahí residen los verdaderos peligros.

Si no tuviéramos que combatir nada más que el dominio de los sacerdotes, la victoria no sería dudosa. El peligro más inmediato que nos amenaza y al que hay que parar; al que solamente podremos conjurar apelando a todas las fuerzas vivas del país, es la decadencia del gobierno representativo, es el aniquilamiento gradual de las instituciones que las dos revoluciones nos han dado, es el relajamiento de las creencias políticas, son los progresos aterradores de la corrupción que nos ha invadido por todas partes. Despertad al país de su entumecimiento, poned en movimiento sus sentimientos patrióticos, apasionadle, no con disputas de sacristía, sino con grandes reformas, por la reforma parlamentaria, por la reforma electoral, por la reforma de las leyes de septiembre, y habréis dado a la causa liberal un servicio más grande que la supresión de este establecimiento de la Calle de Postes en el que mañana se pensará.⁷³

Sin embargo, como frecuentemente ocurre en política, nos encontramos en presencia de una polémica inconclusa. Thiers, nombrado relator del proyecto de Ley de Villémain, hace en su presentación una defensa de la Universidad napoleónica, cercenando aspectos fundamentales de la libertad de enseñanza y sometiendo los centros religiosos a un control

⁷² «Loin que la querelle qui s'agite entre l'Université et le clergé, la philosophie et l'orthodoxie, la nation et les Jésuites, soit contraire au pouvoir qui dirige nos affaires, qui ne voit qu'elle le sert? Pendant qu'on s'échauffe sur toutes ces choses, personne ne parle plus du gouvernement personnel ni du pouvoir parlementaire, personne n'y pense!» (Tocqueville, *Écrits et discours politiques*, 564).

⁷³ Tocqueville, *Écrits et discours politiques*, 615.

riguroso por parte de la universidad. Al mismo tiempo privilegia los estudios clásicos, ironizando sobre los planteamientos tocquevillianos en torno a la renovación de los *curricula*. Villémain, acuciado por motivos familiares, y agobiado por el cariz que estaban tomando las discusiones, presenta su dimisión, siendo sustituido por Salvandy, que aplazó *sine die* la cuestión de la libertad de enseñanza. Pero el daño estaba hecho, la libertad de enseñanza quedó en Francia como una asignatura pendiente que iba a explotar en los primeros años del siglo siguiente y Tocqueville, tras la feroz y, muchas veces, deshonesta, campaña que la izquierda a través de sus periódicos lanzó en su contra, hubo de escuchar también los insultos de carlistas, legitimistas, ultramontanos y clericales.⁷⁴

LAS MUJERES Y LA EDUCACIÓN

Tocqueville concede a las mujeres un papel fundamental: hablar de las mujeres es hablar de la moral y de las costumbres, es pulsar los condicionantes últimos de la organización social y política, es alcanzar la fuente de esas creencias compartidas sin la cuales no hay sociedad.

Su papel es urdir las *moeurs* con hábitos de orden y de moralidad, que frenen las pasiones políticas y posibiliten ambientes de libertad. Así pues, son las responsables de la solución del problema de la democracia, ya que de ellas depende la calidad de los vínculos de dependencia y solidaridad que posibilitan la comunidad política, la nación. Son poseedoras del poder moral, en el sentido de que moralizan desde dentro a la sociedad. Guardianas y promotoras de la moralidad, son, además, el espejo en el que se refleja el grado ético de una sociedad. Finalmente, les compete indirectamente un papel político, pues de ellas depende la educación de sus hijos en aquellos valores religiosos y asociativos que les permitan desarrollar una ciudadanía crítica y contrarrestar, de este modo, las tendencias individualistas de la democracia burguesa.⁷⁵

Lógicamente su educación tiene una importancia singular y adquiere implícitamente un fuerte sesgo político. Tocqueville dirige una vez más sus ojos a los Estados Unidos.

⁷⁴ Françoise Mélonio, *Alexis de Tocqueville* (París: Ministère des Affaires étrangères, 2007), 57.

⁷⁵ Elisa Usategui, «Comunidad y género en Alexis de Tocqueville», *Revista de Estudios Políticos*, 121 (2003): 71-106.

Mucho tiempo antes de que la joven americana haya alcanzado la edad núbil, se comienza a emanciparla poco a poco de la tutela materna. Todavía no enteramente salida de la infancia, ya piensa por sí misma, habla libremente y actúa sola. Delante de ella está constantemente expuesto el gran panorama del mundo y, lejos de intentar ocultárselo a la vista, día a día se le expone cada vez más a la mirada y se le enseña a considerarlo con mirada firme y tranquila. Así, no tardan en serles revelados los vicios y los peligros que presenta la sociedad. Los ve claramente, los juzga sin ilusión y los afronta sin temor, pues está llena de confianza en sus fuerzas y su confianza parece compartida por todos los que la rodean [...] Tiene costumbres puras más que una mente casta.⁷⁶

Así pues, como señala Eileen Hunt Botting, la chica americana de Tocqueville tiene mucho más en común con la chica ideal de Wollstonecraft que con la *Sophie* del Emilio.⁷⁷ Las dos son educadas en la igualdad intelectual con sus hermanos y, quizás, superior, si así lo permite su inteligencia, en la autonomía moral para no dejarse llevar por embaucadores religiosos o padres excesivamente dominadores, en la castidad, pero no en frialdad sexual, en la seducción controlada y sutil para gustar, a la vez que manejar, a sus compañeros varones. La educación hace a las mujeres americanas dueñas de sí mismas y les da un conocimiento profundo de la realidad y de los diferentes campos del saber. En este aspecto, Tocqueville se muestra gratamente sorprendido al escuchar a las mujeres americanas opinar inteligentemente sobre cuestiones científicas, políticas, filosóficas y religiosas, y no solo de modas, moral, arte o decoración.⁷⁸

En consonancia, Tocqueville ponía en tela de juicio las prácticas viciadas de la educación femenina imperante en su época. Tocqueville se lamentaba de una educación fragmentada que hacía de las mujeres seres seductores, pero incompletos a los ojos de los varones y, lo que era más grave, a los suyos propios. Igualmente condenó la «tímida, retirada

⁷⁶ Tocqueville, *La democracia en América*, 242.

⁷⁷ Eileen Hunt Botting, «A Family Resemblance. Tocqueville and Wollstonecraftian Protofeminism», en *Feminist Interpretations of Alexis de Tocqueville*, comp. Jill Locke y Eileen Hunt Botting (Pennsylvania: The Pennsylvania State University Press, 2009), 99-124.

⁷⁸ Tocqueville, *La democracia en América*, 242.

y casi clausttral» educación que se impartía en Francia, que en nada preparaba para su autonomía y las entregaba «enseguida, sin guía y sin ayuda, en medio de los desórdenes inseparables de una sociedad democrática».79 Tocqueville considera indispensable para el mantenimiento de la democracia liberal una educación para la libertad, que cultive las capacidades intelectuales y morales de ambos sexos por igual.

En los Estados Unidos se habían dado cuenta de que «en una democracia la independencia individual no podía dejar de ser muy grande; la juventud, temprana; los gustos, mal contenidos; los hábitos, cambiantes; la opinión pública, a menudo incierta o impotente; la autoridad paterna, débil y el poder marital, discutido».80 No hay que olvidar que las mujeres son las encargadas de instruir a sus hijos, los futuros ciudadanos, en los valores de la libertad y la responsabilidad. Por todo ello, los americanos han querido educarlas en el autogobierno, desarrollando su inteligencia y voluntad. Tocqueville contempla cómo el pueblo americano educa a la mujer en las tres dimensiones que él mismo había dado a la libertad: igualdad, independencia y responsabilidad.81

Sin embargo, las semejanzas con el profeminismo son más aparentes que reales. Educar a las mujeres no significa prepararlas para una ciudadanía crítica y responsable, como sucede en el caso de los varones. No pretende abrirlas a la esfera pública, sino encerrarlas en la privacidad de lo doméstico. La educación para las mujeres está dirigida a que «libremente» acepten someterse sin restricción alguna y con plena abnegación al matrimonio y a las obligaciones que esta entraña para ellas. De este modo, donde antes todo era independencia y libertad, ahora es sujeción y enclaustramiento.

En América, la independencia de la mujer se pierde sin retorno en los vínculos del matrimonio. Si la mujer soltera está menos sujeta que en ninguna parte, la esposa se somete a obligaciones más estrechas. Una hace de la casa paterna un lugar de libertad y de placer, la otra vive en la morada de su marido como en un claustro.82

79 Tocqueville, *La democracia en América*, 242.

80 Tocqueville, *La democracia en América*, 242.

81 Tocqueville, *La democracia en América*, 242.

82 Tocqueville, *La democracia en América*, 245.

Tocqueville encierra a las mujeres en el recinto doméstico, aunque «a veces se muestren como hombres por su mente y corazón».⁸³ Libre de compromisos y obligaciones, la mujer americana acepta el yugo del matrimonio porque conoce y acepta de antemano sus reglas y obligaciones. Su libertad inicial permite a la esposa soportar libremente el enorme peso de las cargas que la nueva situación conlleva, porque la libertad que de soltera disponía le ha dado una auténtica y profunda madurez moral e intelectual. Las cualidades desarrolladas por su educación permiten a las mujeres ser mejores esposas y enfrentarse valientemente a todas las vicisitudes y pruebas de la vida.

Tocqueville, el humanista para quien lo importante no era la naturaleza del amo, sino la obediencia ciega, justifica en el matrimonio la dejación de la libertad personal por parte de las mujeres, hasta el punto de defenderla y legitimarla porque es una dejación libre. El mito de la libre elección hace por primera vez acto de presencia.

A MODO DE CONCLUSIÓN

La educación ocupa un lugar central en la obra y en el pensamiento de Alexis de Tocqueville. En primer lugar, porque la considera la herramienta idónea para llevar adelante el ideal de sociedad meritocrática presente en toda noción de democracia. En este sentido no se cansa de repetir la necesidad de extender la educación al conjunto de la ciudadanía francesa, sin distinción de clase social y género. Indudablemente, esto obliga a abandonar los elementos retóricos y arcaicos dominantes en el sistema escolar francés e implementar una escuela que prepare para la vida y para el trabajo, abierta al progreso y a la innovación científica y social.

Al mismo tiempo, hay otra dimensión de la educación que toca el núcleo de las preocupaciones tocquevillianas. Tocqueville percibió claramente que el progresivo individualismo de las sociedades modernas acabaría disolviendo los vínculos entre las elecciones individuales y los proyectos y las acciones colectivos, esto es, la piedra clave de la cohesión social. Además, este ensimismamiento del individuo en sí mismo podría provocar que el proceso democrático acabara oprimiendo la dimensión del espíritu que confiere al ser humano su dignidad y sus derechos: la libertad.

⁸³ Tocqueville, *La democracia en América*, 245.

Sin grandes ideales y de espaldas a cualquier tipo de trascendencia, encerrado en sí mismo y amante de la seguridad en una sociedad de incertidumbre, el individuo tocquevilliano hace del dinero el gran fetiche y encuentra en el mercado y en el consumo el tótem que le otorga el único sentido que le puede conceder una sociedad individualista y materialista. No es de extrañar entonces que, en su búsqueda individual de refugio y protección, los hombres de la modernidad, puedan terminar cayendo en nuevas formas de despotismo: la tiranía de la mayoría y de opinión pública y el nuevo despotismo, esto es, un Gran hermano omnipresente y represor.

Teniendo a la vista este posible desenlace, Alexis de Tocqueville concede a la educación el objetivo prioritario de formar ciudadanos, individuos dispuestos a trascender su condición de súbditos, conscientes de que la libertad no es solo el derecho a participar en el gobierno, sino el deber de actuar políticamente, capaces de enfrentarse a cualquier Estado desprovisto de todo sentido ético y empeñados en llevar a la realidad el ideal republicano de fraternidad, igualdad y libertad.

La educación será la herramienta idónea para construir un nosotros que permita pensar en uno mismo y a la vez vivir para los demás, es decir, para formar ciudadanos conscientes de que la libertad y la igualdad a la que aspiran no es posible si no luchan al mismo tiempo para que el conjunto de ciudadanos goce de una libertad semejante a la suya. Ciudadanos independientes que se saben no autosuficientes y ven necesaria la colaboración entre todos los miembros de la comunidad. Sus escritos evidencian que en su pensamiento político la libertad adquiere todo su sentido, riqueza y contenido si fomenta compromisos en el espacio público.

La participación política favorece una especie de bucle político en la mentalidad y en la acción política de los ciudadanos, en la medida en que favorece la interiorización de unos derechos que, a su vez, engendran la exigencia de nuevos derechos. No hay ciudadanía sin derechos, pues sin ellos los ciudadanos volverían a la condición de súbditos y la obediencia quedaría degradada al estado de servilismo. Al propio tiempo, la idea de derechos aviva la dimensión cívica de la libertad, al reforzar la idea de reciprocidad de derechos y deberes, así como el respeto al «otro» y el sentido de la responsabilidad para con él.

De este modo, su enfoque de la educación en las sociedades democráticas permite trascender las interpretaciones neoliberales que tradicionalmente se han venido haciendo del pensamiento y de la actividad política de nuestro autor. Son muchos los intérpretes de Tocqueville que se limitan a su crítica al Estado intervencionista de la *Democracia en América* y a interpretar sus análisis como una lucha sin cuartel entre igualdad y libertad.

Por el contrario, analizar el sentido y el lugar de la educación en su obra permite comprobar que la igualdad no es una amenaza a la libertad, sino que, al contrario, ha de venir en su ayuda para construir una organización política y social justa, que permita el libre desenvolvimiento de los individuos, facilite la cohesión y la solidaridad social, traiga el progreso material e intelectual, aleje los enfrentamientos de clase y haga innecesarios los levantamientos populares.

Indudablemente, defiende la libertad de enseñanza, pero concede también al Estado un lugar protagonista: es al Estado y a sus legisladores a quienes les corresponde definir y llevar adelante una política educativa que contribuya a formar una ciudadanía más libre, crítica y con menos desigualdades. Es decir, una educación laica, que aproveche y difunda los logros científicos, que garantice la igualdad de derechos y posibilidades para todos los individuos, que promueva la participación política y social, que inculque la idea de la patria y el compromiso con el interés general, que desarrolle la libertad de pensamiento, la creatividad y la emancipación individual, que defienda el progreso y la innovación social, que se comprometa en la defensa de un mundo más libre, más justo y mejor.

Así pues, Tocqueville no es un liberal al uso y considera necesaria la intervención del Estado en el campo educativo, social y económico. Por tanto, también en el campo educativo se ve como un liberal de una especie nueva, que quiere trascender los límites que su época le marca entre un liberalismo para el cual la intervención del Estado nunca es saludable ni deseable y un socialismo que reclamaba la presencia constante y permanente del Estado. Para Tocqueville, en la sociedad democrática, caracterizada por un alto grado de individualismo, el Estado debe asegurar la solidaridad con vistas al interés general y, al mismo tiempo, favorecer el protagonismo de la sociedad civil. Y todo ello en y desde la libertad.

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SEEKING GRAMSCI IN THE WORK OF BRIAN SIMON*

Buscando a Gramsci en la obra de Brian Simon

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Abstract. This article examines the results of research on the work and career of Brian Simon (1915-2002), one of the leading historians of English education. It shows the theoretical inspiration for comprehensive school in Soviet psychology and the original way of interpreting Marxism by Brian Simon, that is, anti-determinism, and conviction in education as a factor of change. In addition to the collection in four volumes of *Studies in the History of Education*, the autobiography, *A life in education*, and other books by the author, the survey was based on documents and unpublished writings found in the Brian Simon Archive at the Institute of Education/UCL. The conclusions are as follows: 1. The influence of Gramsci could be found in articles and reviews, as well as the courses Professor Simon was involved in from the 1970s onwards; 2. By defending educational reforms that favored the working class, Brian Simon adopted the Marxist view of Gramsci even before knowing the main translation of his work into English (1971); 3. Although a supporter of the Soviet Union, Brian Simon's reformist protagonism suited Gramsci's rejection of the Soviet road to socialism since, for him, this was not the appropriate path for "western" countries and for non-revolutionary periods. Finally, the article indicates perspectives of new studies on Marxist intellectuals from different countries whose common interest was Gramsci.

Keywords: Brian Simon; Antonio Gramsci; Comprehensive school; Soviet psychology; Marxism.

Resumen. *Este artículo examina los resultados de la investigación sobre el trabajo y la carrera de Brian Simon (1915-2002), uno de los principales historiadores*

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de la educación inglesa. Muestra la inspiración teórica de la escuela comprensiva en la psicología soviética y la forma original de interpretar el marxismo de Brian Simon, es decir, el antideterminismo y la convicción en la educación como factor de cambio. Además de la colección en cuatro volúmenes de Estudios en Historia de la Educación, la autobiografía, Una vida en la educación y otros libros del autor, la encuesta se basó en documentos y escritos inéditos encontrados en el Archivo Brian Simon del Instituto de Educación/UCL. Las conclusiones son las siguientes: 1. La influencia de Gramsci se puede encontrar en artículos y reseñas, así como en los cursos en los que participó el profesor Simon desde la década de 1970 en adelante; 2. Al defender reformas educativas que favorecieran a la clase trabajadora, y no la vía soviética al socialismo, Brian Simon adoptó una teoría gramsciana incluso antes de conocer la traducción de su obra principal al inglés (1971); incluso antes de conocer la principal traducción de Gramsci al inglés (1971); 3. Aunque partidario de la Unión Soviética, el protagonismo reformista de Brian Simon concordaba con el rechazo de Gramsci a la vía soviética hacia el socialismo ya que, para él, esta no era la vía adecuada para los países "occidentales" y para los períodos no revolucionarios. Finalmente, el artículo indica perspectivas de nuevos estudios sobre intelectuales marxistas de diferentes países cuyo interés común fue Gramsci.

Palabras clave: *Brian Simon; Antonio Gramsci; Escuela comprensiva; Psicología Soviética; Marxismo.*

INTRODUCTION

In 2010 in Brazil, during a lecture by Professor Gary McCulloch, the English historian of education, I became aware of the work of Brian Simon (1915-2002), one of the leading historians of education in England. During his talk, dealing with Brian Simon's campaign for the comprehensive school, I could identify intellectual connections between him and Mario Alighiero Manacorda (1914-2013), an Italian historian of education and interpreter of Gramsci who became well known among Brazilian Marxist researchers in the second half of the 1980s. Manacorda strongly upheld that every teenager has the right to a training course in the humanities, in contrast with the belief that education in general culture should only be granted to a privileged minority, while the bulk of the students should be given an early professional training that is designed to prepare them for the workplace. According to Manacorda, a new kind of humanism should combine these two phases of education - humanism and the principles of work.

As for Brian Simon, authors such as Gary McCulloch and Tom Woodin, have already written about his intellectual and political background, as well as his leadership in the fight for the comprehensive school.¹ Therefore, my intention in this article is to add an aspect that caught my attention since the beginning of my studies at the Institute of Education: the particular influence of Antonio Gramsci's thought in Brian Simon's educational work.

The research began in 2011 during my Postdoctoral in History of Education at the IoE/UCL (2011-2012) and has been continuing for shorter periods at Brian Simon Archive, which has custody of his research notes, drafts, letters, photographs, reviews, education plans, unpublished articles, and much of his unpublished autobiography. Managing this set of sources, my initial motivation was the similarity of the intellectual trajectories between these two Marxists: Brian Simon and Mario Alighiero Manacorda because the political and intellectual careers of them were very similar. They were typical intellectuals of the Left in the 20th Century who embraced Marxism in their youth and displayed a resistance to Fascism and the Nazis in the 1930s. Manacorda was involved in the cultural and educational sectors of the Italian Communist Party. He was also a journalist who published articles in *L'Unità*, the official organ of the Italian Communist Party, and devoted several works to the ideas of Gramsci.

Brian Simon pursued a career as a teacher and lecturer and became the most important historian of English education during the tense period of the Cold War. He reached the highest positions in the leadership of the Communist Party in Great Britain and remained an active supporter until the end of the 1970s, unlike many intellectual contemporaries of his who left the Party after the Nazi-Soviet pact between Hitler and Stalin in 1939. The soviet invasion on Hungary (1956) also provoked further ruptures with the Communist Party of Great Britain. From 1950 to 1980, Brian Simon lectured at the University of Leicester, where he moved up the career ladder to the highest post in 1966 and eventually becoming Emeritus Professor in 1980. He was a prolific writer and undertook a wide array of critical studies from a liberal perspective, including

¹ Gary McCulloch, Antonio Francisco Canales and Hsiao Yu Ku are about to publish the book *Brian Simon and the struggle for education*. UCL Press.

the comprehensive *Studies in the History of Education* in four volumes, the last of which (1991) included a cogent criticism of the educational policies of Margaret Thatcher.

As is well known, Simon also stood out for his organizational skills in the field of the History of Education. In 1967, he was a co-founder of the History of Education Society (HES). In 1978, he helped set up the International Standing Conference for the History of Education (ISCHE) and became its first President (1978-1982). By being in this position, he was close to the Soviet Bloc and was able to arrange a cultural exchange between historians of education in Western Europe and East Europe.

My initial inspiration, however, did not prove fruitful to conclude that both adopted the same vision of Marxist to defend, respectively, the single school in Italy and the comprehensive school in England although both proposals had points in common. With an initial focus on the comprehensive school, I also focused on the way of employing Marxism by Brian Simon and could identify common points with Manacorda, mainly the following: anti-deterministic view of Marxism; importance of educational reforms in favour the working class; understanding of education not exclusively reproducing social inequalities but also as transforming the individual and society. Both authors fought, at the same historical time, for educational reforms in their respective countries, having as a common point the extension of secondary school to the working class. However, for that campaign, each one of them drew on different theoretical inspirations from Marxism. Manacorda, born in the homeland of Antonio Gramsci, from a young age joined Gramscian Marxism and used his educational principles to defend the single school (*singola scuola*) in Italy. He died a communist but equidistant from the Bolshevik conception of Revolution. On the other hand, Russian Learning Psychology inspired Brian Simon, an advocate of the comprehensive school since the 1930s. In the visits he made to the Soviet schools, he sought to learn personally about the application of this theory as well as programs, curricula and the functioning of those schools. Through these visits, he and Joan Simon became friends with Alexander Luria whose work they translated into English.

Thus, being faithful to the steps taken in the research, this article will seek to contribute with two points: 1. The inspiration in Soviet Psychology

as the theory used by Brian Simon in defense of the comprehensive school;
2. The presence of Gramsci's thought in his work.

CIVIC RESPONSIBILITIES AND MARXISM: A POWERFUL INFLUENCE ON BRIAN SIMON'S IDEAS ABOUT EDUCATION

Considering that the circumstances of Brian Simon's entry into the Communist Party of Great Britain are already well known, I will come back to a few of them since his adherence to Marxism and, later, the fight for comprehensive school, resulted from this turning point in his life.

As is well known, Brian Simon came from a wealthy family whose principles and convictions were embedded in the liberal tradition. Both his parents were committed to undertaking civic responsibilities and belonged to the upper-middle class which sent their sons to expensive public schools and then, if possible, to Oxford or Cambridge.

As a child, Brian Simon had a personal experience occasioned by the rise of Nazi-fascism in Europe when, in 1920, he was a student in a school in the South of Germany. According to him, the pedagogical aim of the Director Kurt Hahn was to discover the artistic, intellectual and physical potential that he believed could be found in *each* and *every* student (Simon's italics), as well as the means that these abilities could be fostered and fully established. However, very soon after the rise to power of the Nazi Party in 1933, troops from the Brown Shirts (SA) surrounded the school and brutally imprisoned Kurt Hahn. Simon recorded these student experiences as well as his revulsion at seeing the Director being beaten. In his autobiography, he states how these experiences had a powerful influence on his ideas about education, particularly its emphasis on potential human capacities:

I knew Hahn in his capacity as a director for a short period between January and March 1933, but his style as a director; his individual attention to the student, and the feeling we had that anything might happen at any time (e.g. a sudden order – the whole school is going to ski right now) has remained with me forever.²

² Brian Simon, *A life in education* (London: Lawrence and Wishart, 1998), 9.

Years later, while Brian Simon became a member of the Communist Party of Great Britain at the University of Cambridge (1935), his mother, Shena Simon, became Chair of the Education Advisory Committee of the Workers' Educational Associations in Manchester. She joined the Labour Party in 1935 in direct reaction to the educational policies of the Conservatives and remained an active member for 40 years. As a key figure, she was one of the signatories of the Spens Report in 1938, on secondary schools in the UK. Later, she published *Three Schools or One?* in which she propagated the concept of a single secondary school.

As for his father, Sir Ernest Simon, he brought up his children in accordance with his liberal convictions, especially by setting an example in teaching them to devote at least a half of their time to public works and rejecting an extravagant life-style. In 1934, in the belief that citizens could be trained to be leaders, he established the Association for Education in Citizenship and declared that at that time nothing was more necessary than training students to carry out public responsibilities in citizenship, with a view to forming a democratic State. These principles can be better understood in the light of the turbulent period in Europe that, by 1945, had undergone two World Wars during which the liberal democracies had been threatened by German militarism and then Fascism. His concern about the growth of authoritarianism and restoring belief in democracy, led Ernest Simon to believe that the educational system should be more attentive to preparing students to act as citizens with a social responsibility and love of freedom.

Because of this conviction, Ernest Simon believed that every man or woman who had reached the age of 21, should feel an obligation to strive towards assisting in the process of forming public opinion. In the view of McCulloch and Woodin, this usually involved a scheme based on the liberal ideal of traditional human education in the 1930s. These authors state that, in his diary, Ernest Simon criticised an aristocratic education that made men and women indifferent to public life, by laying stress on the fact that: "There is nothing I like more than seeing my three children wholeheartedly entering public life and I would like to see them suitably educated for this purpose".³ Since he was convinced

³ Gary McCulloch and Tom Woodin, "Learning and liberal education: the case of the Simon family". *Oxford Review of Education*, v. 36:2, (2010): 192.

that his sons Roger and Brian were public-spirited and men of integrity, when they joined the Communist Party, he was afraid that this might hamper them in pursuing their careers, but despite this, he encouraged them to believe that this was a commitment to their unshaken belief in the importance of public life.

It was while he was a student at Cambridge that Brian decided to become a teacher. According to what he says in his autobiography, *A life in Education*, it was an easy decision because of the influence of his parents. After deciding to become a secondary school teacher and fulfil his ambition of pursuing a career in the world of education, Brian Simon carried out post-graduate studies at the Institute of Education, London University (now IoE/University College London). As well as taking the necessary measures to give lessons to secondary school pupils, which was his case, he ran courses and held discussions about matters more broadly related to education such as social phenomena, his educational goals, procedures and organisation, including psychological, historical and sociological analyses. In his view, this kind of syllabus reflected the thinking of the 1930s rather than the 1980s, where there had begun to be a greater emphasis on administration. While at the Institute, Simon was elected President of the National Union of Students (1938-1939) and during his tenure the 2nd World War broke out. As he states in his autobiography, this required adopting a firm stance, since there was a growing determination among the students not to allow universities in any part of the world to fall victims to the Fascist or Nazi ideology of the continent. What had occurred in Germany where there was little resistance to the Nazi government or in the Fascist government in Italy and occupied France, which were allied to the Nazis, should be avoided at all costs.

Since Brian Simon believed the Communist Parties of that time should play a key role in combating Fascism and the Nazis, after completing his post-graduate studies he enlisted in the army (in the Dorsetshire Regiment and Royal Corps of Signals) and delayed pursuing his career further until December 1945 after the end of the war.

Thus at the age of 30, Simon embarked on a career as a teacher and gave lessons at Primary, Secondary Modern and Grammar schools. By being involved within the State school system, he came to know the real

problems of education, “learning and teaching in schools maintained by the local authorities”.⁴

THE SOVIET PSYCHOLOGY AND THE STRUGGLE FOR A SINGLE SECONDARY SCHOOL IN ENGLAND AND WALES

Brian Simon was concerned with secondary education and its problems since he was teaching at this level and had acquired a good deal of experience of several types of secondary schools including the Secondary Modern and Grammar models. He himself related the circumstances that led him to begin to disagree with what he called “the common illusion” about the intelligence tests practiced by the British educational system. Refuting criticisms that attributed his defense of the comprehensive school to political reasons, he replied that, on the contrary, it was born of his experience as a teacher, which enabled him to understand the injustices of a closed educational system.⁵

During the time he spent as a secondary school teacher, he noted that there were a number of ideological factors involved in the theories and psychology of education by means of which the bourgeoisie were able to spread their view of the world. In the same way, he believed that key ideological issues in the history of education pervaded the lesson content, teaching methods and organisation of schools. In light of this, if there was one failing in progressivist studies in which a Marxist approach was needed, it was in the area of Intelligence Tests.

His campaign for equal opportunities for every child in secondary education did not just lead to a new interpretation in this area. It resulted in a controversial analysis which attracted support for his views but also gave rise to a good deal of criticism and raised problems that were described as a kind of “Cold War in the academic world”.⁶ England began to experience its first years of educational reform after the passing

⁴ Brian Simon, *A life in Education* (London: Lawrence and Wishart, 1998), 47.

⁵ The English educational policies of the 1920s and 1930s were based on a hierarchical pattern that was later known as “the 11 plus”, that is a test set for 11 year-olds at the end of primary school to determine whether or not they can go on to a Grammar school.

⁶ Gary McCulloch. “A people’s history of education: Brian Simon, the British Communist Party and Studies in the History of Education, 1780-1870”. *History of Education* (2010): 445.

of the Education Act (1944) which required secondary education to be given to every child free of charge. However, there continued to exist different types of secondary schools: Secondary Modern and Grammar Schools and Technical Colleges. In view of this, reforms in secondary education were a key feature of educational policies in Britain after the War: in 1944, the school-leaving age was raised to 15; and in 1972, this was increased to 16, which represented a significant increase in the numbers attending secondary school and enabled this trend to gather momentum.⁷

However, since this universal provision of education still maintained a selective procedure for secondary education, Simon believed that only a single secondary school would be able to establish a system based on the principle of equal rights for every student. In view of this, he challenged the optimistic view of the liberal-minded through a counter-argument based on the class struggle and the deep-seated inequalities of the educational system. This analysis, as well as his arguments in favour of comprehensive schools, attracted a good deal of criticism from conservative sectors, but not only from them because in the Communist Party itself the proposal was not a consensus. Moreover, his campaign was launched at a difficult period for the Communist Party as it occurred at the height of the Cold War. In the post-war climate of polarisation between capitalism and communism.

In a certain sense, the campaign for comprehensive schools had a political origin because in the opinion of Simon, it had arisen from a social context that maintained a flawed educational system in Britain. As a member of the Communist Party, he had a direct and decisive influence on the degree of importance that the Party had been able to confer on education since the Second World War. A number of pamphlets, invitations to meetings, lectures and demonstrations on behalf of this campaign have been documented, which can be found in the Archives of the IoE/UCL and are proof of this importance, as well as the views of the Communist Party on the question of national and local powers. This last

⁷ See Hsiao-Yuh Ku recent articles: Defending Comprehensive Education: Brian Simon's response to Margaret Thatcher's governments (1979–1990). *British Journal of Educational Studies* (2021): 1-24; Ideological Struggle in Education: Brian Simon and Comprehensive Education Movement (1946-1965), *History of Education*, v. 51:N. 2, (2022): 266-285 and *The crisis in education: Brian Simon's battle for comprehensive education (1970-1979)*, *Paedagogica Historica* (2022):. 1-23.

point was valued by Simon as an indispensable factor in preserving the autonomy of teachers and for enabling each community to establish its own comprehensive school and not just a different kind of secondary school.

Other documents testify to the fact that the campaign was the outcome of his personal effort in warning the Marxists of the need to conduct an analysis of the real purpose of schools in a capitalist society. In 1937, he had expressed it in an essay during his academic year at the Institute of Education by arguing that “schools must always play a role in society and cannot be radically distinguished from it since they form a part of it”.⁸ Based on the studies that he undertook in the aftermath of the War, Simon concluded that the English schools of the 19th Century had provided a cheap kind of education for the working-class. According to him, since 1870, when the Elementary Education Act was approved, the bourgeoisie, through the mediation of the State, has dominated the educational system, both in terms of its structure and teaching content.

Brian Simon opposed the Intelligence Tests that were applied to select pupils for Grammar schools and thus shaped the future lives of eleven-year old children. In 1952, he was the main speaker at a conference about secondary education, held by the Communist Party, and appealed for an end to the distinction between humanities and technical colleges by abolishing Intelligence Tests and introducing comprehensive schools.

The campaign against Intelligence Tests was accompanied by a series of articles and books published by Simon from about 1950 onwards. At this time, Soviet ideas about the Psychology of Learning began to be known in the West and their fundamental principles formed a theoretical framework established by Simon, who knew the work of Soviet psychologists as he had made contact with them, in particular Alexander Luria, who became a friend. This line of interpretation questioned the theoretical understanding of intelligence adopted by the bourgeoisie by contrasting two assumptions about reasoning: people are born with skills which make them as they are or in contrast our development is mainly due to our education and experiences of life? According to Simon, the second assumption raises a challenging task for education, or

⁸ Brian Simon. “The function of the school in society”, 1937, p. 4. SIM/5/2/5. IoE/UCL.

rather, imposes a social obligation to provide as valuable an educational experience as possible, particularly for the young, so that they can develop their potential skills both for their own benefit and for that of society. Supporting this argument meant confronting a tradition rooted in the idea that intelligence is something that is inborn.

At a conference at the University of Vancouver, in Canada, on The IQ Controversy, Simon recalled the way in which he had been concerned with this problem at the end of the Second World War:

After being demobbed in 1945, I gave a lecture in Manchester and Salford, on primary and secondary modern schools as well as selective schools that only accepted 25% of the intake of pupils attending secondary schools. I was shocked by the rigidity of this hierarchical structure – especially because the Education Act of 1944 had seemed to stick to its promise of revising and humanising the school system. [...] From the age of seven, only a Grade A in the classification of rankings would provide a child with the chance of success at eleven years old and thus be selected for a place in a humanities (i.e. Grammar) school which monopolised the road to higher education [...]. There was only one means of altering this system and that was to establish a single and common secondary school for every child – the comprehensive school, as it is now called.⁹

In his view, the system seemed to be untouchable as it had practices rooted in tradition which a) underpinned the dominant theories and b) allowed ‘selectivity’ to be entrenched. Despite the attempt to introduce educational reforms during the Second World War, these mental tests that were designed for selection, continued to be practised in British schools at the end of the 1940s. For this reason, Simon decided to confront the theory and practice of Intelligence Tests or what seemed to him iron law of psychometrics, because they were wholly based on scientific principles that nobody at that time questioned. While challenging them on the basis of heredity, Simon examined the Soviet theory of learning (Vygotsky, Luria, Leontiev) to find the essential principles for forming an interpretation that contrasted with the system of selectivity. And so

⁹ Brian Simon, *Does Education Matter?* (London: Lawrence & Wishart, 1985), 113-114.

doing, “he helped to inspire a generation of political activists first to change their own attitudes to testing, then to change those of other education professionals and parents”.¹⁰

In the 1950s, Brian and Joan Simon investigated, described and publicized the views of Alexander Luria and L. S. Vygotsky, founders of cultural-historical psychology in the Soviet Union. Letters held in the Brian Simon Archive show their commitment to translation into English the book *Psychology in the Soviet Union*. In November 1957, Joan Simon wrote: “Dear Professor Luria. I am sending the first installment of the translation of your book. [...] We have adopted the system we found most reliable before, that is we had a literal translation made and I have written this up in what I hope is good, readable English”.¹¹ In December, Luria replied:

My dear Mrs. Simon. How can I thank you for the work you have done in translation this little book? The translation is excellent; I have consulted some pages with our linguists and made some very small corrections. Now it is all right. I send you a Preface for the English edition – and you can put it instead of the Russian one. And thank you immensely for all you have done for me! Alexander Luria.¹²

With an Introduction by Brian Simon, *Psychology in the Soviet Union* was published in England (1957) by Routledge & Kegan Paul Ltd. At the same time, Simon published articles against unscientific intelligence tests and the ending of “eleven-plus”, as we can read: “The decisive factor has been the growing anger of parents and increasingly firm pressure from the Labour movement. But the unscientific nature of intelligence testing and selection has also become more generally understood”.¹³

Referring to Alice Heim’s book *The appraisal of Intelligence*, which was extremely critical both of the methodology and theoretical assumptions underlying testing, Brian claimed it was more relevant in 1970

¹⁰ Deborah Thom. “Politics and the people: Brian Simon and the campaign against intelligence tests in Britain schools”, *History of Education*, v. 33, n. 5, (2004): 515.

¹¹ Brian Simon, Visits Abroad. SIM/6. IoE/UCL.

¹² Brian Simon, Visits Abroad. SIM/6. IoE/UCL.

¹³ Brian Simon. “Towards ending 11- plus”, *Education today and tomorrow*. v. X, September/October, (1957): 1-2.

than when it was first published in 1954. Based on this recognition and on Marxism, Brian Simon argued against the unfairness of the English education system, which “appeared to be (as indeed it was) run on the assumption that no child could ever rise above himself, that his level of achievement was fatally determined by an IQ – *his* IQ was it was generally to be”.¹⁴ Relying on Soviet psychology, he states then “while animals learn only through individual experience, the human child learns through joint practice and speech with other human beings; it is by means of the language he acquires, the tools he learns to handle, and so on, that the achievements of the human species are embodied and handed on”.¹⁵ He claims that such an approach was familiar to those who had contact with Luria’s writings, who also made clear the extent to which Soviet research had concentrated not only on what might be called external evidence of learning but also on investigation of its inner mechanism. Then he refers to a writing by Luria that was not translated into English – *Voprosy Psiklogii*:

It is now generally accepted that in the process of mental development there takes place a profound qualitative reorganization of human mental activity, and that the basic characteristic of this reorganization is that elementary, direct, activity is replaced by complex functional systems, formed on the basis of the child’s communication with adults in the process of learning. These functional systems are of complex construction and are developed with to close participation of language, which is the basic means of communication with people simultaneously one of the basic tools in the formation of human mental activity and in the regulation of behavior.¹⁶

Brian Simon’s interest in special schools was also a theme in the correspondence between him and Luria, who had written a book on the subject. In 1956, he states in a letter: “so far I know, and I have studied

¹⁴ Brian Simon, *Intelligence, Psychology and Education: a Marxist critique*, (London: Lawrence & Wishart, 1971): 15.

¹⁵ Brian Simon, *Intelligence, Psychology and Education: a Marxist critique*, London: Lawrence & Wishart, 1971), 140.

¹⁶ Brian Simon, *Intelligence, Psychology and Education: a Marxist critique*, 140.

recent English and American books in this field – it is a different approach to the problem”.¹⁷

In the late 1940s, when comprehensive schools first appeared in England and Wales, there was a fierce debate about their value and it was claimed that opposition to these new schools could be attributed to Soviet interests that attracted hostility to Simon. Even so, Brian’s visits to Soviet schools continued. In total there were five and they are recorded in detail in his papers. About the 1961 visit, for example, there is a diary framed with a postcard from Leningrad and in which, on one of the pages, Brian Simon wrote in his small handwriting: “Monday, Sept. 11, in the evening went to Luria for dinner”.¹⁸

The intellectual relationship and friendship between Brian Simon, Joan Simon and Luria lasted until his death (1976) as attested by the letters in the Brian Simon Archive/IoE/UCL (1957-1976).

At the same time that Brian Simon was promoting Soviet psychology in England, his brother Roger Simon was engaged in the translation and publication of Antonio Gramsci.

ANTONIO GRAMSCI’S WORK OUTSIDE ITALY

Articles and texts of a more ephemeral character, which were written on a day-to-day basis for the Communist Party without any idea of publication, preceded Gramsci’s writings in prison. When he was isolated in prison, he thought that for the first time he would write something in a disinterested way or, in other words, something that would last forever. This gave rise to the idea of the Notebooks that were written from 1929 to 1935. As Gramsci never published any book in his life, to some extent, his ideas only reached the public after his personal tragedy and the battle for his 33 notebooks, which lasted from the time of his death (1937) to the 1950s. The translations into other languages and the breadth of his scope, were conditioned by these historical circumstances.

¹⁷ Luria, Alexander, “Letter to Simon”. June 25, 1956. Brian Simon Archive. SIM/6/1. IoE/UCL.

¹⁸ Brian Simon, “Diary”. SIM/6/1. IoE/UCL.

The publication of the Notebooks was a difficult and tortuous process not only because of the intrinsic features of the work but also because of the political conditions of the time – Italian Fascism, the Second World War and the post-war period. After Gramsci died, his sister-in-law Tatiana saved his writings, and at his request sent them to Moscow where Julia Schucht, his wife, lived. The dispatch took place after a consultation with Piero Sraffa, a great friend of Gramsci, who recommended his wishes should be complied with. Thus, in July 1937, she delivered the Notebooks to the Soviet Embassy in Rome. However, they only reached Moscow a year later, where Palmiro Togliatti, (who had succeeded Gramsci as the leader of the Italian Communist Party in 1926, when he was in prison), began to publish them, together with the Party leaders of the Communist International. At the outset, there were clear signs that it was difficult to persuade the leaders of the Communist International of the importance of this work, as Gramsci had evolved his own theory about the Russian Revolution since he had left Moscow in 1923. After initially adopting a Leninist stance, he moved on to clarify divergences from the Bolshevik methods, such as those outlined by Carlucci and Balestreri: “This factor corresponded with a draft that made clear his own dissatisfaction with the methods of the Bolshevik leaders, which Gramsci had only expressed with greater clarity in 1926, in the letters of 14th and 26th October”.¹⁹

Thus in the midst of all kinds of difficulties at the end of the War, Togliatti managed to start off by publishing the *Letters from Prison* (1947) by the publisher Einaudi who, despite being a member of the communist movement, was a prestigious publisher of wide-ranging material and had a wider influence than the Communist International. At the same time, in collaboration with Felice Platone, Togliatti decided to publish the Notebooks by adopting thematic criteria: Historical materialism and the philosophy of Benedetto Croce (1948); The intellectuals and organization of culture (1949); The Risorgimento (1949); Notes about Machiavelli, politics and the modern State (1949); Literature and national life (1950) and Past and Present (1951). In the opinion of Carlos Nelson Coutinho, one of the leading translators of Gramsci in Brazil, although this edition might have inevitably led readers to think that

¹⁹ Carlucci and Balestreri. *The first months spent by Gramsci in Russia* (June-August 1922), 2015, 4.

Gramsci had written six different “books” with these titles, no-one can deny the achievement of Togliatti in disseminating the ideas of his friend and comrade. For, “without this endeavour perhaps Gramsci would only be known today as a martyr in the struggle against Fascism, rather than one of the most lucid thinkers of the 20th Century”.²⁰

Although this achievement had great historical value, in 1958, the Gramsci Institute, a cultural center set up by the Italian Communist Party, took steps to arrange a new publication which, this time, would reproduce the Notebooks in the exact order in which they were written. Valentino Gerratana, a well-known academic, was assigned the task, which with a team of researchers was effectively completed in 1975 (Einaudi publisher, four volumes).²¹ According to Carlos Nelson Coutinho, this edition became the basis for new translations of Gramsci in different languages such as French, English, German, Spanish and Japanese.

Given the fact that the publication of Gramsci’s writings took so long, in a certain sense they can be regarded as posthumous works. The words of Eric Hobsbawm can thus be understood when he noted that the delay in translating Antonio Gramsci into English meant that they did not exert an influence on left-wing intellectuals during the 1930s and 1940s. He stated that during this time for all practical purposes, Gramsci remained unknown outside of his own country. In fact, “even the attempts to make the *Letters from Prison* known to the public in Britain and the U.S. resulted in failure. Without the assistance of people who kept personal contact with him in Italy and who spoke Italian – mostly Communists – his name could not have existed on the other side of the Alps”.²²

Others authors, as Max Shock, for example, highlight the fact that even before the translation of the *Prison Notebooks*, Gramsci thought

²⁰ Carlos Nelson Coutinho, Introduction. *Antonio Gramsci. Letters from Prison* (Rio de Janeiro: Editora Civilização Brasileira, 1999), 26-27.

²¹ In an explanatory note in his edition of the Cadernos [Notebooks], Carlos Nelson Coutinho quotes the words of Gerratana, who thought that Gramsci might have adopted the thematic criterion, if he had had time to arrange his writings in an orderly way. However, Gramsci did not make this choice and this should be taken into account in the reading and interpretation of the notebooks.

²² Eric Hobsbawm. “Gramsci and political theory”, *Marxism Today*, (July 1977/1977): 205.

was already circulating among the Marxist British left. He informs that the first English translation of Gramsci's work was Lawrence and Wishart's *The Modern Prince*, published in 1957. Besides, New Left intellectuals Tom Nairn and Perry Anderson could read Italian, and so could draw on Gramsci directly. According to him, in the early 1960s, Gwyn A. Williams, a Welsh historian "explained Gramsci's concept of hegemony in English and how the application of this concept could be strategically useful for the left in modern, industrialised and affluent societies where the dominant class achieved a high level of popular consent".²³ Fundamentally, however, he continues, the most important English translation of Gramsci's thought was "Selections from the Prison Notebooks, edited and translated by Quintin Hoare and Geoffrey Nowell Smith and published by Lawrence and Wishart in 1971: from this point onwards, Gramsci became particularly prominent in British left-wing debate".²⁴ As he states, the inspiration and validation of Gramsci's thought among the New Left was largely due to his contribution to the understanding of Thatcherism as an ideological project that had a high degree of consensus.

In turn, David Forgacs claims that although Gramsci's work did not go completely unnoticed in Britain in the two decades after his death, it made a negligible impact before it first appeared in book form in 1957, in Louis Marks's edition of *The Modern Prince and Other Writings*. He added that, in 1956, the manuscript had been presented to the publishers, Lawrence and Wishart, whose managerial board was at that time directly accountable to the higher committees of the Communist Party of Great Britain, who blocked it. The events of 1956 – Khrushchev's speech, the Polish and Hungarian crises, the consequent resignations from the CPGB, reversed the block and the edition finally appeared in 1957. According to him, outside Italy, nowhere more than in Britain have Gramsci's writings exercised so prolonged, deep or diversified an influence, especially for having freeing Marxism from the economism:

the parts of the Gramscian corpus that have been most creatively drawn on have been those dealing with the mechanisms of political stabilization and regulation in advanced capitalist societies,

²³ Max Shock. "Renewing Left-Wing Ideas in Late Twentieth-Century Britain", *Marxism Today*, (1977-1994): 21.

²⁴ Max Shock. "Renewing Left-Wing Ideas in Late Twentieth-Century Britain", 24.

their resources of cultural and ideological ‘hegemony’, the dynamic and flexible nature of political alliances, the recognition of civil society as a terrain of political organization and struggle, and the need for the Left to break out of an ‘economic–corporate’ outlook and construct a hegemonic politics of its own.²⁵

With a different approach, Tom Steele, in the article ‘Hey Jimmy! The Legacy of Gramsci in British Cultural Politics’, makes a critical assessment of the use of Gramscian concepts by the British Marxist intelligentsia concluding that “It’s now almost 50 years since the first translations of Gramsci’s work were made but still the ‘war of position’ and the ‘organic intellectual’ read as enigmatic metaphors rather than political realities”.²⁶

For obvious reasons, the book of Roger Simon *Gramsci’s Political Thought: an Introduction* (1982) must be added to this brief overview. Roger Simon had joined the British Communist Party one year after his brother Brian, on becoming acquainted with Piero Sraffa.²⁷ He oversaw the translation of the work of Gramsci in England and as a result of his initiative and supervision, the edition of *Selections from the Prison Notebooks* came to the attention of the public in London in 1971; it was a work which had taken several years to prepare and without his extreme dedication, might have taken even longer. As is made clear in the Preface, this publication included a selection based on the subject-areas covered in the Italian edition (Togliatti and Platone) with additional texts after consultations with Gerratana at the Gramsci Institute. Roger Simon’s close relationship with Gramsci’s work was widely praised in British intellectual circles. The following note by the publisher appears on the jacket cover: “Roger Simon, economist, currently engaged in studies on Trade Unionism, played a key role in translating the work of Gramsci into English for Lawrence and Wishart Publishers”.²⁸ Also, in

²⁵ David Forgacs. “Gramsci and Marxism in Britain”, *New Left Review*, n. 176 (1989): 6.

²⁶ Tom Steele, “Hey Jimmy! The Legacy of Gramsci in British Cultural Politics”. *New Left, New Right and Beyond* (1999): 26.

²⁷ Piero Sraffa (1898-1983) was a close friend of Gramsci and a lecturer of Economics at the University of Cambridge. He acted as a go-between with the intellectuals of the Italian Communist Party and was the person who suggested Roger Simon should study the works of Marx when both got to know each other at a meeting in the Political Economy Club run by John Maynard Keynes.

²⁸ Note on jacket cover. *Gramsci’s political thought: an introduction*. (London, Lawrence and Wishart, 1982), 2.

the Acknowledgments, we can read: “The initiative for the publication of this volume came from Roger Simon and Steve Bodington, who have supervised its progress throughout, making many invaluable suggestions, and without whose stimulus the work would have taken longer to complete”.²⁹

In his work, Roger Simon mainly draws a comparison between the Gramscian and Soviet pathways to Socialism. He states that Lenin, rightly evolved a critical stance that was opposed to the economics-based view of Marxism, while at the same time giving prominence to this policy, even though he thought there were serious limitations to Marx’s approach. According to Roger Simon, the great theoretical breadth of Marxism was owing to Gramsci who had formulated the concept of hegemony, which had been employed by Lenin in a pioneering spirit. He stated that in the view of Gramsci, mechanistic determinism tended to induce a passive attitude where people just waited for the inevitable economic collapse of capitalism, which discouraged the workers from taking any personal initiative. When analysed the particular situation of Britain, Roger Simon stated that Marxism-Leninism had not been able to formulate a suitable theory to explain the relationship between class struggles and people’s democratic conflicts in non-revolutionary periods – in other words, in times when capitalism is found to be relatively stable. He proceeds by arguing that the theoretical solution to the question of the nature of democracy and the relationship between socialism and democracy lies in Gramsci’s concept of hegemony. Based on this concept, it would be necessary to recognize that the popular struggles and the parliamentary institutions that the communists helped to establish did not necessarily have a class basis – it was a terrain for a political struggle between the two largest classes – the workers and the bourgeoisie.

When seeking to attain their goal of progressing towards socialism, the workers’ movement should find a way of binding their popular and democratic struggles to their socialist objectives by forming an alliance that gives them the opportunity of obtaining a position in national leadership (i.e. hegemony).

²⁹ Hoare, Quintin; Smith, Geoffrey Nowell. *Selections from the Prison Notebooks of Antonio Gramsci*. (London, Lawrence & Wishart, 2007), vii.

As a critic of the pathway followed by the Soviets and Marxism-Leninism, Roger Simon showed concern about the decline of influence exerted by the British Communist Party and mentioned two factors that had seriously constrained its course of action. These were the Soviet invasions of Czechoslovakia and Afghanistan: at a time when the world was largely divided into two blocs (an international phenomenon) and its relations with the Labour Party following an internal dispute with when the Communist Party was founded in 1920 (a national phenomenon)). From this perspective, Roger Simon recommended that the British communists should be committed to the defense of parliamentary democracy and not act in a simply tactical way or regard parliament as “a pure expression of capitalist domination”.³⁰ In his view, this interpretation had been partly outlined and resolved in the program adopted by the British Communist Party in 1951 in its pamphlet “The British Road to Socialism”, which expressed the belief that “the British parliament should be transformed into a Socialist State Parliament instead of being replaced with a Soviet kind of State”.³¹ In 1977, this Program was revised and maintained but Roger Simon argued that as well as adopting a program, it would be necessary to change the practical politics of the workers’ movement to overcome the shortcomings of the economic viewpoint. He also thought that understanding the political ideas of Gramsci was essential when making this transformation.

In short, Roger Simon claims that, after the Revolution of 1917, when the Soviet government dissolved the Constituent Assembly in favour of the soviets, Lenin’s writings on the state became an integral part of the orthodoxy of Marxism-Leninism. For Roger Simon, on the contrary, parliamentary regimes were not instruments of bourgeois domination and the defense of parliamentary democracy was not only tactical. Instead, Communists must be “permanently committed to parliamentary democracy”.³² According to him, the solution given by the *British road to socialism* which declared in favour of a parliamentary road to socialism and not the Soviet road had been a big step forward in relation to Leninist theory, but had left the theoretical issue of the nature of democracy

³⁰ Roger Simon, *Gramsci's Political Thought: an Introduction* (London: Lawrence & Wishart, 1982), 17.

³¹ Roger Simon, *Gramsci's Political Thought*, 17.

³² Roger Simon, *Gramsci's Political Thought*, 17.

and the relation between socialism and democracy unsolved. “Gramsci’s concept of hegemony provided the solution”.³³

BRIAN SIMON AND GRAMSCI’S THOUGHT IN BRITISH EDUCATION

Documents from the Brian Simon Archive shows how contacts were eventually made between English and Italian intellectuals. Dario Ragazzini’s mimeographed study; “The educational theory of Gramsci in English” reveals that, by 1977, in the English-speaking world and in Britain in particular, there began to be “a growing interest in Gramsci, together with the dissemination of his political and cultural essays on Italian Marxism. This is significant because the English-speaking world is familiar with the reflections on the mechanism of character formation and is also aware of the spread of Gramscian concepts and categories in educational theory”.³⁴

According to Ragazzini, it was at this time that the first ideas of Gramsci on education appeared in English. Although in 1965, the *New Left Review* had published a translation of “In Search of an Educational Principle”, this had not been a landmark in studies on Gramsci in England, nor had it aroused any interest in the educational implications of his thinking. Ragazzini stated that: “When comparing the problems of current educational theories with Marxism, in 1976, Brian Simon devoted several pages to the pedagogical aspects of Gramsci’s ideas, and these can be characterised as an initial and well-balanced presentation”.³⁵ This examination was the first time Gramsci’s ideas on education had been disseminated in English.

The pages referred to by Ragazzini were published in *Marxism Today* (1976) under the title “Contemporary Problems in Educational Theory”³⁶ and mainly addressed the principles of “active schools”. Simon

³³ Roger Simon, *Gramsci’s Political Thought: an Introduction* (London: Lawrence & Wishart, 1982), 18.

³⁴ Dario Ragazzini, “The Educational Theory of Gramsci in the English Language”. SIM/6/3/2, p. 3. Brian Simon Archive. IoE/UCL.

³⁵ Dario Ragazzini, “The Educational Theory of Gramsci in the English Language”, p. 4.

³⁶ This article was published again in the book *Intelligence, Psychology and Education. A Marxist Critique*, London, Lawrence & Wishart, 1978, 264-281.

adopted a methodological approach by giving excerpts from Gramsci and then considering each of them and stating whether he agreed with the points or questioned them; in general, he stressed the importance of Gramsci's theories for understanding education as an instrument of social change. This can be illustrated by the following: "Gramsci laid great emphasis on the role of teachers and argued that the transformation of education was both a question of people, teachers, whom they were, and the complexity of society as a whole, and entailed introducing new curricula and methods – or in other words, new programs and projects".³⁷

In Simon's view, although activism reflects a key educational principle, it does not diminish the role of the teacher. In his article, he regards Gramsci as one of the major Marxist theorists in his deep concern for the nature of education and quotes from his writings about single schools, as a means of clarifying the importance of his campaign for comprehensive schools. He states that in Gramsci's view, the aim of a regular school should be to become a "creative school", that is, it should be structured as a "collective" and designed to develop the skills required for intellectual creativity and practice. He envisaged the school as a "collective" and participative process, although, as Simon points out, he did not endorse the theory that postulates that teachers cannot predetermine the way an activity is carried out. In his interaction with the ideas of Gramsci, he follows a list of numbered quotations, which are given below, as they originally appeared in the article:

- 1) "The responsibility of the regular school he [Gramsci] says is to educate new generations; the purpose of a primary school is to bring about what he calls 'dynamic conformism' (an assimilation of cooperative kinds of social behaviour?) – and to prepare the students to become autonomous, creative and responsible human beings".³⁸
- 2) "Their objective [referring to primary schools] is to become what he [Gramsci] calls 'creative schools'- structured as "collectives" and developing skills for a) intellectual creativity and practice and b) for individual initiative and a sense of direction. (Incidentally,

³⁷ Brian Simon, "Contemporary problems in educational theory". *Marxism Today* (1976): 169-177.

³⁸ Brian Simon, "Contemporary problems in educational theory", 176.

it can be presumed that Gramsci was speculating here about the nature of education and schooling in a socialist society”;³⁹

- 3) “Gramsci refers to the need for ‘true and active participation’ by students in school. The relationship between the teacher and student is seen as both reciprocal and active, to such an extent that each teacher is a student and vice versa”;⁴⁰
- 4) (In my view this difficult but stimulating Gramscian conception of the nature of the educational process derives from the central idea of Marx outlined in “Theses on Feuerbach”, and in particular, where Marx refers to the his dialectical theory of social change – ‘the educator must be educated)’”;⁴¹
- 5) Again stressing the active nature of regular schools, Gramsci wrote: ‘Regular schools are active schools although it may be necessary to curb the libertarian ideologies in this field’ and he goes on to strongly emphasise the responsibility of adults to ‘shape’ them further. (Out-of-date perhaps but definitely correct, BS);⁴²
- 6) “Gramsci established that ‘active schools’ are still in a romantic phase in which features of the struggle against Jesuit and technical schools are becoming exaggerated – since he wished to make a clear distinction between them for political reasons. He added that there is a need ‘to enter the classical and rational stage and find the necessary sources to develop appropriate methods and forms’. (This paragraph in my view is of vital importance because it is by exercising this policy that the progressivist forces of the left are currently engaged in our country”);⁴³
- 7) “Like Lenin, Gramsci was a critic of what he also called ‘old schools’. But, also like Lenin, he denied that education should only be based on the so-called culture of the working-class. Both sought to detach

³⁹ Simon, “Contemporary problems in educational theory”, 176.

⁴⁰ Simon. “Contemporary problems in educational theory”, 176.

⁴¹ Brian Simon. “Contemporary problems in educational theory”. *Marxism Today* (June, 1976): 176.

⁴² Simon. “Contemporary problems in educational theory”, 176.

⁴³ Simon. “Contemporary problems in educational theory”, 177.

what was best – what was essential – from the old schools and transform it, while maintaining strict and high academic standards and intellectual performance (Gramsci particularly warned against the temptation to throw away this dimension of education).⁴⁴

In a subsequent article, “Marx and the crisis in education”, in which he rejects determinism and addresses the links between the base and superstructure of society, Simon warned against adopting a mechanistic view of the relationship between these two levels. As he wrote: “He [Marx] recognised that the class struggle is reflected in an ideological conflict in which new classes establish their own ideological viewpoints and fight to achieve hegemony (to use a fashionable expression), exactly as the French encyclopedists did before the French Revolution and the Marxists in Russia before 1917”.⁴⁵ It is worth noting the expression “to use a fashionable expression” which is clearly included by Simon as a recognition of the current influence of the Gramscian principle (the concept of hegemony) on left-wing intellectual circles.

On the occasion of the publication of *Antonio Gramsci: Conservative schooling for radical politics*, by Harold Entwistle (1979), Simon returned to the work of Gramsci. This book, which was based on Italian interpretations, was one of the first studies of the educational concepts of Gramsci that was published in English. Entwistle addresses classical concerns about Gramscian pedagogical theories by examining factors related to the question of “anti-spontaneity” as a conservative feature of the Italian Marxists. This interpretation provoked Simon to make the following criticism: “Entwistle centred his book on a non-question: the paradox of a conservative school for a radical policy!”.⁴⁶ In addition, he criticised the fact that in his analysis, Entwistle was confined to reading interpretations and not consulting the work of Gramsci himself. He then proceeded to quote the following extract from Entwistle:

It is at this point that we run up against a paradox: the formulation of a radical educational policy through the pedagogical principles of a traditional curriculum. If the school is the main

⁴⁴ Simon. “Contemporary problems in educational theory”, 177.

⁴⁵ Brian Simon, “Marx and the crisis in education”. *Marxism Today* (1977): 198.

⁴⁶ Brian Simon, *Visits Abroad* (Australia). 1981, p. 7. SIM/6/3/2.

hegemonic institution and dominated by the ruling class, how can a counter-hegemonic change come about except through a radical curricular reform and a liberal pedagogical system?⁴⁷

Simon responded to this by saying: “This is Entwistle’s problem, not Gramsci’s!”⁴⁸

This criticism was made at the same time that Roger Simon, who had been studying Gramscian ideas since the 1950s, was engaging in the translation of Gramsci.

It’s hard to say to what extent Roger Simon’s book, as well as his commitment to disseminating Gramsci’s work in England influenced his brother’s conception of education. Some papers at the IoE/Archives, however, allow us to state at least that he used these works. One of the folders contains teaching material from a course run by him at the University of Melbourne (Australia) in 1981, in which a section was devoted to Gramsci and his concept of hegemony. In the bibliography, there is a chapter by Roger Simon for a book that was never published and an article by him with the title “Gramsci’s concept of hegemony” (which appeared in *Marxism Today*, 1977). Also, on topic “Educational Development in Britain, 1940-1980: new interpretations”, we can read: “It will focus specifically on British educational developments following World War Two, and will then examine these developments in the light of recent interpretations of the relations between education and society by Louis Althusser, Pierre Bourdieu and Jean- Claude Passeron, Antonio Gramsci”.⁴⁹ This shows that Gramsci became an essential author for Brian Simon in his criticisms of the determinist view of Marxism and a resource conducive to his defense of education as a factor of change.

For these reasons Clyde Chitty’s testimony that “Gramsci was Roger Simon’s concern not Brian’s”⁵⁰ should not be understood as a lack of interest on the part of Brian Simon. And this is because, in addition to his brother’s commitment, Gramsci’s thought renewed the Marxist approach,

⁴⁷ Harold Entwistle, *Antonio Gramsci*. Conservative schooling for a radical politics. (London: Routledge & Kegan Paul, 1979), 78.

⁴⁸ Brian Simon, “Visits Abroad (Australia)”, p. 9. SIM/6/3/2. IoE/UCL.

⁴⁹ Brian Simon. File SIM/6/3/1. IoE/UCL.

⁵⁰ Clyde Chitty. Interview. Institute of Education /UCL(2012).

contributed to the anti-determinist view and was fundamental to British Marxist intellectuals embrace conjunctural analysis, through which Thatcherism “was understood as an ideological project aimed at ‘hegemony’ – political and moral leadership of society based on consent, not simply coercion”.⁵¹

Something must also be said about the four volumes of Brian Simon’s series on the history of education: *The Two Nations and the Educational Structure, 1780-1870*; *Education and the Labour Movement, 1870-1920*; *The Politics of Education Reform, 1920-1940*; *Education and the Social Order, 1940-1990*. From 1960 to 1974, he wrote two volumes, while more than twenty years passed before he published the fourth volume in the series (1991). In the whole of his four books, only in the last volume Gramsci is mentioned once. This lack of citation, however, is not proof that the ideas of the Italian Marxist were not important to Brian Simon and not even that they were not underlying his interpretation of the history of education. Instead, it is necessary to understand the theoretical methodology employed by Brian Simon in this set of books, that is, his work as a historian, was deeply grounded in primary sources. As he states in the Introduction of the last volume, the sources used were newspaper clippings that he and Joan Simon carefully selected from the *Times Educational Supplement* in the 1940s when this newspaper “under Dent’s leadership began to play a crucial role in expressing and mobilising educational opinion in preparation for fundamental legislative change”.⁵² These cuttings, filed and reorganised with much labour, have provided the spine, or to use the modern idiom, the database for the book. According to Brian Simon:

the topics selected for discussion, analysis and interpretation are those which have appeared, over these 50 years [he means from 1944 to 1990] as of major importance to participants concerned primarily with the schools at all levels. [...] The main focus of the book is on policy making, both on a national and a local

⁵¹ Max Shock. *Renewing Left-Wing Ideas in Late Twentieth-Century Britain: Marxism Today* (1977-1994): 8.

⁵² Brian Simon. *Education and the Social Order, 1940-1990*. Introduction (London: Lawrence & Wishart, 1991), 17.

level, on the battles, or differences of view, surrounding these – indeed more generally on the politics of education.⁵³

This description confirms Kavanagh's analysis. According to him, the guidelines of the British Communist Party after the Second World War determined that "communists should avoid thinking in terms of an ideal socialist education policy. Rather, they should use a Marxist analysis of the causes and nature of the present situation to determine immediate reforms in educational content appropriate to the stage of development British society had reached".⁵⁴

The four volumes of Brian Simon's main work are characterized by this objective. All of it is dedicated to knowing the history of British education in order to propose and elaborate educational policies favorable to the working class; it is not a work to project an ideal socialist education in England. Instead, Brian Simon displays an original interpretation of Marxist theory and applies it to the concrete analysis of the educational English system. In *Education and the social order* (1991), the only citation to Gramsci appears briefly after an analysis of the educational policy adopted by the Labour Party during the years 1947 to 1951. According to Brian Simon, then, any measures that could lead to an imbalance in the labour market were kept under control, and hence social instability, no challenge of any kind threatened the citadels of power in the world of education. Moreover, this at a time when the labour movement was experiencing remarkable electoral success, perhaps unique in its history. Then he quotes Gramsci that way: "The explanation, perhaps, lies at a deeper level than covered in this analysis – in terms of the historical role of Education in the assimilation, in a Gramscian sense, of subaltern (or subordinate) classes within the social complex".⁵⁵

⁵³ Brian Simon. *Education and the Social Order*, p. 17.

⁵⁴ Matthew R. Kavanagh. "British Communism and the Politics of Education (1926-1968)" (Doctoral Thesis. University of Manchester, 2015), 82.

⁵⁵ Brian Simon, *Education and social order*, 143. This citation requires a brief explanation of the terms "subaltern (or subordinate) used by Gramsci. As stated in the Preface of *Selections from the Prison Notebooks*, due to the circumstances of the Fascist prison, Gramsci had to use linguistic tricks to face the censorship, and, therefore, he avoided the classic terms such as "class", "Marxism", and even the names Marx and Lenin. Besides, non-hegemonic groups or classes "are also called by Gramsci 'subordinate', 'subaltern' or sometimes 'instrumental'. Here, again, we have preserved Gramsci's original terminology despite the strangeness that some of these words have in English" (*Selections from the Prison Notebooks* Preface. Xiv).

This brief quotation related to an intricate situation as the one described by Brian Simon demonstrates how much he knew Gramsci's thought on education and how powerful it was to understand situations of struggle for hegemony.

In the IoE/UCL Archives there are also papers that show the common interest in Gramsci between Simon and Olga Salíмова, a Russian historian of education who had collaborated with him since 1955. She acted as an intermediary for the publication of his articles in the Soviet Union, as well as arranging visits to Russian schools and for translations to be made of Russian educational psychologists in England. In one of these letters, Olga wrote:

I am in Italy and intend to stay here for 30 days [...] I came to see my Italian friend who is a teacher of Russian at the University of Naples. Her father, Felice Platone, was one of Gramsci's best friends. [...]. I will be very pleased to find out about his opinions – does it make sense to seek some common trends in the development of Marxist theory in recent times? I have been told that my article is the first step in attempts to do research into these problems. Perhaps you know some other examples? I hope to get to know the theorists here at the Gramsci Institute, because I am planning to publish some of Gramsci's works on education.⁵⁶

Two factors draw one's attention in this letter: the first regards Olga's relationship with intellectuals who had been close to Gramsci, such as Felice Platone, who, in the period 1948-1951, had worked in a supervisory capacity with Togliatti in editing the Notebooks in six scholarly tomes for the Einaudi publisher. The second factor was Olga Salimova's intention to publish the works of Gramsci in the Soviet Union, a question that continued to be mentioned in subsequent letters. In one of these, she states that she has submitted her texts to the Department at her university in Moscow and persisted in carrying out a study of the different interpretations of education from a Marxist perspective. In November 1982, Brian wrote to her the following:

⁵⁶ Olga Salimova, "Letter to Brian Simon", 1980, SIM/2/4. IoE/UCL.

I am really interested in your publication on Gramsci. Well done and many congratulations! Please send me a copy [...] of everything you have written about Gramsci. By the way, my brother Roger has just published a book on Gramsci – an Introduction. I will send you a copy so you can have it at hand as it's just been published.⁵⁷

However, the series of letters does not reveal whether or not Olga Salímova published the work as planned.

At this crossroads between Marxist intellectuals from different countries, I return to my initial inspiration, that is, the similarity of path between Brian Simon and Mario Alighiero Manacorda. In 2012, that inspiration took me to Rome to meet Manacorda in person and tell him about my hypothesis. On that occasion, he briefly recounted his disagreements with the Bolshevik model of revolution, his intimacy with Gramsci's thought and his life in the Italian Communist Party. Besides, he was curious about Brian Simon and commented that the history of English education was very different compared to the Italian one, largely because of the religious reform of the sixteenth century. When he heard about Brian's campaign against intelligence tests and in favour of the comprehensive school, he happily exclaimed: "Bravo!", and then he realized "but, unfortunately, I didn't know him".⁵⁸

CONCLUSIONS

The conclusions will be presented considering two orders of factors: 1. the reception of Gramsci's thought in England and the interest in him in Brian Simon's environment; 2. the influence of Gramsci's thought on Brian Simon.

The first aspect concerns Hobsbawm's remark about the fact that they had been delayed "on the other side of the Alps". Perhaps less importance should be attached to this delay, given the difficulties that Gramsci's own companions had had in bringing all the prison notes to

⁵⁷ Brian Simon, "Letter to Olga Salimova", 1982, SIM/2/4. IoE/UCL.

⁵⁸ Mario Alighiero Manacorda. *Interview*. Rome, June 2012. An unexpected detail of this incredible visit was that, when I enter his apartment, he was doing Russian grammar exercises. He died months later, in February 2013.

the attention of the public. The Notebooks only came to be known in the future because they had reached Julia and Togliatti. As is well known, when Gramsci was in Moscow in 1922, he was elected to the Executive Committee of the Communist International, married the Russian Julia Schucht and lived in the Soviet capital. After he returned to Italy, he was imprisoned by the Fascist regime of Mussolini and Julia returned to Moscow where his two sons grew up.⁵⁹

Still regarding the interest in Gramsci, let us going back to the Russian context and Olga Salímovna's search for Gramsci several decades later, a fact that has only become known from the letters exchanged between her and Brian Simon. It was impossible to make clear the outcome of this matter since the series of letters does not mention it.⁶⁰ However, his interest in Gramsci can help us piece together and better understand the relationships and setbacks caused by the political tragedies that have characterised the 20th Century. These letters were surprising because they have enabled us to find traces of Gramsci in the work of Brian Simon, as well as signs of the theoretical concerns of a Russian historian. In light of this, they can allow us to reflect on the way knowledge between intellectuals circulated during the Cold War and the uncertain conditions in which an intellectual lived under the ideological constraints of the Stalinist regime.

The second point concerns the core of this article: to what extent did Gramsci's thought influenced Brian Simon?

As the campaign for a comprehensive school system and the struggle against psychometric tests preceded the translations of Gramsci into English, a direct Gramscian presence on Brian Simon's work from 1940s to 1970s would be impossible. As we have seen, Gramsci's influence can be clearly discerned from the 1970s onwards. The book *Selections from*

⁵⁹ In one road very close to the Kremlin, in the heart of Moscow, there is a plaque on the façade of one of the houses with large letters (in Cyrillic script): "Antonio Gramsci lived in this house from 1922 to 1923 – he was a leader of the Italian Communist Party".

⁶⁰ Reading these letters gave me a feeling of being an intruder in a world that belonged only to them. The calligraphy, the photos in black and white of their children and the whole world that surrounded them reached me through the Archive of the IoE/UCL. The feeling of invading their past led me to decide to write a letter to Olga in 2012, telling her about my situation as a researcher. However, I received no reply. Had she changed her address? Had she died or was it simply that she did not wish to return to these pages of her past?

the Prison Notebooks was published in England in 1971, and in the following years, other publications about Gramsci appeared. However, given that his ideas had been circulating among British Marxists since the 1950s, including Roger Simon, who had been devoted to these studies and was the overseer of the most important translation of Gramsci into English, it is unlikely that Brian Simon had not been familiar with Gramsci's thought since then.

Therefore, on the one hand, Soviet psychology was the theory that underpinned Brian Simon's campaign for the comprehensive school, on the other hand, the campaign itself aimed at educational reforms in a capitalist country. This reforming role of Brian Simon was in line with the Marxist view committed to parliamentary democracy, not to the Soviet road to power. His campaign for the comprehensive school in particular and for educational reforms in general, since the 1940s, therefore, long before Gramsci's main work was translated into English, shows proximity to the conception of hegemony elaborated by Gramsci in prison. Brian Simon did not have an economic view of Marxism and, therefore, did not subordinate politics and culture to the economy. On the contrary, he understood that there was relative autonomy of these spheres and such was the understanding of Antonio Gramsci.

At this point, it is useful to remember Gramsci's distinction between revolutionary strategy in the East and the West countries. According to him, in the West, civil society was far more developed than it had been in Tsarist Russia in 1917 (the East). As a result, to subvert the domination of the ruling class, a 'war of position' was necessary for revolutionary strategy in the West. Let's add here the clarity which Roger Simon interpreted this issue by saying that it was Gramsci who formulated a suitable theory to explain the relationship between class struggles and people's democratic conflicts in non-revolutionary periods.

It was exactly under these historical circumstances that Brian Simon developed his campaign for the comprehensive school and it was under this context that he revealed his reforming role. This aspect is of paramount importance so that we do not fall into reductionisms. And why? This is because, on the one hand, he was inspired by Soviet Psychology to act against Intelligence Tests and defend the comprehensive school. However, on the other hand, this inspiration fueled his reforming

protagonism and his personal effort in warning the Marxists of the need to conduct an analysis of the real purpose of schools in a capitalist society, as he had written in 1937. Therefore, he acted under the conditions of a non-revolutionary period, namely, the English case, as Roger Simon had interpreted Gramsci. Moreover, even if he believed in the Soviet way, by leading reforms, he walked the Gramscian path on the construction of hegemony and the war of positions.

In summary, the theoretical basis of Brian Simon's formulation of the comprehensive school were Soviet ideas about the psychology of education, as he needed a potent scientific theory to do so. Nevertheless, at the same time, he was a Marxist whose *praxis* contributed decisively to democratizing English education in favour of the working-class and, therefore, to building hegemony in the sense of Gramsci, that is, based on the recognition that popular democratic struggles and the parliamentary institutions do not have a necessary class character. Due to his anti-determinist Marxism and his reforming protagonism, Brian Simon embodied Gramsci's thought and proved him right when he formulated the theory on how to apply Marxism in a non-revolutionary period.

Would Brian Simon have been a Gramscian before the *Prison Notebooks* were translated into English? Perhaps, and this is because the original way in which Brian Simon used Marxism to advocate for educational reforms allows us to verify that his practice as a reformer coincided with the Gramscian postulates on the construction of hegemony. For that reason and in that sense alone, we could say that Brian Simon was a Gramscian before knowing the thought of Antonio Gramsci.

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EL PAPEL INSTITUCIONAL EN LA FORMACIÓN PROFESIONAL EN EUSKADI: ALGO MÁS QUE UN APOYO COYUNTURAL*

The Institutional Role in Vocational Training in The Basque Country: Something More Than Just Temporary Support


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Resumen. La Formación Profesional (FP) ha sido un modelo educativo al que durante décadas no se le ha prestado la debida atención en el Estado español. Este desinterés por parte de las autoridades académicas fue solventado durante la etapa del franquismo por la participación de diversos agentes (Iglesia, Organización Sindical, Empresas...) que contribuyeron a su desarrollo y que se convirtieron en la base sobre la que actualmente gira la FP. Sin embargo, con la aprobación del Estatuto de Autonomía del País Vasco y la constitución del Gobierno Vasco, este asumió el papel de gestor de la FP, sin que ello haya significado que algunos de los agentes citados hayan cesado en esa tarea. En este artículo, con una perspectiva legislativa, vamos a dar a conocer cuáles fueron los inicios de la FP vasca y a analizar cómo ha sido el apoyo prestado desde 1979 por las instituciones vascas (gobierno, diputaciones y ayuntamientos) a este modelo educativo, teniendo en cuenta los antecedentes sobre los que discurrió la FP vasca desde sus orígenes hasta nuestros días, insistiendo en cuáles han sido los hitos principales hasta llegar a este momento de éxito.

Palabras clave: Formación Profesional; País Vasco; Instituciones, Empleo.

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Abstract. *Vocational Training (VT) is an educational model that during decades has received insufficient attention from the Spanish state. This lack of interest on the part of academic authorities compensated during Franco's dictatorship by different agents (church, unions, companies...) that contributed to the development of VT. With the passing of the Basque Country Autonomy Statute and the creation of the Basque Government, which took over responsibility of the VT, these same agents still maintain their labour. In this article, and from a legislative perspective, we will analyse the way in which Basque institutions (government, council, local government) have supported IV from 1979 until today, taking into account the antecedents of Basque VT.*

Keywords: *Vocational Training; Basque Country; Institutions, Job.*

INTRODUCCIÓN

El desarrollo de los procesos de industrialización y modernización que comenzó en Europa en los albores del siglo XIX llegó al País Vasco¹ décadas más tarde y supuso una importante aportación al nivel de alfabetización de la sociedad vasca a través de la escuela, en sus niveles de Enseñanza Primaria o Secundaria, pero también en la Formación Profesional, modalidad de estudio ampliamente arraigada en el pueblo vasco y que tanta incidencia ha tenido en las relaciones entre producción económica y educación.

Desde la perspectiva histórica, podemos observar diversos casos en los que puede constatarse esta afirmación, si bien es cierto que en dicho proceso, la política educativa, el desarrollo de los sistemas educativos y la participación de las instituciones educativas, estuvieron acompañadas por la intervención en mayor o menor medida de determinados agentes sociales.²

¹ A lo largo del artículo se recurre a diferentes denominaciones sobre la realidad territorial de Euzkai Herria y su división administrativa, citando indistintamente Euskadi, País Vasco, Comunidad Autónoma del País Vasco o Comunidad Autónoma Vasca, sabiendo que nos referimos a una misma realidad territorial.

² Existe diversa bibliográfica al respecto, tanto a nivel nacional como internacional que se puede consultar en Detlef Müller, Fritz Ringer y Brian Simón, *El desarrollo del sistema educativo moderno. Cambio estructural y reproducción social 1870-1920* (Madrid: Ministerio de Trabajo y Seguridad Social, 1992), 19; Robert Fox y Anna Guagnini, *Education, technology and industrial performance in Europe, 1850-1939* (Paris-London: Maison des Sciences de l'Homme and Cambridge University Press, 1993); Charles R. Day, *Education for the industry world: The Écoles d'Arts et Métiers and the rise of French industrial engineering* (Cambridge Mass: Massachusetts Institute of Technology, 1987); Clara Eugenia Núñez y Gabriela Tortella, *La maldición divina. Ignorancia y atraso económico en perspectiva histórica* (Madrid: Alianza Universidad, 1993); Gabriela Tortella, *Education and economic development since the industrial revolution* (Valencia: Generalitat valenciana, 1990). En estas obras se

El caso de la Formación Profesional (FP) del País Vasco es significativo para poder estudiar este fenómeno pues en él tomaron parte la Iglesia, las administraciones públicas y el sector empresarial.

En este artículo analizamos cuál ha sido la aportación que han realizado las instituciones autonómicas, provinciales y locales vascas a la FP. Para comprender este proceso es necesario considerar que, históricamente, este modelo educativo ha vivido dos etapas claramente diferenciadas: una primera, que va desde sus orígenes en el siglo XIX hasta 1979, el inicio de la etapa autonómica y una segunda que comienza en ese año y continúa actualmente. En ambas etapas se puede apreciar la participación permanente de determinados agentes involucrados en la FP, siendo el elemento característico del modelo vasco de FP.

Remontándonos a sus orígenes hay que señalar que en el último tercio del siglo XIX en el País Vasco surgieron las Escuelas de Artes y Oficios, cuya contribución ha sido clave para entender buena parte de la historia de la educación desarrollada en el país. Estas escuelas localizadas en el País Vasco tenían la misma denominación y los mismos objetivos que el resto de escuelas de similares características del Estado, sin embargo, a diferencia de estas últimas, cumplían otro tipo de funciones al surgir y desarrollarse en función de las necesidades sociales y locales de los municipios en los que radicaban. En consecuencia, las Escuelas de Artes y Oficios del País Vasco adaptaron sus currículos a las necesidades de su sociedad sin olvidar la obligatoriedad de cumplir la disposición legislativa vigente en cada momento. En definitiva, estuvieron mediatizadas por tres elementos: surgimiento, desarrollo y adaptación, todo ello en función de las necesidades locales en la que radicasen. Estos tres elementos son suficientes para que el historiador de la educación preste atención no solo a las instituciones educativas, sino también a las instituciones político-administrativas, de tanto significado dentro del panorama historiográfico del País Vasco.³

recogen trabajos relacionando la educación y la alfabetización en el desarrollo económico en diversos países: Inglaterra, Alemania, Francia, Rusia, Italia, Portugal, India, Finlandia, Suecia, Portugal, Polonia, Argentina, Corea, etc. Los trabajos relativos a España han sido escritos por: Clara Eugenia Núñez, *La fuente de la riqueza. Educación y desarrollo económico en la España Contemporánea* (Madrid: Alianza Universidad, 1992).

³ Las Escuelas de Artes y Oficios han sido objeto de estudio, entre otros, en los siguientes trabajos: Alejandro Tiana Ferrer, *Maestros, misioneros y militantes. La educación de la clase obrera*

Al igual que el resto de las Escuelas de Artes y Oficios del Estado se caracterizaron por tener dos vertientes: una primera, en la que se les consideraba como una mera ampliación de los estudios de Enseñanza Primaria en los que se introducían algunas materias de alfabetización de tipo técnico, como el Dibujo y/o la Geometría y, una segunda vertiente, que tenía un perfil mucho más específico en cuanto a una FP de mayor prestigio. La respuesta a esta doble vía de la FP vasca la encontramos en algo ya señalado: las necesidades sociales que generaba el proceso de industrialización iniciado en Bizkaia y Gipuzkoa, preferentemente, y también en la escasez de disposiciones legales sobre la enseñanza profesional básica hasta 1924, elemento este último que permitía unas adaptaciones curriculares propias.⁴

Para la realización de este trabajo de investigación la metodología ha sido la propia de la investigación histórica, con recogida de datos de fuentes primarias y secundarias, elaboración de entrevistas a diversos testimonios,⁵ análisis de datos y discusión de resultados. Al tratarse de un trabajo de un dilatado periodo histórico, hemos señalado los diferentes contextos, sobre todo en el plano legislativo, que explican los cambios que se han ido produciendo en las dos etapas señaladas.

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⁴ Javier Corcuera Atienza, *Orígenes, ideología y organización del nacionalismo vasco. 1876-1904* (Madrid, Siglo XXI, 1979), Manuel González Portilla, *La formación de la sociedad capitalista en el País Vasco (1876-1913)* (San Sebastián: L. Haranburu, 1981), Luis Castells Arteché *Modernización y dinámica política en la sociedad guipuzcoana de la Restauración, 1876-1915* (Madrid: Siglo XXI, 1987).

⁵ Se realizaron mayoritariamente en la Comunidad Autónoma Vasca, entre el 28 de junio de 2018 y el 18 de julio de 2019.

ANTECEDENTES DE LA FP VASCA

La evolución de la FP vasca tiene un largo recorrido que, emulando los gremios existentes en los diferentes países europeos, sitúa sus orígenes en la Edad Media,⁶ pero no es hasta la llegada de los procesos de modernización e industrialización, a finales del siglo XIX, cuando este modelo educativo comenzó a sentar sus bases y a contar con la presencia de diferentes agentes que le fueron dotando de una personalidad propia. Con las lógicas diferencias provocadas por la distancia en el tiempo se advierte que, en el País Vasco, durante la etapa de la Ilustración, ya se dieron los primeros pasos para la conformación de un sistema educativo dirigido a la industria. Mientras la actividad gremial continuaba su curso con la presencia de sus cofradías y sus particulares tipos de contratación que permitían la existencia de alfareros, herreros o fabricantes de armas,⁷ la población vasca disfrutaba de una institución, la Real Sociedad Bascongada de Amigos del País (RSBAP) que, de alguna manera, se convertía en el primer agente promotor de la FP vasca. La RSBAP se trataba de una institución ilustrada marcada por una importante influencia francesa en la que se mezclaban tradición y modernidad y que consideraba que ofrecer al pueblo una educación de una mínima calidad iba a permitir lograr la felicidad del Estado.⁸ En consecuencia, su metodología de trabajo estaba basada en una selección de aquello que fuese más útil para el país en las diferentes áreas de actuación: agricultura y economía rústica, ciencias y artes útiles e industria y comercio.

Por otra parte, en el tiempo que transcurre entre el siglo de la Ilustración y los inicios del siglo XX, los diferentes sistemas educativos europeos, con sus respectivos niveles de Primaria, Secundaria y Superior, iban consolidándose. España se caracterizaba por un ritmo de implantación más lento y porque su FP estaba fuera del sistema educativo hasta 1924, cuando entró en vigor el Estatuto de la Enseñanza Industrial de

⁶ Ignasi Brunet i Icart y David Moral Martín, *Origen, contexto, evolución y futuro de la FP* (Tarragona: Publicacions Universitat Rovira i Virgili, 2017).

⁷ Joxe Garmendia Larrañaga, *Gremios, oficios y cofradías en el País Vasco* (Donostia: Eusko Ikaskuntza, 2007).

⁸ María Teresa Recarte Badiola, *Ilustración vasca y renovación educativa* (Salamanca: Universidad Pontificia de Salamanca, 1990).

1924.⁹ Desde entonces las autoridades académicas españolas cambiaron de actitud y comenzó un reconocimiento hacia la FP que tuvo como colofón el Estatuto de Formación Profesional de 1928.¹⁰

Diferentes autores como Puelles, Lerena o Viñao consideran que esa situación de ignorancia a la que se sometía a la FP tenía su origen en el establecimiento de un sistema educativo basado en la distinción de clases.¹¹ Así, mientras el bachillerato estaba dirigido a los hijos de la burguesía, los hijos de los obreros eran enviados al mundo laboral.

En este marco, el País Vasco comenzó a contar con sus Escuelas de Artes y Oficios, las cuales disfrutaban de una importante protección gracias al impulso que les ofrecía el Concierto Económico de 1878.¹² Queremos resaltar esta situación porque la aplicación del Concierto Económico, que conservaba las atribuciones administrativas, y la toma de decisiones de las instituciones vascas estaban sentando las bases de una política educativa que, con sus altibajos producidos por los cambios políticos y sociales del momento, va a marcar el devenir de la FP vasca a lo largo de los siglos XX y XXI.

Estas decisiones comenzaron a fortalecer la relación que, históricamente, han mantenido la FP y las instituciones vascas y que han estado caracterizadas por los elementos anteriormente citados: el surgimiento de las Escuelas de Artes y Oficios durante el periodo de industrialización y modernización en Bizkaia y Gipuzkoa; el particular desarrollo de la FP vasca con la ayuda de agentes tan dispares como la iglesia, las diputaciones y/o ayuntamientos y las empresas, y su proceso de adaptación, con la participación e implicación de todos los centros educativos para que la FP se adecuase a las necesidades sociales y locales del país.¹³

⁹ Estatuto de la Enseñanza Industrial (Gazeta de Madrid de 5 de noviembre de 1924, n.º 310).

¹⁰ Estatuto de Formación Profesional (Gazeta de Madrid de 21 de diciembre de 1928, n.º 363).

¹¹ Manuel de Puelles Benítez, *Educación e ideología en la España contemporánea* (Barcelona: Labor, 1980), Carlos Lerena Alesón, *Reprimir y liberar, crítica sociológica de la educación y de la cultura contemporáneas* (Madrid: Akal, 1983); Antonio Viñao Frago, *Escuela para todos, educación y modernidad en la España del siglo XX* (Madrid: Marcial Pons, 2004).

¹² Hilario Murua Cartón, *El modelo vasco de FP: claves de su reciente evolución* (Leioa: Servicio Editorial de la UPV/EHU, 2020).

¹³ Paulí Dávila Balsera, *Las Escuelas y Artes y Oficios y el proceso de modernización del País Vasco, 1879-1929* (Leioa: Servicio Editorial de la UPV/EHU, 1997).

Como es conocido, el proceso de industrialización y modernización emprendido en el País Vasco en el siglo XIX fue muy desigual. Mientras Araba basaba su economía en la agricultura, en Bizkaia estaba surgiendo una nueva oligarquía cuyos orígenes radicaban en la gran burguesía vizcaína que, a finales del siglo XIX, había adquirido una privilegiada posición económica, lo que le permitía transformar el sistema productivo, en el ámbito de los altos hornos, además de poder controlar el poder político y financiero.¹⁴ Por su parte, en Gipuzkoa era la burguesía autóctona la que, basándose en la pequeña y mediana empresa, impulsaba la industrialización. Así, las antiguas ferrerías se iban reconvirtiendo en moderna metalurgia al tiempo que el proceso de modernización se daba en todos los órdenes sociales.¹⁵

Si todo proceso de modernización precisa de la formación de una mano de obra adecuada, el caso del País Vasco es un buen ejemplo y, para ello, los curriculum de las Escuelas de Artes y Oficios se adecuaron a las necesidades sociales y al desarrollo industrial, comercial y artesanal de las poblaciones en las que se instalaron.¹⁶ Ello nos permite afirmar que este modelo de escuelas fue surgiendo al margen de cualquier previsión del sistema educativo y de que se sujetaron a las demandas sociales de formación de obreros y mujeres, haciéndolo en base a dos modelos diferentes de Escuelas de Artes y Oficios: las denominadas *menores*, situadas en pequeñas poblaciones con incipiente industrialización y las *provinciales* de las grandes capitales Bilbao (1879) y San Sebastián (1880).

La FP fue despertando un cierto interés en las instituciones vascas. Así, en 1926, en Vitoria-Gasteiz, se celebró el IV Congreso de la Sociedad de Estudios Vascos - Eusko Ikaskuntza (SEV-EI) dedicado a este modelo educativo. Se celebró en un contexto de reformas educativas y fue perseguido por la dictadura primorriverista al creer que se iban a tratar temas relacionados con la lengua o la cultura vasca. No obstante, el congreso obtuvo un notable éxito al contar con la presencia de un importante

¹⁴ Manuel Montero García, *La California del Hierro. Las minas y la modernización económica y social de Vizcaya* (Bilbao: Beitia, 1995).

¹⁵ Luis Castells Arteche, *Modernización y dinámica política en la sociedad guipuzcoana de la Restauración, 1876-1915* (Madrid: Siglo XXI, 1987).

¹⁶ Paulí Dávila Balsera, *Las Escuelas y Artes y Oficios y el proceso de modernización del País Vasco, 1879-1929* (Leioa: Servicio Editorial de la UPV/EHU, 1997).

número de centros¹⁷ que participaron en la Exposición organizada por la Escuela de Artes y Oficios de Vitoria.¹⁸

Este contexto de producción industrial daba continuidad a los cambios sociales, económicos y culturales que tuvieron lugar a nivel estatal desde la Restauración hasta 1920-1930, lo que provocó que el país poco se pareciera al de años anteriores.¹⁹ Entre esos cambios hubo uno bastante significativo. Si hasta finales del siglo XIX la patronal no veía con buenos ojos la formación de los obreros por lo que podía suponer el despertar de sus conciencias, con el cambio de siglo esa filosofía empresarial, que seguía con su tradicional paternalismo filantrópico y liberal, del que además hacía gala, daba un importante giro y comenzaba a apostar por la formación de la clase obrera.²⁰

Al tiempo que se producían esos cambios, la FP vasca desarrollaba un ralentizado proceso de aceleración que coincidía con la apertura de las Escuelas Elementales de Trabajo en Bilbao y San Sebastián, además de las de Eibar y Bergara.²¹ Por otra parte, dentro de ese lento proceso de aceleración tenía lugar otro elemento clave para el desarrollo de la FP: el Estatuto de Enseñanza Industrial entraba en vigor en 1924 y constituía el primer esbozo de una FP reglada, aunque la intervención estatal, todavía, continuaba siendo muy escasa.²²

La situación que la FP atravesaba en aquellos momentos no resultaba nada prometedora debido a su escasa valoración social, a que sus planes de estudios no estaban definidos y a una débil implicación del Estado en

¹⁷ Escuelas de Artes y Oficios de Bizkaia y Gipuzkoa, Escuelas de Agricultura, Universidad Comercial de Deusto, Escuela de Armería de Eibar, Escuela Teórico-Práctica de Industria y Comercio del Papel de Tolosa, Escuela de Sordomudos y Ciegos de Deusto, Federación de Sindicatos Obreros Femeninos de Nazaret y Escuela del Hogar de la Asociación de Antiguas Alumnas de la Normal de Maestras, ambas de Donostia.

¹⁸ Sociedad de Estudios Vascos (1926).

¹⁹ David Sven Reher y otros, *España a la luz del censo de 1887* (Madrid: Instituto Nacional de Estadística, 1993).

²⁰ María Luisa Rico Gómez, «La FP del obrero como mecanismo de modernización económica e industrial durante la dictadura de Primo de Rivera, 1923-1930», *Rúbrica Contemporánea*, vol. 1, 1 (2012): 157-176.

²¹ Luciano Novo Miguel, *La enseñanza profesional obrera y técnico profesional en España* (Barcelona: Ediciones CEAC, 1933).

²² Antonio Viñao Frago, *Escuela para todos* (Madrid: Marcial Pons, 2004).

este modelo educativo, teniendo que ser los diferentes agentes sociales quienes la gestionasen. Es una etapa en la que se produce un importante abandono del sector primario consecuencia del proceso de industrialización y modernización y, además, la FP dependía del Ministerio de Trabajo, Comercio e Industria y no del Ministerio de Instrucción de Pública y Bellas Artes, como parecía corresponderle.²³

Todas estas carencias constituyeron suficientes elementos para que el presidente de la II República, Niceto Alcalá Zamora, propusiera que: «los servicios del Estado en orden a la formación y perfeccionamiento profesional, actualmente adscritos al Ministerio de Trabajo y Previsión, serán asignados al Ministerio de Instrucción Pública».²⁴ La propuesta tuvo escaso recorrido porque en 1936 comenzaba la Guerra Civil y la FP volvía a depender del Ministerio de Trabajo,²⁵ si bien, durante buena parte de la contienda bélica continuó recibiendo directrices del Ministerio de Educación Nacional.

En los años de posguerra se crean las llamadas Escuelas de Trabajo, también con un ritmo excesivamente lento²⁶ y una cierta sensación de abandono de este modelo educativo que durará hasta la entrada en vigor de la Ley sobre FP Industrial en 1955. Previamente, en 1949, se había aprobado la Ley de Bases de Enseñanza Media y Profesional, un experimento de poco éxito que dio lugar a la creación de 91 Institutos Laborales (6 se ubicaron en el País Vasco) y estos, a su vez, generaron las Universidades Laborales dependientes de la Organización Sindical Española (OSE).²⁷ Sin embargo, estas decisiones tampoco sirvieron para dar una solución a los problemas estructurales de la FP.

²³ María Luisa Rico Gómez, «Modernización y FP técnico-industrial en España, 1924-1931», en Barrio Alonso, Ángeles; De Hoyos Puente, Jorge y Saavedra Arias, Rebeca, «Nuevos horizontes del pasado: culturas políticas, identidades y formas de representación» (Santander: Universidad de Cantabria, 2011).

²⁴ Gazeta de Madrid. Decreto de 22 de septiembre de 1931 por el que los servicios del Estado, en orden a la formación y perfeccionamiento profesional, actualmente adscritos al Ministerio de Trabajo y Previsión, serán asignados al Ministerio de Instrucción pública.

²⁵ Pauli Dávila Balsera, Luis M. Naya Garmendia e Hilario Murua Cartón, «La FP en la España contemporánea: políticas, agentes e instituciones», *Historia de la Educación*, 33 (2014): 43-74.

²⁶ María Luisa Rico Gómez, «La FP del obrero como mecanismo de modernización económica e industrial durante la dictadura de Primo de Rivera, 1923-1930», *Rúbrica Contemporánea*, vol. I, 1 (2012): 157-176.

²⁷ La Organización Sindical Española (OSE) popularmente fue conocida como el Sindicato Vertical. La OSE asumía en su totalidad los llamados Principios del Movimiento.

De la Ley sobre FP Industrial hay tres aspectos que conviene resaltar: tuvo en consideración el modelo de FP alemán; otorgó al alumnado de esta etapa de enseñanza la posibilidad de alternar escuela y trabajo y, por último, contempló la bifurcación de la FP entre la opción académica y la profesional cuyas consecuencias recogió posteriormente la Ley General de Educación (LGE) en 1970.²⁸ Además de estos tres aspectos, la Ley de 1955 aportó otras iniciativas, como la creación de la Formación Profesional Acelerada (1957) y de la Formación Intensiva Profesional (1959), pero en ningún caso fueron exitosas,²⁹ dado que su objetivo final estaba centrado exclusivamente en formar profesionalmente a campesinos y obreros rurales mediante cursillos *ad hoc*.³⁰ Otra iniciativa de la Ley fue el papel que adjudicó a la Dirección General de Empleo y Promoción Social que se convirtió en garante de la realización y seguimiento de los cursos, centros y personas que recibían becas para su formación,³¹ al tiempo que dicha Dirección iba potenciando el Plan Nacional de Promoción de Profesional Obrera (PPO) que implicó al Ejército para impartir cursos y subvencionar a la formación de trabajadores en los sectores menos productivos.³²

La década de los años 60 estuvo marcada por la fuerte presencia del Opus Dei dentro del Ministerio de Educación. Destacados miembros de esta organización religiosa analizaban la situación de la educación española y emprendían una notable reforma educativa que comenzó con la elaboración del Libro Blanco de Educación y finalizó con la entrada en vigor de la Ley General de Educación (1970), lo que permitió que la FP fuera absorbida definitivamente por el Ministerio de Educación. Sin embargo, esta decisión tampoco supuso el revulsivo que el modelo necesitaba. En su preámbulo dejaba entrever que: «el sistema educativo nacional asume en estos momentos tareas y responsabilidades de una magnitud sin precedentes»³³ y en base

²⁸ María Jesús Martínez Usarralde, *Historia de la FP en España. De la Ley de 1955 a los Programas Nacionales de FP* (Valencia: UPV, 2002).

²⁹ Antonio Viñao Frago, *Escuela para todos* (Madrid: Marcial Pons, 2004).

³⁰ Archivo del Ministerio de Trabajo.

³¹ Archivo del Ministerio de Trabajo.

³² Simeón Fernández de Pedro y Ángel González de la Fuente, «Apuntes para una Historia de la FP en España», *Revista de Educación* 239 (1985): 81-87.

³³ Ley General de Educación, Financiamiento y Reforma del Sistema Educativo de 4 de agosto de 1970.

a ello se proponía dos objetivos: completar la educación general con una profesional que capacitase para la incorporación fecunda del individuo a la vida del trabajo y establecer un sistema educativo que se caracterizase por su unidad, flexibilidad e interrelaciones, al tiempo que se facilitaba una amplia gama de posibilidades de educación permanente y una estrecha relación con las necesidades que planteaba la dinámica de la evolución económica y social del país.³⁴

El final del régimen político dictatorial en 1975 trajo importantes cambios a la sociedad española en general y vasca en particular. Así, en 1979, se aprobaba el Estatuto de Autonomía para el País Vasco y el inicio del traspaso de las competencias educativas.³⁵ Este hecho, con el que comienza la segunda etapa de nuestro estudio, se convirtió en uno de los hitos más importantes para la FP vasca, pues desde aquel instante comenzó a depender del Gobierno Vasco, quien siempre ha mostrado un apoyo inequívoco hacia este modelo educativo, «en la década de los 80, el Gobierno Vasco y las Diputaciones, fueron plenamente conscientes de la estrategia de la FP para salir de la crisis».³⁶

Una década después de la aprobación del Estatuto de Autonomía entraba en vigor la Ley Orgánica General del Sistema Educativo (1990), LOGSE, que supuso el impulso definitivo que la FP necesitaba.

Cuando se están incorporando a las escuelas los ciudadanos del próximo siglo, los países con los que tratamos de construir el proyecto europeo, que ofrecerá una nueva dimensión a nuestra juventud de hoy, conceden una gran importancia a la educación y a la formación, tratando de adaptarlas a la apertura del espacio individual, político, cultural y productivo, a la mayor rapidez y complejidad de los cambios de todo tipo, propiciando su prestación

³⁴ Ley General de Educación, Financiamiento y Reforma del Sistema Educativo de 4 de agosto de 1970.

³⁵ Decreto de 30 de diciembre de 1980, por el que se aprueba la publicación del acuerdo de la Comisión Mixta de transferencias de 29 de diciembre de 1980 en materia de enseñanza (BOPV de 22 de mayo de 1981, n.º 20).

³⁶ Iñaki Mujika y Kike Intxausti «La transformación de la FP en Euskadi. Los centros de FP como motor de cambio», *Ekonomiaz*, 94, 2º semestre (2018), 229.

más prolongada a mayor número de ciudadanos, promoviendo las mejoras necesarias para garantizar la calidad.³⁷

En definitiva, lo que la LOGSE pretendía era el control de los procesos culturales y productivos que se estaban dando a nivel nacional e internacional y proponía una formación básica más prolongada y más versátil, capaz de adaptarse a nuevas situaciones y a las necesidades de cada ciudadano mediante un proceso de formación permanente, pero para cuando la LOGSE entró en vigor, la transformación de la FP vasca ya había comenzado su particular carrera hacia la excelencia educativa. En 1983, la Usurbilgo Lanbide Eskola (Escuela Profesional de Usurbil) diseñaba un proyecto estrechamente unido al mundo de la empresa. El proyecto se implementaba en 1986 con la colaboración de Michelín de Lasarte, una empresa dedicada al sector de la automoción (fabricación de ruedas) con quien la escuela usurbildarra firmaba un convenio por el cual se posibilitaban las prácticas en alternancia, similares al modelo de la Formación Dual actual.

LA RELACIÓN ENTRE LA FORMACIÓN PROFESIONAL Y LAS INSTITUCIONES

El interés de centrar nuestro estudio en la FP vasca actual viene precedido por la notable diferencia que ha experimentado este modelo educativo entre las dos etapas establecidas, porque si bien es cierto que en ambas etapas hay un nexo común, la participación institucional, es evidente que los resultados de dicha participación han sido muy diferentes. La primera etapa estuvo caracterizada por una falta de implicación real por parte de las instituciones oficiales estatales, lo que obligó a la FP vasca a recurrir a otras instituciones u organizaciones, como la Iglesia y/o el mundo de la empresa, así como a ayuntamientos y/o diputaciones, mientras la segunda etapa estuvo marcada por el traspaso del Estado al Gobierno Vasco de las competencias educativas y el comienzo de una trayectoria en la que la implicación de las diferentes instituciones vascas va a ser total.

Desde ese instante, con la amplia implicación institucional, se replantean los tres elementos ya citados: el contexto en el que surgen los

³⁷ Departamento de Educación, Universidades e Investigación (1991).

centros de FP, su desarrollo y la adaptación y respuesta que este modelo educativo va a ofrecer a las necesidades de la sociedad vasca. Así, en relación a este último elemento, nos planteábamos la siguiente pregunta: ¿quién ha aportado más a quién, la sociedad vasca a la FP o la FP a la sociedad vasca? La respuesta nos la daba Jorge Arévalo: «La sociedad vasca ha invertido en FP muchísimo dinero, gestionado por diferentes gobiernos. La sociedad nos ha dado muchísimo, porque nos ha dado confianza, que la hemos tenido, y lo que ha hecho la FP ha sido dar respuesta a esa confianza depositada en ella».³⁸ Para poder dar fe a esta afirmación de Arévalo es necesario analizar los siguientes cuatro hitos:³⁹ el I Acuerdo Nacional de Formación Continua; las medidas de estímulo a la FP; Hobetuz y los planes vascos de FP.

El I Acuerdo Nacional de Formación Continua

En 1982 el PSOE ganaba las elecciones generales al parlamento español firmándose dos años más tarde el I Acuerdo Nacional de Formación Continua que iba a suponer la división de la FP en tres categorías: la FP Reglada, la FP Continua y la FP Ocupacional.⁴⁰ Suscrito por el sindicato Unión General de Trabajadores (UGT) la Confederación Española de Organizaciones Empresariales (CEOE) y la Confederación Española de la Pequeña y Mediana Empresa (CEPYME) constataba que una de las debilidades del mercado de trabajo español era «*el alejamiento de la FP respecto*

³⁸ Jorge Arévalo ha ocupado diferentes cargos dentro de la administración pública vasca, siendo en la actualidad Viceconsejero de FP y Aprendizaje Permanente del Departamento de Educación, Política Lingüística y Cultura del Gobierno Vasco. Entrevista realizada en Errenteria, 13 de abril de 2019.

³⁹ *Lanbidez*: I Plan Vasco de FP (1998); *De la tradición a la innovación*: II Plan Vasco de FP (2004); *La nueva FP: marca de país*: III Plan Vasco de FP (2011); *Hacia una FP diferente*: IV Plan Vasco de FP (2014); *La ola del IV Plan Vasco de FP*: La Ley de FP del País Vasco y el V Plan Vasco de FP (2018). Dada la importancia de estos Planes, nuestra intención es realizar un análisis específico sobre los mismos en otro artículo de investigación.

⁴⁰ *FP Reglada*: de ciclo largo, administrada por el Ministerio de Educación Nacional y dirigida a la titulación y cualificación de los jóvenes para su posterior inserción en el mercado de trabajo.

FP Continua: de ciclo corto, gestionada por los agentes sociales se ocupó de promover el desarrollo profesional y personal de los/as trabajadores/as ocupados/as y de mejorar la competitividad de las empresas.

FP Ocupacional: de ciclo corto, gestionada por el Ministerio de Trabajo y Asuntos Sociales a través del Instituto Nacional de Empleo (INEM) y que estuvo dirigida a los/as trabajadores/as desempleados/as para su reinserción en el mercado laboral.

a las necesidades de la mano de obra». ⁴¹ Este alejamiento se entendía como un hándicap para la competitividad de las empresas y un lastre para el crecimiento de la economía y para la generación y mantenimiento del empleo. Además, se trataba de un momento en el que tenía lugar el fenómeno de la libre circulación de los/as trabajadores/as y el desarrollo del mercado único europeo, dos realidades que obligaban a empresas y trabajadores/as a realizar profundas reestructuraciones económicas, profesionales y tecnológicas. ⁴²

De este Acuerdo surgió el Consejo General de la FP, ⁴³ como órgano consultivo y de participación institucional de las Administraciones Públicas y de asesoramiento del Gobierno en materia de FP. Fue el propio Consejo el encargado de diseñar el I Programa Nacional de FP que permitió, dentro de ese nuevo marco de competencias que las Comunidades Autónomas están comenzando a gestionar, que la FP vasca fuera adquiriendo su propia personalidad.

Entre sus decisiones estuvo la gestión de la Formación Continua que recayó en una fundación privada de carácter benéfico-docente, la Fundación para la Formación Continua (FORCEM), cuya tarea consistió en poner a disposición de las empresas y los/as trabajadores/as un instrumento que conectase la oferta de formación con las necesidades reales de cualificación. Este instrumento se puso en marcha en un momento de cambios originados por los procesos de innovación tecnológica y promovió el desarrollo profesional y personal de empresas y trabajadores/as. También contribuyó a la eficacia económica mejorando la competitividad de las empresas y al desarrollo de nuevas actividades económicas creando una cultura de la formación, desarrollando modelos de formación dirigidos a una formación de calidad y estimulando la inversión en formación. ⁴⁴

⁴¹ Resolución de 9 de octubre de 1984, del Instituto de Mediación, Arbitraje y Conciliación, por la que se acuerda la publicación del Acuerdo Interconfederal para la Negociación Colectiva 1985-1986, integrante del Acuerdo Económico y Social (AES), suscrito por la Unión General de Trabajadores (UGT) y las Confederaciones Empresariales CEOE y CEPYME (BOE de 10 de octubre de 1984, n.º 243).

⁴² Hilario Murua Cartón, *El modelo vasco de FP: claves de su reciente evolución* (Leioa: Servicio Editorial de la UPV/EHU, 2020).

⁴³ Ley 1/1986 de 7 de enero por la que se crea el Consejo General de Formación Profesional (BOE de 10 de enero de 1986, n.º 9).

⁴⁴ Hilario Murua Cartón, *El modelo vasco de FP: claves de su reciente evolución* (Leioa: Servicio Editorial de la UPV/EHU, 2020).

Ante la necesidad del Estado de intensificar el esfuerzo para ampliar el radio de actuación de la FP se aprobó el Plan Nacional de Formación e Inserción Laboral,⁴⁵ dedicando un capítulo especial al reciclaje y cualificación ocupacional. Para ello fue preciso coordinar las actividades que se realizaron desde las diferentes administraciones públicas e instituciones privadas y contar con la presencia de las organizaciones sindicales y asociaciones empresariales. En ese contexto, se elaboraron los siguientes programas:

- 1) Programas de FP para jóvenes y desempleados/as de larga duración.
- 2) Programas de inserción profesional para jóvenes demandantes de primer empleo.
- 3) Programas de recuperación de escolaridad dirigidos a jóvenes menores de 16 años que no habían completado la EGB y programas de enseñanza en alternancia, dirigidos a alumnado de 2º Grado de FP, que se realizaron con contratos o convenios con empresas.
- 4) Programa de generalización de la FP Ocupacional para el reciclaje profesional dirigido a dos ámbitos:
 - 1) El rural, que lo gestionó el Ministerio de Trabajo y Seguridad Social con ayuda del INEM.
 - 2) El dirigido a empresas o sectores en reconversión industrial, también con la ayuda del INEM y de los denominados Fondos de Promoción de Empleo.⁴⁶

El éxito de estos programas se puede comprobar porque permitió una revisión y actualización de los mismos que dio lugar a que nuevos programas se dirigiesen a otros colectivos: personal autónomo, personas discapacitadas, emigrantes o personas que, por sus características personales, constituían grupos en situación de riesgo.⁴⁷

⁴⁵ Orden de 13 de abril de 1994 por la que se dictan normas de desarrollo del Real Decreto 631/1993, de 3 de mayo, por el que se regula el Plan Nacional de Formación e Inserción Profesional (BOE de 28 de abril de 1994, n.º 101).

⁴⁶ Orden de 31 de julio de 1985 por la que se desarrolló el consejo de ministros en el que se aprobaron las bases para el Plan Nacional de Formación e Inserción Profesional y se regularon los cursos de Formación Profesional Ocupacional a impartir por los centros colaboradores del INEM (BOE de 7 de agosto de 1985, n.º 188).

⁴⁷ Orden de 22 de enero de 1988 por la que se regulaba el Plan Nacional de Formación e Inserción Profesional y los cursos de FP Ocupacional a impartir en los centros colaboradores del INEM (BOE

En lo que a Euskadi respecta, el GV optó por tomar medidas cortoplacistas, a través de la generación directa de empleo en las propias instituciones o permitiendo la contratación en la empresa privada, pero también lo hizo a medio y largo plazo, con apoyos a las empresas para la mejora de sus sistemas de gestión, estimulando y aportando nuevas iniciativas sobre formación y reciclaje de la población activa. De esta manera, la FP vasca salió beneficiada y pudo dar formación al personal de diferentes entidades, dotar de becas a su alumnado mejor cualificado, recibir alumnado de las empresas en busca de reciclaje y de que su alumnado realizase prácticas en las propias empresas⁴⁸. En definitiva, el Acuerdo Nacional de Formación Continua no tuvo una incidencia estrictamente directa en la FP vasca, pero sí sirvió para emprender diferentes acciones y retratarse como un acuerdo relevante al tratarse de algo novedoso tras tantos años de abandono de la FP.

Medidas de estímulo a la FP

Las acciones puestas en práctica hasta el año 1988 para paliar en lo posible la situación de desempleo existente en Euskadi habían sido coyunturales. Dichas medidas no tenían vocación de proyección al futuro por lo que se buscó una línea de actuación que posibilitase el acercamiento de las variables del mercado de trabajo.

Para que ello fuera realidad el Departamento de Trabajo y Seguridad Social del GV realizó cuatro propuestas de gran calado para promover el reciclaje, la reprofesionalización y la formación ocupacional continua de la población activa:

- 1) La primera propuesta estuvo dirigida a los ámbitos comarcal y sectorial, en función del desarrollo y evolución del mercado de trabajo por comarcas y con planes dirigidos a los diferentes sectores de la actividad industrial.
- 2) La segunda consistió en la elaboración de unos programas de actividades de orientación y formación dirigidos al apoyo y promoción

de 23 de enero de 1988, n.º 26).

⁴⁸ Decreto 146/1985 de 4 de junio por el que se articulaban medidas de promoción al empleo (BOPV de 5 de junio de 1985, n.º 115).

de cursos y acciones orientadas al reciclaje profesional del personal cualificado y no cualificado de las empresas, al personal en situación de desempleo con cualificaciones inadecuadas o insuficientes, a la reorientación y motivación laboral de desempleados/as de larga duración, a la formación de dirigentes sindicales, a la orientación y formación de nuevos empresarios y a la orientación profesional de los/as jóvenes en busca de un primer empleo.

- 3) La tercera se basó en actividades formativas de reciclaje para empresas que ofertasen esa posibilidad para sus empleados/as, con subvenciones a fondo perdido.⁴⁹
- 4) La última propuesta sirvió para la creación de unos programas dirigidos a elevar las posibilidades de encontrar empleo entre los jóvenes que finalizaban sus estudios.

Estas iniciativas promovidas desde el GV fueron un complemento de los programas estatales a los que pretendieron dar una continuidad y evitar ese carácter coyuntural con las que habían nacido. Por otra parte, las ayudas económicas que recibió la FP vasca fueron claves para el impulso que esta necesitaba. Pero si tanto iniciativas formativas como ayudas económicas resultaron claves en ese proceso de impulso para la FP, hay que destacar que ambas se dieron principalmente en Gipuzkoa, gracias al papel que desempeñó la Diputación regida en aquellos instantes por Imanol Murua.⁵⁰

Resultaba evidente que el desarrollo de una economía y el crecimiento de una sociedad pasa por la actualización de los recursos humanos. Así, una política de empleo coherente con la realidad que en aquellos momentos estaba atravesando Euskadi, debía de contemplar inexorablemente no solo unos determinados planes o programas de formación, sino una formación ocupacional continuada. Ante esta perspectiva, el País Vasco plagado de pequeñas y medianas empresas, pero escasamente dotado para afrontar esta situación, encontró en el GV el recurso que necesitaba.

⁴⁹ Se consideraban gastos directos aquellos cuyo coste correspondía a la contratación de servicios externos a la empresa destinados a la formación, el coste de material fungible y el coste del material didáctico necesario.

⁵⁰ Imanol Murua antes de ser Diputado General de Gipuzkoa había sido profesor de FP durante 27 años y era conocedor de la situación a la que había sobrevivido este modelo educativo.

Bajo esta perspectiva, el GV adquirió un cierto carácter proteccionista que se tradujo en la puesta en marcha de una serie de programas dirigidos a la capacitación de toda la población activa y que sirvieron para complementar los programas estatales. Entre sus objetivos estuvieron el de proporcionar conocimientos complementarios a los/as trabajadores/as desempleados/as para facilitar su empleabilidad, el de promover cualificaciones acordes con las necesidades derivadas de los avances tecnológicos que estaban experimentando las empresas, el de incrementar las relaciones entre los sectores educativo y productivo para elevar las posibilidades de empleo a la finalización de los estudios y el de lograr mayores y mejores cotas de competitividad por parte de las empresas.

Para su cumplimiento se estudiaron, diseñaron e impartieron planes de formación ocupacional acompañados de una importante política de becas que se desarrollaron en los centros de trabajo y estuvieron dirigidos a jóvenes que finalizaban sus estudios. También se ofreció ayuda económica por parte de entidades públicas y privadas que impulsaron programas de formación permanente dirigidos al profesorado y se ofertaron planes de reciclaje para trabajadores/as activos/as o en paro. En definitiva, resulta evidente que la política de ayudas económicas emprendida por el GV supuso un fuerte impulso para el desarrollo de esa nueva FP que se estaba forjando en el País Vasco en los años 80. Sin embargo, esta implicación del GV no es la única de estas características porque en 1988, los ayuntamientos y mancomunidades, por su profundo conocimiento de la realidad socioeconómica de su entorno, desarrollaron proyectos educativos de iniciación profesional con el ánimo de generar empleo.

Estos programas interinstitucionales no pudieron considerarse de carácter exclusivamente educativo, al no formar parte de ninguno de los niveles, etapas, ciclos y grados en los que se organizaba el sistema de enseñanza, y requirieron de acuerdos de colaboración con el objetivo de aumentar las competencias y capacidades personales de aquellos jóvenes que habían abandonado los estudios. Se puede aseverar que estos programas fueron un éxito porque esta política se prorrogó en el tiempo, hasta la entrada en vigor del Programa de Empleo y Formación⁵¹ en

⁵¹ Decreto 50/1996 de 21 de marzo por el que se regulaba el Programa de Empleo y Formación en el ámbito local dirigido a personas paradas de larga duración (BOPV de 26 de marzo de 1996, n.º 61).

1996, momento en el que los ayuntamientos se vieron obligados a regular las ayudas que proporcionaban para la contratación de personas desempleadas. Posteriormente, este programa se complementó con otros programas de integración, dirigidos a personas desempleadas de larga duración que, además, vivían en zonas especialmente deprimidas.⁵²

A comienzos del siglo XXI dentro del proceso emprendido con la formación ocupacional, se puso en marcha una iniciativa a la que se denominó «Aprendizaje a lo largo de toda la vida», consistente en un nuevo plan de actuación que tuvo sus orígenes en el «Plan Interinstitucional por el Empleo» que había firmado el Acuerdo de Coalición⁵³ para la constitución del nuevo GV. Este Plan contó con el apoyo económico de diputaciones, ayuntamientos y mancomunidades, agencias de desarrollo local y comarcal, universidades, etc., destinándose dichas ayudas al aumento de la empleabilidad, la mejora de las cualificaciones profesionales y demás aspectos comentados anteriormente. Mientras tanto, el sistema de aprendizaje a lo largo de toda la vida estaba dirigido a mejorar la calidad y la eficacia de los sistemas de educación y formación y a promover la equidad, la cohesión social y la ciudadanía activa.⁵⁴

En este contexto de medidas de estímulo para la FP fue muy significativo el papel emprendido por la diputación de Gipuzkoa, que entendió que la capacitación del factor humano resultaba incuestionable en Euskadi, un territorio con escasez de recursos naturales obligado a basar su economía en un sistema productivo en el que los avances tecnológicos, la mejora permanente de la calidad, el marketing, el servicio, etc. sean los ejes en los que sustentar dicho sistema productivo.⁵⁵

⁵² Decreto 332/1995 de 27 de junio por el que se articulaba el Programa Integrado de Acompañamiento a la Inserción Laboral de personas paradas de larga duración (BOPV de 30 de junio de 1995, n.º 124).

⁵³ El Acuerdo de Coalición se suscribió entre el Partido Nacionalista Vasco (PNV) y Eusko Alkartasuna (EA) y contó con el apoyo de Euskal Herritarrok (EH), pero problemas de índole político hicieron que dicho Acuerdo se rompiera durante la legislatura y finalizase sin la presencia de esta última fuerza parlamentaria.

⁵⁴ Decreto 248/2012 de 27 de noviembre por el que se regulan las ayudas para la realización del aprendizaje a lo largo de toda la vida (BOPV de 11 de diciembre de 2012, n.º 238).

⁵⁵ Hilario Murua Cartón, *El modelo vasco de FP: claves de su reciente evolución* (Leioa: Servicio Editorial de la UPV/EHU, 2020).

En consecuencia, para el curso 1985/86 el Departamento de Economía de la diputación ya había realizado un diagnóstico en el que confirmaba la preocupante capacidad del sistema educativo destinado a responder a las necesidades de las empresas⁵⁶ y elaboraba el siguiente diagnóstico demoledor:

- 1) A nivel territorial no existe ni planificación ni coordinación de las acciones de formación continua.
- 2) Los centros de formación continua son escasos y sin una distribución que corresponda a la realidad del tejido económico, ni sectorial, ni comarcamente.
- 3) Existe un divorcio total entre los centros de formación inicial y las empresas.
- 4) Las actuaciones que se vienen desarrollando en formación continua, no responden a las necesidades reales, presentes ni futuras, del territorio.⁵⁷

A la vista de la situación, en 1991, este Departamento celebró una reunión que se denominó «Gipuzkoa con Europa en la Formación Continua», y optó por una solución estructural⁵⁸ con el objetivo de reforzar el papel de la formación continua y la participación de los agentes económicos y sociales de la provincia, de las entidades formativas y de los diferentes niveles de la Administración Pública, junto con representantes del Fondo Social Europeo, CEDEFOP y la Task Force de Recursos Humanos, Educación, Formación y Juventud. El resultado de la reunión sirvió para darse un acercamiento entre todos los agentes implicados y todas las partes asumieran retos sobre sus formas de proceder⁵⁹ y para tener en cuenta cuál debía ser el papel a desempeñar por parte de la Unión Europea a la

⁵⁶ Informe de la Diputación Foral de Gipuzkoa «Gipuzkoa una experiencia singular en Formación Continua»

⁵⁷ Departamento de Economía de la Diputación de Gipuzkoa.

⁵⁸ Esta decisión fue refrendada por Ayuntamientos, Agencias de Desarrollo Comarcal y Departamentos de Educación y Trabajo del Gobierno Vasco a nivel autonómico y por el INEM a nivel estatal.

⁵⁹ Hilario Murua Cartón *El modelo vasco de FP: claves de su reciente evolución* (Leioa: Servicio Editorial de la UPV/EHU, 2020).

hora de diseñar los programas de formación y del reparto de las ayudas económicas y/o estructurales.⁶⁰

Con ello se habían sentado las bases para la puesta en marcha del «Plan de Concertación», en el que participaron el Departamento de Educación, Universidades e Investigación del GV y el Departamento de Economía de la Diputación de Gipuzkoa por parte de la administración, ADEGI, MCC y ASLE por parte de los agentes económicos y ELA, LAB, CC.OO. y UGT por parte de los agentes sociales. Con la creación de este plan quedaba en evidencia la implicación de las instituciones vascas en el desarrollo de la FP y el importante apoyo que este modelo educativo recibía de las mismas.

Frente a esta situación de complicidad entre la FP vasca y sus instituciones en octubre de 1995 se firmó el «Acuerdo Interprofesional sobre Formación Continua en la Comunidad del País Vasco»⁶¹ entre la asociación empresarial Confebask (Confederación Empresarial Vasca) y las centrales sindicales ELA, CC.OO. y LAB, quedando fuera del acuerdo UGT por estar pendiente de lo que dijeran sus órganos de dirección estatal. De esta manera, el GV asumió como compromiso propio el impulso de una formación de calidad para el empleo, lo que suponía implementar una serie de actuaciones tanto en la formación reglada como en la no reglada, la ocupacional y la continua, pero al mismo tiempo se encontró con la siguiente disyuntiva: GV y Diputaciones estaban obligadas a proveer a la formación continua de fondos económicos, pero la competencia sobre FP no reglada todavía no había sido transferida a la CAPV.⁶²

⁶⁰ El Fondo Social Europeo financió numerosos cursos de formación.

El Fondo Europeo de Desarrollo Regional (FEDER) cofinanció los equipamientos destinados a la Formación Continua.

El RESIDER se dedicó a la revitalización de las comarcas afectadas por los procesos de reconversión industrial siderúrgica.

El FORCE se ocupó del desarrollo de acciones piloto y experimentales en políticas de Formación Continua, principalmente en el área de la construcción.

El EUROFORM dirigió su actividad a las acciones de carácter transnacional en el campo de las cualificaciones.

ERASMUS ofreció medidas de apoyo a la movilidad universitaria.

⁶¹ Existieron dos Acuerdos: el Acuerdo Interprofesional citado y otro Acuerdo por parte del Gobierno Vasco en el que ya tomó parte UGT.

⁶² Hilario Murua Cartón, *El modelo vasco de FP: claves de su reciente evolución* (Leioa: Servicio Editorial de la UPV/EHU, 2020).

Hobetuz

En marzo de 1997 se inscribía en el registro de fundaciones del País Vasco la denominada «Fundación Hobetuz – Fundación Vasca para la Formación Profesional Continua», con el visto bueno del consejero de Justicia, Economía, Trabajo y Seguridad Social, del representante de Confebask y los representantes de los principales sindicatos vascos, ELA, CCOO, LAB y UGT.⁶³

La primera medida adoptada fue la creación de un Patronato integrado por cinco miembros designados por el GV, otros cinco por Confebask y otros cinco por las organizaciones sindicales, cuyos objetivos fueron los siguientes:

- 1) Motivar a empresas y trabajadores/as tanto a nivel organizativo como personal para mejorar su competitividad haciéndolo a través de sus planes de formación.
- 2) Actualizar y desarrollar los conocimientos tanto en los cometidos como en las responsabilidades de cada cual en su ámbito de trabajo.
- 3) Convencer a las organizaciones del papel que estaban desarrollando en el proyecto empresarial.
- 4) Dar prioridad a los proyectos de formación continua que evidenciaran su calidad y potenciaran la competitividad del tejido empresarial vasco.
- 5) Normalizar el uso del euskara en el mundo laboral, esto es, su práctica diaria en las relaciones externas de la empresa con sus clientes, proveedores, publicidad, etc.

Con Hobetuz la Formación Continua tuvo que responder a las necesidades que se iban identificando a través de una permanente actividad de prospección en las empresas, con una especial atención a las pequeñas y medianas empresas (PYMES), dadas las carencias que presentaban las mismas en relación a estructuras eficientes para la formación. Consecuentemente, Hobetuz, presentó los planes de formación continua que se repartieron así:

⁶³ Orden de 24 de marzo de 1997 por la que se inscribe en el Registro de Fundaciones del País Vasco la denominada «Fundación Hobetuz-Fundación Vasca para la Formación Profesional Continua / Langileen Prestakuntzarako Euskal Fundazioa», BOPV de 21 de abril de 1997, n.º 74).

- *De empresa*: si solo afecta a una empresa.
- *Agrupados o de grupos de empresas*: si su ámbito incluye a más de una empresa.
- *Sectoriales*: si afectaban a un sector de actividades, coincidiesen, o no, estas con un convenio colectivo.
- *Intersectoriales*: si abarcaban a empresas y trabajadores/as de varios sectores.

Tras esta primera experiencia, Hobetuz realizó diferentes convocatorias para asentar su presencia institucional en Euskadi que fueron dirigidas a otros colectivos como el ámbito de la salud y/o de los riesgos laborales, poniendo a disposición de las empresas y los centros de trabajo los recursos necesarios para que determinados agentes activos, principalmente sindicatos, pudieran asumir su papel en materia de salud y prevención laboral, lo que permitió que buena parte de los/as delegados/as sindicales tomaran parte en esta convocatoria y en el «Acuerdo Interprofesional en Materia de Salud y Prevención de Riesgos Laborales en la Comunidad Autónoma del País Vasco». ⁶⁴

Se puede confirmar que la incorporación de Hobetuz supuso algo más que la mera presencia de un agente asesor, pues finalizó su recorrido convirtiéndose en el ente que ejerció el control, a todos los niveles, de este modelo de formación. Sin embargo, no funcionó con la misma diligencia en todo Euskadi, siendo Gipuzkoa la provincia que, con su Diputación al frente, lideró todas las iniciativas que se pusieron en marcha en aquellos instantes. ⁶⁵

Los Planes Vascos de Formación Profesional

Los Planes Vascos de FP son fundamentales para entender la evolución experimentada por la FP vasca en las últimas décadas. La aprobación del primero de ellos, *Lanbidez*, (1998-2003), supuso un punto de

⁶⁴ Elisabet Errandonea Ulazia y Edurne López Rubia, «El acuerdo interprofesional en materia de salud y prevención de riesgos laborales en la Comunidad Autónoma del País Vasco», *Revista de Derecho Social* 5 (1999): 209-220.

⁶⁵ Hilario Murua Cartón, *El modelo vasco de FP: claves de su reciente evolución* (Leioa: Servicio Editorial de la UPV/EHU, 2020).

inflexión en la trayectoria que iniciada en los años 80 del siglo pasado.⁶⁶ El Plan buscó una solución integral que pasase por un punto de encuentro entre el mundo del trabajo y los centros de FP a través de la gestión de la FP Reglada y la FP Continua. Para ello presentó tres objetivos: el crecimiento de conocimiento en la formación inicial, encontrar puntos de encuentro entre la Formación Inicial y la Continua y adaptar los sistemas de formación permanente. En consecuencia, este primer plan, basado en los principios de integración, prospectiva, capacidad de adaptación, flexibilidad, globalización, calidad y eficiencia, pretendió dar respuesta a la necesidad de integrar la cualificación y la FP, las diversas formas de adquisición de la competencia y la oferta institucional de FP en la búsqueda de un «sistema integrado».

El reconocimiento de las diferentes instituciones y entidades del País Vasco, del mundo de la empresa, de los propios centros de FP y del profesorado que los integra, respecto al éxito que tuvo la implementación del mismo, se focalizó en la constitución de una red de centros integrales que ofrecían Formación Regalada, Continua y/u Ocupacional.

El II Plan (2004-2007), «De la tradición hacia la innovación», consistió no solo en una revisión del plan anterior, sino en una renovación estratégica del mismo. La actualización y mejora de la FP vasca, la puesta en marcha del Sistema Integrado de Cualificaciones y FP, la apuesta por la calidad y el impulso de las TIC, además de una clara apuesta por la calidad, fueron algunos de los ámbitos estratégicos sobre los que funcionó este II Plan.

Pero, además, también se crearon dos importantes entidades: el Observatorio del Sistema Vasco de FP, cuya referencia principal fue la inserción laboral, y la Agencia Vasca para la Evaluación de la Competencia y la Calidad de la FP, cuya labor se centró en la evaluación y certificación de los aprendizajes no formales e informales, dos organismos que contribuyeron de forma notable a la mejora de este modelo educativo. Por su parte, la cuestión de la calidad, que ya había sido planteada en *Lanbidez*, permitió la realización de diferentes auditorías internas en los centros de FP vascos siguiendo el modelo EFQM, auditorías

⁶⁶ Iñaki Mujika y Kike Intxausti, «La transformación de la FP en Euskadi. Los centros de FP como motor de cambio», *Ekonomiaz* 94 (2018), 229.

que fueron llevadas a cabo por la Agencia Vasca para la Evaluación de la Competencia y la Calidad de la FP, pero también por parte de agentes evaluadores externos como Aenor o Euskalit.

Este II Plan estuvo totalmente identificado con la innovación. La innovación fue objeto de atención directa como ámbito estratégico del Plan al acoger aspectos tan dispares como la demanda de nuevas tecnologías para los procesos de formación, la formación permanente del profesorado y los sistemas de aprendizaje, la reformulación de los itinerarios de formación, el enriquecimiento de las relaciones entre los diferentes centros de FP y la empresa, al tiempo que se iba configurando la citada red de centros, etc. Todo ello unido a uno de los hitos más importantes de la FP vasca, la creación de un centro de investigación, desarrollo e innovación que se convirtió en centro de referencia de todos los centros de FP, Tknika.⁶⁷

El III Plan (2009-2011) «La nueva FP: marca de país», se aprobó en un contexto difícil por la situación política de Euskadi,⁶⁸ a la que tampoco ayudó la situación económica mundial, sometida a una profunda crisis. En ese contexto y teniendo como perspectiva el marco ET2020,⁶⁹ este III Plan optó por dar continuidad a los rasgos estratégicos de *Lanbidez*, con ciertas actualizaciones que los tiempos demandaban o incluso con algunos cambios de orientación en función de los desafíos que se presentaban.⁷⁰ Precisamente, dentro de esos desafíos se encontraba la consolidación de Tknika, aspecto que no terminaba de convencer al Viceconsejero socialista José Carlos Crespo «sobre Tknika mantuve una cierta posición de desconfianza, entre otros aspectos por su afán de internacionalización».⁷¹ La desconfianza también recayó sobre los centros

⁶⁷ Centro impulsado por la Viceconsejería de Formación Profesional del Departamento de Educación del Gobierno Vasco, cuyo eje fundamental son la investigación y la innovación aplicada, trabaja día a día con el objetivo de que la formación profesional de Euskadi se coloque a la vanguardia europea.

⁶⁸ Se produjo un cambio de gobierno como consecuencia de la ilegalización de la izquierda abertzale y la confluencia de los partidos llamados constitucionalistas en su interés de desalojar al nacionalismo del Gobierno Vasco.

⁶⁹ Marco para la cooperación europea en el ámbito de la educación y la formación basado en los logros de su antecesor, el programa de trabajo ET2010.

⁷⁰ Iñaki Zabaleta Imaz y Ana Eizagirre Sagardia, *Evolución del modelo vasco de FP* (Leioa: Servicio Editorial de la UPV/EHU, 2020).

⁷¹ Viceconsejero de Formación Profesional y Aprendizaje Permanente (Educación, Universidades e Investigación), desde 09-07-2010 a 27-12-2012 y director de Administración y Gestión Económica

concertados de FP, que al igual que los públicos solicitaron un «documento» que les asegurara su incorporación a los nuevos planes estratégicos que se estaban diseñando.⁷²

En 2014 el GV incluía el IV Plan Vasco de FP (2014-2017), *Hacia una FP diferente*, al considerar el carácter estratégico que este modelo educativo tenía para el país. En un nuevo contexto, los nacionalistas habían recuperado el GV, entendían que la FP constituía un factor crítico en la competitividad del país, más cuando la crisis económica que había surgido en 2008 continuaba golpeando la estabilidad que la ciudadanía vasca demandaba.

Teniendo como referencia la Estrategia Europa 2020 de la Comisión Europea, el IV Plan pretendía dar respuesta a nuevos desafíos, caracterizados por transformaciones aceleradas de carácter global y con efectos sobresalientes en la competitividad de las empresas. Ello tuvo su reflejo en el Sistema Vasco de FP que sufrió una importante metamorfosis en cuestiones como la orientación de la formación, la innovación, el emprendimiento, la internacionalización o la consolidación de esa red de centros de FP. En definitiva, lo que el IV Plan pretendió fue convertirse en uno de los pilares que impulsasen un crecimiento de la economía vasca, pero que, a la vez, fuera inteligente, sostenible e integrable. Desde la Dirección de Coordinación de la Secretaría General de la Presidencia, se observaba dicho plan con cierta incertidumbre,⁷³ pero también es cierto que la FP vasca venía funcionando en los últimos años con un elevado grado de atrevimiento que venía siendo avalado por el éxito, éxito al que los Planes Vascos de Formación Ocupacional habían contribuido decididamente y a los que dedicaremos un trabajo monográfico.

CONSIDERACIONES FINALES

Como se ha señalado a lo largo de todo el artículo, la participación permanente de diversos agentes en la FP vasca, es una raíz histórica que

(Educación, Universidades e Investigación) desde 21-05-2009 a 09-07-2010. Entrevista realizada a José Carlos Crespo, Santander, 18 de julio de 2019.

⁷² Iñaki Zabaleta Imaz y Ana Eizagirre Sagardia, *Evolución del modelo vasco de FP* (Leioa: Servicio Editorial de la UPV/EHU, 2020).

⁷³ Informe de Dirección de Coordinación de la Secretaría General de la Presidencia (2014).

explica el éxito actual de la FP. Dar cuenta de este proceso, ha sido el foco que nos ha permitido destacar ciertos hitos que han marcado la FP vasca. Así, tras unos comienzos y unas trayectorias difíciles, en estos momentos está atravesando por una etapa plagada de éxitos que tienen su origen en el siglo XIX, cuando las provincias vascas, principalmente Bizkaia y Gipuzkoa, realizaron una clara apuesta por incorporarse a los procesos de modernización e industrialización. Una apuesta relevante que implicó a todo un conjunto de agentes económicos, laborales, sociales y educativos cuyo máximo referente fueron las Escuelas de Artes y Oficios. Ni los vaivenes propios de la etapa de la Restauración, ni la dictadura de Primo de Rivera, ni la II República, ni la etapa del franquismo, supusieron un freno para el desarrollo de la sociedad vasca, equiparándose los países más avanzados de Europa. Como hemos señalado, en el marco legislativo, dos ejemplos evidentes de esta afirmación los constituyen las disposiciones legislativas que entraron en vigor bajo la dictadura primorriverista, los Estatutos de 1924 y 1928, o las leyes de 1955 sobre Formación Profesional Industrial y la Ley General de Educación de 1970, ambas publicadas durante la etapa franquista. También es cierto que, a pesar de estos pequeños avances, la entrada en vigor de toda esta nueva normativa tampoco fue suficiente para dotar a la FP de la rigurosidad que precisaba. La FP solo triunfaba allí donde las necesidades sociales, comerciales y educativa lo demandaban.

Por lo que a la FP vasca respecta, en nuestro análisis detectamos dos etapas claramente diferenciadas, la que transcurre entre los inicios de este modelo educativo y la aprobación del Estatuto de Autonomía de 1979, comienzo de la etapa autonómica, y la transferencia de competencias en materia educativa de las instituciones estatales a las autonómicas, y una segunda etapa que arranca en esa década de los años 80 del siglo pasado y pervive en la actualidad. Sin embargo, y a pesar del cambio de contexto histórico y educativo, la diferencia sobre cómo se desarrolla la FP vasca en ambas etapas, es mínima, pues en ambos casos se observa un entramado laboral, institucional y educativo que, en unos casos cuenta con un fuerte apoyo de la institución eclesiástica, en otros de las diferentes administraciones, bien sean estatales, autonómicas o locales y en otros con la ayuda del mundo empresarial, sin olvidar la actuación del Estado, insuficiente, pero vigilante. Es esta pues, la característica más significativa de la FP vasca en comparación con la FP de otras latitudes

del Estado. Pero sin duda alguna, el hito que marcaría el despegue definitivo de toda esta trayectoria, lo constituyó la transferencia de las competencias en materia educativa que permitieron el control de la FP al recién estrenado Gobierno Vasco a comienzos de los años 80.

La continuidad de las decisiones políticas del Gobierno Vasco permitió que surgieran nuevos hitos que han marcado de manera significativa el éxito de la FP vasca. Estamos hablando de la creación de la Viceconsejería de Formación Profesional y Aprendizaje en 2001, de las medidas de apoyo continuas de las instituciones vascas a su FP, del establecimiento de una red de centros públicos y privados que reman conjuntamente en una misma dirección y que, entre otras medidas, la práctica totalidad de ellos han realizado una apuesta decidida por la calidad, por la innovación, por el emprendimiento, y por la internacionalización de la FP y a la puesta en marcha, a finales del siglo XX, de los denominados Planes vascos de FP, etc. Como se puede comprobar en el estudio sobre la FP vasca y su carrera hacia el éxito, estos son algunos de los hitos que han marcado esta trayectoria, una trayectoria sinuosa, plagada de claros y oscuros en sus inicios pero que, con el apoyo incondicional de las instituciones vascas hacia este modelo educativo han hecho de él una referencia a seguir. Dejando al margen el tono laudatorio que pudiera derivarse, lo cierto es que el trabajo común, en euskera *elkarlan*, ha propiciado un marco de reconocimiento del modelo vasco de la FP.

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PAULÍ DÁVILA BALSERA, catedrático emérito del departamento de Ciencias de la Educación de la Universidad del País Vasco / Euskal Herriko Unibertsitatea. Es el investigador principal del Grupo de Estudios Históricos y Comparados en Educación-Garaian (<https://www.ehu.es/es/web/garaian/home>), reconocido por el Gobierno Vasco. Asimismo, es miembro de la Red Láquesis para un futuro «inclusivo con oportunidades» financiado por la Fundación SM. Ha sido el investigador principal en numerosos proyectos de investigación financiados, tanto por el Ministerio como por entidades públicas y privadas. Sus principales líneas de investigación son los derechos de la infancia desde la perspectiva histórica y educativa, la historia de la educación en el País Vasco y el Patrimonio Histórico-Educativo. Ha realizado numerosas publicaciones, en revistas nacionales e internacionales, entre las que destacan la coordinación de los libros «Derechos de la Infancia y Sistemas de Protección» (Madrid, Delta, 2021) o «Derechos de la Infancia y educación inclusiva en América Latina» (Buenos Aires, Granica, 2011), así como diversos artículos y comunicaciones y ponencias sobre diversos temas de historia de la educación. Fue el presidente del XIII Coloquio de Historia de la Educación, bajo el título «La infancia en la historia, espacios y representaciones», así como de las VII Jornadas de la Sociedad Española para el Estudio del Patrimonio Histórico-Educativo, bajo el título «Espacios y Patrimonio Histórico-Educativo». Actualmente es el director del Museo de la Educación de la Universidad del País Vasco (<https://www.ehu.es/es/web/museoeducacion>) de la UPV-EHU y miembro de la junta directiva de la Sociedad Española para el Estudio del Patrimonio Histórico-Educativo (SEPHE).

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TRABAJOS ESCOLARES DE LA MEMORIA EN ARGENTINA. LECTURAS Y PREGUNTAS DESDE EL ESTADO ESPAÑOL SOBRE LA ENSEÑANZA DEL PASADO RECIENTE*

School Labors of Memory in Argentina. Interpretations and Questions about Teaching History Arised from Spain

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Resumen. La extensa y compleja trayectoria que manifiestan las escuelas argentinas en torno al tratamiento de la historia reciente puede servir, con ciertos recaudos éticos, como referente para proseguir los debates en España sobre la didáctica de la Guerra Civil y el Franquismo y sobre la violencia política en la historia. Aquí propongo una lectura particular y somera de aquel caso, partiendo del enfoque transnacional en historia de la educación y considerando tres elementos contrastantes respecto del español: la amplia cobertura, los vínculos entre pasado y presente, y la forja de determinados consensos. A lo largo del repaso diacrónico y sincrónico, en el que incluyo algunos resultados generales de mi trabajo empírico, realizado con un enfoque etnográfico en la ciudad de La Plata, aprecio en estos trabajos escolares de la memoria (i) la interrelación de diversas temporalidades y dimensiones –cognitiva, ética y política–, (ii) la imbricación con tramas concretas de relaciones –institucionales y sociales–, (iii) la persistencia de la cultura escolar y el código disciplinar de la Historia y (iv) los vínculos con las luchas sociales y el poder.

Palabras clave: Enseñanza de la historia; Didáctica; Memoria histórica; Historia transnacional de la educación; Jóvenes.

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Abstract. *The broad and complex evolution shown by Argentinean schools dealing with recent history may serve as a reference point for the ongoing discussion about the didactics of the Spanish Civil War and the Franco Era, as well as of political violence in History, taking caution, of course, with certain ethical considerations. Here I propose a particular and introductory understanding of that case, based on the history of education's transnational approach and three contrasting aspects in relation to the Spanish one: the broad coverage; exchanges between past and present; and the forging of a certain consensus. By means of a diachronic and a synchronic review, including some general results of my own research- ethnographically oriented and carried out in the city of La Plata - we will notice that these labors of memory reveal (i) the interrelation between several temporalities and dimensions – cognitive, ethic, and political –, (ii) the intertwining with specific webs of relations – institutional and social –, (iii) the perseverance of school culture and the disciplinary code of teaching history, and (iv) the links with social struggles and power.*

Keywords: *Teaching history; Didactics; Historical memory; Transnational history of education; Youth people.*

INTRODUCCIÓN

La pregunta sobre cómo educar después de Auschwitz, formulada originariamente por Adorno, sigue teniendo amplia vigencia en distintas partes del mundo.¹ Auschwitz puede tomarse como epítome de la violencia política inaugurada en el siglo XX, el resumen paradigmático de un complejo proceso de ingeniería social fundado en el aniquilamiento sistemático de sujetos individuales y colectivos concretos y múltiples que no solo abrió profundas heridas y fracturas, sino que está disponible para su reciclaje. Como tal incluye, o puede incluir, desde una perspectiva comparada, explorada por la propia historiografía, procesos como la represión franquista o las dictaduras del Cono Sur.² En este trabajo me propongo un intercambio de experiencias en torno a los abordajes de este tema en las escuelas a un lado y otro del Atlántico, particularmente de España y Argentina.

¹ Theodor W. Adorno, *Educación para la emancipación* (Madrid: Morata, 1998).

² Marcel Détienne, *Comparer l'incomparable* (París: Seuil, 2000); Enzo Traverso, *La historia como campo de batalla. Interpretar las violencias del siglo XX* (Buenos Aires: FCE, 2012).

El enfoque que adopto no es, sin embargo, comparativo. Dado que se funda en una investigación sobre las representaciones de estudiantes en torno a la dictadura de 1976-1983 en este último país, parte de un conocimiento específico de este ámbito.³ De hecho, lo que ofrezco es un recorrido por algunos de sus elementos señeros. Pero lo hago desde un contexto diferente, como es el que plantea el caso español.

Propongo, con los recaudos éticos que indico al final de este apartado, una apropiación no instrumental, una traducción o lectura situada, de la experiencia argentina, dada su extensa trayectoria en la práctica y estudio de los «trabajos de la memoria», incluidos los que se desenvuelven en su «dimensión pedagógica».⁴ El objetivo es abundar en los debates sobre la didáctica del pasado reciente en el laberinto español, aunque el esfuerzo debería ser útil también para discutir, en otro casos y en general, la educación histórica en torno a la violencia política, contribuyendo a una internacionalización del problema. En lo que toca a España, esos debates se retrotraen varios años en los distintos territorios del Estado, tanto en lo práctico como en lo teórico, aunque se han visto potenciados en 2022 con la renovación curricular –encuadrada en la Ley Orgánica 3/2020, de 29 de diciembre– y con la aprobación del proyecto de Ley de memoria democrática.⁵ El caso argentino ha suscitado asimismo en este contexto mucho interés, en el ámbito académico y en el periodístico.⁶

³ Esta investigación se ha desarrollado en dos fases. La primera corresponde a los años 2017 a 2019, y fue financiada por el Consejo Nacional de Investigaciones Científicas y Técnicas (Argentina), como beca interna posdoctoral, en el marco del proyecto PICT-2016-2341. La segunda se ha realizado en 2022, como trabajo de campo para el TFM del Máster Euro-latinoamericano en Educación Intercultural de Universidad Nacional de Educación a Distancia (España).

⁴ Elizabeth Jelin, *Los trabajos de la memoria* (Buenos Aires: Siglo XXI, 2002); Elizabeth Jelin, *La lucha por el pasado. Cómo construimos la memoria social* (Buenos Aires: Siglo XXI, 2017), 264-5.

⁵ En Jorge Rolland, «¿Qué dice la escuela cuando el pasado duele? Enseñanza de la guerra civil y el franquismo», *Iber* 92 (2018): 49-54 se incluyen algunas referencias sobre la didáctica aplicada. Más recientemente puede consultarse Isidora Sáez-Rosenkranz y Joaquín Prats (eds.), *Memoria histórica y enseñanza de la Historia* (Gijón: Trea, 2020). Con un enfoque teórico, Raimundo Cuesta, *Los deberes de la memoria en la educación* (Barcelona: Octaedro, 2007) y Fernando Hernández, «La enseñanza de la historia del presente en la España actual: entre el agujero negro y el relato intencional», *Studia Histórica. Historia Contemporánea* 32 (2014): 57-74. La reforma curricular corresponde al Real Decreto 243/2022, de 5 de abril (BOE, 6 de abril de 2022) y el proyecto de Ley de memoria democrática fue publicado en el *Boletín Oficial de las Cortes Generales* el 7 de julio de 2022. Éste exige explícitamente, en su artículo 44, «medidas en materia educativa y de formación del profesorado».

⁶ Entre los primeros destacan Mario Carretero y Marcelo Borrelli, «Memorias recientes y pasados en conflicto: ¿cómo enseñar historia reciente en la escuela?», *Cultura y Educación* 20, no. 2 (2008):

Este tipo de enfoque abunda en la historia transnacional de la educación, tanto en lo conceptual como en lo práctico. Como han mostrado distintas autoras con motivo de otros hitos históricos, numerosos saberes y prácticas educativas desarrollados a uno y otro lado del Atlántico, en países como Argentina, Brasil, Portugal, España, Reino Unido y Francia, son resultado de intercambios de ideas y experiencias a partir de la circulación de personas y materiales en diversas tesituras.⁷ Esto sucede también con el abordaje del pasado reciente de violencia política.

En este trabajo sugiero partir de tres elementos contrastantes. Primeramente, en el caso español suele recalcarse la exigüidad del espacio y tiempo dedicados a este tema –que aquí remite a la llamada Guerra Civil, el Franquismo y la Transición–;⁸ incluso la actual prescripción para que se contemplen diversos asuntos vinculados con él, que, por cierto, la Real Academia de la Historia –en adelante, RAH– ha rechazado, quedará atenuada, pues las comunidades autónomas, a la hora de desarrollar el currículo, solo tendrán que incluirlos en un 50 o 60 % de sus horarios.⁹ En Argentina podemos apreciar una amplia cobertura tanto en lo que toca al currículo como a la celebración de efemérides y participación en actividades de organismos de derechos humanos, o las visitas a los llamados sitios de memoria.

201-215; Julián Chaves (coord.), *La larga memoria de la dictadura en Iberoamérica. Argentina, Chile y España* (Buenos Aires: Prometeo, 2010); Julieta Olaso, *La represión y las luchas por la memoria en Argentina y España* (Madrid: Catarata, 2016); Ana Asunción-Criado, «Políticas de la memoria y políticas educativas. Una comparativa del caso español con el chileno y el argentino», *Coordenadas. Revista de Historia Local y Regional* 8, no. 2 (2021): 102-120. Entre los segundos figura el reciente reporte de La Base#93: «Memoria: Controlar el pasado, dominar el futuro» (18-7-22).

⁷ Diana G. Vidal, «Transnational education in the late nineteenth century: Brazil, France and Portugal connected by a school museum», *History of Education* 46, no. 2 (2017): 228-241.

⁸ Juan Mainer, «El pasado traumático en la Historia escolar española. La presencia de una ausencia», en *Memória com história da educação: desafios eminentes*, dir. Livia Magalhães, Diana Rocha y José Alves Dias (Uberlândia: Navegando Publicações, 2020).

⁹ Artículo 18.3 del citado RD 243/2022 (BOE, 6 de abril de 2022). La RAH rechazó (o recomendó reformular) muchos de sus contenidos, considerando que incurrieran en un descarado «presentismo», pues se limitan a la contemporaneidad y no permiten entender a «España» en su «continuidad», desde «el principio» (en el Paleolítico inferior), como expresa en las alegaciones presentadas el 28 de diciembre de 2021 durante la fase de discusión pública del borrador del Real Decreto (<https://www.rah.es/alegaciones-de-la-real-academia-de-la-historia-al-borrador-de-proyecto-de-real-decreto-por-el-que-se-establece-la-ordenacion-y-las-enseñanzas-minimas-del-bachillerato/>) (última consulta, julio de 2022).

Por otro lado, en los pocos casos en que se contemplan estos contenidos, el enfoque predominante en España es cognitivo: interesa saber –o recuperar y reconocer– qué pasó, aquello que Adorno denominara la «ilustración» sobre lo acontecido.¹⁰ Como veremos, un abordaje prioritariamente centrado en ellos, sin considerar –la discusión sobre– por qué ni el para qué, que implica vínculos con el presente, puede desembocar en una historia contemplativa, descriptiva, sin relación con las realidades de los sujetos. En Argentina los nexos con proyectos políticos particulares –y explícitos– han convertido el tema en un ámbito de interés para amplias capas de la población, más allá de los círculos más inmediatamente comprometidos.

La cuestión, con todo, no se reduce a la mayor o menor atención al tema, ni al enfoque en sí, sino al contexto general en que se desenvuelven los abordajes sobre el pasado reciente. Así, aquella regulación sobre enseñanzas mínimas en el Bachillerato del Estado español comprende también el tratamiento de valores y actitudes, varios de cuyos ítems la RAH propone directamente «eliminar».¹¹ Este rechazo no concierne tanto al carácter neoliberal de la triada, propia de la LOGSE, de contenidos sustantivos, procedimentales y actitudinales, o del enfoque competencial, recomendado por el Consejo de la Unión Europea, en los cuales se funda este Real Decreto, sino más bien a un ambiente generalizado de suspicacia frente a todo lo que tenga que ver con memoria, justicia transicional y educación democrática. Aunque Argentina no es ajena ni a ese enfoque neoliberal ni a esas suspicacias, ni mucho menos, existen unos consensos en torno a las representaciones del pasado y a sus anclajes educativos, establecidos sólidamente al albur de enconadas luchas sociales sostenidas durante cuatro décadas.

A la luz de estas tres cuestiones nos adentramos en los trabajos escolares de la memoria en Argentina, con un enfoque que subraya la recepción o apropiación por parte de los sujetos implicados, de modo que no

¹⁰ Adorno, *Educación*, 26, 90. Ver Rolland, «¿Qué dice la escuela...?».

¹¹ Este es el caso de algunos ítems del Bloque B («Retos del mundo actual»), como el de «Memoria democrática» y, particularmente, el de «conciencia de hechos traumáticos del pasado y de no repetición de situaciones violentas y dolorosas», así como la totalidad de los que componen el C («Compromiso cívico»), porque, a juicio del redactor de las alegaciones, «no es de Historia».

ofrezco un panorama sobre la didáctica aplicada del pasado reciente.¹² Para ello organizo la exposición en dos bloques: un repaso diacrónico del desarrollo de las luchas en torno al pasado reciente en Argentina, incluidas las que se han librado en las escuelas, y un diagnóstico sincrónico sobre la situación en el entorno escolar de este país, recuperando algunas conclusiones de mi propia investigación, referidas a la ciudad de La Plata, capital de la Provincia de Buenos Aires. En este recorrido ampliaré la caracterización de esas tres cuestiones para plantear en las conclusiones cuatro elementos nucleares de una «educación para la emancipación», que es como Adorno designó su propuesta para educar después de Auschwitz.¹³

Antes de comenzar querría indicar algunas salvedades como recaudo frente a un problema ético fundamental en este tipo de trabajos: el extractivismo epistemológico. Aunque es cierto que difícilmente uno puede escapar a las posiciones que ocupa en determinado entramado político-institucional, abordo este estudio sin ánimo de representar ninguna realidad; lo que ofrezco es una visión personal y ciertamente independiente, tanto por deseo propio como por la imposición de determinadas circunstancias que se podrían detallar en otro momento. Por otro lado, quiero reconocer la originalidad en que se han desenvuelto y pugnado las elaboraciones en torno al pasado reciente en el caso argentino, sin pretender enriquecer con ellas el caso español: no son materia para explotar sino para reconocer e inspirar. Como correlato de ello, creo que en este tipo de enfoques es también fundamental respetar la autonomía de cada caso, lo que supone no trasvasar mecánicamente lo que sucede en uno al otro; cada uno tiene sus propias lógicas, aunque existen múltiples vínculos entre ambos, por razones históricas y proyectos comunes.

¹² Véase, por ejemplo, Carolina Kaufmann, *El fuego, el agua y la Historia. La Dictadura en los escenarios educativos. Memorias y desmemorias* (Buenos Aires: Miño y Dávila, 2007); VV. AA., *Pensar la dictadura. Terrorismo de Estado en Argentina. Preguntas, respuestas y propuestas para su enseñanza*, Buenos Aires (Ministerio de Educación de la Nación, 2010); VV. AA., *El uso pedagógico de los archivos: reflexiones y propuestas para abordar la historia, la memoria y los Derechos Humanos* (Buenos Aires: Ministerio de Educación de la Nación, 2021), así como los recursos del portal Educ.ar.

¹³ Adorno, *Educación*, 79.

TRAYECTORIA GENERAL DE LAS LUCHAS EN TORNO AL PASADO RECIENTE EN ARGENTINA

Entre 1976 y 1983 las Fuerzas Armadas instauran un régimen dictatorial en la República de Argentina, impulsando una represión sin parangón, aunque con raíces y filiaciones en los periodos previos –constitucionales o no–, en un contexto de elevada contestación social y organización popular, división del peronismo, acentuada crisis económica nacional e internacional y Guerra Fría. El régimen, autodenominado Proceso de Reorganización Nacional, se tambalea hacia 1982, por el siniestro saldo de lo que presentó como «guerra contra la subversión»; las nefastas consecuencias o componentes del plan económico neoliberal, con una inflación del 343,8% en 1983 y reducción del PIB en torno al 12% entre 1979 y 1982;¹⁴ la Guerra de Malvinas, y la protesta social. Desde entonces arranca un proceso de transición que culmina con las elecciones, convocadas por el jefe de la cuarta Junta militar, Reynaldo Bignone, en septiembre de 1983.

Desde la propia dictadura y a lo largo de las siguientes décadas se libran distintas luchas en torno a la representación de lo acaecido en estos años; unas luchas que tendrán en lo judicial el terreno preferente, pero que también abordarán la cuestión de la transmisión, por ejemplo, en la escuela. En el siguiente repaso diacrónico el papel de los relatos o memorias sociales, que aparecen también en el mundo educativo, es crucial, como síntesis de ciertos sentidos estables o estabilizados: la memoria militar, constitucional y las de los organismos de derechos humanos.¹⁵

Hablo repetidamente de «memoria» porque es un término ubicuo en este contexto, pero no querría cosificarlo. Sin entrar en la polémica sobre sus relaciones con la historia, para no extenderme, alude a elaboraciones en torno al pasado que trascienden –aunque también dialogan con– el saber historiográfico experto e implica complejos procesos sociales e

¹⁴ Marcos Novaro, *Historia de la Argentina 1955-2010* (Buenos Aires: Siglo XXI, 2010), 177, 190.

¹⁵ Ana Pereyra, «La relación de los adolescentes con la historia reciente de Argentina» (Tesis doctoral, FLACSO, 2007), 214-5; Florencia Levin *et al.*, «El pasado reciente en la escuela. Análisis y reflexiones a propósito de las representaciones estudiantiles de la última dictadura militar argentina», *Iber* 55 (2008), 98-100; Daniel Lvovich y Jaquelina Bisquert, *La cambiante memoria de la dictadura: discursos públicos, movimientos sociales y legitimidad democrática* (Los Polvorines: UNGS, 2008); Miriam Kriger, «La enseñanza de la historia reciente como herramienta clave de la educación política», *Persona y Sociedad* XXV, no. 3 (2011), 38-40.

históricos, como queda connotado en la expresión originaria de los «trabajos de la memoria».¹⁶

Antecedentes: fines de los años 70 y comienzos de los 80

Durante el propio periodo de vigencia oficial de la dictadura, circula ampliamente, como puede imaginarse, el relato justificador del propio régimen, que presentaba su labor como la salvación de la patria en un tipo de «guerra no convencional» contra el enemigo interno por antonomasia, la «subversión». La educación y la enseñanza de la historia reciente serán campos y medios privilegiados para la difusión de este relato, a través de un control pleno sobre los actores y las instituciones educativos, no exento de importantes continuidades con periodos previos.¹⁷ En 1979 se reforma el currículum de historia por primera vez desde 1956, que introduce contenidos referidos al pasado reciente en la Secundaria,¹⁸ con el fin de reproducir el relato militar de la «guerra antisubversiva», que los libros de texto comenzarán a incluir desde entonces.¹⁹

En este periodo emergen las luchas mundialmente conocidas de los familiares, y especialmente de las madres, de las personas secuestradas y/o asesinadas por las Fuerzas Armadas y los llamados grupos de tareas, a las que se suman las abuelas de los nietos y nietas apropiados por estos y sus afines, y grupos profesionales, especialmente juristas.²⁰ A pesar de su variedad, van constituyendo, con sus prácticas de resistencia, el germen

¹⁶ Jelin, *Los trabajos...* Esta polémica entre historia y memoria ha sido sintetizada, entre otros, por Enzo Traverso, *El pasado, instrucciones de uso* (Buenos Aires: Prometeo, 2011). Para el caso de España, ver inicialmente Ismael Saz, «Franquismo: pasado y memoria», *Sociohistórica* 21-22 (2007): 187-201 y, en el terreno educativo, Cuesta, *Los deberes*.

¹⁷ Martín Legarralde, «Combates por la memoria. La transmisión de la última dictadura militar en las escuelas secundarias de la provincia de Buenos Aires (2008 – 2013)» (Tesis doctoral, UNLP, 2017), 87-100.

¹⁸ Paula González y Yésica Billán, «La historia argentina reciente en la normativa escolar: de mediados del siglo XX a principios del siglo XXI», en *Saberes y prácticas escolares en torno a la historia contemporánea y reciente. Desafíos en el abordaje del pasado reciente en la Argentina II*, comp. Paula González (Los Polvorines: UNGS, 2021), 22.

¹⁹ Diego A. Born, «Las representaciones de la última dictadura militar. Los textos escolares de Historia en el nivel Secundario de la Ciudad de Buenos Aires, 1976-2009» (Tesis de Maestría, FLACSO, 2010), 46, 54.

²⁰ Cabe citar a las Madres – tanto en lo que toca a la Asociación como a la organización Línea Fundadora – y Abuelas de Plaza de Mayo, la Asamblea Permanente por los Derechos Humanos (APDH), Familiares de Detenidos y Desaparecidos por Razones Políticas, Servicio de Paz y Justicia (SERPAJ),

de un primer relato de los organismos de derechos humanos. Designado por algunos como de un solo demonio, plantea que la dictadura estaba impulsando una represión inédita contra la sociedad y, particularmente, contra los sectores más movilizadas, pero inocentes, a juzgar por la pretendida autoevidencia de sus luchas en favor de la democracia y la libertad.

Para algunas autoras actuales, este relato formaría parte de una «narrativa humanitaria», que tiende a recalcar los rasgos identitarios – sexo, edad, profesión– frente a las filiaciones políticas de las víctimas, en un contexto de expolio y persecución generalizadas de la disidencia y, en general, la militancia política.²¹ Esta narración manifiesta una «crisis de legitimidad del recurso a la violencia», que algunas retrotraen a los años previos a la dictadura.²² Y da paso al énfasis en la cuestión de los derechos humanos, de la que participa el campo de las ciencias sociales.²³ No en vano, esos organismos denuncian las desapariciones en términos de «crímenes de lesa humanidad».

Transición: los años 80

Con el proceso de entrega del poder de la cuarta Junta al gobierno electo de Raúl Alfonsín en diciembre de 1983, el relato militar se perfila para contrarrestar la creciente deslegitimación y garantizar la impunidad, a través del *Informe Final* y la llamada Ley de Pacificación Nacional, conocida como de Autoamnistía.²⁴

El gobierno constitucional, por su parte, impulsa un relato que se suele denominar constitucional o de los dos demonios. Define la contraposición entre dos fuerzas de signo contrario, identificadas con la militancia revolucionaria armada y los grupos represivos clandestinos

el Centro de Estudios Legales y Sociales (CELS), el Movimiento Ecuaménico por los Derechos Humanos y la Asociación de Ex Detenidos Desaparecidos (AEDD).

²¹ Alejandra Dandan, «El estigma sobre la militancia todavía tiene vigencia. Entrevista a Emilio Crenzel», *Página/12* (Buenos Aires), 31 de julio de 2011.

²² Marina Franco, *Un enemigo para la nación. Orden interno, violencia y «subversión», 1973-1976* (Buenos Aires: FCE, 2012), 284-5.

²³ Elizabeth Jelin, «Los derechos humanos y la memoria de la violencia política y la represión: la construcción de un campo nuevo en las ciencias sociales», *Estudios Sociales* 27 (2004): 91-113.

²⁴ Stella M. Ageitos, *Historia de la impunidad* (Buenos Aires: Adriana Hidalgo Editora, 2002), 95-114, 121-4.

–vinculados con las Fuerzas Armadas y policiales principalmente–, que, a pesar de su disparidad, habrían sumido al país en una violencia inaudita pero ajena al conjunto de la población. Se articula con medidas como los decretos 157 y 158, que emite Alfonsín nada más asumir para procesar simétricamente a las cúpulas de las organizaciones guerrilleras y de las Fuerzas Armadas.²⁵ Y se expresa en el informe *Nunca Más*, particularmente en su prólogo y en su difusión televisiva de julio de 1984.²⁶

Esta teoría incide en la narrativa humanitaria, dada la descripción de las víctimas en función del sexo, edad y ocupación, omitiendo las militancias y motivaciones políticas, hasta consagrarla.²⁷ Para Nora Rabotnikof, constituye una memoria de un «pasado-pasado», de un pasado que nunca más debe volver, con tajantes oposiciones entre pasado y presente, democracia y dictadura, autoritarismo y democracia.²⁸

Finalmente, los organismos de derechos humanos, junto con organizaciones de juristas, amplían su actividad, ya en un marco formalmente legal. Dadas las amenazas e intimidaciones, así como el riesgo de procesamiento a líderes revolucionarios –muchos aún desaparecidos–, se va apuntalando el relato de un solo demonio, también sobre la base de la narrativa humanitaria. A este enfoque contribuyen también la producción y difusión de señeras obras cinematográficas, como *Historia oficial* –1985– y *La noche de los lápices* –1986–.

En el mundo educativo colisionan aquí tendencias muy dispares, en cuanto a que coexisten prácticas y agentes impuestos por la dictadura

²⁵ En consecuencia, se detendrá (en algunos casos con prisión provisional), juzgará y condenará en distintos procesos, en 1986, 1987 y 1989, a los dirigentes montoneros Mario Firmenich, Fernando Vaca Narvaja, Roberto Perdía y Ricardo Obregón Cano. El Juicio a las Juntas condenó a los militares Jorge R. Videla, Emilio E. Massera, Roberto E. Viola, Armando Lambruschini y Orlando Agosti en diciembre de 1985.

²⁶ Emilio Crenzel, *La historia política del Nunca Más. La memoria de las desapariciones en la Argentina* (Buenos Aires: Siglo XXI, 2008).

²⁷ Federico G. Lorenz, «El pasado reciente en la Argentina: las difíciles relaciones entre transmisión, educación y memoria», en *Enseñanza de la historia y memoria colectiva*, comps. Mario Carretero, Alberto Rosa y María F. González (Buenos Aires: Paidós), 285; Crenzel, *La historia política*, 60-1, 72, 93, 102.

²⁸ Nora Rabotnikof, «Memoria y política a treinta años del golpe», en *Argentina 1976. Estudios en torno al golpe de estado*, comps. Clara Lida, Horacio Crespo y Pablo Yankelevich (México DF, Colegio de México, 2006), 266.

–incluyendo manuales ya plenamente adaptados a los contenidos de 1979– con las ausencias provocadas por la represión y algunos docentes restituidos en sus cargos.²⁹ Asimismo, una parte del estudiantado reclama homenajear a sus pares y antecesores y visibilizar sus luchas, lo que lleva a la instauración del 16 de septiembre en la provincia de Buenos Aires como día del estudiante secundario.³⁰ En estos momentos prima el fomento de una democratización institucional, como atestiguan los debates del II Congreso Pedagógico Nacional –1984-1988–, dejando a un lado los contenidos y el currículum.³¹ El informe *Nunca Más*, por su parte, recomendaba fervientemente «[e]stablecer la enseñanza obligatoria de la defensa y difusión de los Derechos Humanos en los organismos docentes del Estado».³²

Impunidad: los años 80 y 90

La situación de mediados de los 80 se complica por momentos, en el terreno político y económico, y da lugar a una larga fase marcada por la impunidad.³³

A pesar de la promulgación de la Ley 23.492, de Punto Final, en 1986, seguida de la 23.521, de Obediencia Debida, en 1987, los militares conocidos como «carapintadas» realizan una serie de levantamientos que amenazan el ordenamiento constitucional, acompañados por los atentados terroristas del autodenominado Movimiento por la Dignidad Nacional, entre 1988 y 1990. Además, la desaparición y ejecución secreta de algunos de los participantes en la fallida ocupación del cuartel de La Tablada –Buenos Aires–, por parte del izquierdista Movimiento Todos

²⁹ Born, *Las representaciones*, 57-9, 62-4; Sandra Raggio, «Argentina: el pasado reciente y su gestión en la escuela ¿Hacia una nueva pedagogía?», en *Pedagogía, historia y memoria crítica*, comp. Fabián González y Beatriz Areyuna (Santiago de Chile: Universidad Academia de Humanismo Cristiano, 2014), 130, n. 11.

³⁰ Ley provincial 10.671, de 1988.

³¹ Hilda Lanza, «La propuesta oficial y la propuesta editorial para la enseñanza de la historia en la escuela media» en *Currículum presente, ciencia ausente*. Tomo III. *La enseñanza de la Historia en la Argentina de hoy*, Hilda Lanza y Silvia Finocchio (Buenos Aires, Miño y Dávila, 1993), 49, 82.

³² CONADEP, *Nunca Más. Informe de la Comisión Nacional sobre la Desaparición de Personas* (Buenos Aires, EUDEBA, 2014), 477.

³³ Lvovich y Bisquert, *La cambiante memoria*, 48-9, 92.

por la Patria, constataron el mantenimiento de lógicas represivas inconstitucionales.

La labor de impunidad se amplía con el nuevo presidente, Carlos S. Menem. Abundando en el relato constitucional de los dos demonios, pero con la óptica de una pretendida reconciliación nacional, en el marco de un supuesto futuro prometedor iluminado por las privatizaciones masivas, Menem firma los decretos n° 1002 a 1005 en 1988, más otros en 1990, para indultar a cerca de 1.200 personas condenadas en todos los procesos de la época: cúpulas militares, guerrilleros y *carapintadas*. Este momento es decisivo porque, como vemos en el siguiente apartado, desencadena una movilización social clave en contra; una movilización con la que, aun así, dialoga el gobierno, por ejemplo, al abrir el Museo de la Memoria en la Capital.

En el ámbito educativo se articula la política neoliberal del menemismo con diversas disposiciones que suponen básicamente la delegación de competencias en las provincias y la homologación de la enseñanza pública y privada, además de una tecnificación de la formación, al incidir en los procedimientos y el saber experto, por ejemplo en Historia.³⁴ Sin embargo, incorpora los periodos recientes, con un afán democratizador, a través de un desarrollo curricular concreto, especialmente dirigido al tercer ciclo de la Enseñanza General Básica y el Polimodal.³⁵ La ciudad de Buenos Aires, que se convierte en Capital Federal con un ejecutivo y legislatura propios, no renueva los contenidos hasta 2009.³⁶ Por último, en 1996 se aprueba, también en la provincia de Buenos Aires, el 24 de marzo, aniversario del golpe de 1976, como fecha clave para tratar en las escuelas.³⁷

³⁴ Reforma de la Constitución, Ley de Transferencia de Servicios Educativos (Ley 24.049), Ley Federal de Educación (Ley 24.195) y Ley de Educación Superior (Ley 24.521), a las que se añaden las de las provincias, por ejemplo, en Buenos Aires (Ley Provincial de Educación, n.º 11.612). Ver Legaralde, *Combates*, 83.

³⁵ González y Billán, «La historia argentina», 28-30. Como recogen estas autoras, entre el léxico circulante encontramos alusiones a los «golpes militares», «la última dictadura militar» y «la violación de los derechos humanos» (Contenidos Básicos Comunes de la EGB en la provincia de Buenos Aires) y «terrorismo de estado» (CBC del Polimodal de la provincia de Buenos Aires).

³⁶ Nadia E. Zysman, *De la «subversión marxista» al «terrorismo de Estado». Representaciones de la última dictadura militar en las narrativas históricas de la escuela media argentina (1983-2009)* (Córdoba: Editorial Universitaria Villa María, 2015), 282-4.

³⁷ Ley 11.782.

Resistencias y «boom de la memoria»: los años 90

Los años 90 en Argentina también son los del «boom de la memoria».³⁸ Aunque el fenómeno se conecta con procesos más generales, que autores como François Hartog denominaron como «ola memorialista»,³⁹ en el caso argentino concierne a una sólida resistencia frente a las políticas de impunidad repasadas previamente; entrañan un esfuerzo asociativo y, por primera vez, también académico «desde abajo» que constituye el momento clave en la formación de un consenso general que se mantiene hasta hoy.⁴⁰ Algunos autores lo vinculan con el escenario de creciente deterioro de la situación socioeconómica, que habría proyectado un futuro poco promisorio.⁴¹ Influyeron asimismo las revelaciones y confesiones de participantes en la represión de la dictadura, como Adolfo Scilingo y Antonio Pernías, así como los juicios en el extranjero y la escenificada autocrítica de militares como Martín Balza.⁴²

Este es el momento en que la categoría de memoria emerge como objeto de trabajo militante y de políticas públicas, por ejemplo en torno a la Secretaría de Cultura de la Capital Federal.⁴³ Al hilo de la actividad de antiguos y nuevos organismos de derechos humanos y otras agrupaciones, como Hijos por la Identidad y la Justicia contra el Olvido y el Silencio, y también de ciertos trabajos académicos, se irá perfilando también un nuevo relato, denominado militante, que considera que la dictadura se habría dirigido a aniquilar a las organizaciones revolucionarias –fueran armadas o no–, como parte de un programa de reconfiguración global del país para implantar el neoliberalismo.⁴⁴ Ello constituía una

³⁸ Lvovich y Bisquert, *La cambiante memoria*, 59-77.

³⁹ François Hartog, *Regímenes de historicidad: presentismo y experiencias del tiempo* (México: Universidad Iberoamericana, 2007), 25, 128.

⁴⁰ Jelin, «Los derechos humanos», 101.

⁴¹ Carretero y Borrelli, «Memorias recientes», 208.

⁴² Lvovich y Bisquert, *La cambiante memoria*, 62.

⁴³ Ana Guglielmucci, *La consagración de la memoria. Una etnografía acerca de la institucionalización del recuerdo sobre los crímenes del terrorismo de Estado en Argentina* (Buenos Aires: Antropofagia, 2013).

⁴⁴ Mauricio Chama y Hernán Sorgentini, «Los estudios sobre la memoria del pasado reciente argentino», en *Transiciones, memorias e identidades en Europa y América Latina*, eds. Juan I. Piovani, Klara Ruvituso y Nikolaus Herz (Madrid y Frankfurt am Main: Iberoamericana y Vervuert, 2016), 80.

vuelta de tuerca al relato de un solo demonio y desafiaba la narrativa humanitaria, proponiendo una «narrativa de la continuidad histórica» en torno a estas «memorias de la política».⁴⁵

Como parte de estas líneas de continuidad, las organizaciones y actores memorialistas irán combinando hasta el día de hoy las representaciones sobre el pasado reciente con alusiones a la política económica del momento, los derechos de los pueblos originarios, las disidencias sexuales y muy especialmente el problema de la «violencia institucional» contemporánea en los barrios populares y villas, cernida sobre las víctimas del «gatillo fácil», tradicionalmente relegadas no solo por ser pobres –y tachadas de culpables–, sino también por corresponder a la «democracia».⁴⁶

Al hilo de la «consagración pública» de la memoria, la cuestión de la transmisión será central, y por ello distintas iniciativas empezarán a insistir en la importancia de «pasar la posta».⁴⁷ Organismos surgidos en estos momentos, como la Subsecretaría de Derechos Humanos y Sociales, la Comisión Pro Monumento a las Víctimas del terrorismo de Estado y la Comisión Provincial por la Memoria de Buenos Aires –en adelante, CPM–, articularán importantes actividades, por ejemplo de musealización y patrimonialización del pasado reciente.

La historiografía dedicada a abordar las últimas décadas vive un cierto desarrollo frente a la parálisis de los años previos, sobre todo en torno al vigésimo aniversario del Golpe;⁴⁸ un desarrollo motivado en parte «desde *fuera* del campo académico».⁴⁹ Los manuales escolares se hacen eco de él, así como de la movilización general en torno a la «memoria» del pasado reciente, trascendiendo en algunos casos el planteamiento cientificista de la nueva legislación; éste sería el punto de inflexión fundamental en la evolución de los manuales escolares de las últimas décadas.⁵⁰

⁴⁵ Rabotnikof, «Memoria y política», 274-5.

⁴⁶ CORREPI, *30 años en las calles contra la represión. Antirrepresivo 2021* (Buenos Aires: Autoedición, 2021), 10-1.

⁴⁷ Guglielmucci, *La consagración*, 70.

⁴⁸ Por ejemplo, Hugo Quiroga y César Tcach (comps.), *A veinte años del golpe. Con memoria democrática* (Rosario: Homo Sapiens, 1996).

⁴⁹ Roberto Pittaluga, «Notas sobre la historia del pasado reciente», en *Historia, ¿para qué? Revisitas a una vieja pregunta*, ed. Jorge Cernadas y Daniel Lvovich (Buenos Aires: Prometeo/UNGS, 2016), 131.

⁵⁰ Born, *Las representaciones*, 98-9, 130-1.

Una parte importante del cuerpo docente hizo un trabajo sustancial para resignificar la dictadura como un régimen intrínsecamente ligado al «terrorismo de estado»,⁵¹ cosa que vimos que se reflejó en el campo curricular.

Culminación de la consagración y estatización de la memoria: los primeros 2000

A partir de los gobiernos de La Alianza –1999-2001– y aquellos posteriores a la crisis de 2001, como el de Eduardo Duhalde –2002-2003– y, sobre todo, Néstor Kirchner –2003-2007– y Cristina Fernández de Kirchner –2007-2015–, se profundiza el proceso de consagración o, como expresa Ludmila Da Silva en el prólogo de la etnografía de Ana Guglielmucci, «estatización» de la memoria.⁵²

En este marco, especialmente con el gobierno de Néstor Kirchner, la memoria constitucional se mantiene, en lo que toca a la defensa genérica del estado de derecho y la democracia liberal, pero se combina con las memorias militantes, que de ese modo se oficializan; su mejor expresión es, de nuevo, el *Nunca Más*, pues en el nuevo prólogo de 2006 se reivindican las luchas de las organizaciones políticas y sociales de los años 70, con las que se entronca genealógicamente el propio presidente, y además se alude explícitamente a la «enseñanza de la historia».⁵³ Se trataría de un relato fundacional, que no debe desligarse de la profunda crisis de legitimidad del sistema liberal republicano con motivo de la crisis de 2001.

La cuestión trascendental de esta fase fue el largo camino que condujo a la derogación de las leyes de impunidad en 2003 y 2005 y de los decretos de Menem en 2010, con nuevos juicios condenatorios, a pesar de la desaparición o asesinato de testigos clave, como Silvia Suppo y Jorge Julio López.

La labor en el terreno de la educación durante estos años es ingente. El Instituto Espacio para la Memoria, creado en 2002, nucleará la gestión de los sitios de memoria en la Capital, a los que se añaden decenas

⁵¹ Zysman, *De la «subversión»*, 290-1.

⁵² Guglielmucci, *La consagración*, 11, n. 4.

⁵³ CONADEP, *Nunca Más*, 8.

musealizados por todo el país. La Subsecretaría de Derechos Humanos de la Nación se eleva al rango de Secretaría y se instaura el Día Nacional de la Memoria por la Verdad y la Justicia –24 de marzo–, según la Ley 25.633, que también alienta su abordaje en las escuelas. La CPM inaugura en 2002 su señero programa Jóvenes y Memoria;⁵⁴ es la institución más explícitamente comprometida con el trabajo de los vínculos entre pasado y presente en torno a la violencia institucional.⁵⁵ Durante los gobiernos kirchneristas, además de las políticas que sostienen el esfuerzo judicial, se crea el Espacio para la Memoria y para la Promoción y Defensa de los Derechos Humanos en la antigua Escuela de Mecánica de la Armada, uno de los mayores centros clandestinos de secuestro, detención y asesinato de la dictadura, donde desde entonces se realizan señaladas actividades, como el Seminario Internacional Políticas de la Memoria.

En 2006 se aprueba la Ley 26.206, de Educación Nacional, que contiene una referencia explícita a la enseñanza de la historia reciente y la dictadura –artículo 92c–. Esta apelación, como los desarrollos curriculares subsiguientes, recoge el trabajo de los Núcleos de Aprendizaje Prioritario de 2004, 2006 y 2012.⁵⁶ En Capital Federal, finalmente se renuevan los contenidos de historia, entre los que se incluyen los de las etapas recientes.⁵⁷ También proliferan programas que promueven la formación docente continua y la producción y difusión de materiales para la escuela, a cargo de múltiples agentes e instituciones –organismos de derechos humanos, sindicatos, secretarías y direcciones–,⁵⁸ como el de *Educación y Memoria*, del Ministerio de Educación de la Nación.⁵⁹

Aquí se desatan algunas pugnas en el campo académico, pues, aunque la historia reciente sigue creciendo, la Academia Nacional de la Historia y reconocidos historiadores claman contra el presentismo y la

⁵⁴ Sandra Raggio, «Transmisión de la memoria: la *experiencia* en el encuentro con Otros», *Aletheia. Revista de la Maestría de Historia y Memoria de la FaHCE* 7, no. 14 (2017).

⁵⁵ Véase la revista *Puentes* (La Plata), por ejemplo, los números 15 y 26.

⁵⁶ González y Billán, «La historia argentina», 31-2, 36.

⁵⁷ Zysman, *De la «subversión»*, 232.

⁵⁸ Zysman, *De la «subversión»*, 236-8.

⁵⁹ Por ejemplo, VVAA, *Pensar la dictadura*.

pérdida de autoridad, como explica De Amézola.⁶⁰ En el espacio público, por ejemplo la prensa, emergen ciertos relatos, vinculados con la memoria militar y también con la constitucional, que impugnan las políticas públicas y actividades de los organismos por ser, supuestamente, totalitarias y parciales.⁶¹

Neoliberalismo y pasado reciente: desde 2015

Con la elección de Mauricio Macri como Presidente, a partir de una coalición que impulsará un nuevo proyecto neoliberal, se producen desplazamientos importantes en el campo de la memoria oficial. Se retoman elementos de la constitucional, sobre todo los dos demonios, y se pretende una reconciliación fundada tanto en la «historia completa» como en altas dosis de negación, que incluye, por ejemplo, la cifra de los 30.000, cuestionada por el propio presidente.⁶² Con ello, se impugnan la política de derechos humanos y la memoria oficial de los años del kirchnerismo, aspirando a una ruptura con ellas y a capitalizar una sensación de cansancio –en verdad, de rechazo– respecto del «curro de los derechos humanos», como los sectores más reaccionarios acostumbraron a descalificar la memoria como política de estado.

A pesar de todo, esta se mantiene como tal, por ejemplo en el Plan Nacional de Acción en Derechos Humanos,⁶³ por más que su presupuesto

⁶⁰ Gonzalo De Amézola, «La Historia que no parece Historia. Sobre la enseñanza escolar de la Historia del presente en la Argentina», *Revista de Teoría y Didáctica de las Ciencias Sociales* 8 (2003), 18-9. Otros defendieron posturas opuestas, como los firmantes del manifiesto de 2015 «La democracia se construye con memoria y con justicia». Son interesantes las «intervenciones» recogidas por Alejandra Oberti y Roberto Pittaluga, «Apuntes para una discusión sobre la memoria y la política de los años 60/70 a partir de algunas intervenciones recientes», *Sociohistórica* 38 (2016).

⁶¹ Este es el caso de algunos editoriales de *La Nación*, por ejemplo, en 2006 («La memoria histórica de los argentinos», 19 de marzo; «La memoria ejemplar», 22 de marzo; «Cuando se deforma la verdad», 24 de mayo), de las diatribas de Cecilia Pando y otros integrantes de la Asociación de Familiares y Amigos de los Presos Políticos de Argentina y las proclamas lanzadas en convocatorias como la de los 25 de mayo en la Plaza San Martín de Buenos Aires.

⁶² Federico Lorenz, «¿Por qué vuelven los 70?», *Le Monde diplomatique* (ed. Cono Sur) 213, marzo de 2017. Estas tendencias las ilustran, de nuevo, algunos editoriales de *La Nación*, por ejemplo «No más venganza» (23 de noviembre de 2015) y «Derechos humanos que recortan la memoria» (16 de diciembre de 2017). En otros diarios, como *Clarín*, enfrentado con Cristina Fernández de Kirchner por la Ley 26.522, de Servicios de Comunicación Audiovisual (2009), encontramos expresiones similares (25 de marzo de 2017). Este periodo lo analiza preliminarmente Wechsler (2020).

⁶³ *Primer Plan Nacional de Acción en Derechos Humanos 2017-2020* (Ministerio de Justicia y Derechos Humanos, Presidencia de la Nación, 2017), 7.

fuera reducido un 15%.⁶⁴ Y la oposición a algunas de aquellas medidas y declaraciones, además de la continuación de los procesos judiciales y el mantenimiento del ordenamiento legal básico, manifiestan la perduración de los consensos.

Los trabajos escolares en torno al pasado reciente siguen los lineamientos curriculares de la fase previa y muchas de las prácticas ya tradicionales –por ejemplo, en torno a las efemérides–, que vemos más detalladamente a continuación, si bien no exentas de sonados y publicitados conflictos, como el caso de la maestra de La Boca, que difundió en su aula un vídeo justificativo del golpe de estado de 1976.⁶⁵ Por lo demás, el día a día se vio jalonado por los conflictos salariales –las «paritarias»– y los proyectos de evaluación de inspiración neoliberal del gobierno nacional.

APUNTES SOBRE LOS TRABAJOS ESCOLARES DE LA MEMORIA EN ARGENTINA

Para disponer de una panorámica sincrónica sobre la situación de los trabajos escolares de los últimos años podemos acudir inicialmente al relevamiento de la Universidad de Buenos Aires realizado en 2015 con estudiantes del último año de la Secundaria en escuelas públicas de 37 localidades de toda la República.⁶⁶ En él se aprecia que la escuela es la principal instancia de transmisión, ya que es el lugar en el que primero –56,8%– y de manera más frecuente –68,2%– han oído hablar sobre la dictadura los y las estudiantes, mientras que son solo unos pocos los que jamás han tratado el tema en ella –1%–.⁶⁷

En cuanto a las memorias sociales que imperan, en este y otros estudios destaca la constitucional, seguida de la de un solo demonio.⁶⁸ Asimismo, la

⁶⁴ *La Nación*, 29 de octubre de 2016.

⁶⁵ *La Nación*, 28 de marzo de 2017.

⁶⁶ VV. AA., *Las representaciones de los jóvenes sobre el pasado reciente. Relevamiento nacional* (Buenos Aires: Ministerio de Educación de la Nación, 2015).

⁶⁷ VV. AA., *Las representaciones*, 8-9, 12.

⁶⁸ Pereyra, *La relación*, cap. 8; Levin *et al.*, «El pasado», 98-100; Kriger, «La enseñanza», 44-5; Viviana Pappier, *¿Cómo se enseña la última dictadura a los jóvenes?* (La Plata: UNLP, 2022), 188, 263-4; Gonzalo De Amézola, «¿Qué saben los estudiantes secundarios de la última dictadura?», *Clío & Asociados. La Historia enseñada* 27 (2018), 37, 40.

narrativa humanitaria habría retrocedido en algunos casos en favor de las apelaciones a las militancias de las víctimas.⁶⁹ Sin embargo, también se documenta un cierto eclecticismo o yuxtaposición de elementos narrativos de unas y de otras,⁷⁰ que muchos conectan con ciertas derivas banalizadoras y mitificadoras.⁷¹

Para profundizar en el diagnóstico es fundamental también analizar las prácticas. Silvia Finocchio repasa los aspectos positivos y negativos en el uso de determinadas «entradas educativas».⁷² Reconoce la enorme difusión que ha tenido el informe *Nunca Más*, pero opina que se ha sobredimensionado la importancia del testimonio para entender el periodo y se han sobrecargado de moral las aproximaciones. Respecto a las rondas de las Abuelas de Plaza de Mayo, valora el reconocimiento a este colectivo, pero lamenta la fetichización de imágenes y textos, reduciendo la enorme diversidad de luchas a la Asociación de Abuelas y a contemplar la suya como algo desligado del presente. Finalmente, la citada película *La noche de los lápices* difunde rápidamente el horror, empleando además una herramienta familiar para los estudiantes, aunque no lo inserta «en una compleja trama histórica y política».⁷³

En este sentido, se aprecia que, junto con la ampliación y enriquecimiento crecientes –si bien no lineales– del marco de los trabajos escolares de la memoria en Argentina, a través de las normativas, materiales didácticos y prácticas diversas que hemos repasado, su despliegue constata problemas importantes, aunque representan avances impensados en otros contextos.⁷⁴

⁶⁹ Levin *et al.*, «El pasado reciente», 96; Kriger, «La enseñanza», 45-6; VVAA, *Las representaciones*, 11.

⁷⁰ Pappier, *¿Cómo se enseña?*, 253.

⁷¹ Pereyra, *La relación*, 339; Levin *et al.*, «El pasado reciente», 96; Diego Higuera, *La escuela ante la transmisión del pasado reciente argentino: sentidos comunes, dilemas de la representación y los desafíos del presente* (Buenos Aires, Libros libres, 2010), 96.

⁷² Silvia Finocchio, «Entradas educativas en los lugares de la memoria», en *Historia reciente. Perspectivas y desafíos para un campo en construcción*, comps. Marina Franco Florencia Levin (Buenos Aires: Paidós, 2007), 253-77.

⁷³ Finocchio, «Entradas», 276.

⁷⁴ El siguiente repaso se inspira en Jorge Rolland, «Deberes de memoria en las escuelas: una revisión crítica para la construcción democrática a partir del caso argentino», *Enseñanza de las Ciencias Sociales* 19 (2020), desde donde se puede ampliar la bibliografía. Hay que señalar que la inmensa mayoría de los estudios están centrados en grandes ciudades (Capital Federal, La Plata, Rosario y

Entre esos problemas habitualmente se señala la escisión entre pasado y presente, con oposiciones tajantes entre dictadura y democracia. Se subraya igualmente la falta de agencia o el reconocimiento de agentes concretos. Además, tiende a predominar el horror, hasta el punto de tornar estos pasados «inefables». ⁷⁵ Finalmente, los procesos históricos se presentan a menudo en un sentido moral –en términos de luchas entre buenos y malos, conflictos en torno a ideales genéricos y autoevidentes–, sin causas históricas concretas, de modo que eventos decisivos, como el golpe de estado del 24 de marzo de 1976, son entendidos como un «rayo en cielo sereno». ⁷⁶ Como contracara, algunos estudiantes parecen percibir el tema como si no tuviera relación alguna con sus intereses, convertido en un deber típicamente escolar, o sea, como «deberes». Y lo pueden ver como algo impuesto desde fuera, quejándose de la cristalización de la memoria, del «careteo» de ciertos temas y eslóganes, como el nunca más. ⁷⁷

Cuestión objeto de análisis es, lógicamente, por qué se produce esta situación. Muchos piensan en la persistencia de la cultura escolar y el código disciplinar, según los definieron Julia y Cuesta, ⁷⁸ pues el formato prevalente es el de las efemérides y las clases convencionales, centradas en el discurso del docente y el memorismo. Otros se refieren a la formación docente. ⁷⁹ Algunos se lo achacan a un conflicto generacional, como parte de una «crisis de transmisión», y a elementos supuestamente inherentes a los y las adolescentes. ⁸⁰ Otros, en fin, lo vinculan con cuestiones de amplio calado, como la persistencia de los esquemas

Córdoba), con perfiles socioeconómicos obreros, administrativos y estudiantiles, de modo que, en verdad, no son representativos de lo que sucede en la totalidad del territorio.

⁷⁵ Levin *et al.*, «El pasado reciente», 95.

⁷⁶ Pereyra, *La relación*, 150.

⁷⁷ Pappier, *¿Cómo se enseña...?*, 233. Lorenz, «El pasado reciente», trata este problema en general.

⁷⁸ Dominique Julia, «La culture scolaire comme objet historique», *Paedagogica Historica* 31, no. 1 (1995). Cuesta, *Los deberes*, cap. 1.

⁷⁹ Miguel A. Jara, «Representaciones y enseñanza de la Historia reciente-presente. Estudio de casos de estudiantes en formación inicial y en su primer año de docencia», *Enseñanza de las Ciencias Sociales* 11 (2012).

⁸⁰ De Amézola, «La Historia», 16-7, 21-2.

nacionalistas, el tipo de socialización política e incluso la propia labor de la dictadura.⁸¹

Todos estos problemas de los trabajos escolares de la memoria se matizan si se considera, tanto desde la investigación como desde la docencia, su desenvolvimiento cotidiano, los contextos y situaciones de transmisión y las elaboraciones, consumos o apropiaciones que realizan los sujetos implicados, pues aportan una perspectiva más realista, desde lo que *es* antes que desde lo que *debe ser*.

Ya a principios de los 2000 se realizaron investigaciones empíricas al respecto.⁸² Más recientemente, autoras como Paula González han investigado la resignificación activa que realizan los docentes en determinados «contextos» o «atmósferas de transmisión».⁸³ Enfoques similares, dirigidos no solo a docentes sino también a estudiantes, los encontramos en Viviana Pappier y Diego Higuera. Martín Legarralde se ha ocupado de las «situaciones de transmisión», en el marco de su interés por los «usos del pasado»; situaciones que constatan comportamientos y representaciones no esperados y que impugnan numerosos aspectos de la cultura escolar y las relaciones intergeneracionales. Este autor es muy crítico también respecto de los «contextos específicos de investigación», en cuanto entiende que las «situaciones de entrevista» determinan muchos de los pretendidos hallazgos de los y las investigadoras.⁸⁴

Al mismo tiempo, otros estudios se han preocupado por las relaciones que los sujetos, especialmente estudiantes, establecen entre el pasado y el presente, apuntando a una enseñanza de la historia reciente de tipo ético, o vinculada con la formación ciudadana, por ejemplo, al hablar de pobreza, seguridad y protesta social. Algunos, inspirados en el

⁸¹ Finocchio, «Entradas educativas», 275; Pereyra, «La relación», 345; Higuera, «La escuela», 55; Pappier, «¿Cómo se enseña?», 224.

⁸² Marcela Jabaz y Claudia Lozano, «Memorias de la dictadura y transmisión generacional: representaciones y controversias», en *Memorias en presente. Identidad y transmisión en la Argentina posgenocidio*, comp. Sergio Guelerman (Buenos Aires, Norma, 2001); Mariana Nobile, «La memoria colectiva de los adolescentes de la ciudad de La Plata sobre la última dictadura militar» (Trabajo Fin de Grado, UNLP, 2004); Pereyra, *La relación*.

⁸³ Paula González, *La historia reciente en la escuela: saberes y prácticas docentes en torno a la última dictadura* (Los Polvorines: UNGS, 2014).

⁸⁴ Legarralde, *Combates*, 202, 225.

concepto de conciencia histórica, se han pronunciado en favor de una «ética aplicada».⁸⁵

Siguiendo estos planteamientos, en mi trabajo he podido apreciar cómo, en lo que respecta a los y las estudiantes, más allá de la prevalencia de las oposiciones ontológicas, la falta de agencia y la moralización ya constatadas, sus elaboraciones muestran los siguientes aspectos fundamentales: desarticulaciones entre dimensiones profundas de sus relatos; enconados conflictos con la cultura escolar y el código disciplinar de la Historia; elaboraciones significativas para el desenvolvimiento de las relaciones entre pares, y complejos intercambios entre las cuestiones cognitivas y ético/morales, con importantes implicaciones en sus actitudes políticas. Pude dar forma a estas cuestiones sobre todo con las entrevistas en profundidad que realicé, a raíz de un acompañamiento durante tres meses del año 2018, en dos grupos del último año de la Secundaria, en la orientación de Ciencias Sociales, de una escuela pública y otra privada católica del centro de La Plata, con poblaciones de origen socioeconómico similar.⁸⁶

Por un lado, al distinguir entre una dimensión interpretativa y otra justificativa en los relatos de las y los estudiantes sobre el pasado reciente, pude apreciar que mientras todos ellos proclamaban la necesidad de «recordar para no repetir», su explicación histórica no contemplaba la intervención activa de agentes concretos, ni daba cuenta de un entramado histórico de causas y consecuencias, de manera que fenómenos como la llamada vuelta a la democracia parecían entenderse como resultado del cumplimiento de ciclos, cuando no de designios prefijados. ¿Cómo prevenir si se delega todo al azar o a la teleología? Esta cuestión, lejos de ser un fallo de comprensión, podría seguir indagándose en el marco de las poderosas influencias que tienen determinadas representaciones sociales, más allá de la escuela, así como de una necesaria práctica pedagógica que atienda a las relaciones entre estas dos dimensiones y de la investigación de procesos de desposesión o desencanto vividos por las

⁸⁵ Pereyra, *La relación*, 16, 329; De Amézola, «¿Qué saben?», 40.

⁸⁶ Jorge Rolland, «El pasado presente del futuro. Exploraciones de las relaciones entre escuela e historia reciente», *Aletheia. Revista de la Maestría en Historia y Memoria de la FaHCE* 11, no. 23 (2021). Los nombres de los sujetos participantes han sido modificados para garantizar el anonimato, salvo en el caso de personajes públicos.

juventudes –en mi estudio, más acentuadas en la escuela pública que en la privada–.

Por otro lado, algunas de las manifestaciones de los chicos y chicas, como cuando acaban señalando que, en verdad, no ven sentido al abordaje del tema –a pesar de lo proclamado–, o se muestran críticos con el modo en que se hace, expresan un claro rechazo con respecto al academicismo, cuando no a las rutinas, de la cultura escolar, al referirse a la desconexión con respecto a sus intereses o a la insensibilidad de los y las docentes que llevan a tratarlo como «un tema más» –Justo, entrevista 12-7-18–, y también con respecto al memorismo. Aquí también aprecié diferencias entre una u otra escuela, pues en la privada la crítica no se dirigía contra el propio establecimiento o la manera en que en él se desarrollaban unas costumbres comunes a otras escuelas, sino directamente contra esas «otras» escuelas –«estatales»– en las que «se baja mucha línea política» –Luca, entrevista 28-8-18–. En la escuela pública, por su parte, como atestiguaron otros registros, tales como las producciones escritas, apenas están representadas las categorías que definí para plasmar un apego a la cultura escolar.⁸⁷

En tercer lugar, el propio pasado reciente es a menudo empleado por algunos chicos y chicas para canalizar sus conflictos. Dona se quejaba de la «dictadura de lo políticamente correcto» –expresión que había oído por primera vez en boca de su pareja, un antiguo alumno de la misma escuela– al tiempo que en las observaciones manifestaba un claro aislamiento en el grupo –Dona, entrevista 12-7-18 y observación 31-5-18–. En la escuela privada, Ana no aceptaba el discurso ni de la docente ni de otros compañeros –que cuestionaban la cifra de los 30.000–, pero reconocía que «yo discuto con todos. Ya me viste vos [...]. La profe me debe matar», al contrario que otras compañeras, que «son más tímidas», aunque al final a aquellos con los que discute «se les pasa [...]. No nos llevamos mal» –Ana, entrevista 21-8-18–. Esta chica emplea el tema como un medio más para relacionarse como a ella le gusta o como ella sabe.

⁸⁷ Jorge Rolland, «Mediaciones entre jóvenes y pasado reciente. Un análisis a partir de sus producciones escritas en dos escuelas de La Plata, Argentina», *Clío & Asociados. La Historia enseñada* 30 (2020): 28, fig. 7.

Estas dos cuestiones permiten sugerir que el pasado reciente, como la enseñanza de la historia en general, no puede ni evaluarse ni discurrir en un terreno exclusivamente racional, pues siempre está inserto en tramas de significado, en relación con los vínculos que mantienen, sostienen y desafían los sujetos respecto de la cultura prevalente –en este caso, escolar y disciplinar– y entre sí.

Finalmente, en mi experiencia particular he observado, a partir de un diálogo intertextual con las y los estudiantes, que los intercambios entre pasado y presente, y entre las dimensiones cognitiva y ético-moral, son constantes y complejos. Ante el planteamiento de una situación ficticia de crisis total, algunos, como Justo y Diego, avalan determinados deslindes para reclamar, o por lo menos sugerir, medidas de excepción o directamente inconstitucionales, aunque en otros niveles son perfectamente partidarios de un régimen constitucional y garantista; los ecos de estos deslindes resuenan, no sabemos si como causa o consecuencia, cuando denuncian que en la dictadura «metieron a todos en la misma bolsa» –Justo, entrevista 12-7-18–. Además, se aprecia la persistencia del esquema que más arraigado se encuentra al hablar de historia –entretejido con el nacionalista–: la racionalidad instrumental. Para Diego, la dictadura buscaba, fundamentalmente, una «solución» a los problemas del «país», aunque «a la larga no beneficiaba [...], como que no compensa una cosa con la otra» –Diego, entrevista 21-8-18–. ¿Y si consiguiéramos convencer –nos– de que en ciertas tesituras sí compensa? La pregunta es pertinente para discutir qué tipo de esquemas o racionalidad aplicamos a la comprensión del mundo y de cualquier episodio histórico.

Para terminar, quería recoger un par de notas sobre el citado programa de Jóvenes y Memoria, que hoy funciona en 14 provincias del país, aunque nació en la de Buenos Aires, a instancias de la CPM; un programa que ha cumplido 20 años y en el que han participado 185.000 jóvenes solo en esta provincia.⁸⁸

A este programa concurren numerosas escuelas y organizaciones sociales, por iniciativa propia y con el fin último de presentar un trabajo de investigación sobre el territorio en el que se vive, estudia y trabaja, en

⁸⁸ <https://bit.ly/3B2oJMP>. Véase también Raggio, «Transmisión de la memoria».

formato libre, en la localidad de Chapadmalal, después de un año de actividad y varios encuentros regionales entre coordinadores/as, estudiantes e integrantes de las organizaciones. El planteamiento promueve la libre apropiación del pasado reciente y la vinculación de los y las jóvenes con su comunidad, con un fuerte cuestionamiento de la cultura escolar y la transmisión bancaria, unidireccional y autoritaria. En una entrevista con la directora del programa, esta señalaba que la «pedagogía de la memoria» implica una transmisión desde «un lugar activo», no como «trasvasamiento» –María E. Saraví, entrevista 15-8-18–.

Más allá de los múltiples elementos que nutren este enfoque, sobre los que no puedo extenderme aquí, acaso la cuestión más relevante desde mi punto de vista es su afán vincular; un afán que se torna en logro cuando parece que los y las participantes valoran, ante todo, la dimensión de la socialización. Dado que la cuestión crucial de la labor «reorganizadora» de la dictadura ha sido la ruptura y recomposición del lazo social,⁸⁹ el empeño de un programa como el de Jóvenes y Memoria se dirige al establecimiento de vínculos sociales que refuercen la dimensión comunitaria y el apoyo mutuo, particularmente en contextos de arrasamiento renovado como el que han representado las sucesivas políticas neoliberales, sobre todo las de los 90.

Este afán vincular se aprecia en las palabras de Saraví, pues explica que no se trata de «ver qué pasó [...]. La gran cuestión de la transmisión es: bueno, ¿qué queremos? ¿Por qué queremos transmitir lo que pasó? ¿Por qué es importante?» y en ese sentido se busca «intervenir» para que los y las jóvenes se involucren «desde nuestro presente»: «[L]a experiencia del programa [...] es un poco poder atravesar la experiencia de pensarnos, de repensarnos [...], de involucramiento [...] desde nuestro presente» –M. E. Saraví, entrevista 15-8-18–. El encuentro de Chapadmalal es «en pequeño, cómo pensamos la democracia y cómo creemos que debería ser la convivencia democrática; cómo se resuelven los conflictos, si escuchamos o no al otro, cómo nos paramos frente al otro, en el respeto por las pautas que... consensuamos» –*ibidem*–.

⁸⁹ Alejandro Kaufman, «Violencia y memoria: alrededor de dos textos de la historia reciente», en *Golpes. 1982, 1976, 1980*, Alejandro Kaufman y Carlos Brocato (Buenos Aires: Hekht Libros, 2017), 19.

Faustina y Sofía, dos antiguas participantes –entre 2007 y 2009 la primera y entre 2012 y 2017 la segunda–, luego voluntarias del programa, valoraban «trabajar en equipo» –Faustina, entrevista conjunta 4-7-18–. Sofía rescataba de su participación inicial, al comienzo de la Secundaria, que «los adultos me escuchaban –porque a los 12 años los de 18 son unos adultos–. Y ver que en una instancia de debate vos tenés el mismo lugar que ellos... ya es un montón. Ya sabés que tu voz vale [...]. Después, la organización: cómo [...] nosotros teníamos que organizarnos para ir a hacer entrevistas [...]. Porque no es sólo la autoorganización de tu cotidiano [...], sino en la organización..., en la lucha..., de por qué queremos [...] ese proyecto [...]. Y después... aprender a debatir, al respeto por el otro...» –Sofía, entrevista conjunta 4-7-18–. Esta vivencia socializadora debe seguir siendo indagada, pero aparentemente constituye el móvil genuino para los y las participantes: encontrarse –imbricados e imbricadas con el pasado reciente, como sucedía con Ana–; al fin y al cabo, en los encuentros regionales «los mezclamos en talleres para que interactúen y [...] conozcan a otros [...] se encuentren con otros grupos» y en *Chapa* hay «permanencia», «se quedan a dormir» y «cada uno lleva su trabajo terminado [...] con la idea de poderse lo mostrar a otros» –M. E. Saraví, entrevista 15-8-18–.

CONCLUSIONES: LECTURAS Y PREGUNTAS DE UNA EDUCACIÓN PARA LA EMANCIPACIÓN

Cuatro cuestiones decisivas emergen tanto para investigar los abordajes educativos del pasado reciente, como para progresar en su planificación e implementación; cuestiones que puede ser interesante pensar en el laberinto español.

En primer lugar, lo que se ha observado en muchas escuelas argentinas es que este tema se entretene con cuestiones políticas, éticas y morales. Esta interrelación de dimensiones –que incluye también la emocional y la estética– se acentúa especialmente en los temas que versan sobre violencia política. Pero, en verdad, se produce porque concierne a la conciencia histórica, que, además, pone en marcha tanto los procesos de percepción e interpretación como los de orientación y motivación, y que, aun reconociendo la especificidad del pasado, se dedica a elaborar

la «relación histórica», la tensión particular entre pasado y presente.⁹⁰ La propia investigación histórica se ancla también en un «proyecto social» que remite a diversas dimensiones y temporalidades.⁹¹ Por ello, habría que preguntarse cómo se vinculan siempre los contenidos sustantivos y conceptuales con otros de tipo político y ético, que convierten al pensamiento histórico en un trabajo en el presente.

En este sentido, hemos apreciado que la memoria constitucional se conecta con la refundación oficial durante el alfonsinismo y kirchnerismo, y con los programas neoliberales del menemismo y macrismo; otras memorias, como la militante, entrañan proyectos de resistencia en diálogo con los conflictos actuales. En los trabajos de Nobile, Pereyra, Higuera, Pappier, De Amézola y en el mío los aprendizajes del pasado se vinculan con valores y actitudes políticas concretas. El programa Jóvenes y Memoria se aboca esencialmente a un proceso social de «intervención».

En segundo lugar, cualquier abordaje está siempre anclado en tramas concretas de relaciones; en el caso de la escuela, principalmente institucionales –o académicas– y sociales. Estas tramas son las que constituyen a la escuela como realidad aprehensible, además de transformable. El desenvolvimiento de los trabajos escolares de memoria no atañe única, ni principalmente, a la adquisición de unos conocimientos en el vacío, ni al mayor o menor grado de cumplimiento con unos objetivos muy a menudo establecidos por fuera de ese contexto. Se realiza, y adquiere densos e influyentes significados, *en relación con* las vivencias de los sujetos, sus tensiones, aspiraciones, conflictos, deseos y también determinaciones. Esto atañe –y compromete– igualmente a las y los investigadores, cuyo papel es decisivo en el proceso de conocimiento. Y globalmente lleva a preguntarnos para qué lamentar la banalización y otros supuestos fallos y vicios de estudiantes y docentes si no consideramos con altas dosis de relativismo cultural sus maneras de entender el mundo, sus trayectorias y expectativas, así como qué sentido puede tener documentar las respuestas a nuestros cuestionarios si no reflexionamos e intervenimos sobre lo que representamos en las situaciones de entrevista.

⁹⁰ Jörn Rüsen, «How to make sense of the past – salient issues of Metahistory», *The Journal for Transdisciplinary Research in Southern Africa* 3, no. 1 (2007), 174-6.

⁹¹ Josep Fontana, *Historia. Análisis de pasado y proyecto social* (Barcelona: Crítica, 1999).

En los trabajos de Higuera y Pappier, las complejas elaboraciones de los y las estudiantes cobran sentido en tramas específicas de relaciones; en mi caso, el pasado reciente desempeña un papel destacado en procesos de socialización entre pares y el factor de la titularidad de la escuela influye en las valoraciones de los chicos y chicas sobre el tema. Otros autores, como Legarralde, dieron cuenta de los procesos intersubjetivos en las «situaciones de entrevista». Y el programa Jóvenes y Memoria alienta siempre la libre apropiación del pasado en relación con el territorio que habitan los sujetos, sus deseos, necesidades y conflictos.

Una tercera cuestión clave pasa precisamente por impugnar la cultura escolar y el código tradicional de la historia escolar, pues no solo constituyen una de las tramas más poderosas y persistentes del abordaje escolar del pasado, sino que imponen determinadas prácticas – memorísticas, verticales y negadoras del conflicto, cuando no ritualizadoras, como en el caso específico de las efemérides en Argentina– frente a las que numerosos sujetos reaccionan, explícita o implícitamente, de un modo negativo. ¿Cómo promover una educación para la emancipación de la mano de la transmisión unidireccional, el ánimo de cubrir el expediente y la desposesión de los sujetos respecto de sus procesos de aprendizaje?

Por último, el tratamiento del pasado reciente no puede dejar de lado la historización de las propias categorías y los enfoques con los que nos aproximamos a él, ni los poderosos vínculos con el poder.⁹² Más allá de la forma que pudiera tomar este planteamiento, por ejemplo como teoría de la violencia política, es evidente que habría que partir del propio lenguaje que empleamos. ¿Cómo desconocer la relación entre lo decible, lo no decible y el poder? La importancia de la persistencia de la narrativa humanitaria reside, entre otras cosas, en que acompaña un proceso de oclusión del concepto de revolución y guerra, forjado a sangre y fuego, al menos en el caso argentino, durante los años 70. Las condiciones que permiten que se digan unas cosas y no otras también son parte de la historia, así como de las pugnas por la representación.

⁹² Yannis Thanassekos, «Transmettre l'histoire et la mémoire des crimes et génocides nazis. Connaissance du passé et critique du présent», *Témoigner. Entre mémoire et histoire* 101 (2008), 122-4 ha sido meridianamente claro (y radical) al respecto. También Kaufman, «Violencia y memoria».

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ENSEÑANZA ACTIVA Y TRABAJO. LA EDITORIAL SALVATELLA Y LA RENOVACIÓN PEDAGÓGICA A TRAVÉS DE LA REVISTA AVANTE. ESPAÑA, 1931-1960*

Active teaching and work. The Salvatella Publishing house and pedagogical renewal through the journal Avante. Spain, 1931-1960


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Resumen. Este artículo se enmarca dentro de una investigación más amplia cuyo objetivo principal es analizar el concepto de trabajo que se transmite en la escuela española del primer franquismo, fundamentalmente a través de los textos escolares de lectura destinados a la enseñanza primaria. Una de las editoriales seleccionadas fue Salvatella, en cuyos manuales observamos que el concepto de trabajo aparecía estrechamente vinculado al principio de actividad y de educación para la vida, preceptos sobre los que existían diversas interpretaciones que abarcaban desde la simple actividad manual entendida como trabajo educativo, hasta la actividad intelectual vinculada a la vocación y a la preparación para el trabajo productivo.

Desde que comenzó su actividad en 1922, Salvatella ha dado vida a diversos proyectos, presentándose siempre como una editorial vinculada a la escuela activa. Una de estas realizaciones fue *Avante*, una revista orientada a los maestros que se editó en dos periodos diferenciados: el primero durante la República, entre 1931 y 1936 y el segundo durante la dictadura franquista, entre 1942 y 1960.

* Para la realización de este artículo han sido fundamentales la entrevista telefónica mantenida con el actual director de la editorial Salvatella, Joan Salvatella, y el Catálogo de la propia editorial publicado por su 25 aniversario, al cual he podido acceder gracias al Centro de Estudios sobre la Memoria Educativa (CEME) de la Universidad de Murcia.

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Si partimos de la hipótesis extendida de que el franquismo intentó silenciar todo aquello que sonase a renovación pedagógica, cabe plantearse las siguientes cuestiones: ¿cómo pudo continuar su actividad una editorial con una vinculación tan explícita con la escuela activa? ¿Cómo interpretaba el principio de actividad y de educación para la vida? ¿Cómo se relacionaban estos principios con el concepto de trabajo? Este artículo trata de estas y otras cuestiones relacionadas con la historia de la editorial y sus colaboradores entre 1931 y 1960.

Palabras clave: Franquismo; Enseñanza activa; Editorial Salvatella; Trabajo.

Abstract. *This article is part of a broader investigation that analyzes the concept of work transmitted in Spanish schools during the early Franco regime, mainly through school textbooks for primary education. One of the publishers selected for this work is Salvatella, in whose textbooks we observe the way in which the concept of work during the early years of the Franco regime is closely linked to the principle of activity and education for life. There are various interpretations about these precepts, ranging from manual activity understood as educational work, to intellectual activity linked to both vocation and preparation for productive work.*

Since beginning its activity in 1922, Salvatella has given life to various projects, presenting itself as a publisher linked to the active school. One of these achievements was Avante, a magazine aimed at teachers and published in two different periods: (1) during the II Republic (between 1931 and 1936); and (2) during the Franco dictatorship (between 1942 and 1960).

Building on the widespread hypothesis that the Franco regime tried to silence anything resembling pedagogical renovation, the following questions should be asked, among others: How could a publisher with such explicit links to the active school continue its activity during the Franco regime? How did the publisher interpret the concepts of activity and education for life? How was this concept related to the notion of work? This article deals with these and other questions related to the history of the publisher and its collaborators between 1931 and 1960.

Keywords: *Franquism; Active Teaching; Salvatella Publisher; Work.*

NACE LA EDITORIAL SALVATELLA CON UNA CLARA INSPIRACIÓN: LLEVAR A LAS ESCUELAS LA ENSEÑANZA ACTIVA

La editorial Salvatella tiene su origen en una librería fundada en el año 1870 en lo que entonces era el pueblo de Gràcia (Barcelona). Quince años más tarde sería comprada por Miquel Salvatella, primer miembro

del clan familiar que daría nombre a la empresa. Sin embargo, sería el hijo del fundador, Miquel A. Salvatella i Giralt, quien en 1922 fundaría la editorial y quien finalmente influiría de manera decisiva en la orientación definitiva de la casa, vinculando la producción editorial de manera directa con la *Escuela Activa*.¹ Desde entonces hasta ahora, Salvatella ha venido desarrollando su labor sobreviviendo a las dos grandes etapas en que suele dividirse el estudio de la manualística escolar.²

Dentro de la recién creada editorial su fundador llevaría a cabo diversos proyectos, todos ellos marcados por la impronta de la renovación pedagógica y por la intención de trasladar a los maestros el método de la escuela activa. La primera de estas iniciativas fue la creación de la revista *Avante* en 1928, que, si bien es cierto que surge en un principio a modo de boletín publicitario para dar a conocer la editorial en las escuelas, a partir de 1931 se convertiría en una revista mensual de Pedagogía cuyo propósito era «sugerir, inspirar y guiar en el hacer escolar».³

La revista *Avante* se publicó de forma ininterrumpida hasta 1936, dando a conocer «orientaciones pedagógicas de fácil adaptación, ensayos de métodos nuevos o poco extendidos, prácticas escolares extraídas de la realidad misma y resultados obtenidos por distinguidos maestros en su trabajo cotidiano».⁴ No podemos saber el alcance real que tuvo en cuanto a su difusión, pero sí podemos deducir que se trató de una publicación importante porque entre 1931 y 1936 llegó a publicar cerca de sesenta números. Durante toda esta primera etapa estuvo liderada por los inspectores Aniceto Villar –en la dirección– y Federico Torres –al frente de la redacción–, contando en su equipo con otras importantes figuras del mundo de la Inspección educativa como Adolfo Maíllo, Antonio J. Onieva, Santiago Hernández Ruiz, Antonio Fernández, etc. Otras

¹ Sobre los orígenes de la librería y la editorial Salvatella puede consultarse Isidre Vallés, «L'Editorial Salvatella i l'escola activa», *L'Avenç* 41 (septiembre 1981): 61.

² Escolano señala la existencia de una primera generación de manuales escolares que transcurre entre la revolución liberal y la segunda república, y una segunda generación que, aunque surge después de la Guerra Civil, en España comienza a perfilarse hacia mediados de los años sesenta. Agustín Escolano Benito, «Libros para la escuela. La primera generación de manuales escolares» y «La segunda generación de manuales escolares», en *Historia ilustrada del libro escolar en España*. Vols. 1 y 2, dir. Agustín Escolano (Madrid: Fundación Germán Sánchez Ruipérez, 1997-1998), 19-46 y 19-47, respectivamente.

³ «Una encuesta de Avante», *Avante* 52 (agosto-septiembre, 1932): sin página.

⁴ «Una encuesta de Avante», sin página.

personalidades del gremio de la Inspección prestarían su colaboración de forma más ocasional, entre los que destacamos la figura de Agustín Serrano de Haro.

Llegada la Guerra Civil *Avante* interrumpió su publicación, teniendo que esperar hasta 1942 para volver a ver la luz, eso sí, esta vez en una nueva etapa condicionada por la «limitación de sus contenidos»⁵ y por un cambio en el formato, ya que vuelve transformada en una enciclopedia de actividades para la escuela a la que los maestros podían suscribirse anualmente o comprar los fascículos sueltos.

Hemos de decir que, bajo el mismo título de *Avante*, Salvatella editó además toda una serie de materiales dirigidos a los maestros de la enseñanza primaria. Entre ellos se encuentran la *Colección Avante*, y los *Cuadernos Escolares*, ambos publicados en 1933 y consistentes en una serie de libros en los que se facilitaban instrucciones e informaciones relacionadas con las tareas a desarrollar en la escuela –como ejemplos de trabajos manuales, métodos para confeccionar mapas, etc.–, y se daban a conocer las ideas pedagógicas renovadoras.⁶ Es curioso que estos materiales publicados en 1933 continuaran editándose en 1947, tal y como puede verse en el catálogo de este año.⁷

Junto con la revista *Avante*, Salvatella publicó –también en los años 1934 y 1935– unos fascículos titulados *Lecciones*, cuya pretensión era suministrar a los maestros «motivos, sugerencias, datos, guiones, que facilitan el hacer escolar, de acuerdo con las directrices de la pedagogía de nuestro tiempo». Estos cuadernos monográficos estaban dedicados a temas tan representativos como «El buey», «Los árboles», «La hulla», «Las industrias españolas», etc. que funcionaban como centros de interés a partir de los cuales se desarrollaban todo el contenido y las actividades. A partir de

⁵ Vallés, «L'Editorial Salvatella i l'escola activa», 62. Vallés añade que el régimen franquista también prohibió «su difusión como revista dirigida directamente a las escuelas», sin embargo, en la revista del periodo republicano se indica que funcionaba por suscripción de los maestros, no que llegara directamente a las escuelas.

⁶ Editorial Miguel A. Salvatella, *Catálogo de carácter extraordinario con motivo del 25º aniversario* (Barcelona: Salvatella, 1947), 227.

⁷ Salvatella, *Catálogo de carácter extraordinario...*, 205.

1947 la editorial publicó de nuevo estos cuadernillos, pero en esta ocasión encuadernados en dos volúmenes.⁸

Sin embargo, la editorial Salvatella no agotó sus proyectos en los materiales de *Avante*, sino que llevó a cabo muchas otras realizaciones entre las que creemos conveniente destacar la *Colección Escolar Salvatella*. Bajo este nombre se aglutinan todos los manuales escolares destinados a los alumnos que la casa publicó desde 1930. De este modo, quedaba satisfecha la preocupación de la editorial por «proporcionar a las escuelas libros para los niños, de acuerdo con los postulados de la Pedagogía Activa».⁹ Aunque no vamos a analizar dichos materiales en este artículo, sí queremos destacar que estos manuales fueron redactados por los mismos colaboradores de *Avante*, y muchos de ellos, además de ser publicitados en la propia revista o en la enciclopedia, eran utilizados para articular las lecciones programadas que ofrecían por este medio.¹⁰

LOS COLABORADORES DE AVANTE DESDE LA INSPECCIÓN EDUCATIVA. RUPTURAS Y CONTINUIDADES PEDAGÓGICAS DESPUÉS DE 1936

El equipo que conformaba la redacción de *Avante* estaba compuesto por una plantilla más o menos fija y, teniendo en cuenta que cerca del 50 por ciento de estos autores procedían de la Inspección educativa, nos gustaría destacar brevemente el importante papel que jugó este organismo en las decisiones pedagógicas del periodo que nos ocupa. Nos referimos así a un plantel de pedagogos con muy distinta formación, que realizaron diversas funciones en aras de dar sentido y coherencia al nuevo sistema educativo caracterizado por la heterogeneidad en sus niveles, tipos de escuela, etc.

⁸ Salvatella, *Catálogo de carácter extraordinario...*, 231-233.

⁹ Salvatella, *Catálogo de carácter extraordinario...*, 272.

¹⁰ Aunque en este artículo no se analizan los textos escolares de la editorial Salvatella, si lo hace la investigación más amplia en la que se incluye. Uno de estos manuales especialmente relacionado con el concepto de trabajo que analizamos es el *Libro del Trabajo*, de Adolfo Maíllo, sobre el que puede consultarse el siguiente trabajo: Carmen Diego y Montserrat González, «Adaptar el saber al régimen político: *El libro del trabajo* de Adolfo Maíllo», en *Pedagogías alternativas y educación en los márgenes a lo largo del siglo XX*, coord. Andrés Payá Rico (Valencia: Universitat de Valencia, 2022), 195-199.

Sus competencias iban más allá de la supervisión del cumplimiento normativo, estando directamente relacionadas, entre otras cuestiones, con la orientación y la dirección de las escuelas, la elaboración de un currículum hasta entonces inexistente, la formación del profesorado y, lo que reviste especial importancia para nuestro estudio, la redacción de los textos escolares que se empleaban en las escuelas.

Algunos de estos inspectores, como Antonio J. Onieva, procedían de la Escuela de Estudios Superiores del Magisterio (EESM) y viajaron pensionados por la Junta para Ampliación de Estudios (JAE) a otros países en los que pudieron presenciar algunas de las prácticas educativas más renovadoras. Otros, como Adolfo Maíllo, fueron maestros –mayoritariamente rurales– sin estudios superiores y con una formación pedagógica autodidacta que accedieron al cuerpo de inspectores por oposición libre. En cualquiera de los dos casos, su firme sentimiento de responsabilidad frente al Estado y su compromiso con la educación en todas sus facetas hicieron de algunos de ellos verdaderos «pedagogos orgánicos del Estado» durante el franquismo.¹¹

Para comprender mejor el alcance de la labor realizada por estos inspectores es necesario referirnos aquí al concepto de *cultura escolar* analizado por Agustín Escolano –entre otros–, quien lo ha dividido en tres facetas o ámbitos concretos que facilitan su comprensión y su estudio: la «cultura empírica», creada a partir de la práctica de los profesores y los alumnos en el aula; la «cultura teórica», que emana del conocimiento experto «generado a través de la investigación y la reflexión»; y la «cultura política», vinculada «al discurso y a las prácticas normativas de orden político-institucional».¹² La labor de estos pedagogos orgánicos del Estado tiene incidencia en las tres esferas de la cultura escolar y hace que la convivencia entre ellas sea armoniosa.¹³

Ahora bien, el análisis de estos actores que influyeron en las distintas esferas de la cultura escolar y que colaboraron con la editorial Salvatella

¹¹ Juan Mainer Baqué y Julio Mateos Montero, *Saber, poder y servicio. Un pedagogo orgánico del Estado: Adolfo Maíllo*, (Valencia: Tirant lo Blanch, 2011), 18.

¹² Agustín Escolano Benito, «La cultura de la escuela en el sistema educativo liberal», en *Historia ilustrada de la escuela en España. Dos siglos de perspectiva histórica*, dir. Agustín Escolano Benito (Madrid: Fundación Germán Sánchez Ruipérez, 2006), 24-25.

¹³ Mainer y Mateos, *Saber, poder y servicio...*, 19.

no puede desligarse de ciertas consideraciones sobre el contexto en el que ejercieron dicha influencia. En el caso de nuestro grupo de inspectores, destaca el hecho de que su trayectoria profesional se inició en el periodo de la edad de oro de la Pedagogía española, por lo que –de uno u otro modo– habían confraternizado con las prácticas educativas renovadoras que se englobaban dentro del movimiento de la *Escuela Nueva*. Estas prácticas, que proliferaron en España durante el primer tercio del siglo XX, llegaron a su punto más álgido durante la II República. Sin embargo, como señalan diversos autores, tras la Guerra Civil entraron en un proceso de ocultamiento y de aparente rechazo.

Si tenemos en cuenta que una de las primeras medidas del Régimen triunfante fue llevar a cabo un minucioso proceso de depuración que afectaría a los contenidos de todos los niveles educativos, materiales de enseñanza, profesorado, etc., llama la atención que existiera un elevado porcentaje de este grupo de inspectores cuya trayectoria profesional, no solo no quedó interrumpida tras la victoria franquista sino que, en algunos casos, les llevaría a desempeñar cargos de verdadera responsabilidad e influencia en la Administración educativa.¹⁴ En este sentido podemos afirmar, con Mainer, que «la pretendida dependencia entre una forma de régimen político, su marco legal educativo, el discurso pedagógico y la vida escolar..., está lejos de producirse en la realidad de manera homogénea o automática».¹⁵ Y es que, si bien es cierto que la práctica totalidad de los inspectores que formaban parte del equipo de *Avante* sobrevivieron a la depuración,¹⁶ también existieron casos como el de Santiago Hernández Ruiz, que hubo de tomar el camino del exilio sin que ello significara que la editorial, en la que había colaborado como redactor de manuales escolares, dejase de publicar sus obras ni de contar con sus comentarios sobre otros libros de la editorial.¹⁷

¹⁴ Juan Mainer Baqué, *Inventores de sueños. Diccionario bioprofesional de pedagogos y didactas de Geografía e Historia hacia 1936* (Zaragoza: Institución Fernando el Católico, CSIC, 2009), 140.

¹⁵ Juan Mainer Baqué, *La forja de un campo profesional. Pedagogía y Didáctica de las Ciencias Sociales en España (1900-1970)*, (Madrid: CSIC, 2009), 484.

¹⁶ Dentro de la redacción de *Avante* en el periodo republicano, los inspectores que sobrevivieron a la depuración fueron Adolfo Maíllo, Antonio J. Onieva, Aniceto Villar, Federico Torres y José María Azpeurrutía.

¹⁷ En el Catálogo publicado por Salvatella en 1947 se anuncia el libro *Disciplina Escolar* (1936), de Santiago Hernández Ruiz, aludiendo a «los profundos conocimientos profesionales, la práctica escolar y la observación, siempre aguda y exacta, del autor». Salvatella, *Catálogo de carácter extraordinario...*,

Dejando atrás el proceso de depuración y centrándonos en las transformaciones que el régimen franquista llevó a cabo en el ámbito educativo, nos interesa destacar el supuesto rechazo del movimiento de la *Escuela Nueva* y su, a veces, mal empleado sinónimo *escuela activa*.¹⁸ Sobre este parecer se han pronunciado varios autores. Viñao se refiere al carácter pedagógico innovador en los programas escolares inéditos de 1938, elaborados por una comisión técnica durante el ministerio de Pedro Sáinz Rodríguez. La causa a la que atribuye este hecho es que los miembros de dicha comisión habían cursado sus estudios superiores en la EESM y/o habían sido becados por la JAE para viajar a otros países donde entraron en contacto con las prácticas renovadoras englobadas dentro del movimiento de la *Escuela Nueva*.¹⁹ Por lo tanto, habían recibido una formación y habían vivido experiencias que, de alguna manera, no podían ser desterradas de su concepción educativa de un día para otro.

Por su parte, del Pozo y Braster distinguen tres etapas en función del modo en que la nueva pedagogía franquista acepta o rechaza el movimiento de la *Escuela Nueva*. La primera etapa que señalan transcurre entre 1936 y 1949 y constituye un periodo de «repudio» y «silencio» de dicho movimiento. A veces se menciona la escuela activa, pero no se explican ni sus características ni sus principios y, a pesar de que algunos educadores «se pronunciaron por una razonable actividad» por temor a retornar a la «escuela pasiva y verbalista», la mayoría «identificaron actividad con desenfreno, anarquía e indisciplina».²⁰

Por otra parte, señalan que en esta primera etapa predominaba una única interpretación de la escuela activa: aquella que la concebía como «escuela productiva», emparentándola directamente «con el socialismo, con el comunismo y con las realizaciones de la Unión Soviética». La Escuela del Trabajo de George Kerschensteiner era considerada «el antecedente

235. En la misma fuente (página 41) encontramos una reseña de Santiago Hernández Ruiz sobre el libro *Ingenuidades*, de Antonio Fernández.

¹⁸ Entendemos que la escuela activa es uno de los principios comprendidos dentro de la Escuela Nueva, siendo este un movimiento más amplio.

¹⁹ Antonio Viñao, «Politics, education and pedagogy: ruptures, continuities and discontinuities (Spain 1936-1939)», *Paedagogica Historica* 51, no. 4 (2015): 408-409.

²⁰ M^a del Mar del Pozo Andrés y Sjaak Braster, «El movimiento de la Escuela Nueva en la España franquista (España, 1936-1976): repudio, reconstrucción y recuerdo», *Revista Brasileira de História de Educação* 12, no. 3 (septiembre-diciembre, 2012): 21-22.

directo de esta corriente».²¹ Sobre este punto debemos advertir que, en España, la identificación de la Escuela del Trabajo con la escuela activa ya venía produciéndose desde los años veinte. Lorenzo Luzuriaga, principal introductor del pensamiento de Kerschensteiner en España, aludía a este aspecto declarando que

El término «escuela activa» es una versión francesa, hecha en Suiza, hacia 1918, del vocablo alemán «Arbeitsschule» o «escuela del trabajo», el cual a su vez es una reinención del pedagogo alemán J. Kerschensteiner, quien lo empleó por primera vez en 1907, en una conferencia dada con el título «la escuela del futuro como la escuela del trabajo».²²

El propio Adolfo Maíllo se refiere en *Nociones de Pedagogía* (1935) a «la escuela activa o del trabajo», atribuyendo su creación teórica y práctica a Dewey y a Kerschensteiner.²³

Volviendo a la periodización establecida por del Pozo y Braster, habría que esperar hasta la segunda etapa, que transcurre entre 1950 y 1962, para que se plasmase en los documentos y escritos pedagógicos un incipiente interés por las iniciativas extranjeras, mezclándose «la suspicacia y el entusiasmo» hacia la Escuela Nueva. Algunos pedagogos vinculados a este movimiento fueron incluidos en la lista de aceptados por el Régimen, siendo la primera María Montessori, probablemente por su vinculación con el catolicismo.²⁴ Además, indican que a mediados de los años cincuenta se produjo una reformulación del concepto de actividad «desde una óptica cristiana», que la vinculaba con los adjetivos ‘intelectual’ y ‘espiritual’.²⁵

Teniendo en cuenta todas estas observaciones acerca de las rupturas y continuidades pedagógicas durante el franquismo, es llamativo que la editorial Salvatella manifestara de una forma tan explícita su adhesión a los postulados de la escuela activa, convirtiéndola en su seña de identidad.

²¹ Del Pozo y Braster, «El movimiento de la Escuela Nueva...», 24.

²² Lorenzo Luzuriaga, «La Escuela Activa», *Revista de Pedagogía* 45 (1925): 386.

²³ Adolfo Maíllo, *Nociones de Pedagogía* (Madrid: El Magisterio Español, 1935), 252.

²⁴ Del Pozo y Braster, «El movimiento de la Escuela Nueva...», 26.

²⁵ Del Pozo y Braster, «El movimiento de la Escuela Nueva...», 27-28.

La primera muestra en este sentido son los distintos *slogans* que figuraban en muchas de las contraportadas de sus textos escolares, como «Editorial Salvatella, por y para la escuela activa». El hecho de que este lema continuara apareciendo en los manuales que la editorial editó y reeditó durante el franquismo nos hace preguntarnos si constituye la editorial Salvatella una excepción al citado rechazo mayoritario y a la reformulación de la escuela activa que caracteriza este periodo.

Sobre este parecer, Vallés sostiene que «a pesar del nuevo orden establecido, la editorial continuó su tarea, adaptándose a la situación y no renunciando a los postulados de la escuela activa, aunque estos, en la práctica, quedaron muy restringidos en la escuela por la mentalidad absolutista de los profesores, incluido el de las órdenes religiosas». ²⁶ Por nuestra parte, gracias al mencionado Catálogo de 1947, hemos podido comprobar que, efectivamente, en la segunda mitad de la década de los cuarenta la editorial continuaba aludiendo a la escuela activa como modelo de inspiración. Valga en este sentido las referencias a sus orígenes redactadas en 1947:

Había un plantel de maestros salidos de las Normales en el primer tercio de este siglo con un bagaje vocacional espléndido. Su espíritu se había formado en un ambiente de emoción pedagógica, valga la expresión y llevaban un mucho de hálito quijotesco que los llenaba de ansias de mejoramiento y de impulsos desinteresados.

[...].

Estudió [este plantel de maestros] teorías y métodos, probó, ensayó, quiso plasmar en su escuela aquellas concepciones de gabinete o aquellas instituciones modelo de que le hablaban, y casi siempre salió desalentada. Lo que la realidad daba de sí no era lo que le decían ni lo que ella había concebido. Y es que para poder compaginar la expresión de las ideas con el obrar en la práctica hay que hablar el lenguaje de la realidad y además hay que poseer los medios con que las ideas puedan traducirse en realidades, y a ella, a esa fiada juventud, ni le hablaban el lenguaje de la realidad

²⁶ Vallés, «L'Editorial Salvatella i l'escola activa», 64.

ni le proporcionaban medios con que llevar a la práctica lo que las teorías tenían de practicable.²⁷

Para esta generación de maestros –explica el Catálogo–, la revista *Avante* supuso la clave para poder llevar a cabo los postulados de la escuela activa en sus aulas:

Así se explica que cuando salió a la luz “Avante” tuviera una acogida tan entusiasta y fuera recibida con tan sincero aplauso. Esa juventud a que aludimos se sentía interpretada y comprendida. Nuestra publicación les hablaba un lenguaje liso y llano, decía la verdad cierta y tangible y se movía en un plano de realidades que no estaban acostumbrados a encontrar en otras publicaciones. [...]. Por otra parte, les ofrecía modelos concretos y maneras de actuar contrastadas, con las que podían llevar a la plena realización el espíritu de la escuela moderna, la esencia de lo que se ha dado en llamar **escuela activa**.²⁸

ENSEÑANZA ACTIVA Y TRABAJO. ANÁLISIS DE RELACIONES E IDEAS ENTRE AMBOS CONCEPTOS

Como ya hemos mencionado, el núcleo central de nuestro análisis es la identificación de aquellos principios de la enseñanza activa que intervienen en el concepto de trabajo que suscribe la revista *Avante* durante las dos etapas en que fue editada, analizando las pervivencias –si las hubiera– y las rupturas o los cambios en la idea del trabajo que pudieron producirse.

Sin embargo, para poder establecer adecuadamente las relaciones que existen entre los distintos factores que operan en nuestro análisis, hemos de referirnos previamente a una problemática que influye notablemente en la complejidad de nuestro estudio y que deriva, como ya hemos señalado, de la confusa interpretación de la enseñanza activa que se produce por parte de muchos pedagogos, y que se plasma, bien en el empleo de los términos escuela activa y Escuela Nueva de manera indistinta,

²⁷ Salvatella, *Catálogo de carácter extraordinario...*, 11.

²⁸ Salvatella, *Catálogo de carácter extraordinario...*, 11-12. La negrita es del original.

bien –siguiendo a Luzuriaga– en la identificación de la primera con la Escuela del Trabajo.

Para el interés de nuestro análisis basta con puntualizar que, dentro de lo que nosotros hemos venido denominando *enseñanza activa*, existen dos preceptos estrechamente relacionados: el *principio de actividad* y el de la *educación para la vida*. Según el primero, la participación activa del alumno en su propio aprendizaje mejora la comprensión y el entendimiento. El segundo viene a decir que las actividades educativas deben vincularse a la vida real, donde se produce la conexión con los intereses personales de los alumnos.

Ahora bien, si nuestro principal objetivo está centrado en identificar el tratamiento que la revista *Avante* hace de los principios de actividad y educación para la vida, y cómo estos se plasman en el concepto de trabajo, hemos de referirnos, más detalladamente, al modo en que se produce el enlace entre estas ideas. En este sentido, somos conscientes de que esta relación no es fácilmente perceptible, pero ello no significa que no exista. Esperamos poder aclararla convenientemente.

La vinculación entre *enseñanza activa* y *trabajo* se ha venido produciendo fundamentalmente en dos niveles. Por un lado, surge de la interpretación sesgada de los principios de actividad y de la educación para la vida, según la cual el primero sería identificado con la simple realización manual y el segundo con la enseñanza profesional. La unión de ambos principios daría como resultado la identificación de la enseñanza activa con el entrenamiento de habilidades manuales para aprender un oficio. Este enfoque reduccionista es consecuencia, en parte, de que todos estos conceptos y corrientes educativas procedían de otros países – Estados Unidos, Francia, Alemania, etc.– y su recepción en España se producía mediante las traducciones que realizaban aquellos pedagogos que conocían el idioma. Este filtro idiomático constituía en muchas ocasiones un sesgo informativo, bien porque la traducción era literal, bien porque se suprimía aquello con lo que no se estaba de acuerdo.²⁹

²⁹ Cecilia Valbuena, «Georg Kerschensteiner y la escuela del trabajo: su introducción en España en el primer tercio del siglo XX a través de la figura de Lorenzo Luzuriaga», *Foro de Educación* 16, no. 25 (2018): 73-74.

Por otro lado, la relación entre *escuela activa* y *trabajo* se produce a partir de la adaptación de esos dos mismos principios al campo de la didáctica. En este caso, la participación activa del alumno puede producirse a nivel manipulativo, mediante la realización de experimentos o prácticas relacionadas con algún contenido, o puede darse a nivel intelectual a través de preguntas, trabajos de investigación, lecturas, redacciones, conversaciones, etc. Por su parte, la educación para la vida es entendida como la vinculación de las actividades educativas a la vida real y al entorno inmediato del niño. De este modo, la relación entre enseñanza activa y trabajo en este segundo nivel es más sutil, quedando casi en el campo de la inspiración, el descubrimiento de vocaciones, el despertar de los intereses, etc.

Este segundo nivel en el que los principios de actividad y educación para la vida son interpretados con mayor amplitud es el que prevalece y, por lo tanto, el que nos interesa. Sobre él centraremos nuestro análisis de *Avante* como publicación dirigida a los maestros, defensora de la enseñanza activa desde sus orígenes.

EL PRINCIPIO DE ACTIVIDAD Y LA CONCEPCIÓN DEL TRABAJO EN AVANTE

Antes de proceder al análisis de *Avante* queremos insistir en una primera diferenciación entre la publicación de 1931 y la enciclopedia de 1942, pues si bien es cierto que la primera es una revista especializada en Pedagogía en toda regla, en la que figura la autoría de los artículos y los miembros que componen el equipo de redacción, en el caso de la segunda no podemos saber –aunque sí lo intuimos– quién estaba al frente de ella o quiénes eran los redactores. El hecho de que Aniceto Villar, Federico Torres, Adolfo Maíllo, Antonio Fernández o Gregorio Sierra –entre otros– continuaran formando parte del grupo de autores de textos escolares de Salvatella que eran utilizados en las lecciones preparadas por la enciclopedia *Avante*, nos hace pensar que pudieran ser ellos mismos los que estuvieran detrás de esta publicación.

Por otra parte, así como la revista de los años treinta se encuentra organizada y fechada adecuadamente, de forma que cada tomo comprende un año de publicación y en cada número se especifican los meses a los que corresponde, en el caso de la enciclopedia no podemos establecer

con certeza esta información. En este caso se trata de una publicación, muy extensa, organizada en veintiocho tomos compuestos de un número variable de fascículos. Sabemos que comienza a publicarse en 1942 y que hasta 1946 lo hace de forma ininterrumpida, publicándose un total de cinco tomos. Tras dos años sin editarse, *Avante* vuelve en 1949 con la publicación del tomo VI.³⁰ A partir de entonces deja de aparecer la fecha de publicación hasta el tomo XXVIII, en el que aparece como fecha de depósito legal el año 1961. Por otra parte, no sabemos realmente cuántos fascículos se publicaban al año, por lo que nos ha resultado imposible calcular las fechas de los tomos VII al XXVIII.³¹

Para salvar esta dificultad hemos buscado indicios en las lecciones que nos permitieran intuir, si no el año concreto, la fecha aproximada. De este modo, hemos podido situar el tomo XIV en torno a 1953, gracias a que en él aparecen varios apartados en los que se alude a los Cuestionarios Nacionales de 1953.

Una vez expuestas estas diferencias y dificultades, pasamos a exponer los resultados del análisis de ambas publicaciones.

Análisis de la revista *Avante* (1931-1936)³²

Son muchas las alusiones a la nueva educación y a la enseñanza activa en la revista *Avante* del periodo republicano. Sin embargo, no se trata de referencias hechas desde la ceguera del enamoramiento, sino de comentarios muy reflexionados a pesar de encontrarnos en el periodo de máxima exaltación de dicho movimiento en España. Esta tendencia se aprecia sobre todo en los editoriales de la revista, los cuales van evolucionando desde una mirada puesta en los problemas que plantea la realidad escolar para introducir los nuevos métodos de enseñanza, a posturas más críticas con la consideración de los métodos renovadores como

³⁰ Intuimos que la revista no se editó durante los años 1947 y 1948 porque la fecha de publicación del tomo V es 1945 y la del tomo VI 1949. Consultada en el Centro Internacional de la Cultura Escolar (CEINCE) en Berlanga de Duero (Soria).

³¹ El catálogo de 1947 (227) dice que se publican tres fascículos al año. Sin embargo, en la contraportada de los propios fascículos se especifica que la suscripción incluye cinco fascículos por semestre.

³² Consultada en la Biblioteca Nacional de España. Aunque la revista se publica desde 1931 hasta 1936, solo hemos podido revisar los tomos de 1932 a 1936 por no conservarse completa.

remedios milagrosos capaces de sanar todos los problemas de la escuela española y, por ende, de la educación.

Así, si tomamos como primera referencia el año 1932, vemos que junto a artículos que ilustran sobre las bondades de un método concreto como los centros de interés de Decroly o el método de proyectos, encontramos un editorial que pone de manifiesto la errónea aplicación que se está haciendo de estos métodos por parte de los maestros:

A los maestros actuales se nos ha hablado mucho de todo ello. Hemos ido espigando acá y allá, por los libros y revisas, para tener también nuestra participación en esa cosecha que tantos propagan ha de ser copiosa y selecta; pero hay que reconocer que no la vemos clara y, sobre todo, que no hemos aprendido prácticamente a sembrar para poder recogerla. De aquí resulta que no adoptamos los nuevos métodos, y si alguna vez nos decidimos a implantarlos, los tergiversamos, los deformamos, y creemos andar con Montessori, con Decroly o con Miss Parkhurst, cuando en realidad llevamos por compañía la desorientación.³³

Esta opinión sobre las complicaciones en la adaptación de las nuevas metodologías es compartida también por los propios lectores de *Avante*, tal y como muestra este escrito publicado por la revista y dirigido expresamente a Onieva y Maíllo:

Hemos leído con fruición, con verdadera delectación, sus magistrales artículos sobre la escuela activa y los centros de interés; ellos revelan que sus autores conocen bien la materia tratada. Pero su lectura no nos capacita completamente para que podamos lanzarnos a transformar radicalmente nuestra escuela, sin peligro de producir algún trastorno lamentable.

Tenemos la impresión de que cuanto ustedes escriben es sólo aplicable a las escuelas graduadas; creemos que los establecimientos-modelo que visitan en el extranjero no son precisamente escuelas unitarias de asistencia numerosa y sin patio de recreo ni otra dependencia que la sala de clases, sino escuelas-palacio, con

³³ «Editorial», *Avante* 53 (octubre 1932): sin página.

perfecta graduación, con material docente abundante, con varias instituciones circunescolares (*sic*), campos de recreo, etc., etc.³⁴

Finalmente, a medida que avanza el año 1934 los editoriales van manifestando cierto eclecticismo en cuanto a la manera de concebir la introducción de las nuevas pedagogías:

En resumen: que la pedagogía clásica tiene mucho de bueno, que no todo lo han dicho los pedagogos-inventores modernos, y que sin menospreciar lo que éstos hayan aportado de bueno, hay que procurar compaginarlo con las mejores directrices que ya se hallaban señaladas en la pedagogía antes de Dewey.

Y sobre todo no conceder la exclusiva a ninguno de los métodos modernos, sino servirse de lo mejor de todos ellos y procurar ponerlos de acuerdo. ¡Al fin y al cabo las diferencias que los separan no son tantas como sus respectivos partidarios nos quieren hacer ver!³⁵

Ahora bien, una vez expuesto el modo en que el equipo de *Avante* interpretaba y difundía las prácticas pedagógicas renovadoras que circulaban durante el periodo republicano, vamos a centrarnos en la aplicación de la enseñanza activa que difunden a través de la revista. En este sentido, podemos avanzar que se aprecia una doble interpretación del principio de actividad: una en sentido manual y otra más dirigida hacia lo espiritual.

a) *La actividad manual per se:*

Existen en la revista *Avante* distintos tipos de tareas como el trabajo del cuero, la construcción de aparatos, experimentos científicos, etc. Todos estos trabajos requieren que el alumno ponga en práctica distintos tipos de habilidades –mayoritariamente de tipo motriz–, que aprenda a manejar herramientas, instrumentos y materiales, pero no se especifica en ningún momento que el trabajo manual esté relacionado con otras ramas del conocimiento como pueden ser la Física, la Química o las Ciencias Naturales. Simplemente exponen cómo ha de realizarse la tarea para la construcción del aparato o para la realización del experimento.

³⁴ Eduardo Guillén, «La nueva escuela», *Avante* 54 (noviembre 1932): sin página.

³⁵ «Editorial: Excesiva pretensión de los métodos modernos», *Avante* 72 (junio 1934): 82.

En este caso, al no tratarse de una adaptación del principio de actividad para forjar un aprendizaje distinto de la realización manual en sí misma, sin ninguna vinculación con el concepto de trabajo, este tipo de actividades carece de interés para nuestra investigación.

b) La actividad espiritual o el verdadero motor del aprendizaje:

Antes de comenzar la exposición de esta categoría, creemos necesario aclarar que el término ‘espiritual’, que ha salido a la luz en varios de los artículos de la revista, está libre de toda connotación religiosa. Los distintos autores que lo emplean lo hacen siempre como sinónimo de intelectual o emocional, relacionándolo con la comprensión de otras materias de enseñanza como la Historia, la Geografía, etc., fundamentalmente a través de las emociones.

En los ejemplos que siguen puede comprobarse que, en este caso, sí se hace referencia al método activo. Quizás el artículo más representativo de esta tendencia sea «El libro en la escuela» del propio director de la revista, Aniceto Villar. Este artículo es reproducido parcialmente en el Catálogo de la editorial Salvatella de 1947, de modo que lo que se expone a continuación puede ser considerado una continuidad en el franquismo:

Tan chocantes son los conceptos de actividad, de vida y de trabajo escolares que hoy tienen muchos pedagogos, que se introducen en la escuela las herramientas del herrero, del carpintero, del albañil y de otros muchos oficios al mismo tiempo que se destierran de ella los libros. [...]

¡Qué paradójico, o mejor, qué absurdo aparece todo esto aunque sólo se mire con los ojos del sentido común! ¡Y qué perjudicial resulta al contrastarlo diariamente en el trabajo escolar! Porque es este trabajo diario en la escuela el que pone de manifiesto la extravagancia de ciertas posiciones teóricas de los pedagogos. Y si el sentido común no bastara a poner en evidencia que el libro es, dentro de la escuela, un útil de trabajo extraordinariamente mejor que las tenazas o el martillo, la tarea diaria de comunión espiritual en que maestro y alumnos actúan se encargaría de demostrarlo.

Actividad en la escuela, sí; trabajo, sí; vida, sí; pero vida, trabajo y actividad predominantemente espirituales, y no olvidemos que esto requiere un extraordinario esfuerzo interior.³⁶

Otro ejemplo de cómo a través del libro puede exigirse la participación activa del alumno, despertando lo emocional y conectando con el interés, lo encontramos en un artículo de Serrano de Haro sobre la enseñanza de la Historia en el que defiende «el procedimiento de la lectura comentada» frente al «procedimiento narrativo». Para ponerlo en práctica debe emplearse un libro de Historia adecuado; esto es: «acomodado al estado medio de desarrollo intelectual de los niños a que se dedica», convenientemente ilustrado, que incorpore «trozos literarios de valor histórico» y «estampas» de las grandes figuras de cada época como héroes, santos, gobernantes, etc., que despierten la emoción en los niños. «De este modo, y bajo la égida de tal libro ideal, la enseñanza de la Historia pondrá “en marcha la actividad personal de los alumnos”, como quería Verniers, e iremos realizando un procedimiento activo de enseñanza de la Historia en la escuela».³⁷

También Onieva reclama la participación activa de los alumnos en sus artículos sobre el método de proyectos. Según expone en el primero de la serie, este método no difiere demasiado del de los centros de interés, ya que ambos «procuran la actividad del discípulo», fomentan las iniciativas y conectan «las disciplinas escolares en razón de los intereses, necesidades y gustos de los niños».³⁸ Lo vemos en la creación de una feria en la que los alumnos, ante la necesidad de vender caramelos, deciden elaborarlos ellos mismos convirtiendo la clase en una lección de química en la que se aprende por descubrimiento, y lo vemos en el museo escolar, cuyas piezas deben ser recolectadas y organizadas por los mismos niños. Ambos proyectos exigen que la escuela funcione como un laboratorio, «y es que el laboratorio escolar no es una instalación, sino una función» que permite que el niño invente y recree los fenómenos, que haga y que mediante la acción aprenda.³⁹

³⁶ Aniceto Villar, «El libro en la escuela», *Avante* 74 (septiembre 1934): 114.

³⁷ Agustín Serrano de Haro, «La enseñanza de la Historia III», *Avante* 73 (julio-agosto 1934): 101.

³⁸ Antonio J. Onieva, «El método de proyectos en la escuela», *Avante* 59 (abril 1933): 2.

³⁹ Antonio J. Onieva, «Desarrollo de un proyecto escolar IX», *Avante* 73 (julio-agosto 1934): 104-105.

Finalmente, queremos añadir dos observaciones importantes porque enlazan con algunas características que hemos observado en la enciclopedia *Avante* que comienza a publicarse en 1942. Nos referimos, en primer lugar, al hecho de que a mediados de 1934 comienzan a aparecer, dentro de la sección «Motivos y sugerencias», unas lecciones que parecen ir dirigidas a informar a los maestros sobre la situación económica e industrial del país. Así encontramos artículos que se titulan «Comercio de importación general de España», «La industria de la hulla», «El trigo», etc. En ellos se presentan gráficos, datos estadísticos y económicos, y en general, pinceladas sobre un tema que parece tener más bien la finalidad de informar en lugar de facilitar, orientaciones pedagógicas o lecciones desarrolladas. Sin embargo, su verdadera intención es ofrecer motivos extraídos de la vida real para articular las lecciones en la escuela.

En este sentido y también con esta finalidad, inauguran el mismo año la sección «Lecciones» en la que presentan un tema central, como puede ser «las industrias españolas», que funciona como centro de interés en torno al cual se van exponiendo las cuestiones asociadas a él –la industria del aceite, el vino, los cereales, etc.– y las actividades propuestas. Estas lecciones se incluyeron primero de forma resumida dentro de la revista y, posteriormente, se publicaron en unos fascículos aparte que continuaron editándose durante la dictadura con los mismos contenidos, si bien pasaron a publicarse en dos volúmenes encuadernados.⁴⁰

En segundo lugar, nos referimos a que en septiembre de 1935 aparece una sección dedicada a «la escuela rural» que se mantiene hasta el último número de la revista. En ella se define esta institución como aquella que está «enclavada en núcleos de población en que predominan las actividades agro-pecuarias». Por lo tanto, siendo la escuela rural aquella que está en el campo y a la que asisten los hijos de familias fundamentalmente agricultoras y ganaderas, nos interesa señalar expresamente el papel que asignan a esta «escuela aldeana» bajo el paradigma de la educación para la vida, el cual está estrechamente relacionado con la vocación y la profesión:

Hay que salvar desde la escuela aldeana la economía española
y defender el equilibrio económico del Estado español, sujetando

⁴⁰ A ellos nos hemos referido anteriormente.

en el campo a las inteligencias despiertas. El éxodo rural es cada día más vigoroso. La ciudad fascina. Y las profesiones liberales se hipertrofian hasta lo inconcebible, mientras en el campo faltan diestros directores. Y por eso, si hasta ahora «el maestro ha sido un agente inconsciente de la despoblación de los campos», desde aquí ha de poner lo más puro de su fervor en alumbrar vocaciones rotundas y en deshacer pasajeros deslumbramientos de la puerbertad inexperta; [...].⁴¹

Esta concepción de la escuela rural será la que predomine durante la primera etapa franquista en que se publica la enciclopedia *Avante*. Bajo esta interpretación del principio de actividad y de la educación para la vida, la escuela española debe coadyuvar a sostener la principal actividad económica de la nación, contribuyendo al despertar vocacional de los niños que acuden a ella y estimulando el amor al campo y el interés por las labores agrícolas.

Sobre cómo se llevaría a cabo esta intervención en la vocación profesional de los niños que asisten a la escuela rural no ofrecen ninguna pista en la revista del periodo republicano, pero sí podemos avanzar que la lectura y la actividad *espiritual* jugarán un papel muy importante, tal y como explicaremos en los resultados del análisis de la enciclopedia del periodo franquista.

Análisis de la enciclopedia *Avante*. Temas prácticos de trabajo escolar (1942-1961)

Como puede observarse, esta segunda edición de *Avante* en forma de enciclopedia abarca un amplio periodo de tiempo en el que se producen importantes cambios a nivel social, político y, por supuesto, pedagógico. Esta evolución se aprecia en la publicación, no solo en los contenidos de las enseñanzas que recoge, sino también en la metodología que promueve y, por añadidura, en su concepción de la escuela activa. Baste en este sentido con avanzar que esta se vuelve más explícita a medida que avanzan los años y va evolucionando, desde concepciones más ligadas al trabajo manual, hacia un modelo más completo en el que entran en juego el intelecto y la voluntad.

⁴¹ «La escuela rural: el folklore y las vocaciones agro-pecuarias», *Avante* 87 (noviembre 1935): 179.

La aparición de la sección «Pedagogos modernos» a partir del tomo XII de la revista –aproximadamente 1952–, podría ser considerado un ejemplo de cómo la escuela activa va ganando presencia en la publicación. En ella aparecen muchas de las figuras ligadas a las distintas corrientes educativas renovadoras englobadas dentro de la Escuela Nueva como Montessori, Kerschensteiner, Dewey, Claparede, o Ferrière, entre otros. No obstante, se trata de una información predominantemente biográfica, siendo muy escasos los apuntes que recogen sobre su contribución pedagógica a dicho movimiento.

Respecto a los datos arrojados por el análisis sobre la concepción de la enseñanza activa y su reflejo en la idea del trabajo, podemos decir que han revelado la presencia de los dos mismos planteamientos –manipulativo e intelectual– que estaban presentes en la revista *Avante* del periodo republicano, pero que ahora se vislumbran con mayor claridad porque el propio equipo de redactores ofrece más explicaciones sobre la contribución del método activo al aprendizaje.

Por otra parte, encontramos el principio de actividad en su vertiente intelectual o espiritual que, basándose en la realización de preguntas, lecturas, conversaciones, trabajos de investigación, etc. y siempre guiados por el principio de la educación para la vida, ofrece una importante variedad de posibilidades a la hora de influir, motivar, despertar vocaciones, descubrir intereses, etc. Esta segunda concepción, se relaciona con el trabajo productivo.

A continuación, ofrecemos algunos de los ejemplos extraídos en representación de ambas categorías.

a) La enseñanza activa y el trabajo manual:

En el periodo que nos ocupa, dentro de esta categoría hemos analizado el principio de actividad en su versión manipulativa, que unido al principio de la educación para la vida, se traduce en la realización de trabajos manuales y prácticas que tienen una finalidad doble: la de ejercitar el dominio de determinadas técnicas relacionadas con el trabajo manual, como pueden ser la motricidad fina, el manejo de herramientas o la utilización de los materiales de laboratorio; y la de mejorar la comprensión de las distintas materias de conocimiento. El matiz diferenciador

respecto a esta categoría en la revista del periodo republicano, es que en este caso se explica la relación entre el trabajo manual y el aprendizaje que se pretende reforzar. Lo veremos más claramente a través de los ejemplos.

La importancia que el equipo de *Avante* concedía al trabajo manual queda patente en los índices de los distintos tomos, dado que la sección de «Actividades Manuales» se mantiene en casi la totalidad de ellos. No obstante, se percibe una evolución en la sección, de manera que el tipo de actividad que se propone va cambiando. Así, mientras que en los primeros tomos la totalidad de los trabajos propuestos servían para apoyar las lecciones de Física –como la construcción de un péndulo, una grúa, sifones, etc.–, en otros tomos posteriores aparecen actividades cuyo objetivo era más variado, pudiendo ser el propio entrenamiento de la actividad manual a través de trabajos de cartonaje, flores de papel, juguetes con tapones, etc.; el aprendizaje de determinadas técnicas empleadas como el afilado de herramientas, los trabajos de marquetería, o las uniones y ensambladuras; o la realización de trabajos que pusieran en práctica otros conocimientos como la Geometría y las Matemáticas para construir, por ejemplo, un banco de carpintero.

Pero, además de la sección de «Actividades Manuales» existen otras como la de «Prácticas Científicas» en las que se proponía la realización de trabajos manuales relacionados con las Ciencias Naturales, la Física o la Química. Un ejemplo de lo que estas prácticas suponían a nivel formativo lo encontramos en la propuesta de construcción de un microscopio escolar por los propios niños, quienes con ello adquirirían «un firme conocimiento del instrumento en cuestión y sus aplicaciones» aprendiendo a «usarlo con destreza y facilidad». Además, su autor destaca «el valor formativo y educativo general»⁴² que la propia labor de construcción les reporta y explica cómo incide el principio de actividad en la comprensión de la utilidad del propio aparato por parte de los alumnos.

Otro ejemplo lo hallamos en una lección consistente en construir un horno de cal y realizar en él una serie de experimentos para obtener cal viva, cal apagada y mortero. Basta con citar el comienzo de la lección

⁴² «El microscopio escolar», *Avante* I (1942): 180.

para comprender cómo el equipo de redactores de *Avante* aplicaba el principio de actividad en sus lecciones:

Esta lección se ha visto tratada en varias enciclopedias y libritos de ciencias, pero como una lección de tipo intelectual; por lo cual los niños de feliz memoria retendrán su contenido durante una semana, dos o más, pero la lección y sus símbolos químicos se amortiguarán velozmente, obteniendo de ella un resultado casi nulo. Es lección muerta, como muchas de nuestros programas clásicos y, como cosa muerta, ha de inspirar repugnancia en la mente infantil.

Se pretende dar calor y vida a este tema tan interesante de la humana actividad, y al hacerlo pensamos en que nuestros alumnos han de empuñar el útil del obrero y no la pluma del contable; pues así los principios que contiene nuestro trabajo serán muy útiles para ellos en el futuro.⁴³

Existen otros ejemplos como la construcción de molinos, de un germinador, etc., cuya propuesta de aplicación de la enseñanza activa viene a ser la misma. Sin embargo, queremos terminar este apartado con un último ejemplo significativo porque se trata de una lección que también aparece en la revista de los años treinta, si bien entonces no se puso en relación con el método activo. Se trata de una lección sobre la formación del museo escolar:

El museo escolar es un arsenal, un mundo que se ofrece a los niños.

Pero el interés y el cariño de éstos hacia el museo crece si son los mismos niños quienes lo forman.

[...]

Al encontrar un objeto, el niño pregunta, se interesa enormemente, descubre su utilidad, ordena, clasifica, deduce, asocia y hace fantasías, y eso es una vibración intelectual que cae en la vida de nuestros alumnos como una lluvia vivificante en campos yermos, como semilla que dará sus frutos en el mañana.⁴⁴

⁴³ «Cal viva, cal apagada, fraguado de la cal y mortero», *Avante* III (1944): 44.

⁴⁴ «Cómo formar el museo de una escuela unitaria rural», *Avante* IV (1945): 43.

b) *La enseñanza activa espiritual y el trabajo productivo:*

Como ya hemos señalado, a mediados de 1934 comenzaron a aparecer en la revista *Avante* un tipo de informaciones relacionadas con el mundo productivo que se mantienen hasta los últimos números y que enlazan con los primeros años en que la publicación vuelve después de la Guerra. Se trata de un tipo concreto de contenidos sobre la situación de las industrias agrícola, pesquera, metalúrgica, ganadera, etc., presentados con estilo periodístico y acompañados de gráficos y de datos estadísticos, que serán muy numerosos en esta segunda edición en formato enciclopédico. Por otra parte, también hemos puesto de manifiesto la aparición en 1935 de una sección dedicada a la escuela rural, en la que se expone la necesidad de educar a los niños del campo para que permanezcan en el entorno rural y se dediquen a las labores agrícolas y ganaderas. Esta tendencia también se mantiene durante los años cuarenta y principios de los cincuenta.

Este tipo de contenidos que comienzan a aparecer en la revista durante los últimos años antes de la guerra y que vuelven a estar muy presentes en la publicación que se edita tras la contienda, son los que ponen en relación, precisamente, la enseñanza activa con el trabajo productivo. Veamos de qué manera y con qué finalidades.

En primer lugar, hemos de remitirnos –una vez más– a la aplicación del principio de la educación para la vida, según el cual la educación, además de aplicarse a la vida real, no debía consistir en unos contenidos formativos uniformes para todas las escuelas, sino que tenía que ser adecuada al entorno y al tipo de alumnado, debiendo tener en cuenta sus intereses y habilidades. Por lo tanto, bajo esta concepción la educación no debía ser la misma en un entorno rural y en un entorno urbano y precisamente sobre esta diferenciación se pronuncian los colaboradores de *Avante* en numerosas ocasiones, bien en referencia a la diferencia de procedimientos con que el maestro debe abordar la enseñanza y que se reducen a la dualidad escuela unitaria frente a escuela graduada, bien en alusión a los contenidos que deben abordarse en cada una de ellas.

Esta diferenciación se hace especialmente patente con la llegada de los Cuestionarios Nacionales de 1953 que pretendían ser un programa oficial para todas las escuelas españolas. Sobre este aspecto los redactores se hacen la siguiente pregunta: «¿Por qué no ha de haber al menos dos tipos

o modelos de cuestionarios? ¿Cómo es posible que las unitarias de ambiente rural puedan regirse por los mismos programas que los grupos escolares de las ciudades?».45

En segundo lugar, debemos referirnos al principio de actividad, que se refleja en las variadas orientaciones facilitadas a los maestros para promover la participación activa del alumno en su versión *espiritual*, destinada a contribuir a la formación del carácter.

La actividad en la escuela debe ser, ante todo, actividad interna del niño, promoción de fuerzas espirituales, suelta de los resortes que mueven el mecanismo del alma en todos los buenos sentidos. Mientras esos resortes permanezcan herméticos y el alma de los niños no se sienta movida a sacar de sí todo el fruto de voliciones, ideas y sentimientos que es capaz de dar, no podrá decirse que la escuela es verdaderamente activa.⁴⁶

Entre estos mecanismos que proponen para lograr que se produzca esa participación activa a nivel espiritual, destacan el establecimiento de un clima en el aula que facilite las conversaciones entre el alumno y el maestro sobre las lecciones, el fomento de la lectura, la realización de resúmenes escritos, redacciones y presentaciones orales, la búsqueda y elaboración de ilustraciones o la ejecución de trabajos monográficos en los que sean los alumnos quienes buscan la información.⁴⁷

Ahora bien, de entre todos los mecanismos señalados para lograr esa participación espiritualmente activa del niño, los colaboradores de *Avante* destacan especialmente uno por su capacidad para despertar los intereses y conducir la voluntad hacia aquello que se quiere enseñar. Se trata de la lectura, una herramienta indispensable por ser una de sus finalidades básicas «la formación moral y patriótica de los niños».⁴⁸

Por eso el maestro, después de elegir bien los libros de lectura, tanto en su aspecto pedagógico como en su fondo moral y patriótico, debe aprovechar toda ocasión que estos libros le ofrezcan

⁴⁵ «Avante y los programas oficiales», *Avante* XVIII: p. de cubierta.

⁴⁶ «Colaboración activa del niño», *Avante* XVIII: 117.

⁴⁷ «Colaboración activa del niño», 117.

⁴⁸ «Una lección de lectura para grados medios», *Avante* I (1942): 287.

para agitar las fibras sensibles de sus alumnos y dejar en ellas la huella de los buenos sentimientos. No basta con que el niño lea sin enterarse apenas de lo leído. Es necesario detenerse; hacer resaltar los personajes y las situaciones; hallar todo el sentido del hecho y de las frases; mostrar por completo el colorido de la narración y de las descripciones; vivir la lectura, en una palabra, con todo su contenido material y espiritual.⁴⁹

No obstante, para que la lectura influya verdaderamente en los sentimientos del alumno «tiene que ser, sin ningún género de duda, algo que, si no ha sido realmente vivido, tenga todos los caracteres de vivida realidad». Debe huirse por lo tanto de los «sermones morales» y ofrecer al niño lecturas que traten sobre «pedazos de vida ciertos o fingidos» que penetren en su alma y le hagan «sentir la belleza moral».⁵⁰

De la aplicación de estos mecanismos destinados a lograr la participación y el despertar vocacional de los alumnos, a esa diferenciación entre la escuela rural y la escuela urbana, con sus distintos métodos y finalidades, resulta la transmisión de una determinada concepción del trabajo productivo que estará siempre condicionada por las necesidades del país.

Merece la pena hacer un inciso para establecer correctamente las relaciones entre los parámetros que estamos trabajando. En este sentido, queremos resaltar que la concepción del trabajo en el franquismo está estrechamente vinculada con el ideal de patriotismo y con la filosofía organicista. Bajo esta concepción, la promoción de unos trabajos frente a otros estará siempre condicionada por las necesidades del país. Así lo exponen en *Avante* cuando afirman que el patriotismo útil para «el vital desenvolvimiento de la nación como organismo colectivo» tiene que estar basado en dos pilares fundamentales: «que nuestra nación es una empresa en la que todos sus hijos nos hemos asociado y tenemos interés en hacerla triunfar» y «que esta empresa tiene su destino universal o ecuménico del que no podemos ni debemos desentendernos».⁵¹

⁴⁹ «Una lección de lectura para grados medios», 287.

⁵⁰ «Una lección de lectura para grados medios», 287.

⁵¹ «Patriotismo», *Avante* XVIII: 219.

Una vez cerrado el paréntesis, podemos decir que la tarea de la escuela puede consistir en dar a conocer las riquezas de España:

La escuela puede contribuir de varios modos a despertar en las nuevas generaciones el amor a la patria y el deseo de ayudar a su engrandecimiento, y uno de estos modos, quizá de los mejores, consiste en dar a conocer a los niños las riquezas que nuestra nación atesora.

En parte este conocimiento ya se adquiere al estudiar la geografía; pero este estudio en sentido geográfico tiene un aspecto permanente y hasta cierto punto estático, con lo cual pierde en proporción muy elevada la acción estimulante que debe ejercer en el ánimo de los futuros ciudadanos de España.

Conviene actualizarlo, darle vida presente y poner sus consecuencias en relación con la inmediata realidad de nuestra propia vida, para de este modo juntar al ideal de mejoramiento patrio el interés personal, es decir, el propio egoísmo, dicho en términos crudos y verdaderos.⁵²

Teniendo en cuenta lo anterior y a partir del análisis realizado podemos establecer tres etapas en la revista, en función del tipo de labores que se intentan fomentar. El primer periodo abarca aproximadamente la década de los años cuarenta y se caracteriza porque el interés de la nación es luchar contra el abandono del campo que ya se vislumbraba en la década anterior. En consecuencia, la escuela debe transmitir a las nuevas generaciones el amor al campo y cultivar la afición por el trabajo agrícola y ganadero. Estos contenidos aparecen en diversas secciones de formato muy diferente.

Un ejemplo lo encontramos en uno de los apartados dedicados a la producción agrícola en el que ofrecen la siguiente sugerencia a los maestros: «Haremos resaltar que, a pesar de todo, España es esencialmente agrícola y por consiguiente esta riqueza debe merecer nuestra mayor atención».⁵³ Igualmente se expresan cuando se refieren a la producción ganadera como necesaria para la explotación agrícola y para el consumo:

⁵² «Producción Agrícola», *Avante* II (1943): 31.

⁵³ «Producción Agrícola», 32.

De todo lo expuesto sacaremos la conclusión de que España posee una importantísima riqueza ganadera, pero no la suficiente para cubrir todas las necesidades nacionales. Por consiguiente debe intensificarse hasta cubrir todo el consumo interior.

Procúrese llevar esta convicción al ánimo de los niños. Con ello quizá se conseguirá que influyan en el de los mayores y que cuando crezca la nueva generación se vaya formando un ambiente favorable al progreso de la ganadería con lo que se contribuirá a elevar el nivel medio de la vida en nuestra patria y acrecentar la riqueza nacional.⁵⁴

También encontramos lecciones que versan sobre las tareas agrícolas: la necesidad de estas labores, las herramientas que se utilizan, las clases de trabajos agrícolas, etc.⁵⁵

El segundo periodo de la revista abarca aproximadamente la década de los cincuenta excepto los tres últimos tomos de la publicación.⁵⁶ En los primeros años de esta etapa la presencia de las labores agrícolas todavía es muy acusada pero se percibe una progresiva apertura de los contenidos sobre el trabajo productivo a un espectro más amplio, de modo que ya comienzan a aparecer oficios relacionados con la construcción, la metalurgia, el comercio, la pesca, etc.

Algunos ejemplos los encontramos en lecciones de lectura y escritura preparadas para párvulos y grado de iniciación, en las que se ofrecen a los maestros varias lecturas relacionadas con el trabajo seleccionadas de la propia editorial Salvatella. Igualmente proponen actividades de conversación sobre el trabajo que realizan sus familiares, la necesidad del trabajo, los instrumentos que se utilizan, etc.⁵⁷

Observación y conversación. –Digan los niños animales que ayudan al hombre a trabajar. –¿Cómo y para qué empleamos los caballos, bueyes, asnos, etc.? – Háblese del trabajo intelectual. –¿Qué utensilios se emplean en esta clase de trabajo? (Papel,

⁵⁴ «La ganadería», *Avante* IV (1945): 231.

⁵⁵ «Labores agrícolas», *Avante* VI (1949): 79-80.

⁵⁶ Al carecer de fecha de publicación, no podemos determinar exactamente el periodo.

⁵⁷ «II. –Lenguaje», *Avante* IX: 109.

plumas, libros, periódicos, etc.) –Los productos de nuestro trabajo necesitan circular, cambiarse por otros productos o por dinero para satisfacer todas nuestras necesidades. –¿Dónde se compran y se venden los animales que necesitamos para trabajar? –¿Y los demás animales domésticos? – Las ferias y mercados. –¿Dónde adquirimos las telas, los comestibles, el calzado, los libros, etc., etc.? –Háblese a los niños del comercio, sus clases principales (al por mayor, al por menor, de importación, de exportación) y su importancia. [...].⁵⁸

Con este mismo sistema se presentan los oficios de herrero y de albañil.⁵⁹ Y también el trabajo intelectual empieza a adquirir cierta presencia:

Conviene inculcar en la conciencia de los niños –trabajadores del mañana– que no sólo trabaja el que lo hace físicamente, sino que tanto o más mérito tiene el que lo hace con la inteligencia; previsión muy necesaria dada la extendida creencia en la clase obrera de que sólo ella lleva la carga de la sociedad [...].⁶⁰

Igualmente, encontramos referencias a los marineros y pescadores:

No podía faltar una Sección dedicada al mar y a esos heroicos y esforzados marineros que todos los días exponen su vida en beneficio de la prosperidad de la Patria. Hay que procurar que los niños españoles no desconozcan que nuestra grandeza pasada la encontramos en las rutas del mar y que en esas encrucijadas hemos de encontrarla nuevamente; corresponde, por ello, a la Escuela despertar vocaciones marineras formando corazones llenos de fe.⁶¹

Ahora bien, a medida que avanzamos en este segundo periodo, los contenidos sobre el trabajo se tornan más industriales, de modo que, en lugar de referirse al marinero o al pescador hablarán de la industria pesquera y conservera. La presencia de la industrialización en los contenidos llega a tal punto que un apartado titulado «Los mejillones» sirve para ofrecer abundantes datos sobre la industria conservera, el cultivo del mejillón, las regiones en las que se realiza esta labor, etc., todo ello acompañado de

⁵⁸ «II. –Lenguaje», 154.

⁵⁹ «II. –Lenguaje», 165-166 y 215-216.

⁶⁰ «El trabajo y el trabajador», *Avante* XV: 43.

⁶¹ «El trabajo y el trabajador», 44.

ilustraciones sobre escenas del trabajo en este sector.⁶² En estos y otros contenidos sobre la «industrialización de España» se pone de manifiesto la importancia que este sector está adquiriendo en la transformación y el progreso del país.⁶³

Sin embargo, el hecho de que se presente la industria como el sector necesario para lograr un mayor nivel de vida y el progreso del país, no quiere decir que se olvide por completo la visión tradicional del campo. Esta seguirá siendo abordada, si bien en menor medida, para mostrar actitudes morales como el esfuerzo, el valor, el tesón, etc. Así, en contraste con las comodidades que ofrece el trabajo industrial derivadas de la creación de «importantes centros de trabajo, donde millares de obreros ganarían altos jornales y disfrutarían de un nivel de vida mucho más elevado»,⁶⁴ encontramos alusiones al pastor trashumante, el cual debe llevar «una vida dura, trabajosa y llena de dificultades, pero que con su tesón y buena voluntad logra vencer».⁶⁵

Finalmente, hemos establecido una tercera etapa en nuestro análisis que comprendería los tres últimos tomos de la publicación. Este cambio coincide con una variación en la organización que consiste en la aparición de un nuevo apartado, la Formación Político-Social, en el que se recogen los principales contenidos sobre el trabajo. No obstante, en él se habla del trabajo como actividad sin referirse a ningún oficio o sector específico y con un enfoque que viene a coincidir, tanto en los enunciados de las lecciones como en las ilustraciones, con los de los manuales destinados a la Formación del Espíritu Nacional (FEN) de la editorial Doncel:⁶⁶ «La cooperación social», «El trabajo como servicio», «El trabajo como necesidad», «El trabajo como creación», etc.

⁶² «Los mejillones», *Avante* XVIII: 159-160.

⁶³ «Industrialización de España», *Avante* XIX: 31-39.

⁶⁴ «Las industrias metalúrgicas», *Avante* XIX: 88.

⁶⁵ «El pastor trashumante», *Avante* XXIII: 71.

⁶⁶ La editorial Doncel fue fundada en 1958 por la Delegación Nacional del Frente de Juventudes y editó los manuales de FEN, materia que pasaría a denominarse Educación Cívico-Social en los Cuestionarios Nacionales de 1965. Vid. Cecilia Valbuena, «La configuración del concepto de trabajo en el falangismo y su vehiculización hacia la escuela de la dictadura. España, 1940-1957», en *A investigação em História da Educação. Novos olhares sobre as fontes na era digital*, coord, Claudia Pinto Ribeiro et al. (Porto: CITCEM, 2021), 73-74.

Según este enfoque de tan marcado carácter falangista, el trabajo es concebido como un deber social y moral. Ambos tipos de deberes quedan recogidos en el Fuero del Trabajo, cuyos principales preceptos son transmitidos a los maestros, junto con indicaciones precisas para que lo incluyan entre sus enseñanzas y siempre buscando la reflexión por parte del alumno:

1. Ante la lámina de Adán y Eva explíquese el pasaje en que Dios los amonesta por su pecado y recálquense aquellas palabras en que le impone a Adán la obligación del trabajo: «Ganarás el pan con el sudor de tu frente».

[...]

El Estado español reconoce también esta obligación y la impone a todos los ciudadanos de España.

Léase el párrafo 5 del cap. I del «Fuero del Trabajo», y coméntese de una manera sencilla, al alcance de los niños pequeños.

[...]

¿Qué quiere decir *el deber del trabajo*? ¿Y si uno tiene dineros y no quiere trabajar? Hágase ver que esa persona tiene que vivir a costa del trabajo de los otros, y eso no es muy legítimo ni cristiano. Los hombres viven en sociedad para ayudarse mutuamente y lo natural es que todos aporten su esfuerzo y no que unos lo aporten para que los otros se aprovechen sin esforzarse.⁶⁷

CONCLUSIONES

A modo de síntesis vamos a tratar de responder a las preguntas de investigación planteadas al inicio del artículo, intentando aclarar, en primer lugar, cómo pudo continuar su actividad la editorial Salvatella teniendo una vinculación tan explícita con la escuela activa. Sobre esta cuestión no tenemos una respuesta clara y segura que sea fruto de los resultados de la investigación, sino más bien una intuición basada en la posibilidad de que el hecho de aludir a la enseñanza activa no supusiera traspasar las fronteras de la censura pedagógica. Por otra parte, el hecho

⁶⁷ «El Fuero del Trabajo: sus aspiraciones principales», *Avante* XXVI: 213-214.

de que los métodos asociados a la Escuela Nueva fueran silenciados por la pedagogía del Régimen durante los años cuarenta no quiere decir que no fueran aplicados en las lecciones que exponían los redactores de *Avante*. Y es que, en el fondo, su postura fue siempre la misma: la de no seguir un solo método al pie de la letra como si fuera la panacea a nivel educativo, sino extraer de cada método aquello que más conviene a cada caso, y construir una lección a partir del eclecticismo metodológico, a veces sin llegar siquiera a mencionar los métodos empleados.

Sobre la concepción del principio de actividad que Salvatella pretendía transmitir podemos concluir que no hubo grandes variaciones entre los periodos, ya que tanto la revista de la etapa republicana como la enciclopedia de la dictadura defendían la enseñanza activa, fundamentalmente a nivel espiritual. Esto quiere decir que lo que realmente importaba era la actividad intelectual y el despertar emocional que la aplicación de este principio exigía por parte del alumno, principalmente en las lecciones vinculadas con el conocimiento de la Historia, las Ciencias Naturales, o la Geografía.

Respecto a la aplicación del principio de la educación para la vida sí observamos una evolución a lo largo de las tres décadas en que se publica *Avante*. Esta transformación no es sino una consecuencia del cambio de modelo productivo de España, de tal modo que, mientras predominaba la agricultura como principal actividad económica, la escuela –especialmente la rural–, debía favorecer este modelo, no solo facilitando este tipo de conocimientos sino trabajando activamente en el terreno de la motivación para despertar las vocaciones agricultoras entre el alumnado. Cuando a mediados de los años cincuenta se produce el viraje hacia el desarrollismo industrial, cambia el modelo de trabajo y de trabajador que se quiere formar desde la escuela.

En otro orden de cosas, no queremos cerrar el artículo sin mencionar el asombroso parecido que guarda *Avante* con los primeros años de la revista *Vida Escolar*, del Centro de Documentación y Orientación Didáctica de Enseñanza Primaria (CEDODEP), cuyo primer director fue precisamente Adolfo Maílló –entre 1958 y 1964–. Durante este periodo, el inspector orientó la revista *Vida Escolar* colaborando, bien desde el anonimato

en distintos editoriales, bien a través de sus 46 artículos firmados.⁶⁸ El hecho de que esta publicación careciera en sus primeros años –los que estuvo Maíllo al frente del CEDODEP– de una «ventana de títulos de crédito» en la que se especificara el nombre del director y el equipo de redacción,⁶⁹ como sucedía con la enciclopedia *Avante* de la dictadura, ha contribuido a fundamentar nuestra hipótesis de que los autores que conformaron la redacción de *Avante* en los dos periodos fueron los mismos, algunos de los cuales pudieron continuar su trayectoria en la revista *Vida Escolar*.

Por último, dejamos una pregunta abierta en referencia al tratamiento que los redactores de *Avante* dieron al tema del trabajo en los últimos números de la revista, coincidente con el que se le daba en la materia de FEN, y es que llama la atención que este cambio se produzca al final de la década de los años cincuenta, cuando la Falange ha sido relegada políticamente a un segundo plano. Una posible hipótesis es que este hecho puede deberse precisamente a que, con esta pérdida de poder y de control del que había sido el partido único, los maestros ya no fueran formados por la Delegación Nacional del Frente de Juventudes para impartir estas materias. En consecuencia, los redactores de *Avante* pudieron introducir sus lecciones en la enciclopedia para hacérselas llegar a los maestros, quienes a partir de ese momento tendrían que impartirlas.

Otra posible hipótesis sobre este viraje hacia el falangismo en algunos contenidos de *Avante* a finales de los años cincuenta es que, al incorporarse Maíllo al CEDODEP en 1958 y comenzar unos meses más tarde su andadura la revista *Vida Escolar*, abandonara la primera, que pudo caer bajo la dirección de personalidades distintas de las que la habían llevado hasta entonces. Pero esto solo son hipótesis, pues desconocemos quiénes fueron sus autores y tampoco sabemos cuál fue la verdadera causa de que dichos contenidos, de tan marcado carácter falangista, se introdujeran en la revista tan tardíamente. Posiblemente, la búsqueda de su respuesta será motivo de otros trabajos.

⁶⁸ Mainer y Mateos, *Saber, poder y servicio...*, 104.

⁶⁹ Mainer y Mateos, *Saber, poder y servicio...*, 104. La salida de Maíllo del CEDODEP coincide con el momento en que dicha ventana de títulos de crédito comienza a aparecer.

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LOOMING DEPROFESSIONALIZATION: STATE INTERVENTIONS INTO THE OPERATION OF PROFESSIONAL INSTITUTIONS OF SECONDARY TEACHER TRAINING IN HUNGARY IN THE EARLY TWENTIES*

Desprofesionalización en ciernes: intervenciones estatales en el funcionamiento de las instituciones profesionales de formación del profesorado de secundaria en Hungría a principios de los años veinte

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Abstract. In the paper, the transformation processes of secondary teacher training in Hungary are examined through the investigation of personal and conceptual changes related to two professional institutions, namely the Secondary Teacher Training Institution and the Secondary Teacher Examination Committee in Hungary in the early 1920s.

By employing the method of document analysis of archival sources, substantial amount of primary sources were involved in the research from various archives. Additionally, the secondary literature review is also used as a research method in contextualizing the findings of the analysis. As for the interpretation, notions related to the critical approach of professionalization theories are applied in the paper.

The study gives a brief overview of the development of professional institutions from the mid of the nineteenth century to 1919 in order to provide an insight into some of the main barriers of their development,

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which expected to be solved by the new regime in Hungary solidified after 1920. The appointment of new leadership in the teacher training institution, the influence on its curriculum, the forced interrogation of the political views of teacher candidates delegated to the teacher examination committee before the state examination and the determination of the reform of the teacher examination regulations all suggest that the state intention of reshaping the teacher training according to circumstances of the new political-social reality after the war resulted in a new relationship between the state and the professional institutions that could lead to deprofessionalization on the long term. This development could be regarded as an unprecedented phenomenon compared to the situation of professionals in other countries in the Central and Eastern European region.

Keywords: Professionalization; Secondary teacher training; Deprofessionalization, State interventions.

Resumen. *En este artículo se examinan los procesos de transformación de la formación del profesorado de secundaria en Hungría a través de la investigación de los cambios personales y conceptuales relacionados con dos instituciones profesionales, a saber, la Institución de Formación del Profesorado de Secundaria y el Comité de Examen del Profesorado de Secundaria en Hungría a principios de la década de 1920.*

Mediante el empleo del método de análisis documental de fuentes archivísticas, se incluye en la investigación una cantidad sustancial de fuentes primarias procedentes de diversos archivos. Además, la revisión de la literatura secundaria también se utiliza como método de investigación para contextualizar las conclusiones del análisis. En cuanto a la interpretación, en el trabajo se aplican nociones relacionadas con el enfoque crítico de las teorías de la profesionalización.

El estudio ofrece una breve panorámica del desarrollo de las instituciones profesionales desde mediados del siglo XIX hasta 1919 con el fin de proporcionar una visión de algunos de los principales obstáculos de su desarrollo, que esperaban ser resueltos por el nuevo régimen en Hungría establecido después de 1920. El nombramiento de nuevos directivos en la institución de formación del profesorado, la influencia en su plan de estudios, el interrogatorio forzoso de las opiniones políticas de los candidatos a profesores delegado en el comité de examen de maestros antes del examen estatal y la determinación de la reforma del reglamento de examen de profesores sugieren que la intención estatal de remodelar la formación del profesorado de acuerdo con las circunstancias de la nueva realidad político-social tras la guerra dio lugar a una nueva relación entre el Estado y las instituciones profesionales que podría conducir a la desprofesionalización a largo plazo. Esta evolución podría considerarse un fenómeno sin precedentes en comparación

con la situación de los profesionales en otros países de la región de Europa Central y Oriental.

Palabras clave: *Profesionalización, Formación del profesorado de secundaria, Desprofesionalización, Intervenciones estatales.*

INTRODUCTION

Throughout the current study, the claim in the title of the paper will be examined whether deprofessionalization process could be observed in the professional training of secondary school teachers in Hungary during the interwar period. This thought slightly contradicts the general perception of the status of secondary school teachers in the current Hungarian secondary literature, which conveys the idea that despite the political interrogations in the early 1920s which resulted in the dismissal of more than 25.000¹ public servants including several secondary teachers and the obvious decrease of the social status of young secondary teachers in the early stage of their professional career,² the secondary teacher profession managed to spare and leverage their ideological function across different political regimes.³ To offer a different approach to the professional development of the schoolteachers, I specify the theoretical background of my research paying special attention to the critical approach of professional theories and the explanation of the notion of deprofessionalization within it. Then, a brief insight into the sources and the methods of the research is provided for the reader. In the second part, the institutionalization of the training of secondary school

¹ Imre Pornói, «Az 1920-as évek Népoktatása és a nyolcosztályos népiskola Magyarországon» [Public Elementary Schooling in the 1920s and the Implementation of 8-grade Elementary Schools in Hungary], *Magyar Pedagógia* 3-4 (1995): 318.

² Gábor Gyáni, «Magyarország társadalomtörténete a Horthy-korban» [The History of the Hungarian Society in the Horthy-era], in *Magyarország társadalomtörténete a reformkortól a második világháborúig* [The History of the Hungarian Society from the early 19th century to the end of the World War II.], eds. Gábor Gyáni and Kövér György (Budapest: Osiris Kiadó, 2006), 281-282.

³ Andor Ladányi, *A középiskolai tanárképzés története* [History of the Secondary School Teachers] (Budapest: Új Mandátum Kiadó, 2008); András Németh, *Magyar pedagógusképzés és szakmai tudásformák I. 1775-1945. Nemzeti fejlődési trendek, nemzetközi recepciós hatások* [Training of Pedagogues and their Professional Knowledge in Hungary I. 1775-1945. National Trends of Development and Reception of International Tendencies] (Budapest: ELTE Eötvös Kiadó, 2012); Béla Pukánszky, «A tanárképző intézet szerepének alakulása a magyarországi tanárképzés történetében» [The Role of the Teacher Training Institute in the History of the Hungarian Teacher Training], *Pedagógusképzés* 39-40 (2013): 73-91.

teachers and the changes within this process between 1918-1919 will be discussed. In the rest of the paper, two-two cases related to the investigated institutions will be shown from the period of the early 1920s which suggest that the state intrusion into the inner affairs of professional organisations continued after the fall of the ephemerally existing communist regime in 1919.

Developments in secondary teacher training in Hungary in the early 1920s also had international relevance. This aspect could be grasped by the singularity of the Hungarian developments compared to the other countries belonging to the Central and Eastern European region. As a consequence of the war, governments took the initiative in almost all countries of that part of Europe (Germany,⁴ Austria,⁵ Czechoslovakia,⁶ Romania,⁷ the Serbian-Croatian and Slovenian Kingdom⁸) to either transform the school systems inherited from the previous political era or create a new education structure that could unify the newly emerged states. Nevertheless, the initiatives of the Hungarian government aimed at preserving the inherited structures from the period of the Austro-Hungarian Monarchy but in a form that could be aligned with the new ideology of the Horthy-regime.⁹ The transformation of the personal background of the professional institutions and the harmonization of their inner operation with the expectation of the government led to their gradual deprofessionalization.

⁴ Uwe Sandfuchs, «Die Lehrerbildung in Deutschland - Geschichte, Struktur und Reform», in *Lehrerbildung in Europa. Geschichte, Struktur und Reform*, eds. András Németh and Ehrenhard Skiera (Frankfurt am Main - New York: Peter Lang, 2012), 59-72.

⁵ Gerald Grimm, Beáta Bali and Veronika Pirka, «Lehrerbildung in Österreich - Aspekte ihrer Genese von den Anfängen im späten 18. Jahrhundert bis zur Zweiten Republik», in *Lehrerbildung in Europa. Geschichte, Struktur und Reform*, eds. András Németh and Ehrenhard Skiera (Frankfurt am Main - New York: Peter Lang, 2012), 91-110.

⁶ Tomáš Kasper and Dana Kasperová, «Lehrerbildung in der Tschechischen Republik - historische und aktuelle Aspekte», in eds. András Németh and Ehrenhard Skiera *Lehrerbildung in Europa. Geschichte, Struktur und Reform* (Frankfurt am Main - New York: Peter Lang, 2012), 219-239.

⁷ Emilia Gogu, Corina-Cristina Bozdugan and Daniela Nenciu, «Profile of the Romanian Upper Schooling During the Interwar Period», *Fiat Iustitia* 12 (2) (2018): 82-95, <https://ideas.repec.org/a/dcu/journal/v12y2018i2p81-95.html>; Irina Livezeanu, *Cultural politics in Greater Romania. Regionalism, nation building & ethnic struggle, 1918-1930* (Ithaca and London: Cornell University Press, 2000), 34-36.

⁸ Edvard Protner, Zdenko Medves, Stefka Batinic et al., «The Development of Teacher Training in the States of Former Yugoslavia», in *Lehrerbildung in Europa. Geschichte, Struktur und Reform*, eds. András Németh and Ehrenhard Skiera (Frankfurt am Main - New York: Peter Lang, 2012), 237-265.

⁹ In Hungary, the period between 1920 and 1944 named after the governor of Miklós Horthy.

THEORETICAL BACKGROUND

In an essay by Talcott Parsons, professionalization was labelled as the main indicator of modernization in western societies.¹⁰ Researchers who followed the principles determined by Parsons investigated the corporations of professional groups and the traits of these organisations mainly based on the self-definition of the professionals. By accepting the self-perception of professional groups, several aspects of the nature between the professionals and the rest of the society in which they performed remained veiled. In the 1970s, several researchers suggested that the trait model of the research completely missed revealing the role of power, by which professional groups monopolized their special field of interest.¹¹

Additionally, Hans Albrecht Hesse pointed out in his volume that state power played a pivotal role in organising the modern professions in the Central-European context to modernize the social structures.¹² Following the path set by Hesse, researchers of the critical approach of professional theories examined the training system of the professionals with special attention to the universities and higher education-attached training programs since special competencies were transferred to professional candidates in these programs, which made them specialists with distinct social functions. Universities and professors began to exercise a certain control over disciplines, in which theoretical knowledge and professional competencies were encompassed. University professors took control over the distribution and formation processes of the theoretical knowledge of professions leading to the detachment of the professional training programs from the market economy processes. Thus, professors who represented the elites of the professions were able to monopolize the formation and operation of professional groups through state contribution and recognition.¹³

¹⁰ Talcott Parsons, «The professions and social structure», in *Essays in sociological theory*, ed. Talcott Parsons (London: Macmillan, 1955), 37.

¹¹ Terence Johnson, *Professions and power* (London - New York: MacMillan, 1972), 25-28; Magali Sarfatti Larson, *The rise of professionalism. A sociological analysis* (Berkeley: University of California Press, 1977).

¹² Hans Albrecht Hesse, *Berufe im Wandel: ein Beitrag zum Problem der Professionalisierung* (Stuttgart: Eke, 1968), 28-35.

¹³ Elliot Friedson, *Professionalism. The third logic* (Cambridge: Polity Press, 2001), 87-92; Peter Lundgreen, «Berufskonstruktion und Professionalisierung in historische Perspektive», in *Professionalisierung pädagogischen Berufe im historischen Prozeß*, eds. Hans Jürgen Apel, Klaus-Peter Horn, Peter Lundgreen and Uwe Sandfuchs (Bad Heilbrunn: Verlag Julius Klinkhardt, 1999), 21-22; Konrad H.

This aforementioned phenomenon was labelled by Charles McClelland as a “back door control” referring to the enormous power and multiple roles of professors who not only did control and disseminate the theoretical knowledge necessary for exercising a profession but also performed as leaders in professional organizations and even at the level of decision making in the governmental structures as members of advisory boards.¹⁴ The presence of professionals in the sphere of politics cannot be regarded as an anomaly due to the fact that state control was realized partly through the regulations of professional training.¹⁵

Moreover, even Parsons believed that professional groups and the state administration are mutually dependent on each other and there is a fine balance between them.¹⁶ If this balance was tipped in favour of the state administration for some reason, the operation of the professional groups would be hindered. The hindrance is classified as a deprofessionalization process, which refers to the fact that the social circumstances fundamentally changed in the twentieth century in comparison with the period the professions emerged. This change could result in 1) the loss of the privileged social status of professionals, 2) losing control over their training and 3) the total transformation of the ideology of the professions, which served as a primary drive for monopolizing their professional activities. 4) As a result of the deprofessionalization, professional organizations were disbanded or transformed in a way that leadership was given to those collaborators who proved to be loyal servants of the state power. 5) In extreme cases, the validity of the permission of professionals to perform in the labour market was suspended temporarily or permanently.¹⁷

Deprofessionalization is a rare historical phenomenon, however, it could be perceived in Nazi Germany and the USSR where some of the

Jaraus, *The unfree professions. German lawyers, teachers and engineers, 1800-1950* (New York - Oxford: Oxford University Press, 1990), 16-23.

¹⁴ Charles E. McClelland, *The German experience of professionalization. Modern learned professions and their organizations from the early nineteenth century to the Hitler era* (Cambridge - New York - Sydney: Cambridge University Press, 1991), 25.

¹⁵ Martin Heidenreich, «Berufskonstruktion und Professionalisierung. Erträgen soziologischen Forschung», in Apel, *Professionalisierung pädagogischen Berufe*, 35-40.

¹⁶ Parsons, «The professions and social structure», 47-48; Julia Evetts, «The sociological analysis of professionalism. Occupational change in the modern world». *International Sociology* 2 (2003): 400.

¹⁷ Friedson, *Professionalism*, 128-129.

professions were deprofessionalized thanks to the intrusion of the state into the personal and theoretical dimensions of the professions.¹⁸ Deprofessionalizing professions was not in the interest even of these totalitarian regimes since the disappearance of the specialists could have undermined the functionality of the societies. Nevertheless, operating in unfavourable political and social circumstances could also lead to achieving the state of deprofessionalization, which reveals an important feature of this socio-historical phenomenon, namely its extended process character.¹⁹

Even though the immediate aftermath of the war left circumstances that strengthened the unfavourable conditions for the operation of professional groups, professions did not begin to be deprofessionalized immediately in countries of the Central and Eastern European region. In Germany and Austria, the professionals related to secondary teacher training recognized the necessity of cooperating with the new political regimes despite their conservative attitude.²⁰ Still, professional institutions managed to preserve a certain distance from the executive branch of the state until the Nazis occupied all segments of society.²¹ Similarly to Hungary, Christian-conservatives were in charge of education affairs in Austria in the 1920s. Despite the structural reforms implemented in teacher training, professional institutions remained intact from state interventions, which cannot be claimed in the case of Hungary. Moreover, the reform initiatives of the Austrian education ministry were elaborated by Richard Meistner a pedagogy professor at the University of Vienna.²²

Furthermore, other countries of the region, i.e. Czechoslovakia, Romania and the Serbian-Croatian and Slovenian Kingdom also implemented structural reforms in their teacher training and even withdrew the license of some professionals to practice. The ultimate aim of these reform initiatives was to unify the newly emerged countries through education since these states emerged as the consequence of the Parisian Peace Treaties (1919-1920) and were compounded by several territories with different

¹⁸ McClelland, *The German experience*, 223-227., Jarausch, *The unfree professions*, 8., Friedson, *Professionalism*, 140-141.

¹⁹ Friedson, *Professionalism*, 129.

²⁰ Jarausch, *The unfree professions*, 31-39.

²¹ McClelland, *The German experience*, 177-179.

²² Grimm, Bali and Pirka, «Leherbildung in Österreich», 99.

ethnic, economic and institutional backgrounds. Initial state interventions inflicted politically inspired interrogations on the remnants of old professionals as happened in the case of the University of Pressburg in Czechoslovakia²³ and the University of Klausenburg²⁴ in Romania in 1919-1920. After professionals of the previous political system were dismissed and their offices were taken by individuals loyal to the new governments, reforms were implemented to solidify social circumstances and thus ensure the territorial gains of the new countries. These state interventions were motivated by ethnic tensions since the excluded professionals were representatives of the old elites of the Austro-Hungarian Monarchy. Thus, these types of state intrusions in the internal affairs of professional institutions can be interpreted as the demolition of old structures and new professionalization initiatives of the newly emerged states.

The Hungarian case, however, differed from the countries of the region since the state interventions did not aim to modify the institutional settings in the teacher training before 1924 and it was not motivated either by abolishing all the previously emerged institutional elements and creating an entirely new institutional structure with new professionals. The Hungarian Christian-socialists wanted to align the professional institutions with the clerical-conservative ideology of the government to ensure the political stability of the country and adapt society to the new realities resulting from the disastrous consequences of the war.²⁵ Nevertheless, these adaption processes led to steady deprofessionalization due to the recurring state interventions in different forms, from which two-two cases will be detailed from the early period of the 1920s.

THE METHOD OF THE INVESTIGATION AND THE SOURCES

The research in the focus of this paper can be characterized as deductive and idiographic research. It is deductive since the research problem is derived from the professional theories, by which historical notions related

²³ Ignác Romsics, *Magyarország története a XX. században* [The History of Hungary in the 20th century] (Budapest: Osiris Kiadó, 2004), 182-183.

²⁴ Livezeanu, *Cultural politics*, 219-224.

²⁵ Péter Tibor Nagy, «Az állami befolyás növekedése a magyarországi oktatásban (1867-1945)» [The Increase of the State Influence on the Education in Hungary (1867-1945)] (Academic Doctoral Thesis, Hungarian Academy of Sciences, 2003), 155-157.

to the secondary teacher training will be interpreted. Furthermore, it is also idiographic due to the scale of the involved primary sources and the intention to take into account all elements that had a role in the development of the secondary teacher profession.²⁶ Document analysis of the archival sources and secondary literature review were employed as primary methods.²⁷ The data gathered from the usage of the method were synthesised dialectically to be able to depict both the inner circumstances of the investigated institutions involved in the research and their impact on the whole secondary teaching profession.²⁸ Additionally, research questions also try to reflect on the intention to reveal both the inner structures of the professional institutions and the character of the structure, which came into existence as a result of their operation. Three main research questions are to be answered during the research. First and foremost, revealing the operation mechanisms of the Secondary Teacher Examination Committee and the Secondary Teacher Training Institute. Secondly, determining the connections between the institutions involved in secondary teacher training. This aspect includes not only the previously mentioned institutions but other elements of the institutional environment, for instance, the faculty of philosophy and the Baron Eötvös József College. Lastly, the third research question focuses on the investigation of the connections between the Ministry of Religion and Public Education (MRPE) as a governmental entity responsible for the regulation of teacher training and the professional institutions in the capital and other Hungarian full universities (Debrecen, Szeged, Pécs).²⁹ Throughout the rest of the paper, this latter research aspect

²⁶ Earl Babbie, *A társadalomtudományi kutatás gyakorlata* [The Practice of Social Research] (Budapest: Balassi Kiadó, 2008), 82.

²⁷ Károly Veress, *Bevezetés a hermeneutikába* [Introduction to Hermeneutics] (Budapest: L'Harmattan - Magyar Daseinanalitikai Egyesület, 2019), 104-109; Emilio Betti, «A hermeneutika mint a szellemtudományok általános módszertana» [Hermeneutics as a general method of history of ideals], *Athenaeum* 1, no. 2 (1992): 16-19; Carla Willing, «Interpretation and analysis», in *The Sage Handbook of Qualitative Data Analysis*, ed. Uwe Flick (London - Washington: Sage, 2014), 138.

²⁸ Katalin Kéri, *Bevezetés a neveléstörténeti kutatások módszertanába* [Introduction to Methodology of Research Activities in the Discipline of History of Education] (Budapest: Műszaki Könyvkiadó, 2001), 73.

²⁹ Full universities are meant as higher education institutions at least entailing four faculties, namely philosophy, medicine, law, and theology. This criterion could be applied to the higher education institutions mentioned in the text. It also seems necessary outlining that before 1918 only three full universities existed in Hungary. The first was established in Tyrnau (Nagyszombat) but moved to Pest in the late eighteenth century. In 1872, another university was established in Klausenburg (Kolozsvár), which later moved to Szeged as the result of the Great War. In the last period of the Austro-Hungarian Monarchy, two additional universities were set up in Debrecen and Preßburg (Pozsony) in 1912. The

will be discussed in details focusing on the connections between the MRPE and the professional institutions of the capital by depicting two cases highlighting the transformation of the connections between the state entities and the professional organizations after 1918.

The focus is narrowed to one research question out of the three for the following reasons. First of all, this is an ongoing research in the phase of revealing and processing the relevant sources, by which the history of secondary teacher training could be depicted. Therefore, this study could be characterized as a “preliminary report” of the whole research process.

Secondly, the emphasis is also set on the initial phase of the endeavours of the MRPE to restrict the independent operations mechanisms of the professional institutions to outline the change in the connections between the professionals and the state bureaucracy after the Great War. By focusing on this aspect, it could be highlighted that there was a continuity of blatant attempts of state intrusions into the internal affairs of professional institutions between different regimes after 1918. From that perspective, the Horthy-era did not differ significantly from its predecessors between 1918-1919 since it also attempted to alter the personnel composition and the principles which determined the operation of professional institutions. These historical phenomena could be characterised as deprofessionalization tendencies that professional institutions had to face on a recurring basis throughout the whole of the interwar period.

All research questions, including the one which stands in the focal point of the current paper, are examined in the archival sources available in the National Archives of Hungary (NAH). Primary sources available here are connected primarily to the third research aspect, namely the connections between MRPE and the professional institutions.³⁰ Furthermore, sources

latter institution moved to Budapest and then to Pécs after 1920. Even though in different time periods, but teacher examination committees and teacher training institutions were assigned to all the full universities. See Németh, *Magyar pedagógusképzés*, 89-103.

³⁰ Within the NHA materials connected to the history of teacher training institutions, the sources could be found in sections of K592 and K636 were involved in the research, which contains archival sources of the 5th department (secondary schools between 1919 and 1944) and the 4th department (universities and colleges between 1919 and 1944) of the MRPE, respectively. Although both the Secondary Teacher Examination Committee and the Secondary Teacher Training Institution were higher education institutions, their affairs were relegated to the Department of Secondary Schools for ideological reasons in 1919 and remained there until 1923.

available in the Archives of Eötvös Loránd University (AELU) are also involved in the investigation. These materials are concerned with the inner operation mechanisms of the teacher examination committee and the teacher training institution. Moreover, some aspects related to the connection between the MRPE and other professional entities also could be revealed.³¹ Archives of the Eötvös College (Mednyánszky Dénes Library and Archives, referred to as MDLA in later parts of the paper) are also involved in the research since both the relationship between professional institutions and some aspects of the inner operation of the teacher training institution could be examined in the documents preserved here.³²

INSTITUTIONAL DEVELOPMENT OF THE SECONDARY TEACHER TRAINING IN HUNGARY UNTIL 1918

Until 1849-1850, the philosophy faculty of the University of Pest had been subjected to the other faculties, which provided preparatory training for students aiming at continuing their studies in upper faculties. After the fall of the revolution in 1848/1849, the Habsburgian government implemented higher education reforms following the idea of the reforms in Berlin carried out half a century earlier in 1809 to set a new course to the battered empire.³³ As a result, the faculty trained intellectuals ready for teaching in the newly created 8-grade secondary schools. However, the teacher qualification state exam cannot be completed in Hungary until 1862 since the lack of a Secondary Teaching Examination Committee.³⁴

³¹ The primary concern of the investigation is to process and analyse sources in fonds of 14/e («Documents of the Directorate of the Secondary Teacher Examination committee between 1866 and 1949») and the 15/b («Documents of the Administration of the Secondary Teacher Training Institution between 1871 and 1949») in Archives of Eötvös Loránd University (AELU).

³² The archival materials related to the external connections of the College are preserved in the section of «Documents related to the education and directorate affairs of the institution, 1895-1945», 50 Box, 95/1-4 dossier. MDLA., the section of the «Connections between MRPE and the directorate of the Eötvös College», 50 Box, 96/b/1-3 dossier, MDLA.

³³ Rebekka Horlacher, *The educated subject and the German concept of Bildung. A Cultural History* (New York - London: Routledge, 2016), 58-62; Németh, *Magyar pedagógusképzés*, 51-53.

³⁴ Previously committees were established in other parts of the Habsburg Empire in Vienna, Lemberg, Innsbruck and Prague after the introduction of the first provisional teacher training law in 1853. Garai Imre, *A középiskolai tanári professzió intézményesülésének folyamatai. A tanárvizsgáló bizottság és a tanárképző intézet működése a pesti tudományegyetemen az 1862-1919 közötti időszakban* [Professionalization Processes of the Secondary School Teacher Profession. Operation of the Secondary Teacher Examination Committee and the Teacher Training Institute of the University of Pest, 1862-1919] (Budapest: ELTE Eötvös College, 2022), 49.

Besides the lack of a teacher examination board, the training of secondary teachers was hindered by the fact that the training of the philosophy faculty was unsystematic due to the constant change in the curriculum, which can be seen as a structural deficiency of the universities following the Humboldtian ideal.³⁵ To mitigate this issue, curricular reforms were introduced in 1875, 1882 and 1888, which inserted comprehensive exams in all training programs to systemize the training and ensure the preparation of the candidates for the state examination.³⁶

Additionally, new institutions were set up to ensure the teacher candidates' theoretical and practical preparedness after the Compromise in 1867.³⁷ Basically, the development of teacher training in Hungary can be perceived as several attempts to systemize the training without the intrusion of the structure of the philosophy faculty. Avoiding direct political intrusion into the inner affairs of the faculty was a priority for all MRPE ministers. In 1870, the Hungarian Royal Secondary Teacher Training Institute of Budapest was established, which could be regarded as a conglomerate of seminars under a common administration. In the first period of the operation of the institute, methodological preparation dominated the training following the model of the Heyne and Wolf types of classical-philologist courses. Later, the methodological training was replaced by theoretical training thanks to the full professors of the philosophy faculty who influenced the training of the institution.³⁸ Consequently, a Practicing Secondary School of the Teacher Training Institute was founded in 1872, which was regarded as a true Hungarian investment by the contemporaries

³⁵ Pukánszky, «A tanárképző intézet szerepének», 78-79.

³⁶ Garai, *A középiskolai tanári professzió*, 284-285.

³⁷ The Compromise was a convention between the Habsburg-dynasty and the Hungarian political elite, which transformed the Habsburgian Empire into the Austro-Hungarian Monarchy. After the fall of the Hungarian revolution in 1849, the Habsburgs oppressed Hungary and reintroduced the absolutistic way of governance. Due to the serious military collapses in Italy in 1859-1861 and against Prussia in 1866, the oppression could not be maintained that forced Franz Jopesh I. to begin negotiations with the Hungarians. In 1867, the Compromise ensured the maintainance of the Habsburgian Empire but in a transformed way. Austria and Hungary formed a "real union", which meant to have common affairs derived from the fact that both countries had a common ruler. The common affairs were the foreign affairs, military affairs and finances covering the financial backgrounds of both the foreign and the military related expenses. From other aspects, both parts of the Monarchy was governed by their governments independently. Romsics, *Magyarország története*, 17.

³⁸ Michael J. Hofstetter, *The romantic idea of a university. England and Germany, 1770-1850* (New York: Palgrave, 2001), 20-25.

despite the German origins of practical training. By establishing a practical school, the theoretical and the practical preparation of the profession were separated from each other.³⁹

In 1887, the faculty council of the philosophy faculty decided to establish seminars for rationalising its training, but this initiative did not prove to be fruitful, since the preparation for the necessary exams for teacher candidates remained unfulfilled. Over some time, theoretical training and scientific-research-related activities dominated these courses. Therefore, The Eötvös József College as a teacher training boarding school was founded in 1895, which followed the institutional example of the Parisian *École Normale Supérieure*. The MRPE expected the institution to be as effective as its French counterpart.⁴⁰

Moreover, the foundation coincided with the crystallization of the ideology of teacher training, which manifested in the “scholar-teacher” concept. It partly refers to the Humboldtian origins of the training, namely the teaching activities had to be based on meticulous scientific training and thus well-prepared scholar-teachers could lead a slow social reform through propagating self-cultivation. Partly, it is connected to the idea of the social mission of the French secondary teachers, which was to disseminate the cultural achievements of the country while remaining loyal servants of the state.⁴¹ This element was of utmost importance in Hungary with its multiethnic social reality.

Despite the complex institutional system, only 17.6% of teacher candidates were given systematic training in one of the institutions in the academic year of 1917/1918. It was not a surprise that the legal changes in the revolutionary period between 1918-1919 aimed at systematizing

³⁹ Garai, *A középiskolai tanári professzió*, 100-103, Pukánszky, «A tanárképző intézet szerepének», 81-83.

⁴⁰ Even in the 1920s, the leaders of the Eötvös College referred to the institutional example of the French *École Normale* when they wished to justify the appointment of a vice-principal in the institution. Teleki Pál, «205/1922. - 5. Cur. sz. Felterjesztés a Vallás és Közoktatásügyi Minisztériumhoz (VKM) az Eötvös Collegiumba aligazgató kinevezése tárgyában» [Proposal of Pál Teleki, the president of the Eötvös College to appoint a vice-director in the Eötvös College]. Budapest, 1922, 50 Box, 95/3 Dossier, MDAL. (Both of the abbreviations of VKM and MRPE stands for Ministry of Religion and Public Education. The VKM format is used when it is referred in Hungarian and the MRPE could be considered its English version).

⁴¹ Garai, *A középiskolai tanári professzió*, 42-46., Raymond Bourdoncle and Andre Robert, «Primary and secondary school teachers in France: changes in identities and professionalization», *Journal of Education Policy* 15 (2000): 70-73.

the training by extending the training of the teacher training institution to all teacher candidates.⁴²

A SUMMARY OF THE CHANGES IN TEACHER TRAINING DURING THE COMMUNIST REGIME IN 1919

According to Pál Hatos, the Great War had disastrous consequences on the Hungarian society. The war paralyzed and dissolved the functionality of society due to the subordination of all economic and social efforts to win the war.⁴³ This had a consequence on the universities including the teacher training, which basically led to the deterioration of the theoretical and practical training of the candidates. In the first phase of the war, only a minor reduction in preparation time for state exams was given to veterans returning from the trenches. From 1918, veterans who had been spending 7 semesters or more time on active duty were allowed to apply for the comprehensive exam and after its completion, they could apply for the state exam immediately without any further theoretical preparation.⁴⁴ Furthermore, the one-year-long practical training was reduced to three months before the last phase of the state exam.⁴⁵

⁴² Garai, *A középiskolai tanári professzió*, 272.

⁴³ Hatos Pál, *Az eléltözött köztársaság. Az 1918-as összeomlás és az öszirózsás forradalom története* [The Sick Republic. The History of the Collapse in 1918 and the Democratic Revolution] (Budapest: Jaffa Kiadó, 2018), 22.

⁴⁴ Lovászy, Márton, «A vallás- és közoktatásügyi magyar miniszter 1918. évi 95.975. számú rendelete az összes főiskolákhoz, a háborúból visszatért tanulóknak tanulmányi idejükben szenvedett veszteségeikért való kárpótlásáról» [No. 95.975 decree of Lovászy Márton MRPE to all higher education institutions in 1918 about the compensation of university students for their time loss due to have been in active service on the frontlines], Budapest, 21st November 1918, II-III. Fund 14/e, 2 Box, 2 dossier, AELU. See Garai, *A középiskolai tanári professzió*, 254-255.

⁴⁵ After completing the 4-year-long theoretical training at the university, secondary teacher candidates were expected to complete a 1-year-long practical training in a public secondary school. Pedagogical training could have begun and completed after passing the last theoretical comprehensive exam in order to ensure the candidates' theoretical preparedness before commencing the teaching practice. The decree issued by Lovászy MRPE completely crushed this idea by reducing the length of the training to 3 months and made it possible to begin teaching activities during the theoretical training. Lovászy, Márton, «A vallás- és közoktatásügyi magyar miniszter 1918. évi 95.975. számú rendelete az összes főiskolákhoz, a háborúból visszatért tanulóknak tanulmányi idejükben szenvedett veszteségeikért való kárpótlásáról» [No. 95.975 decree of Lovászy Márton MRPE to all higher education institutions in 1918 about the compensation of university students for their time loss due to have been in active service on the frontlines], Budapest, 21st November 1918, VI. Fund 14/e, 2 Box, 2 dossier, AELU. See Garai, *A középiskolai tanári professzió*, 254-255.

After the communist regime had come to power on 21st of March 1919, several changes were made affecting teacher training. These changes can be categorized into three groups. The first is related to personal changes in the teaching boards in all training institutions. Several changes were made at the personal level both at the philosophy faculty and in the Secondary Teacher Examination Committee which had a close connection with the faculty since full professors were entrusted to give exams. The scale of the changes can be understood through the composition of the committee. Only 15 examiners remained in place out of the 68 members of the newly appointed committee.⁴⁶ The second level of the changes affects the training at the theoretical level. The communist politicians believed that the “scholar-teacher” concept should be abolished, and “socially sensitive teachers” should be trained instead. Consequently, sociology, economics, socio-psychology and socio-biology were added to the general level of the training of the candidates, which can be interpreted as an outright intrusion into the theoretical level of the training.⁴⁷ On the third level, the whole structure of the training transformed. All previously established institutions were centralized under the direction of the teacher training institution, which was renamed Secondary Teacher Training College.⁴⁸ Moreover, the structure of the examinations was also

⁴⁶ Közoktatásügyi Népbiztosság [Public Education Commissariat], «75029/1919. IV. Dr. Wittmann Ferenc a budapesti középiskolai tanárvizsgáló bizottság alelnökének állás alóli felmentése tárgyában» [Dismissal of Dr. Ferenc Wittmann, the vice-president of the Secondary Teacher Examination Committee], Budapest, 8th April 1918, K 592 Fund, 31 Bunch, 25 Title (1919), NAH., MRPE, «81.537/1919. VI-1. A budapesti középiskolai tanárvizsgáló bizottság új elnökének ügyvezető alelnökének és tagjainak kinevezése tárgyában» [Appointing the new president and members of the Secondary Teacher Examination Committee in Budapest], Budapest, 30th April 1919, K 592 Fund, 31 Bunch, 25 Title (1919), NAH. See also Garai, *A középiskolai tanári professzió*, 425-428.

⁴⁷ A Közoktatásügyi Népbiztosság, «172701/1919. szám alatt Tóth Lajos javaslatát véleményezésre leküldte, amely alapján szociális biológiai és szociális pszichológiai tanszék megszervezésére tett javaslatot» [The Public Education Commissariate send the proposal of Lajos Tóth under the No. 172701/1919, by which social biology and socio psychology departments are advised to be established], Budapest, 23rd July 1919, 15/b 4 Fund, Napló [Registry of the Teacher Training Institution], 1906-1921, AELU.

⁴⁸ Lukács György népbiztos helyettes, «159.085 VI. 1. Rendelet az Eötvös Collegium Középiskolai Tanítóképző Főiskolába történő beolvasztása tárgyában» [Decree of György Lukács vice-commissar of public education in merging Eötvös College into the Secondary Teacher Training College], Budapest, 14th July, 1919, 50 Box, 96/b/3 dossier, MDLA. (Imre Garai, *An elite teacher training institute. The history of Eötvös József Collegium, 1895-1950* (Budapest: ELTE Eötvös College, 2019), 160. Additionally, a “Curative Pedagogical Secondary School” was also attached to the new Teacher Training College. The regulation of the secondary school was preserved among the archival materials of the transformed teacher training institution. See: Dr. Ranschburg Pál, «95.895/1919. B. VIII. Jelentés a Középiskolai Tanítóképző Főiskola gyógyító pedagógiai gyakorló középiskolájának szervezeti szabályzatáról» [Report of Dr Pál Ranschburg about the regulation of the Curative Secondary Pedagogical School of the

altered significantly. The written parts of the state exam were erased including the necessity of writing and defending a thesis. Similarly, the pedagogical exam, which had been a compulsory part of the state exam since 1882 was also driven out.⁴⁹

CONTINUITY AND DISCONTINUITY IN THE OPERATION OF THE PROFESSIONAL INSTITUTIONS OF THE SECONDARY SCHOOL TEACHER TRAINING

Intrusion into the personal and curricular affairs of the Secondary Teacher Training Institution

After the communist regime was toppled on 1st August 1919, all legal changes issued after 31st October 1918 were annulled. Following the restoration of the teacher training institution, its director, Gedeon Petz⁵⁰ believed the institution could continue the operation as it was before the war. In early September 1919, the rehabilitated director reported on the latest developments of the members of the council of the teacher training institution since the preliminary step of renewing the institution was the appointment of new members to vacant positions and the rehabilitation of those who were alive since the council was the most important organisation of the institution.⁵¹

Secondary Teacher Training College]. Budapest, 21st May, 1919, K 592 Fund, 31 Bunch, 25 Title (1919), NAH. Garai, *A középiskolai tanári professzió*, 270.

⁴⁹ Közoktatásügyi Népbiztosság [Public Education Commissariat], «79.686/1919. VI-1. A középiskolai tanárvizsgálati szabályzat módosítása tárgyában» [Modification of the exam regulations of the secondary teacher candidates], Budapest, 4th April 1919, K 592 Fund, 31 Bunch, 25 Title (1919), NAH. Garai, *A középiskolai tanári professzió*, 258-259.

⁵⁰ Petz was a professor of German language and literature and appointed as director of the teacher training institution in 1905 when the previous director stepped down for personal reasons Garai, *A középiskolai tanári professzió*, 243.

⁵¹ The establishment of the council was the result of a structural reform issued by Loránd Eötvös in 1899. Eötvös as a full professor of physics had a particular interest in teacher training and intended to systematize the operation of the teacher training institution by setting up a permanent board. The council consisted of the president of the council, the director of the institution, the vice-director and 7 more council members. The president had a representative role and usually did not take part in the daily operation of the institution. These tasks were performed by the director and the vice-director. The responsibility of the council was to determine the educational programme of the institution in each semester and scrutinize the education advancement of those teacher candidates who chose to be a member of the institute, which was not mandatory until 1924. See MRPE, «38.640/1899. A budapesti m. kir. középiskolai tanárképző-intézet Szervezeti Szabályzata» [Organisational Regulation of the Hungarian Royal Secondary Teacher Training Institution], Budapest, 1899. 15/d Fund, 13 Box, AELU.

Petz reported that the 108.157/1914 MRPE degree on 22nd August 1914 appointed the members of the council before the war. From those who regained their positions back then, the president, Loránd Eötvös passed away, one council member retired and his position remained vacant and another member collaborated with the communist regime, which prevented him from fulfilling his duties.

Concerning the presidency, Petz suggested that apart from himself as the de-facto head of the institution, two other senior members should be appointed to the position. One was Izidor Fröhlich who was also a full professor of physics as was the deceased former president. Fröhlich had been teaching in the institution for almost 40 years by 1919, which made him one of the most senior members.⁵² The other appointed professor was Zsolt Beöthy, whose career almost began simultaneously with the presence of Fröhlich in the institute. Compared to Fröhlich, the prestige of Beöthy was higher since he was promoted as the president of both the teacher examination committee and the teacher training institution from 1890 until 1896 when he stepped down from the position of the latter institute.⁵³ Lastly, Petz also implied in his report the possibility of postponing the appointment until the general situation in the country became more stable.⁵⁴

The MRPE decided to leave the presidency vacant and appointed the members of the council for only one academic year instead of the previously standard 5-year term.⁵⁵ On the 9th of October 1920, the ministry issued the decree of 110.614/920. V. containing the 5-year length appointment of the director, the council members and the president.

⁵² Garai, *A középiskolai tanári professzió*, 178.

⁵³ Istvánné Kiss, *Szemelvények a budapesti egyetemi tanárképző intézet gyakorlógimnáziumának jegyzőkönyveiből (1924-1944)* [Extrats from the Minutes of the Secondary Practicing School of the Teacher Training Institute of the University of Pest (1924-1944)] (Budapest: Országos Pedagógiai Könyvtár és Múzeum, 1991), 6-7.

⁵⁴ Petz Gedeon igazgató, «Jelentés a tanárképző intézet tanácsának tagjairól» [Report of Gedeon Petz the director of the teacher training institution about the member of the council], Budapest, September 1919. K 592 Fund, 31 Bunch, 25 Title (1919), NAH.

⁵⁵ VKM, «183.959/919 BXVI. sz. A tanárképző intézet igazgatójának és a tanács tagjainak a kinevezése az 1919/1920. tanév időtartamára» [The MRPE appointed the director and the members of the council of the Secondary Teacher Training Institution for the academic term of 1919/1920], Budapest, 20th September 1919, 15/b 4 Fund, Napló [Registry of the Teacher Training Institution], 1906-1921, AELU.

Regarding the leadership of the institution, Remig Békefi was awarded by the trust of the ministry.⁵⁶ His choice was unusual from multiple perspectives. First, courses held by him in the teacher training institute appeared in the syllabus more than a decade later compared to the first appearance of Fröhlich and Beöthy. Additionally, he gained his full professorship only in 1900 thanks to his volumes on the history of education in Hungary in the early modern times.⁵⁷ Secondly, he was nominated as a member of the council in 1911 for a short period but he stepped down the next year due to his election as the abbot of Zirc.⁵⁸ As a result of his new role, his presence in the teacher training institution became rare and he could hardly manage to even hold his lectures. Lastly, he was a cleric whose presence was not unusual in the institution, however, their number decreased steadily with the progress of secularization and Békefi remained the only individual who represented them in the institution in the first decade of the twentieth century.⁵⁹ In fact, he became the first clerical who occupied the top position of the teacher training institution.

His nomination could be perceived as a clear political intention of paving the way for a new area, in which a new clerical-conservative ideology dominated education after the fall of the communist regime. Secularization and the separation of the state and ecclesiastic affairs particularly in the field of education, which stood at the core of the education policy of the Dualist era cannot be interpreted anymore after the revolutions and the fall of the Monarchy. Thus, the appointment of

⁵⁶ VKM, «110.614/920. V. sz. A tanárképző intézet elnökének, igazgatójának és a tanács tagjainak a kinevezése az 1920/1921 évtől az 1925/1926. évig szóló időtartamra» [The MRPE nominated the president, the director and the members of the council for the term of 1920/1921 and 1925/1926 academic years], Budapest, 9th October 1920, 15/b 4 Fund, Napló [Registry of the Teacher Training Institution], 1906-1921, AELU.

⁵⁷ Imre Szentpétery, *A királyi magyar Pázmány Péter Tudományegyetem története. Vol. 4. A bölcsészettudományi kar története, 1635-1935* [The History of the Royal Hungarian Péter Pázmány University. Vol. 4. The History of the Philosophy Faculty, 1635-1935] (Budapest: Királyi Magyar Egyetemi Nyomda. 1935), 582.

⁵⁸ Zirc is located approximately 120 kilometres westwards from Budapest. The abbey was founded here in the late twelfth century and maintained by the Cistercian order. It has a significant cultural importance due to the education-related activities of the order. In later centuries, several Gymnasiums were founded or maintained by the Cistercians and consequently governed from Zirc as the Hungarian centre for the order.

⁵⁹ Garai, *A középiskolai tanári professzió*, 246.

Békefi could be regarded not as just a sign of a major political shift but also as an era for the professional institutions, in which their interest derived from their unique social function and expertise could be overruled at any time for ideological reasons.⁶⁰

Not only did the MRPE intrude into personal affairs but also tried to influence the theoretical training of the institution. In late November 1919, the MRPE issued a request to consider the possibility of introducing compulsory philosophy and economics courses for all teacher candidates and make the visitation of these courses the prerequisite of applying for state examinations from 1919/1920.⁶¹ This request was an extraordinary development from at least two aspects. First, it had never occurred before the war in the history of the institution that a governmental entity put forward a request concerning the theoretical part of the training. The communist regime was the first, which tried to establish the foundations of political indoctrination.⁶² Secondly, just after the fall of the communist regime in an atmosphere of revenge and tensions,⁶³ considering a request of such political sensitivity could have resulted in bitter consequences for the whole of the institution.

Therefore, the council delegated the case to Ernő Fináczy for examining the request of the ministry.⁶⁴ Although Fináczy was a full professor of

⁶⁰ Nagy, «Az állami befolyás növekedése », 15-16.

⁶¹ VKM, «200.884/919. BXVI. sz. Leirat a társadalomtudományi és közgazdasági kurzusok kötelezővé tételéről a tanárjelöltek számára az 1919/1920. tanévtől» [Decree of the MRPE about compulsory sociological and economic classes for all teacher candidates from the academic year of 1919/1920], Budapest, 21st November 1919, K 592 Fund, 31 Bunch, 25 Title (1919), NAH.

⁶² Balassa József a középiskolai tanítóképző főiskola igazgatója, «275/1918-1919. Felterjesztés a Középiskolai Tanítóképző Főiskola szervezeti szabályzatáról» [József Balassa the head of the Secondary Teacher Training College submission on the organisational regulation of the College], Budapest, 16th July 1919, K 592 Fund, 31 Bunch, 25 Title (1919), NAH.

⁶³ The investigation of those teachers who remained in position during the communist period had just begun in October 1919 and lasted until April 1920. See Petz Gedeon a középiskolai tanárképző intézet igazgatója, «177/1920. Levél a VKM-miniszterhez az igazoló eljárásokról» [Gedeon Petz the director of the teacher training institution informs the ministry about the results of the interrogation processes], Budapest, 23rd April 1920, K 592 Fund, 143 Bunch, 19 Title (1920), NAH.

⁶⁴ A Tanárképző Intézet Tanácsa, «92/1919. A VKM leiratának véleményezésével a tanács Fináczy Ernő tanácsstagot bízza meg» [The request of the MRPE was delegated to the council member of Ernő Fináczy], Budapest, 17th December 1919, 15/b 4 Fund, Napló [Registry of the Teacher Training Institution], 1906-1921, AELU.

pedagogy, in earlier periods of his career he also served in the MRPE in various positions, which made him the right candidate to give a professional assessment from the ministerial decree. The council discussed the measures taken by the ministry and the report on it on 22nd December 1919.⁶⁵ In the final report about the case, the director outlined the supportive attitude of both Fináczy and the rest of the council towards the motion of the ministry. Still, a barrier was mentioned, which prevented the implementation of the planned courses. The current legal and teacher examination regulations back then made it possible to apply for the state examination without the rule of mandatory membership in the teacher training institution. Thus, intruding into the curriculum of the institution could have been in vain since only a small proportion of the secondary teacher candidates would have visited these newly introduced courses.⁶⁶

Avoiding the implementation of the courses just underlines the fact that the council noticed the political intentions behind the motion and wished to ensure the curriculum remained intact. To achieve this aim, the authoritativeness of the council compounded by the scientific achievements and political experience of Fináczy was put behind the refusal of the request of the ministry. The defiance of the teacher training institution perplexed the MRPE and sent the motion between its departments to invent new ways of exercising control over the views of the teacher candidates.⁶⁷

⁶⁵ A Tanárképző Intézet elnöksége, «95-102/1919. A tanárképző intézet tanácsának 1919. december 22-i ülése» [Session of the council of the teacher training institution on 22nd December 1919], Budapest, 22nd December 1919, 15/b 4 Fund, Napló [Registry of the Teacher Training Institution], 1906-1921, AELU.

⁶⁶ Petz Gedeon a középiskolai tanárképző intézet igazgatója, «109/1919. Levél a VKM-miniszterhez a tanárjelöltek közgazdasági és társadalomtudományi képzéséről» [Report of Gedeon Petz on the sociological and economic training of the teacher candidates], Budapest, 23rd December 1919, K 592 Fund, 31 Bunch, 25 Title (1919), NAH.

⁶⁷ The proposal was sent from the 4th to the 5th department of the MRPE and then to the presidential department only to finally remain incomplete. VKM, «213.989/1919. B.I. Szociológiai és közgazdaságtani órák bevezetése a budapesti középiskolai tanárképző intézetben» [Decree of the MRPE related to the introduction of social and economic classes for teacher candidates in the teacher training institute of Budapest], Budapest, 23rd December 1919, K 592 Fund, 31 Bunch, 25 Title (1919), NAH. Garai, *A középiskolai tanári professzió*, 280-281.

New measurements in the teacher examination processes and the determination of the reform of the teacher examination regulations

Since the intention of scrutinizing the political behaviour and views of all teacher candidates remained unfulfilled, the MRPE found new ways to pursue its intentions. In January 1920, the president of the Teacher Examination Committee in Debrecen reported that the directorate of the committee accepted a motion introduced by a senior member. It related to the interrogation of teacher candidates about their behaviour during the communist dictatorship and their national sentiments. According to the proposal, the inquiry took place between passing the state examination and getting the graduation certificates.⁶⁸ The idea of the proposal of the Committee in Debrecen was to prevent communist or politically untrustworthy candidates from being employed in secondary schools. The philosophy faculty in Debrecen was way smaller than in the capital in terms of the number of students, therefore, professors knew the personal background of their students. From the circumstances of the approval of the motion, it was obvious that the regional committee reported this measure to the ministry due to the intention of using this punitive measure locally against candidates involved in political activities during the revolutionary period.

In the higher education affairs department of the MRPE, it was recognized that the proposal of the Committee in Debrecen serves as a good pretext to renew the intentions that could not be fulfilled a few months earlier in the case of the teacher training institute. Therefore, the proposal was forwarded to the Committee in Budapest requesting a professional assessment.⁶⁹ The president of the Committee in the capital, Zsolt Beöthy reported that the Committee would not pose any plea against the

⁶⁸ Láng Nándor a debreceni m. kir. középiskolai tanárvizsgáló bizottság elnöke, «4/1920. Levél a VKM-miniszterhez» [Nándor Láng the president of the Teacher Examination Committee in Debrecen reports an accepted motion of the directorate of the Committee], Debrecen, 21st January 1920, K 592 Fund, 143 Bunch, 19 Title (1920), NAH.

⁶⁹ VKM, «27.562/ 1920.B. XVI. sz. Leirat a budapesti tanárvizsgáló bizottságnak a debreceni tanárvizsgáló bizottság javaslatának véleményezése ügyében a tanárjelöltek politikai magatartásának és nemzethűségének ellenőrzéséről» [The MRPE asks the professional assessment of the Teacher Examination Committee in Budapest about the proposal of the Committee in Debrecen regarding the interrogation of teacher candidates about the political behaviour and national sentiments], Budapest, 31st March 1920, K 592 Fund, 143 Bunch, 19 Title (1920), NAH.

planned measure of their counterparts in Debrecen. In fact, Beöthy confessed that they had their own process of ensuring the participation of the right candidates on the state exams.

He described a dubious practice, during which names of the students who were invited to the state exams were published in several locations of the philosophy faculty before the exams. Peers could report and even indict each other if they believe that the invited candidates were involved in suspicious activities. In case of an indictment, the committee could suspend the examination process temporarily or ban the candidate suspect from the state exam permanently.⁷⁰ After assessing the report of the Committee in Budapest, the MRPE not only recognized the existing practices of screening out undesirable candidates before the state exams but it also coerced the Committees to deny handing out the diplomas to those candidates who proved to be “disloyal to their nation”.⁷¹ This coercion later became a permanent part of the Teacher Examination Regulations after the reform initiatives in the early 1920s and 1930s.⁷² Thus, the examination committees had to investigate not only the theoretical and practical preparedness of the candidates but also their political views. The political interrogation of the candidates was outside the operational scope of the professional institutions which fundamentally reveals the transformation of the social reality after the war.

The alteration of the social circumstances also reversed the balance between the professional groups and the state. The political pressure concerning the scrutiny of the views and the behaviour of teacher candidates clearly indicated the dawn of a new social reality. The beginning of a new era between the connections of the MRPE and the professional

⁷⁰ Beöthy Zsolt a budapesti országos középiskolai tanárvizsgáló bizottság elnöke, «593/1920. Levél a VKM-miniszterhez a debreceni bizottság előterjesztésének véleményezéséről» [Zsolt Beöthy, the president of the Teacher Examination Committee in Budapest reports about the proposal of the Committee in Debrecen to MRPE], Budapest, 19th April 1920, K 592 Fund, 143 Bunch, 19 Title (1920), NAH.

⁷¹ VKM-miniszter; «104.649/1920.V. Rendelet a budapesti országos tanárvizsgáló elnökségének a tanárjelöltek tanácskormány idején tanúsított magatartásának megvizsgálásáról, igazolóbizottság alakításáról» [Decree of the MRPE to the directorate of the Teacher Examination Committee in Budapest about the interrogation of teacher candidates and establishment of committees carrying out interrogations], Budapest, 18th April 1920, 14/e Fund, 3 Box, 1 dossier, AELU.

⁷² [Sine nomine], «Javaslat a Középiskolai Tanárvizsgálati Szabályzat módosítása tárgyában» [Proposal of the new Teacher Examination Regulations], 1925. 11.§., 14/e Fund, 11 Box, AELU.

institutions was also underlined by the developments related to the reform initiatives of the teacher examination regulations.

After Zsolt Beöthy was replaced by József Szinnyei⁷³ as the president of the teacher examination committee,⁷⁴ reforms related to the teacher examination regulations began. Szinnyei declared that he had sworn in his office led by the intention of facilitating the reforms of the regulations. Its previous version was implemented in 1888 and all the teacher examination committees regarded it outdated even before the war.⁷⁵ Since the regulations determined the structures of the state exams, the general requirements in each part of the exam process and even the text of the qualification degree, these regulations basically shaped the performance and operation of the whole secondary teacher profession. Consequently, its amendment should have been preserved in the realm of professional competency.

In the transformed social circumstances, in which the MRPE interfered in the personal, curricular, and even qualification processes of the professional institutions, the reform initiatives of the regulations were also influenced by the ministry. The four teacher examination committees were expected to renew the regulations along 12 points set out by the MRPE in May 1921. Some of them related to the identification of deficiencies in the teacher training such as the lack of methodological materials or the need of regulating the practice of the candidates.⁷⁶ However, the 4th and the 5th points made clear that the government intended to make membership of the teacher training institution compulsory for all candidates and the certificate of participating in the courses of the institution had to be submitted to the examination committees as a

⁷³ Szinnyei was the full professors of comparative linguistics of Ural-Altai related languages and gained a professorship in 1893/1894 in Budapest. He was employed both in the teacher training institute and in the teacher examination committee. Garai, *A középiskolai tanári professzió*, 170.

⁷⁴ VKM, «109.696/1920. V. augusztus 2. A budapesti országos középiskolai tanárvizsgáló bizottság elnöke és tagjainak az 1919/1920 tanévvel kezdődő további öt év tartamára leendő kinevezése tárgyában» [Nomination of the members of the Secondary Teacher Examination Committee in Budapest for 5-year period begins in 1919/1920], K 592 Fund, 172 Bunch, 19 Title (1921), NAH.

⁷⁵ Szinnyei József a budapesti országos középiskolai tanárvizsgáló bizottság elnöke, «Tv. 81./1923-1924. Felterjesztés a tanárvizsgáló Szabályzat módosítása tárgyában» [The submission of József Szinnyei, the president of the Teacher Examination Committee related to the reform of the Teacher Examination Regulations], Budapest, August 1923, K 636 Fund, 197 Box, 30 Title (1925), NAH.

⁷⁶ VKM, «5725/921. V. ü. o. Rendelet a középiskolai tanárképzés reformjáról» [Decree of the MRPE on the reform of the secondary teacher training], 1-3, 10-12. Budapest, 14th May 1921, 14/e Fund, 11 Box, AELU.

prerequisite of applying for state exams. A similar conceptual shift could be registered in the 8th point, in which the importance of physical education⁷⁷ of the teacher candidates during their preparation time for their profession was outlined.⁷⁸

Determining the reform initiatives of the teacher examination regulations made it obvious that the MRPE conceived the operation of the professional institutions differently in the new social reality after the war. The professional-related affairs could not be maintained and regulated only by the professionals, but the state also wished to pursue its interests even if it resulted in obvious defiance from the professional entities or significant achievements in personal appointments or conceptual determination of the system of the training. For both the ministry and the professional institutions, the early 1920s could be perceived as the period of gaining experience of the consequences of the transformed social reality. The professional organizations wanted to continue their operation as it was before the war to fulfil their aims. On the contrary, the MRPE was bent on tailoring some elements of their activities to meet the requirements of the altered reality after the revolutions. The question for the professional institutions, however, became very clear from the early period of this process: how long could the operation of the professional institutions be preserved under constant pressure from state entities?

SUMMARY

Throughout this paper, an ongoing research is presented, which could be characterised as a deductive and idiographic investigation focusing on

⁷⁷ Mentioning the physical education could be regarded as a major conceptual shift at least from two aspects. First, the teacher training institutions and even universities lacked the necessary facilities for physical education. Second, physical education was an extraordinary subject in secondary schools and, therefore, their teachers were trained in different high schools and qualified by different examination committees. From the motion of the ministry, it was not clear how could physical education related anyhow to the matter of the training and qualification of secondary school teachers. It can be assumed that its mentioning had ideological reasons. In the new situation of the country after the lost war, physical education obtained a significant importance to regain the capability of self-defence. For that reason, the MRPE launched several programs throughout the country, which enhanced the military capabilities deemed necessary for schoolboys. Physical education of teachers could be envisaged as part of these programs. Romsics, *Magyarország története*, 182.

⁷⁸ VKM, «5725/921. V. ü. o. Rendelet a középiskolai tanárképzés reformjáról» [Decree of the MRPE about the reform of secondary teacher training], 4-5, 8. Budapest, 14th May 1921, 14/e Fund, 11 Box, AELU.

three major aspects. Out of the three questions, the connections between the professional entities and the MRPE in the early 1920s were shown by employing the methods of archival source analysis and secondary literature reviews as primary ways of interpreting the sources.

The development of the professional institutions of the secondary teacher training began in the late 1840s and lasted all over the century. During this evolution theoretical parts of the training were separated from the practical preparation of candidates and institutional examples from Germany and France were implemented in the Hungarian context to provide a systematic preparation for the teachers to fulfil their duty. Despite the efforts of the ministry and professionals, less than 20% of the students were given standardized education, which accounted for the high ratio of failed exams before the teacher examination committees responsible for qualifying teachers.

The consequences of the Great War paralyzed the social system including the professional institutions. The length of both the theoretical and practical preparations was reduced significantly. Furthermore, the short-lived communist dictatorship centralized the teacher training institutions under the direction of the Secondary Teacher Training College. In the institution, newly implemented subjects were introduced with the aim of ideological indoctrination of the teacher candidates. Moreover, the teacher qualification was transformed significantly since all written exams and the necessity of writing a thesis were revoked. Even the structure of the exam was altered by abolishing pedagogical exams. All these changes were driven by the ambition of demolishing the “scholar teacher training” concept.

From the early 1920s, two-two cases were analyzed related to the Secondary Teacher Training Institution and the Teacher Examination Committee in Budapest. In the case of the teacher training institution, the appointment of the president and the introduction of new compulsory classes obviously showed the efforts of the MRPE to intrude into the inner affairs of the professional organization. Although Remig Békefi was a recognized scholar, his appointment as president expressed the intention of the MRPE to reshape the secular character of the institute. A political motive was also clearly expressed in the motion of the ministry aiming at introducing obligatory subjects for all candidates. The leadership of the institution recognized the obvious political intentions

and prevented the ministry from intruding into the curriculum by referring to legal shortcomings.

After having encountered opposition from the council of the teacher training institute, the ministry found new ways into exerting control over the political views of the teacher candidates. Committees were entitled to scrutinize the political behaviour of the teacher aspirants. In 1920, the committee of Debrecen requested the ministry to be entitled to refuse handing out diplomas for those who were involved in the political activities of the communist regime. Originally, the request was made for planned punitive measures against local students, however, the MRPE extended this right to all committees intending to screen out candidates who did not seem to be comfortable with the ideology of the new era.

Additionally, the MRPE took care by determining the reform initiatives of the teacher examination regulations to influence the professional qualification and thus the operation of the professional institutions in the long term. In the case of previous renewals of the teacher examination regulations, professional institutions set out the cornerstones of the reforms. As an indicator of the transformed relationship between the ministry and the professional institutions, the MRPE announced the key points of the renewal process, which also contained conceptual shifts in the training. Prescribing the mandatory membership of the teacher training institutions and emphasizing the importance of the physical education of the teacher candidates set the “scholar teacher training” concept on a gradual descending trajectory.

The intentions of the ministry were affected by the circumstances, into which the end of the war drove the country. After the lost war, a new social and economic structure have to be created to maintain the functionality of the remaining parts of the country. Therefore, politicians had to be convinced that several aspects of social life have to be set on a new course including professional institutions. This led to ministerial activity, which ignored the previously established connection based on mutual cooperation between the government entities and the professional institutions. Perception of affairs previously regarded as internal matters of the professional institutions had changed and thus raised the interest of politicians. This new relationship between the MRPE and the professional institutions

did not lead to an immediate deprofessionalization but it certainly eroded the social distinctiveness of professionals derived from their expertise.

Regarding the relations between the professionals and the executive branch of the state, the Hungarian developments could be characterised as unprecedented compared with the countries in the Central and Eastern European region in the early 1920s. State initiatives were also prevalent in other countries of the region that aimed at restructuring previously emerged professional institutions. In Germany, professionals could withstand the attempts of degrading the previously achieved social positions of secondary teachers and maintained the institutional settings of their training in the era of the Weimar Republic.⁷⁹ Moreover, the Austrian Christian-socialist-led education ministry implemented structural reforms of the training but these measures were implemented by the contribution of professionals.⁸⁰ In the newly emerged countries in the region, governments tended to reorganise the professional training of teachers to ease the territorial differences. These initiatives of setting professional development on a new course also resulted in dismissing professionals inherited from the period of the Austro-Hungarian Monarchy.⁸¹

However, the Hungarian government wanted to slightly modify the structure of the training but aimed at implementing significant changes in the inner operation of professional institutions. This intention could be traced back to two reasons. First, the political-economic collapse of the Monarchy and the short-lived revolutionary regimes between 1918-1919 had shaken the whole of Hungarian society. Consequently, the institutional structure and any changes implemented in the revolutionary period cannot be maintained after 1920. Secondly, professionals were deemed suspiciously as the remnants of the fallen liberal political and social era who had to be aligned with the new political order. Since the Horthy-regime could be labelled as a parliamentary political system with authoritarian elements due to the lack of equal conditions for the political parties in the political contests,⁸² representatives of the regime

⁷⁹ McClelland, *The German experience*, 210-213.

⁸⁰ Grimm, Bali and Pirka, «Leherbildung in Österreich», 98-99.

⁸¹ See Livezeanu, *Cultural politics*, 218-219., Protner, Medves and Batinic et al., «The Development of Teacher», 243-244.

⁸² Romsics, *Magyarország története*, 235.

felt necessary to ensure the political stability by exerting a certain level of control over professional institutions that were manifested in the form of renewal attempts of state interventions.

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ENTREVISTA CON JUAN FRANCISCO DELGADO RUIZ, EXPRESIDENTE DE LA CONFEDERACIÓN ESPAÑOLA DE ASOCIACIONES DE MADRES Y PADRES DEL ALUMNADO (CEAPA) (1992-1996)

Interview with Juan Francisco Delgado Ruiz, former president of the Spanish Confederation of Fathers and Mothers (CEAPA)

Javier González Moreno^a

Resumen. Desde su fundación en 1979, la Confederación Española de Asociaciones de Padres de Alumnos (CEAPA) agrupa a la mayoría de las asociaciones de madres y padres de alumnos de los centros docentes públicos de nuestro país, convirtiéndose así en una de las organizaciones más importantes de la educación española. En esta entrevista conversamos con Juan Francisco Delgado Ruiz, quien fue un importante directivo de la CEAPA durante muchos años, sobre el nacimiento de la misma y su evolución, así como su influencia en la política educativa y su relación con la secularización de nuestro sistema educativo. Asimismo, conversamos sobre la experiencia previa de Juan Francisco Delgado Ruiz en el Partido Socialista y su experiencia posterior en Europa Laica, organizaciones también relacionadas con la secularización y la laicidad de la educación.

Palabras clave: CEAPA; Participación; Educación; Familias.

Abstract. *Since its foundation in 1979, the Confederación Española de Asociaciones de Padres de Alumnos (CEAPA) has brought together the majority of parent associations of students from public schools in our country, making it one of the most important organizations in Spanish education. In this interview, we spoke with Juan Francisco Delgado Ruiz, who was an important director of CEAPA for many years, about its birth and its evolution, as well as its influence on educational policy and its relationship with the secularization of our educational system. We also talked about Delgado Ruiz's*

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previous experience in the Socialist Party and his later involvement with Europa Laica, organizations working in the fields of secularization and lay education.

Keywords: CEAPA; Participation; Education; Families.

INTRODUCCIÓN

En esta entrevista con Juan Francisco Delgado Ruiz (1949) tratamos cuestiones relacionadas con las analizadas en el libro *La política educativa del PSOE sobre escolarización y secularización (1976-1996)*, en el que se incluyen 13 entrevistas a importantes responsables de la política educativa de aquellos años del Partido Socialista Obrero Español (PSOE) y/o del Ministerio de Educación.¹ Esta entrevista, junto con las realizadas a dos de los secretarios generales del Sindicato de Estudiantes durante dicho período, publicada en el número 16 de esta misma revista,² complementa esa investigación con otros puntos de vista de aquellos hechos tan importantes para la configuración de nuestra legislación educativa.

Efectivamente, Juan Francisco Delgado Ruiz ha sido testigo de primera mano de la política educativa española desde la Transición. En primer lugar, fue miembro del PSOE desde la Transición hasta el año 2000, partido por el cual llegó a ser diputado (1977-1979) y senador (1979-1982). En una segunda etapa, fue presidente de la Confederación Española de Asociaciones de Padres de Alumnos (CEAPA) (1992-1996), vicepresidente de la misma (1990-1992) y miembro de su Junta Directiva (1985-1996 y 2001-2004). Representando a CEAPA, ha sido miembro del Consejo Escolar del Estado (1986-1997 y 2001-2004). En una tercera etapa, abandonó el PSOE en 2000 y desde 2003 es miembro relevante en temas educativos de Europa Laica, de la que fue también presidente

¹ Javier González Moreno, *La política educativa del PSOE sobre escolarización y secularización (1976-1996)*. Madrid: Ministerio de Educación y Ciencia, 2021 pp. 351-483 (entrevistas con: José Torreblanca Prieto, Manuel de Puellas Benítez, Victorino Mayoral Cortés, Manuel Reyes Mate Rupérez, Julio Carabaña Morales, Aurora Ruiz González, Manuel Menor Currás, Antonio Juan García-Santesmases Martín-Tesorero, Francisco Ramos Fernández-Torrecilla, Antonio Embid Irujo, Joaquín Arango Vila-Belda, Gustavo Suárez Pertierra, y Álvaro Marchesi Ullastres).

² Javier González Moreno. Entrevista con los secretarios generales del Sindicato de Estudiantes Juan Ignacio Ramos (1987-1991) y Bárbara Areal (1994-1998). *Historia y Memoria de la Educación* 16 (2022): 609-633. <https://doi.org/10.5944/hme.16.2022.33442>.

(2008-2017). Asimismo, Juan Francisco Delgado Ruiz es un estudioso de la educación, la laicidad y la historia de ambas, con importantes publicaciones como su libro *La cruz en las aulas*.³

En esta entrevista tratamos temas de indudable interés para la historia de nuestra política educativa reciente: todas las leyes educativas desde la Transición, los debates internos del PSOE sobre educación y laicidad, la fundación y evolución de CEAPA, junto con sus relaciones con el Ministerio de Educación y otras organizaciones confesionales como la Confederación Católica de Padres de Familia (CONCAPA), la evolución de la participación de las comunidades escolares en la gestión de los centros docentes, el Consejo Escolar del Estado y la génesis y labor de Europa Laica en la educación.

ENTREVISTA

En 1976 se publicaron las alternativas de la enseñanza, con una propuesta de nueva política educativa, en las que la idea principal era la participación de las comunidades escolares en la gestión de los centros y el sistema educativo. ¿Tuviste alguna participación en las alternativas?

Francisco Delgado: Por la edad, no. Me uní al Partido Socialista Obrero Español (PSOE) en 1974, pero me dedicaba a otras tareas, sobre todo de reconstrucción del partido y todavía no tenía relación directa con la gestión política de la enseñanza. Mi relación con la gestión política de la enseñanza comenzó en 1979 en el Senado porque fui portavoz del PSOE en el debate sobre la Ley Orgánica del Estatuto de Centros Escolares, la ley del gobierno de la Unión de Centro Democrático (UCD) que pretendía regular este tema entre otros. Fue a partir de ahí que me interesó el tema y desde entonces no he parado de investigarlo. En la Confederación Española de Asociaciones de Padres de Alumnos (CEAPA) entré en 1983, cuando no ostentaba ninguna responsabilidad política relevante.

³ Juan Francisco Delgado Ruiz, *La cruz en las aulas*. Madrid: Akal, 2015.

La Ley General de Enseñanza de 1970 en su artículo 5.5 decía: «Se estimulará la constitución de asociaciones de padres de alumnos por centros, poblaciones, comarcas y provincias y se establecerán los cauces para su participación en la función educativa». En el artículo 57 se hablaba, también, de la coordinación entre los órganos de gobierno de los Centros y las Asociaciones de Padres de Alumnos (APA) y las Asociaciones de Alumnos, que se citan en un texto legal por vez primera en España. ¿Cómo era la participación en aquellos años?

Francisco Delgado: La Ley Moyano de 1857 llega hasta prácticamente hasta 1970. La primera vez que se establece una cierta participación es durante la Segunda República, cuando se crean unos consejos escolares que no se terminan de desarrollar porque el bienio conservador no lo hace. Así pues, la participación hasta 1970 es prácticamente inexistente.

Eso sí, en la época del dictador Primo de Rivera se crea la Confederación Católica de Padres de Familia (CONCAPA), que en 1936 hizo un alegato en Burgos a favor del golpe de Estado y se alinearon con la sublevación. La CONCAPA funcionaba principalmente en los centros religiosos y no tenía casi presencia en los centros de titularidad estatal.

En los años 70, en la Transición, había un ambiente de asociacionismo con un cierto peso, por ejemplo, las asociaciones de vecinos o los movimientos de renovación pedagógica...

Francisco Delgado: Había algunas asociaciones de padres en algunos institutos que funcionaban como organizaciones sociales. Durante mis estudios en las enseñanzas medias, primero en un instituto público de Albacete y en una escuela de formación profesional en Valencia, no vi participación de las familias. Las asociaciones de padres no tenían la fuerza de las asociaciones de vecinos en aquella época.

La CEAPA, la Confederación Española de Asociaciones de Padres de Alumnos, se creó en el año 1979 y costó aproximadamente dos años que el gobierno de la UCD le diera el plácet legal. Empezó agrupando organizaciones de padres de alumnos de Barcelona, Sevilla, Valencia y Madrid principalmente, que eran APA locales que habían empezado a federarse. La conexión fue a través de personas ligadas al Partido Comunista de España (PCE) principalmente, y algunas ligadas al PSOE también.

Surgió porque la única representación institucional de las familias ante el Estado era la CONCAPA.

Fuiste diputado del PSOE en la legislatura 1977-1979, y participaste como vocal en la Comisión de Cultura. ¿Cómo viviste la legislatura constituyente?

Francisco Delgado: En aquel momento en el PSOE me encomendaron dos cosas a nivel estatal (aparte yo tenía mis tareas a nivel local, porque fui uno de los refundadores del PSOE en la provincia de Albacete, y colaboraba con las de Ciudad Real y Cuenca): emigración y deportes.

Estuve coordinando un colectivo de deportes entre los años 1978, en que se fundó, y 1983. También participé en la ejecutiva de la Unión General de Trabajadores (UGT) llevando los temas de emigración, viajando mucho por Europa y América Latina, ya que había cinco millones de españoles en el exterior (tres en Europa y dos en América Latina) y había gran interés por su situación.

En temas educativos ya entré en 1979 cuando fui elegido diputado y fui portavoz del PSOE en el proyecto de ley de la Ley Orgánica del Estatuto de Centros Escolares (LOECE), junto al compañero José Vicente Beviá Pastor, en el Senado.

Hubo una gran polémica porque la LOECE introducía en la legislación española el concepto de «ideario», que pretendía desactivar la participación de la comunidad escolar al supeditar el funcionamiento del centro a lo dispuesto por el propietario. El PSOE presentó un recurso de inconstitucionalidad contra la LOECE. El Tribunal Constitucional declaró inconstitucionales cuestiones como la asociación de padres única como cauce exclusivo de la participación de las familias, por lo que se estableció que los padres podrían participar sin necesidad de asociarse y que se podrían asociar libremente; sin embargo, dio validez legal al ideario. ¿Cómo fueron los debates de la LOECE?

Francisco Delgado: Era la primera ley que se hacía en democracia sobre educación y trataba principalmente sobre la organización interna de los centros educativos. Su tramitación coincidió con los Pactos de la Moncloa, con grandes planes de construcciones escolares, y con los



Francisco Delgado en una conferencia del PSOE en Lille.
Fuente: Archivo privado de Francisco Delgado.

Acuerdos con la Santa Sede, que mantenían la enseñanza de la religión en las escuelas. La LOECE era una ley de la UCD y quería ser fiel a esos Acuerdos.

En esos años hubo muchos debates internos en el PSOE como, por ejemplo, el Congreso Extraordinario de septiembre de 1979. ¿Cómo viviste esos momentos?

Francisco Delgado: Estuve en ese congreso como delegado por Albacete. Previamente había sucedido el XXVIII Congreso en mayo de 1979, con la polémica sobre el abandono del marxismo y la renuncia de Felipe González como secretario general. Estuve cinco meses colaborando con la gestora que dirigió el partido en ese interregno. En el Congreso Extraordinario los críticos presentamos una lista alternativa para la Ejecutiva del partido en la que yo iba como responsable del área de emigración. Hubo debates muy importantes y lo del marxismo es un poco la pantalla de lo que pasó allí dentro. El PSOE se había definido como marxista en el congreso de Suresnes de 1974, históricamente nunca lo había sido. Lo fundamental es que el felipismo ganó el congreso frente a

los sectores críticos, que luego se convirtieron en Izquierda Socialista, una corriente del partido encabezada por Luis Gómez Llorente, Pablo Castellanos, Alfonso Puerta, etc. Este sector se había conformado en 1978 en una taberna de Madrid, porque los tics neoliberales del PSOE se venían detectando en el interior del partido. En un principio no se autorizó la creación de la corriente y en ese Congreso Extraordinario intentamos hacernos con el control del partido, sabiendo que íbamos a perder, pero al menos tratando de instaurar una estrategia verdaderamente socialista en todo el partido. Y, ya con la lista elaborada con Enrique Tierno Galván como presidente, Luis Gómez Llorente como secretario general y Paco Bustelo como secretario de organización, a las 5 de la mañana se retiró la candidatura porque Luis Gómez Llorente, que era una persona con un ideario socialista avanzado, tuvo miedo de seguir adelante, y porque había habido compromisos de Alfonso Guerra con algunas personas de la lista, por ejemplo, un compromiso previo con Enrique Tierno Galván para llevarlo como candidato a la alcaldía de Madrid.

El Congreso Extraordinario fue importante para la política educativa del PSOE porque supuso el relevo como responsable de educación de la Comisión Ejecutiva de Luis Gómez Llorente por José María Maravall.

Francisco Delgado: Luis Gómez Llorente, según una conversación que tuve con él, a pesar de ser la cara visible de la izquierda del partido, no era partidario de la escuela pública única y laica que manteníamos los socialistas republicanos históricamente dentro del PSOE, el PCE y otros partidos. Y él era partidario de no generar tensiones con la Iglesia en el ámbito de la enseñanza.

Quienes desarrollaron la política educativa del PSOE fueron Maravall y su equipo. Eran personas que, si bien tampoco apostaban por la escuela pública única y laica, no querían las ventajas que se dieron finalmente a la escuela privada con la Ley Orgánica del Derecho a la Educación (LODE). Maravall aspiraba a una ley como la Ley Debré francesa, es decir, que hubiera la posibilidad de escuelas privadas ayudadas por el Estado, pero no escuelas financiadas totalmente por el mismo. En ese sentido, Maravall perdió la batalla interna. Él ha sido el ministro de

Educación que más tiempo ha estado en el cargo y tuvo tres grandes huelgas y manifestaciones. La primera fue la de los sectores confesionales exigiendo más financiación para los centros privados. La segunda fue la de los estudiantes, que tenían toda la razón. Y la tercera, la de los profesores, que fue la que provocó su caída, un error del que creo que luego se han arrepentido los sindicatos. Sostengo que, de alguna manera, Ferraz también maniobró para hostigar a Maravall y que cayera y así llegara Solana al Ministerio de Educación.

Solana fue quien instauró un modelo de conciertos educativos a la medida de la enseñanza privada con la Ley Orgánica de Ordenación General del Sistema Educativo (LOGSE).

En 1982 dejaste el Congreso de los Diputados y en 1983 entraste en CEAPA.

Francisco Delgado: Yo ya estaba en las APA de los centros educativos de mis hijos, pero no participaba porque me era imposible por los múltiples viajes que tenía que hacer. En 1983 creamos la Federación de APA de Albacete y nos confederamos en la CEAPA y al año aproximadamente entré en el Secretariado de la misma. La CEAPA funcionaba con secretariado a



Francisco Delgado en la CEAPA. Fuente: Archivo privado de Francisco Delgado.

imagen de las organizaciones relacionadas con el PCE. Inicialmente, la coordinación del Secretariado recayó en personas de Madrid, Valencia y Sevilla. La primera presidenta oficial fue Francisca Tricio de Burgos, siendo yo vicepresidente y después entre 1992 y 1996 ejercí yo la presidencia.

¿Cuál era el funcionamiento interno de CEAPA (congresos, estatutos, elección del secretariado, etc.)?

Francisco Delgado: Los estatutos se adaptaron en 1988, pasando el órgano ejecutivo de secretariado a junta directiva (elegida bianualmente), los mandatos de los miembros eran limitados. Se regía por la Asamblea General, en donde estaban representadas la federaciones y confederaciones de todo el Estado, que en total, mientras ejercí la presidencia, representaban a unas 12.000 Asociaciones de Madres y Padres de Alumnos (AMPA) de todas las provincias, islas y Ceuta y Melilla. Su proyecto político era el de un modelo de escuela pública, democrática, única y laica..., dando un protagonismo a las asociaciones de madres y padres, en la línea del artículo 27.7 de la Constitución.

El delegado federal de Educación del PSOE, Victorino Mayoral y su equipo publicaron en 1981 un Cuaderno de Política Sectorial titulado Los padres y la escuela (APAS), un manual para crear una asociación de padres de alumnos y así promover la participación.

Francisco Delgado: En el PSOE había un grupo de militantes, entre ellos Victorino Mayoral, que luego crearon la Fundación CIVÉS, que estaban en una línea diferente del modelo de escuela que yo defendía, por lo que no participé en la publicación de ese manual. Tampoco me invitaron a hacerlo.

Te incorporaste al Secretariado de CEAPA durante las negociaciones de la LODE, una ley que supuestamente era la ley de la participación, pero que también lo era de otras muchas cosas, como la financiación de la enseñanza privada, es decir, los conciertos. ¿Cuál fue la actuación de CEAPA en estas negociaciones?

Francisco Delgado: Me incorporé a CEAPA, cuando la ley estaba muy avanzada. CEAPA, desde su fundación, defendía siempre la escuela pública

y laica, por lo que estábamos en contra de los conciertos educativos en aquella época. En este sentido, la confrontación con el Ministerio era casi permanente. También defendíamos una participación mucho más activa de las familias en el ámbito escolar, por lo que tampoco vimos bien el desmontaje, en parte, de los mecanismos participativos de la LODE que se hizo posteriormente con la Ley Orgánica de la Participación, la Evaluación y el Gobierno de los centros docentes (LOPEG).

La referencia que tengo del Ministerio en aquellos años es Alfredo Pérez Rubalcaba, con quien me reuní decenas de veces, más que con Maravall o con Solana, ya que Rubalcaba fue secretario general de Educación y secretario de Estado y luego ministro de Educación. Con él mantuve una relación fluida dentro de la discrepancia que manteníamos respecto al modelo educativo. Él fue en el PSOE el autor, desde su XX-VIII Congreso, de la potenciación del modelo de conciertos. La mentira que se contaba dentro del partido era que no había suficientes escuelas y que el Ministerio no disponía de dinero suficiente para sustituir a la enseñanza privada subvencionada. En el fondo lo que se pretendía era un modelo dual público-privado porque dentro del PSOE existían una serie de propuestas, como era que el partido había defendido la idea de escuelas privadas de élite progresistas como fue, en su día, la Institución Libre de Enseñanza (a la que habían asistido hijos de miembros del PSOE), porque los curas estaban metidos en la enseñanza estatal, o también porque había cooperativas privadas próximas ideológicamente como, por ejemplo, la del Hogar del Empleado. Al mismo tiempo, no querían problemas con la Conferencia Episcopal. El resultado fue que se le financió a la Iglesia sus centros escolares y se formó la doble red o triple red, si nos atenemos a la red rural y de los barrios más desfavorecidos.

¿En qué consiguió influir CEAPA en la LODE?

Francisco Delgado: La influencia que tuvo CEAPA en la redacción de la LODE y las siguientes leyes fue técnicamente cero, salvo –mucho más adelante– que las AMPA tuvieran un miembro nato en los Consejos Escolares de Centro. Al igual que el Consejo Escolar del Estado, ya que, de todas las recomendaciones que el Consejo ha hecho a las leyes y reglamentos que el Gobierno le ha remitido para su consulta, casi ninguna ha sido tenida en cuenta. Y eso ha ocurrido con todos los gobiernos.

Por ejemplo, durante la redacción de la última ley, la LOMLOE, se le presentaron al secretario de Estado de Educación tres sencillas enmiendas de no más de cinco palabras para quitar carga confesional en los centros públicos, y no se permitió cambiar ni una coma. Ni el secretario de Estado de Educación ni los portavoces parlamentarios del PSOE, Unidas Podemos, Herri Batasuna, Esquerra Republicana de Catalunya y los gallegos. Una de esas enmiendas era que no se permitiera la simbología ideológica en los centros públicos, con lo que podrá seguir habiendo rituales, crucifijos y demás.

El Consejo Escolar del Estado se creó en 1986 y tú entraste en ese año.

Francisco Delgado: Sí, por CEAPA. Recientemente fui propuesto como personalidad de reconocido prestigio por tres sindicatos, pero este tipo de nombramientos son casi siempre para personas cercanas al gobierno de turno.

La percepción que yo tenía allí, y que creo que tenían muchos de los miembros del Consejo, era que estábamos legislando. Nos mandaban los proyectos de ley y los proyectos de reglamentos y con muy buena voluntad manteníamos nuestros debates, planteábamos nuestras enmiendas, votábamos, etc. Y luego se redactaba un informe con nuestras conclusiones y nuestras propuestas de cambios que se enviaba al Ministerio y luego prácticamente nada quedaba reflejado cuando se promulgaba el texto legal.

Por ejemplo, con la LOPEG no se aceptó ninguna enmienda del Consejo. Un antiguo miembro del Consejo, de la Federación de Trabajadores de la Enseñanza-Unión General de Trabajadores (FETE-UGT), hizo un informe cuantificando las enmiendas del Consejo que habían aceptado los sucesivos gobiernos a los proyectos legales y el número era ínfimo. Lo mismo ocurre con el Consejo de Estado, que es un consejo jurídico. Ese es el nivel de democracia participativa que hay en este país.

En la primavera de 1986 se celebraron las primeras elecciones a los consejos escolares de centro, que se celebrarían cada dos años a partir de entonces.

Francisco Delgado: Las elecciones a consejos escolares nos las tomábamos en las APA, en la Federación y en CEAPA como una fiesta, en el sentido de que nos daba la posibilidad a las familias de participar en la gestión de los centros, de colaborar en la elaboración del proyecto educativo y de la programación anual, en la convivencia, en la vida del centro. Se vivía con ilusión.

En las primeras elecciones había solo un voto por familia y lo recurrimos para que fuera un voto por cada progenitor. Fue una de las primeras cosas que CEAPA recurrió en los tribunales y que ganó. En Galicia se mantuvo durante un tiempo porque estaba Fraga.

Durante la redacción de la LOPEG, CEAPA envió al Ministerio una serie de recomendaciones y no fueron aceptadas, con lo cual CEAPA instó a las APA a no participar en esas elecciones a consejos escolares. Fue una especie de huelga. A raíz de eso se consiguió que en los consejos escolares de centros grandes hubiera, dentro del cupo de cinco padres, uno elegido por la APA del centro.

En un principio parecía que la LODE iba a ser una ley muy participacionista, algunos creían que incluso autogestionaria. Sin embargo, conforme fueron avanzando las negociaciones, fue deslavazándose y quedó una participación mucho más débil. ¿Crees que las competencias que la LODE otorgaba a los consejos escolares eran suficientes?

Francisco Delgado: La participación activa de las comunidades escolares en la gestión de los centros viene establecida por el artículo 27 de la Constitución. La concreción que hizo la LODE no fue suficiente y la situación ha ido empeorando, de forma que en este momento la Constitución no se cumple. Ya en la LOPEG se rebajó mucho la participación, pero es que en la Ley Orgánica de Mejora de la Calidad de la Enseñanza (LOMCE) se les dio a los directores de los centros potestad prácticamente absoluta para gestionarlos, desapareciendo la participación de los consejos escolares e incluso de los claustros. Los consejos escolares

llegaron a quedar como órganos meramente consultivos. Ahora la Ley Orgánica de Modificación de la LOE (LOMLOE) les ha devuelto algunas competencias.

En las elecciones escolares la participación fue bajando progresivamente. ¿A qué achacabais en CEAPA esta situación y cómo intentasteis revertirla?

Francisco Delgado: Las leyes estatales de educación fueron vaciando la participación, pero es que el proceso de transferencias competenciales en materia de educación a las comunidades autónomas, que se prolongó desde finales de los 80 hasta el año 2000, provocó que hubiera 17 normativas que también restaban competencias a los consejos escolares, cada una a su manera, especialmente en las comunidades gobernadas por la derecha. Asimismo, ha habido un cierto porcentaje del profesorado que entiende que las familias no deben participar en la gestión de los centros y la han rechazado. Por ejemplo, con la pandemia se cerraron los centros a las familias por cuestiones sanitarias, pero una vez finalizada la alerta sanitaria en muchos lugares los patios siguen cerrados a los padres, ni siquiera pueden entrar al patio a recoger a sus hijos. Cada vez hay barreras más grandes. Y en el caso de la participación de los estudiantes la situación es peor, su voz está vetada. En resumen, las causas han sido la legislación restrictiva y el corporativismo de una parte sustancial del profesorado, sobre todo de gran parte de los equipos directivos.

Llevo fuera de CEAPA desde 2009 o 2010, pero recuerdo que hacíamos muchas campañas a favor de la participación, con éxito relativo. En cualquier caso, el tercer golpe que se le da a la participación es el mundo este que tenemos, en el que cada vez hay menor participación física: mueren asociaciones, los sindicatos tienen cada vez menos afiliados, las asociaciones de vecinos decrecen... Las asociaciones de padres actualmente apenas organizan más que actividades extracurriculares, fiestas de fin de curso y viajes, pero no participan en la gestión de los centros (economía, convivencia y disciplina, proyecto educativo, etc.). Conozco centros en los que los padres no reciben el proyecto educativo de centro cuando matriculan a sus hijos y que incluso cuando lo piden no se lo dan. Eso sí, para ser ecuanímenes hay magníficas excepciones, pero son minoritarias.

En 1995 se promulgó la LOPEG, todavía con los socialistas en el gobierno, la cual fue una revisión de la LODE, en el sentido de que recortó bastante la participación que se había establecido. ¿Cómo vivisteis esta nueva ley?

Francisco Delgado: Nos reunimos con Álvaro Marchesi (secretario de Estado) para que nos explicara la LOPEG y él salió de la reunión teniendo claro que no la íbamos a apoyar. A raíz de eso apoyamos la abstención en las elecciones de consejos escolares como protesta.

También hay que decir que en una primera etapa de CEAPA una serie de personas intentamos que fuera una organización independiente del ámbito partidista, con mucho coste interno y externo. El PSOE quería que CEAPA fuera una organización a su medida. Por ejemplo, respecto a la huelga general de 1988 se nos pidió que no la apoyáramos y la apoyamos porque uno de los orígenes del conflicto era una reforma del empleo juvenil por la cual se dejaba de abonar salario a los aprendices de formación profesional, de prácticas en alternancia. Cuando estudié maestría industrial en Bilbao iba a clases por la mañana y a trabajar de prácticas en una empresa por la tarde y esas cuatro horas me las pagaban y con eso financiaba parte de mis estudios. CEAPA fue a la huelga general en defensa de ese derecho a las prácticas remuneradas y Rubalcaba nos conminó a que no la apoyáramos, pero lo hicimos.

CEAPA, con el Partido Popular (PP) en el poder, seguimos intentando que no fuera una correa de transmisión del PSOE. Pero desde la LOMCE me da la sensación de que hay en CEAPA una cierta tendencia a apoyar las políticas del PSOE. De hecho, han quitado de su web la definición de asociación «laica» y la han cambiado por «no confesional», que es una forma de no entrar en batallas ideológicas. Con la última reforma de Celáa, la LOMLOE, CEAPA, que yo conozca, no ha hecho, al menos externamente, ningún movimiento contra la mercantilización del sistema educativo, ni contra su confesionalidad, ni contra la segregación que dicha reforma podría provocar.

En 1986-1987 tuvo lugar la huelga de estudiantes. ¿Cuál fue la posición de CEAPA?

Francisco Delgado: CEAPA apoyó las reivindicaciones de la protesta, sobre todo respecto a la participación de los estudiantes, pero no la forma en que se desarrolló, porque hubo manifestaciones que se descontrolaron.

La que no apoyamos fue la huelga de profesores de la primavera de 1988 porque entendíamos que era una protesta muy corporativista, y porque se hacía un flaco favor a un modelo de escuela pública única y laica que nosotros defendíamos, ya que entendíamos que con Maravall teníamos más posibilidades de lograrlo que con quien vendría después, es decir, con Solana.

En mi opinión, Solana fue un ministro que hizo bastante daño a la enseñanza pública por el desarrollo que hizo de la LOGSE; entre otras cosas, porque la ley, como todas, salió sin memoria económica. En España nunca hemos llegado al 6% del PIB de inversión en educación, apenas se llegó al 5,1% con Rubalcaba de ministro. Para la LOGSE se prometió un billón de pesetas, pero ese billón fue a los fastos de 1992, es decir, a los Juegos Olímpicos de Barcelona y la Exposición Universal de Sevilla. Luego, el paso del tiempo ha agravado el problema porque con el sistema autonómico se da el caso de que hay comunidades autónomas que gastan el doble en educación que otras; por ejemplo, hubo un momento que el País Vasco gastaba e invertía al año por alumno el doble que Canarias, lo que desde el punto de vista constitucional es bastante contestable.

En 1996 llegó al poder el PP. ¿Cómo fue el cambio?

Francisco Delgado: El PP nombró a la primera mujer ministra de Educación de la historia de España, que fue Esperanza Aguirre, y eso que de 1900 a 1931 hubo 53 ministros del ramo y en la Segunda República hubo otros 18, lo cual es paradójico. En cualquier caso, a la primera entidad social a la que Esperanza Aguirre invitó a una reunión fue a CEAPA, porque la CONCAPA ya la tenía de su lado y ella quería saber la opinión de las familias, entre comillas, no católicas, de los rivales, sobre el gasto que las familias tenían que hacer en educación. Ella ya tenía las cifras, pero quería conocer nuestra opinión. Todo esto porque en España

la enseñanza no es totalmente gratuita: libros, folios, papel higiénico, actividades extraescolares... Hasta existen colegios públicos que piden cuotas a las familias para estas cosas. Ella quería comparar lo que se gastaba el Estado en escuelas concertadas y escuelas públicas y lo que se gastaban las familias en cada caso.

Dentro del PP hay gente que prefiere los centros concertados, pero también ha habido históricamente una parte de la burguesía que prefería no llevar a sus hijos a centros de curas, sino a centros públicos, sobre todo a institutos públicos con gran prestigio. Pero el caso es que, en su primer mandato, el PP no hizo nada porque no tenía mayoría absoluta y dependía de los nacionalistas vascos y catalanes.

Pero en su segundo mandato ya sí tuvo mayoría absoluta y promovieron una nueva ley educativa, la Ley Orgánica de Calidad de la Educación (LOCE), que se debatió en el parlamento y salió solo con los votos del PP. En 2002 surgió un movimiento promovido por CEAPA y otras organizaciones a favor de una «Escuela pública y laica: religión fuera de la escuela», que inicialmente estaba formado por CEAPA, Sindicatos de Trabajadores de la Enseñanza (STES), Confederación General del Trabajo (CGT), Federación de Enseñanza-Comisiones Obreras (FE-CCOO), FETE-UGT, los Movimientos de Renovación Pedagógica, Izquierda Unida (IU), etc. (por cierto, ahora CEAPA no está en esa plataforma). A esa campaña también se apuntó el PSOE, cuando estaba en la oposición. Finalmente, el PP perdió el gobierno por la gestión de los atentados del 11-M y llega el PSOE al gobierno, con lo que la LOCE no se llegó a aplicar.

En 1994 CEAPA impugnó los reales decretos sobre la asignatura de Religión porque no estabais de acuerdo con que los alumnos que no cursaran Religión estuvieran obligados a permanecer en el centro.

Francisco Delgado: Nosotros aspirábamos a que ocurriera como en Italia, donde el tribunal constitucional de ese país sentenció que la Religión debía estar fuera del horario lectivo de todos los alumnos y sin asignatura alternativa para los que no la escogieran. CEAPA, siempre entendió que la Religión no debía estar en la escuela.

¿Cómo era vuestra relación con CONCAPA?

Francisco Delgado: En el Consejo Escolar del Estado nuestra relación con CONCAPA no era mala y solíamos votar bastantes cosas juntos, salvo cuando tenía que ver con el tema religioso. Votábamos muchas veces juntos cuando se trataba de la participación de las familias. Con Carmen de Alvear, la presidenta de CONCAPA, mantuve una buena sintonía personal, al margen de cuestión ideológica.

¿Había una presencia significativa de CONCAPA en centros públicos y de CEAPA en centros concertados?

Francisco Delgado: Había APA de centros concertados, incluso religiosos, que estaban federadas en federaciones de APA nuestras, pero era algo minoritario. Y APA de centros públicos en federaciones de CONCAPA, no conozco ningún caso.

En 2001 se fundó Europa Laica.

Francisco Delgado: Entré en Europa Laica en 2003, a los pocos meses de asistir a un congreso en Motril (Granada) al que había sido invitado para dar una ponencia sobre educación y laicidad. Europa Laica nació de un grupo de docentes de Primaria y Secundaria de Talavera de la Reina (Toledo), influenciados por las tesis laicistas de Gonzalo Puente Ojea, un diplomático y ensayista que fue embajador de España en el Vaticano entre 1985 y 1987. Al principio eran nueve personas, más Antonio Gómez Movellán de Madrid, más otro compañero de Bilbao, más otro de Huelva. Se fundó porque en Francia había una organización laicista llamada *Europe et Laïcité*, que ya no existe, así que se fundó una Europa Laica española para defender los ideales históricos del laicismo: el Estado separado de la religión, la ideología de la Ilustración, las leyes francesas de laicidad de 1905, etc. El presidente era un profesor de Francés que visitaba mucho Francia y tenía muchos contactos con *Europe et Laïcité*, con la *Fédération Nationale de la Libre Pensée* (una entidad de libre pensamiento y laicista centenaria) y con la masonería francesa (aunque entre los fundadores de Europa Laica no había masones).

Luego fui presidente y portavoz de Europa Laica entre 2008 y 2017 y hasta 2022, miembro del Consejo de la Asociación Internacional del



Comparecencia de Francisco Delgado como representante de Europa Laica Comisión de Educación del Congreso de los Diputados el 10 de julio de 2013, defendiendo la escuela pública y laica y contra la LOMCE. Fuente: Archivo privado de Francisco Delgado.

Librepensamiento (AILP). En aquella época Europa Laica estaba formada por gente muy joven y yo era el mayor de la junta directiva. En un momento dado, el presidente González Barón tuvo un problema de salud y dejó la presidencia, y fui elegido en el siguiente congreso. Y he de decir que en este tiempo Europa Laica ha crecido y se ha hecho muy visible, pero hemos avanzado poco en laicismo en España, más bien hemos retrocedido, al menos institucionalmente. La sociedad está muy secularizada, pero las instituciones son muy confesionales.

¿Crees que la secularización de la sociedad bastará para que tarde o temprano las instituciones también se secularicen?

Francisco Delgado: Puede ser, pero no es lo que está ocurriendo. Las corporaciones religiosas están cogiendo muchísima fuerza en todas partes del planeta y se están situando en dos ámbitos muy importantes: la caridad y la educación. En un mundo con creciente desigualdad eso les da mucho poder. Con eso ya no necesitan que la gente vaya a misa, a las procesiones, a los diferentes rituales, rece antes de dormir, se casen por las iglesias... No me refiero solo a la corporación católica, también a los cristianos evangélicos,

a los ortodoxos, a los musulmanes. Cada vez cogen más poder político e intentan imponer sus normas a la sociedad, en especial a las mujeres.

De hecho, ya en España las bodas por la iglesia son solo el 20% y se bautiza a menos del 50% de los niños. Pero no necesitan eso. Controlan la caridad y la educación en muchos lugares, en Europa, en América Latina, en Estados Unidos, en Rusia, en los estados islámicos, etc. En España, por ejemplo, además tienen un gran negocio montado en torno al patrimonio histórico-artístico que el Estado les ha cedido. Cuando hay que reparar una catedral lo hace la Administración, pero el precio de las entradas se lo queda la Iglesia. En Francia se está incumpliendo gravemente la ley de laicidad de 1905; la ley Debré rompió con todo eso al permitir financiar escuelas confesionales. En Rusia el patriarca ortodoxo apoya a Putin y en Ucrania el patriarca ortodoxo apoya a Zelenski. Aquí en España hemos tenido un juicio con el alcalde anticapitalista de Cádiz que hemos perdido en todas las instancias, y que nos ha costado casi 10.000 euros, por la famosa medalla que le dio a una virgen. Las religiones están ganando fuerza en el ámbito institucional.

Obras de Juan Francisco Delgado Ruiz

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RESEÑAS

LA MODERNIZACIÓN DE LA ENSEÑANZA TRAS LA LEY GENERAL DE EDUCACIÓN. CONTEXTOS Y EXPERIENCIAS

Por CARMEN SANCHIDRIÁN BLANCO (coord.). Valencia: Tirant Humanidades, 2022.
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La sinergia creada en este volumen colectivo por las diferentes aportaciones pretende mostrar una mirada diferente y poliédrica en relación con la Ley General de Educación (LGE) de 1970. La obra no solo se centra en el contexto español, previo y posterior a dicha ley educativa, sino también en los aspectos que en que influyeron los países vecinos.

La monografía se ha dividido en dos secciones: una primera, centrada en el contexto educativo, formada por ocho capítulos a partir de testimonios orales, fotográficos o de la prensa, entre otros. Y una segunda parte, conformada por diecisiete capítulos, que muestra diversas experiencias en las aulas españolas, junto con algunas aportaciones de Brasil y de Italia. Todo ello, precedido por una introducción de la profesora Carmen Sanchidrián, en la que se realiza una breve y enriquecedora definición de lo que representó la nueva ley.

En un primer momento, Diego Sevilla hace una aproximación educativa al franquismo, en la que relata la evolución de la población activa previa a la LGE de 1970. Menciona alguna de las obras de la década de los años cuarenta que denunciaban la situación del momento como, por ejemplo, *Hijos de la ira* de Damaso Alonso, *Nada* de Carmen Laforet, *Historia de una escalera* de Antonio Bueno Vallejo o *La colmena* de Camilo José Cela. Otras obras referenciadas de la década de los años cincuenta como *El Jarama* de Rafael Sánchez Ferlosio o *Entre visillos* de Carmen Martín Gaité, también sirven al autor para esta contextualización. Por su parte, Mónica Torres describe las reformas comprensivas y el primer intento de implantar este modelo en la escuela franquista con una

enseñanza obligatoria, común y única desde los seis hasta los catorce años. Realiza un recorrido por diferentes países como Francia, Alemania o Reino Unido, a principios del siglo XX, en los que se pretendía democratizar el sistema educativo con la perspectiva de que se expandiera a la educación secundaria.

A partir de imágenes en series de televisión o de la prensa, José Francisco Jiménez Trujillo nos describe cómo estas nos pueden servir de apoyo en el conocimiento de la Historia de la Educación. En concreto, hace referencia a una serie televisiva de principios de los años setenta, *Crónicas de un pueblo*, o a las viñetas de Quesada que evidencian el contraste de unas prácticas educativas que distaban de las que se pretendían desarrollar a partir de la LGE de 1970. Asimismo, nombra la revista *Triunfo* y detalla ejemplos sobre la religión, que tampoco quedaba al margen de críticas.

En otro de los capítulos, Cristina Redondo e Isabel Gil nos muestran un proyecto llevado a cabo en la Universidad de Málaga a lo largo de dos cursos, con el objetivo de ayudar al alumnado a conocer la evolución histórica del sistema educativo y sus condicionantes políticos y legislativos. Todo ello, a partir de una serie de prácticas entre las destacan los testimonios orales y fotográficos. De esta forma, se cuestiona aquello que se ve con lo que se enseña. La práctica consistía en realizar una serie de entrevistas de treinta y cinco ítems, divididas por bloques como, por ejemplo, la imagen del maestro, las actividades extraescolares y de ocio o las experiencias, entre otros. Algunos aspectos que destacan son la metodología, basada en la memorización. Con respecto a la evaluación, encuentran discrepancias puesto que diferencian diversos grupos: aquellos que resaltan el examen como el medio más utilizado para evaluar, otro grupo que afirma que no tenía exámenes, y un último grupo que tenía en cuenta la nota de todo el curso en la evaluación final (evaluación continua) o al que el profesorado les calculaba la nota media con los cuadernos presentados.

La cosmovisión que tenía la población sobre la Formación Profesional (FP) es abordada por Juan Luis Rubio, Guadalupe Trigueros y Cristina Ceballos, mediante el análisis de medios de comunicación como los diarios *ABC*, *La Vanguardia*, *El País* y de propaganda oficiales como el NO-DO. Por su parte, M.^a del Mar Gallego analiza los cambios que se produjeron y la evolución de los métodos lectores con la nueva ley. Se

proyectaba con la reforma que, a partir de un sistema educativo nacional, se deberían fomentar las oportunidades educativas de toda la sociedad. A ello, habría que sumarle una preparación especializada del alumnado estableciendo el inicio de la lectoescritura a los seis años. La autora analiza una serie de cuadernillos escolares de educación infantil, publicados y utilizados en la actualidad por diferentes editoriales. Una de las conclusiones a las que llega es que, al trabajar dichos manuales en la etapa de educación infantil, el alumnado pasaría a la etapa de educación primaria sabiendo leer y escribir. Todo ello lo vincula con la realidad social y cultural y la necesidad de que exista una legislación que acompañe a los métodos de enseñanza.

Cabe considerar la contribución de Edson Rodrigues y Alboni Marisa Dudeque Pianavski como un estudio de caso centrado en la preservación de la memoria escolar a partir de la restauración y organización de objetos como pueden ser imágenes, mobiliario o máquinas, entre otros. El estudio consta de una primera fase con la recogida de testimonios y objetos y la evaluación de su estado; una segunda fase en la que se organizan los grupos de trabajo; y en una tercera y última fase, en la que se presentan los resultados a través de la página web del centro.

En el último capítulo de la primera parte del libro, Carmen Sanchidrián y M.^a Dolores Molina nos muestran la importancia que tiene para los historiadores de la educación ahondar en los objetos escolares más allá de aquello para lo que eran utilizados y cómo se utilizaban. Las autoras nos permiten acercarnos, a partir de una encuesta realizada a 252 personas de entre 18 y 82 años, a la relación que tienen los objetos escolares con las emociones, así como al motivo por el que son recordados. Para ello, han categorizado los objetos en doce grupos, entre otros, material para la escritura, uniformes, objetos musicales, fotografías o anuarios. Una vez tenían los objetos, establecieron cuatro categorías según el motivo por el que habían elegido dicho objeto. Las autoras destacan que los motivos por los que eran recordados los objetos eran fundamentalmente generales como, por ejemplo, los libros o los estuches, los cuales frecuentemente conllevan relaciones significativas y recuerdos personales.

En la segunda sección de la monografía que reseñamos, se incluyen numerosas experiencias y proyectos realizados en distintos centros y comunidades, así como una gran variedad de materiales utilizados que

nos acercan a la realidad educativa vivida en la década de los años setenta. Varios trabajos están centrados en el análisis de imágenes, de los cuales destacamos dos en un mismo centro, el Instituto de Isabel la Católica de Madrid, dentro de un proyecto centrado en la recuperación de su patrimonio. Por un lado, se analizan murales realizados tras la aprobación de la LGE de 1970 por un grupo de alumnas junto con su profesor de Dibujo en un grupo experimental de arte. Por otro lado, con José Barceló como director y profesor del centro experimental hasta 1978, se utilizaron métodos de enseñanza activa en los laboratorios habilitados en el instituto, pudiéndose observar, a partir de las imágenes, la evolución de la enseñanza de dicha materia en el centro.

De otro lado, en una experiencia educativa llevada a cabo en la Residencia San Isidoro de la Escuela Normal de Murcia entre los años 1965 y 1977, ya se utilizó la fotografía con la finalidad de dejar constancia escrita y documentada del trabajo que se desarrolló en el centro. El autor nos muestra una serie de imágenes clasificadas por grupos según la necesidad y transformación del centro, desde actos institucionales hasta actividades musicales. La catalogación y análisis de las fotografías de la Escuela de Pedagogía Musical-Método Ireneu Segarra, entre 1974 y 1985, muestran las prácticas de la renovación pedagógica musical en Cataluña. A partir del fondo recuperado del Archivo Musical de la Abadía de Montserrat, los autores nos acercan a una metodología activa centrada en el ritmo, el movimiento y la danza y a un análisis exhaustivo de la educación musical a partir de los recursos iconográficos.

Las memorias de prácticas son otro material que cobra especial relevancia y que saca a relucir experiencias de los diferentes centros en esta segunda sección. Algunos ejemplos que nombraremos son las memorias de prácticas durante la Segunda República de un alumno de la Escuela Normal del Magisterio de Baleares, Lorenzo M. Durán. A partir de las diferentes imágenes proporcionadas, se puede apreciar la trascendencia de transmitir al alumnado el respeto por la naturaleza y el trabajo cooperativo en actividades al aire libre como es la realización de tareas agrícolas en la escuela unitaria de niños de Sencelles. Otras metodologías estudiadas son las utilizadas para el aprendizaje de la lectoescritura en la Escuela Normal de Málaga, en cuyo trabajo se pueden apreciar la evolución de los recursos y metodologías.

Otro de los instrumentos utilizados en el aula fue la televisión. El empleo de este medio con fines educativos fue todo un acontecimiento en el Colegio Luis Vives de Mallorca. Esta práctica moderna en su momento vino acompañada de actividades que incluían el ritmo, la expresión corporal, la astronomía o actividades deportivas, entre otras.

Otro de los estudios recogidos en la monografía, se centra en la Banda Juvenil de Música constituida a principios de los años setenta en el barrio de Miraflores de Los Ángeles de Málaga, que se convirtió en un lugar de encuentro al margen de la educación formal. La finalidad de este grupo era alejar a los jóvenes de las drogas y la delincuencia, utilizando como medio actividades culturales: ocio, aprendizaje musical y cooperación. Adaptándose a todos los niveles y necesidades, se pretendía que sirviera como medio de promoción social y transformación de su entorno.

De otro lado, dentro de los Movimientos de Renovación Pedagógica (MRP), encontramos a una agrupación de Asturias, el Colectivo Pedagógico de Asturias (CPA). Este colectivo estaba formado por profesorado comprometido en cambiar y difundir nuevos enfoques didácticos. Con la publicación de la revista *Andecha Pedagógica* trataban de visibilizar y promover una mejora en las prácticas pedagógicas.

En definitiva, y pese a no poder reseñar todos y cada uno de los capítulos por la extensión de la obra, podemos decir que los autores y las autoras nos brindan la oportunidad de conocer medios, enfoques, fuentes y experiencias didácticas que no han sido apenas estudiados hasta la fecha. Periódicos, revistas, series de televisión, programas de radio, proyectos didácticos o la fotografía, entre otros, son algunos de los objetos de estudio que nos encontraremos, y que nos permiten aproximarnos y entender una realidad educativa compleja propia del contexto en el que se aprobó y desarrolló la Ley General de Educación de 1970.

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EL PROFESORADO EN ESPAÑA: HUELLAS DE UNA HISTORIA DE RELACIONES ENTRE LO PÚBLICO Y LO PRIVADO

Por JESÚS MANSO y BIANCA THOILLIEZ (eds.). Madrid: Narcea, 2022, 165 páginas.
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En España, debido a la tradición educativa sobre la relación entre las entidades privadas y las administraciones públicas, es difícil establecer una idea común en pedagogía. Las influencias públicas y privadas han existido desde el origen del sistema educativo; así se han ido configurando las ideas en el desarrollo del quehacer docente.

El profesorado en España. Huellas de una historia de relaciones entre lo público y lo privado es una obra, editada por Bianca Thoilliez y Jesús Manso, elaborada en el marco del proyecto *LobbyingTeachers: Fundamentos teóricos, estructuras políticas y prácticas sociales en las relaciones público-privadas en materia del profesorado en España*. Esta propuesta recopila un total de ocho capítulos desarrollados por especialistas, entre ellos investigadores que no formaban parte del proyecto. El eje vertebral del libro es una perspectiva histórica para comprender las relaciones de las administraciones públicas y las entidades privadas en el sistema educativo español, así como su influencia en la profesión docente. Estas *huellas* del pasado nos permiten conocer y reflexionar sobre distintos aspectos actuales en materia educativa. A lo largo del libro se presenta la gran variedad de fuentes históricas empleadas en la investigación, que ejemplifican las evidencias mostradas. Delia Manzanero es la responsable del primer capítulo, «El maestro en la Institución Libre de Enseñanza (ILE). Huellas de una institución privada que revolucionó la escuela pública en España». ¹ A lo largo de este capítulo, la autora muestra

¹ Este capítulo se ha desarrollado en base al marco del Proyecto *Krause y el Krausismo del Sexenio Democrático*.

cómo esa institución, que nace siendo privada, forma parte actualmente del patrimonio común educativo. La ILE, creada, entre otros, por Giner de los Ríos (maestro de maestros), es un marco referencial actual por todas sus aportaciones. En primer lugar, por su trabajo en diferenciar instrucción de educación, la ILE supuso un enfoque de una educación más humana y social, destacando la importancia de que esta sea personalizada. En línea con esta socialización de la educación, el maestro tiene un papel clave y fundamental para combatir las injusticias sociales (sigue las ideas del krausismo de renovación y prevención). Otra de sus ideas clave fue la defensa de la libertad de enseñanza (interviene la conciencia del profesor) y de ciencia (siendo esta un fin común). El derecho a la educación aparece como un deber, pues la formación es un bien del que tienen que disfrutar todos los ciudadanos. Igualmente, la Institución promocionó la formación y continua relación con las tendencias pedagógicas europeas y vanguardistas. Como se puede observar, la ILE fundó las bases, en sentido progresista, de la educación y la función del docente. Los capítulos que le suceden (el dos y el tres) hacen alusión a propuestas materializadas que surgen en España a raíz de la Institución Libre de Enseñanza. En el capítulo titulado «Aportaciones de la Fundación Sierra Pambley a la educación y a la formación del profesorado», Daniel Turienzo y Jesús Manso realizan una exposición detallada sobre su nacimiento y transformaciones a lo largo de la historia, así como una radiografía detallada sobre sus aportaciones a la formación del profesorado. Esta fundación privada fue creada por Francisco Fernández Blanco y de Sierra-Pambley –hombre de carácter noble de talante ilustrado y liberal– con una acción filantrópica, pues se garantizaba el acceso a sus establecimientos educativos independientemente del nivel socioeconómico. La Fundación Sierra-Pambley (FSP) nace defendiendo una enseñanza democrática, laica, liberal y reformista, aunque sufre transformaciones a lo largo de la historia. En el caso de la formación del profesorado, la FSP tiene gran influencia, pues llevaba a cabo una selección muy rigurosa y daba importancia a aspectos como la formación continua (estancias en el extranjero) o el estricto cumplimiento de normas morales y deberes y principios pedagógicos (ausencia de libros de texto, metodología socrática, talleres, escuela unificada. La siguiente aportación, a cargo de Encarnación Martínez Alfaro, trata sobre «La influencia de la ILE en el Instituto-Escuela El papel del profesorado en la consolidación y difusión de un nuevo modelo educativo». La autora estudia la influencia

de la ILE en el Instituto-Escuela (las propuestas de un centro privado se llevaron a cabo en uno oficial de educación secundaria) en el contexto europeo (influencia de la pedagogía de otros países). Se desarrollan a lo largo del capítulo aspectos relacionados con el Instituto-Escuela como la coeducación, la educación integral, el trabajo mediante el método científico y los cuadernos de clase, así como la continuidad metodológica primaria-secundaria y el recurso a la evaluación continua. Como rasgo característico institucionista, se daba gran relevancia a la formación continua y a la participación en la vida social del centro. La autora señala la presencia de estas ideas y prácticas incluso después de la guerra civil (a pesar de la represión ejercida sobre el profesorado) y finaliza el capítulo mostrando su asombro sobre el hecho de que, a pesar de la trascendencia de su experiencia pedagógica, esta sea ignorada socialmente en España.

La guerra civil y el franquismo son dos hitos que generan un antes y un después en las propuestas pedagógicas. No obstante, aparecen otras, como abordan Teresa Rabazas Romero y Sara Ramos Zamora en «La educación personalizada como modelo de formación docente en las instituciones públicas y privadas de la Institución Teresiana en Madrid (1950-1975)», a lo largo del capítulo cuatro. En un momento de apertura dentro de la dictadura franquista, se reintroduce en España la educación personalizada basándose en las ideas del humanismo cristiano (de Pedro Poveda y de la enseñanza personalizada de Pierre Faure). Esto genera un cambio de enfoque hacia el paidocentrismo, la importancia del conocimiento del alumnado para facilitar su aprendizaje (individualizador) y la enseñanza colectiva (a partir de las puestas en común y el aprendizaje entre iguales). En este capítulo (cuarto) se analizan dos centros docentes en los que se lleva a cabo dicha educación personalizada: uno de entidad pública (pero de Patronato), con alumnado de clase social baja, donde las actividades están centradas en el desarrollo profesional; y otro privado, donde las actividades son más creativas e intelectuales. Las autoras finalizan el capítulo resaltando su contribución a la formación de las mujeres. A través del quinto capítulo, Félix Asenjo y Gabriela Ossenbach hacen un recorrido histórico sobre la presencia de las Escuelas de Magisterio de la Iglesia católica en España, en las cuales esta institución contaba con una gran autonomía para la formación de los docentes, aunque se tuvieron que ir adaptando a las exigencias del

Estado. Los autores, a lo largo de este capítulo, ilustran el nacimiento de la escuela de magisterio ESCUNI adscrita a la Universidad Complutense de Madrid e indican cómo estas adscripciones fueron un hito relevante en la contribución de las entidades privadas a la formación del profesorado que aún perduran. Ani Pérez Rueda es la responsable del capítulo seis, en el cual realiza un recorrido histórico sobre los Movimientos de Renovación Pedagógica en España. El capítulo comienza conceptualizándolos como colectivos de maestros y maestras para mejorar la calidad de la educación. En el capítulo se analiza el Movimiento Cooperativo de la Escuela Popular desde su origen, y los declives y expansiones que sufre a lo largo de la historia de España. Hoy en día la formación en innovación del profesorado es promovida, en parte, desde fundaciones y organismos privados o semiprivados. La autora finaliza el capítulo reivindicando la importancia de «defender espacios de apoyo mutuo y de formación ajenos a las injerencias del capital» (p. 118). A continuación, en el capítulo realizado por Javier González Moreno se hace un recorrido histórico normativo sobre las tensiones públicas y privadas, especialmente a través de la participación en la Ley Orgánica del Derecho a la Educación (sin el carácter autogestionario original). Esta ley quería fomentar la participación de la comunidad educativa como una red integrada bajo los principios de libertad y responsabilidad. No obstante, resultó un fracaso y se fueron suprimiendo elementos de participación en los años siguientes. La existencia de una doble red (centros públicos y privados-concertados) ha supuesto una segregación social que ha perjudicado en la calidad de la enseñanza de la pública, creando un conflicto que sigue aún vigente. En el último capítulo, Virginia Cabadas, Elena Piñana y Bianca Thoilliez estudian «Los Premios Francisco Giner de los Ríos (1983-2020). Un caso de colaboración público-privada en la prescripción de ideales docentes en España» como un ejemplo de colaboración público-privada (Ministerio de Educación con financiación del BBVA). Estos premios han generado grandes influencias en el profesorado modificándose en función del contexto. En el capítulo, las autoras presentan las modificaciones que han surgido durante estos años en cuanto a: (i) los requisitos de la experiencia docente (en primer lugar, centrados en la innovación y después en la calidad); (ii) las categorías que han ido apareciendo y desapareciendo; (iii) la extensión de los participantes (del mismo centro, etapas educativas y distintas titularidades, aunque es protagonista la escuela pública); (iv) la financiación (desde el

Banco Exterior hasta la Fundación BBVA); (v) los criterios de baremación respecto a las influencias supranacionales (como el enfoque competencial); (vi) su difusión y acceso de todos a ese contenido (mediante la digitalización y, en las últimas convocatorias, la realización de recursos audiovisuales cortos de interés para todos); (vii) por último, se analizan las temáticas de los premiados, relacionadas especialmente con la interdisciplinariedad, seguida por las áreas de Ciencias Experimentales, Ciencias Sociales y Tecnología. El resto de las áreas, si aparecen, están entre las interdisciplinarias. Finalizan concluyendo que estas veinticuatro convocatorias han supuesto grandes cambios educativos y sociales en España; especialmente, en la determinación de lo que es un buen docente.

Esta obra es de gran relevancia para comprender las dinámicas público-privadas vigentes en la educación a lo largo de un estudio detallado de la historia y de los factores que han configurado la visión actual y el desarrollo personal y profesional de los docentes.

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EDUCATION AND THE BODY IN EUROPE (1900-1950). MOVEMENTS, PUBLIC HEALTH, PEDAGOGICAL RULES AND CULTURAL IDEAS

By SIMONETTA POLENGHI, ANDRÁS NÉMETH AND TOMÁŠ KASPER (eds.). Berlin [etc]: Peter Lang, 2021, 266 pp. ISBN: 9783631835647

Italian edition: *Corpo ed educazione in Europa (1900-1950). Movimenti socio-culturali, salute pubblica, norme pedagogiche*. Parma: Junior, 255 pp. ISBN: 9788884349354

Long neglected in the education literature as a discrete topic of inquiry (the term was not listed in any of the main European encyclopaedic dictionaries of the late-nineteenth and early-twentieth centuries, from the *Diccionario de educación y métodos de enseñanza* by the Spanish educationalist Mariano Carderera to the imposing *Encyklopädie des gesamten Erziehungs- und Unterrichtswesens* by the German scholar Karl Adolph Schmid, through the famous *Dictionnaire de pédagogie et d'instruction primaire* by Ferdinand Buisson, and the later *Dizionario illustrato di pedagogia* edited by Antonio Martinazzoli and Luigi Credaro), the body has been an ambiguous presence in the field of education for centuries: sometimes treated as an object, but more frequently as an instrument, and almost never as an aim of specific interventions.

It is thus not surprising, as clearly set out by the editors of this volume – which brings multiple novel perspectives to the international literature on the theme – that the first scholars to investigate the “multifaceted and complex” (p. 7) nature of the body were sociologists, beginning with Norbert Elias and his long-term analysis of the civilizing of Western society. While the thinking of Michel Foucault stands out within following scholarship, and indeed is adopted as an interpretive key in several of the essays in this collection, we should not overlook the contributions of Thorstein Veblen regarding the consumerist dimension of

the body and the “theory of the leisure class”, Marcel Mauss concerning the body as a social construct, and Pierre Bourdieu with respect to the notion of habitus – first proposed by Mauss – as an expression of a given somatic culture. The constructs of vulgarity and good manners, alienation, marginalization and respectability, moderation and debauchery, discipline, rigour, and freedom are all mediated and communicated by the body, as pointed up by early studies on the topic, beginning in the first half of the twentieth century (in parallel with the developments covered in this book). The significant changes observed over time in “human attitudes towards the body” (p. 7) were thus followed by its “rediscovery” – or perhaps it would be more appropriate to say its redefinition – in the 1980s and 1990s, within a broader cultural history in which the so-called corporeal or body turn has intertwined with other “turns” (material, visual, emotional...), and all that these entail in terms of behaviours, practices, and feelings.

Against this heuristic backdrop, the editors of the volume – Simonetta Polenghi, András Németh, and Tomáš Kasper – situate a recent but important tradition within history of education: a tradition that, in dialogue with general history and to a lesser extent with educational science (but also anthropology, psychology, art...), pointed up the unitary nature of all educational phenomena (as simultaneously involving the body, the mind, and the will), while also examining the spaces and materials that offered a medium for formative and transformative processes, whether overt or latent. This has resulted in a broader focus that is not confined to schools, the main locus of inquiry to date, but also comprehends the many settings of non-formal and informal education where the body has played and continues to play a leading role, whether as a tool of freedom or, conversely, as a tool of repression.

And indeed, the period under study in the volume – specifically the half-century spanning the Belle Époque and the years immediately following World War II – was characterized precisely by the emergence, alongside the persistence of “strong normalizing powers” (the “straightening” of bodies pointed out in the now classic writings of the Foucauldian Georges Vigarello), of “new trends in medicine, art, literature, and education in favor of naturalness and freedom that paved the way for the cultural and sexual revolutions of the 1970s” (p. 12). One symbolic change among many, akin to the refusal and gradual abandonment of

swaddling clothes for new-born children in the late 1700s, was the rejection of the corset, in the name of a new ideal of the female body, now to be unfettered from the – metaphorical more so than material – ties imposed by society.

Hence, in addition to the material body, this book offers an account of the body as metaphor, or more specifically as a tool for constructing and interpreting the world, as recently proposed by Mona Gleason in *Paedagogica Historica* (“Metaphor, materiality, and method: the central role of embodiment in the history of education”, 54, 1-2, 2018: 4-19). Each of the fourteen essays, which have been authored by seventeen scholars from twelve universities in ten European countries, addresses this duality in relation to a respective national context, ranging from Great Britain to France and Belgium, from Germany to Hungary and the Czech Republic, and from Austria to Switzerland, Italy and Spain.

The first section of the volume revolves around the concept of *Lebensreform* or life reform, a nineteenth-century cultural current originally descended from vegetarianism that soon extended its focus beyond dietary issues, and whose recent ramifications extend into the subculture of today’s new age movement. Ehrenhard Skiera (Europa-Universität Flensburg, Eötvös Loránd Tudományegyetem – ELTE, Budapest) reconstructs the “motive spectrum” (p. 27) of *Lebensreform* in relation to the concept of “new man” being advocated at the same time by the *éducation nouvelle* current. The eloquent image of the “body of the future” (p. 27), which bears a relationship to the project nature of education, here foreshadows the generalized, albeit variously interpreted, “critical attitude to the political, institutional power of the period as well as to its cultural trends and conventions” (p. 43) described by Janka Balogh and András Németh (Eötvös Loránd Tudományegyetem – ELTE, Budapest) in the following essay about the reformed perspective on the body in dance. Of particular note here is the thinking of Hungarian dancer and choreographer Rudolf Laban, who proposed that the body is liberated by means of a detailed analysis of its movements, which in turn reflect the intrinsic harmony of the universe. This view resonates with Maria Montessori’s well-known theory that there can be no freedom without self-control, such that movement education is integral to helping the child develop forms of self-discipline.

The theme of *Lebensreform* is again central to Agnes Trattner's (Karl-Franzens-Universität Graz) essay on bodily cultural practices among German-speaking youth at the turn of the twentieth century (gymnastics, dance, yoga, hiking, vegetarianism, nudism...), while Dorina Szente and András Németh (Eötvös Loránd Tudományegyetem – ELTE, Budapest) examine unprecedented changes in the image of the female body in Hungary, where the earlier-referenced banishment of the corset went hand in hand with short haircuts, new sports outlets, and a more refined diet for women. Ilaria Mattioni (Università di Torino), on the other hand, explores the relations between the body, fashion, and female education in Italy, drawing on fairy tales, etiquette manuals, novels, and women's magazines, especially Catholic ones, to illustrate the moral preconceptions then binding the "fairer sex", especially with respect to the care and display of the body.

The second section of the volume focuses on the domain of physical education and sport, including in relation to the possible definition of "national bodies", that is to say, local, ideologically determined variants of the metaphorical body that is the main theme of the book. Thus, Grégory Quin (Université de Lausanne) draws connections between the notion of a "British body" (p. 109) and the capitalist-bourgeois values of progress, unlimited speed, and primacy that were channelled through English sports during the decades under study. Meanwhile, Michaël Atali and Yohann Fortune (Université de Rennes 2) see actions designed to "control, analyse and straighten" (p. 121) as the hallmark of the scientific and rational approach to the body that dominated in the France of Demeny, Tissié, and Hébert. A further essay authored by Quin with Christelle Hayoz (Haute École pédagogique Fribourg) describes the construction of physical education as a school subject in Switzerland, homing in on the linguistic and cultural differences that, undermining the scope for developing a single federal model, caused variability in emphasis between the educational dimension (as in the French-speaking cantons: *éducation physique*) and the operational one (see the German-speaking cantons' *Bewegung und Sport* and its primary focus on the development of physical and sporting prowess). Next, Paolo Alfieri (Università Cattolica del Sacro Cuore, Milano) tracks the evolution of physical education as a school subject in Italian elementary schools, from the highly disciplined tradition of the 1800s to the aftermath of the fascist era, when for

the first time “a more subjective view of the body” (p. 159) was formulated and advanced from among the ruins of the totalitarian regime. Finally, Xavier Torredadella Flix (Universitat Autònoma de Barcelona) explicitly draws on a Foucauldian perspective in exploring the concept of “manl[iness]” (p. 164) that characterized the regeneratively-oriented “Hispanic mental framework” (p. 163) surrounding physical education.

The third and concluding part of the volume completes the discussion by zooming in on the concepts of “emotions, hygiene and (ab)normality”, each of which, in a different way, introduces us to a more modern vision of pedagogy. Indeed, by the late 1800s, hygiene education in Italy was already being pursued with regenerative aims, the focus of the first essay in the section by Simonetta Polenghi (Università Cattolica del Sacro Cuore, Milano). Just as the war being waged on illiteracy during the same period saw schooling associated with respectability, so the battle of the hygienists linked physical cleanliness with moral purity. It is no coincidence that Paolo Mantegazza, a positivist doctor and science populariser, defined education and hygiene as “Siamese twins” (p. 189); nor that schoolteachers from the turn of the century through the post-WWII years were constantly instructed to look after their pupils’ physical cleanliness in order to bring out their “innocent and clean heart[s]” (p. 190). Again, as we were consistently taught by Foucault, it is control over bodies – required to be neat, efficient, disciplined, punished... – that dictates the microphysics of power marking the history of modern man. And indeed, in the 1800s and 1900s, schools headed the charge to construct a new society across the whole of Europe. This mandate, which not only involved schools in nation-building efforts throughout the “long nineteenth century”, but “consecrated”, so to speak, their educational programmes (some years ago, in specific reference to physical education, I discussed the “phenomenology of schoolization”: Matteo Morandi, “Snodi identitari di una materia scolastica”, in Id. (ed.), *Corpo, educazione fisica, sport. Questioni pedagogiche*, Milano: FrancoAngeli, 2016, 57), also features in the essay by Michèle Hofmann (Universität Zürich), who, returning to the Swiss context, distinguishes between the “ideal” bodies of the reform movements and “normal” (i.e., regulated, made to conform) bodies in public schools.

Tomáš Kasper (Technická Univerzita v Liberci, Univerzita Karlova v Praha) revisits the image of a “symbiosis” (p. 220) between the physical,

mental, and moral life in his reconstruction of education programmes for children with disabilities in Bohemia, later to become part of Czechoslovakia, over the period under study. In light of the preceding content, we can only read as rhetorical the question put to us by the author: Did the care provided to children with disabilities, in this country as elsewhere, contemplate “just’ the way of physical recovery” (p. 213)?

Nevertheless, Sarah Van Ruyskensvelde and Pieter Verstraete (Katholieke Universiteit Leuven) offer a counterexample to the “pedagogy of the rod”, discussing residential care for minors in Belgium in the period spanning the 1910s and 1930s. In this case, the logic of rigor and moralization was replaced by a true journey of “emotionalization”, a more refined strategy that was based on careful but unobtrusive observation of the children with a view to helping them to develop self-control.

This case study, like those presented earlier in the book, poses the reader with numerous questions regarding the legacy of the past and possible future developments of this story, in the playing out of tensions between conservation and progress, between freedom and discipline, and between self-control and other-control of bodies and more, during the pivotal period that was the first half of the twentieth century. At the same time, the key role of the body in education calls for a redefinition (in historical and not only theoretical terms) of pedagogy itself, which must surely concern itself with souls, hearts, and intellects, but also with muscles, corsets, desks, and nutrition, and even with noses, as Maria Montessori was pleased to demonstrate in a famous lesson of hers. Amongst many other insights, this book shows us that while we are behind on this task of redefining education, recent lines of inquiry are fortunately beginning to fill the gap.

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PER UNA STORIA DELL'ASSISTENZA ED EDUCAZIONE DELL'INFANZIA ABBANDONATA NELLE MARCHE. IL BREFOTROFIO DI OSIMO DAL PRIMO OTTOCENTO AL SECONDO DOPOGUERRA

Por SOFIA MONTECCHIANI. Macerata: Eum, 2021, 191 páginas. ISBN 978-88-60-56-77-41

Uno de los problemas históricos y sociales más importantes, que durante siglos ha marcado dramáticamente el destino de generaciones enteras de niños es, sin duda, el fenómeno del abandono infantil. Dependiendo de la época histórica y del contexto de referencia, este problema ha adquirido diferentes características y connotaciones determinadas por los aspectos sociales y las múltiples reflexiones antropológicas, pedagógicas y políticas desarrolladas a lo largo del tiempo en el ámbito cultural y científico.

Igualmente, desde un punto de vista historiográfico, la cuestión de la infancia y, en particular, de los menores abandonados, se ha convertido ya en uno de los principales paradigmas de la investigación contemporánea, estudiado y analizado gracias a múltiples enfoques disciplinares que, en los últimos tiempos, han puesto al descubierto, además de las necesidades, los derechos que poseen los niños y niñas. Sin embargo, con el objetivo preciso de identificar los puntos cruciales que a lo largo de los siglos han marcado la evolución cultural del concepto de infancia, junto con la reconstrucción teórica de las ideas pedagógicas, parecía oportuno, además de necesario, estudiar las transformaciones sufridas por las distintas instituciones que, época tras época, se han dedicado real y cotidianamente a ayudar a los niños y niñas y, en particular, a uno de los grupos sociales más vulnerables, como el de los menores abandonados.

Y precisamente sigue esta línea el reciente e interesante libro publicado por Sofia Montecchiani, *Per una storia dell'assistenza ed educazione dell'infanzia abbandonata nelle Marche. Il brefotrofio di Osimo dal primo Ottocento al secondo dopoguerra*, fruto de un minucioso trabajo de intensa búsqueda en diferentes archivos muy bien respaldado por un adecuado marco metodológico. Partiendo de numerosas fuentes, algunas procedentes de archivos y otras impresas, el estudio se proponía, por una parte, seguir enriqueciendo una línea de estudios que en el campo histórico y educativo puede presumir, con razón, de una consolidada tradición historiográfica; por otra parte, ha intentado, consiguiéndolo con éxito, llenar algunos vacíos que se pueden encontrar en algunos estudios especializados que han descuidado a propósito, o estudiado solo de manera superficial, las vivencias de algunas realidades locales significativas, gracias al análisis de las cuales podemos obtener una visión de conjunto de ámbito nacional.

La autora, en particular, centrándose en el caso concreto de los acontecimientos que llevaron a la fundación en 1838 del *brefotrofio* en la pequeña localidad de Osimo en la provincia de Ancona, durante siglos perteneciente al Estado Pontificio, ha conseguido hábilmente poner de relieve cómo en el pasado, gracias a esta institución y a otras similares fundadas en diferentes regiones de la península italiana, se creó ese vínculo crucial entre la asistencia y la educación para la primera infancia, del que numerosos y acreditados investigadores han podido destacar su eficacia y protagonismo, tanto en el proceso de alfabetización del pueblo como en la definición de una primera identidad nacional también en las clases sociales menos favorecidas de la población.

Como es sabido, en el contexto geográfico europeo y ya en la Baja Edad Media, fueron precisamente los diferentes estados de la península italiana quienes asumieron un papel pionero en la creación de una red de asistencia para los «expósitos», pero no fue hasta el siglo XIX cuando, paulatinamente, fue tomando forma y se impulsó un nuevo enfoque de las instituciones asistenciales tradicionales, como los orfanatos, *brefotrofi*, hospitales y hospicios para niños abandonados que, aun conservando su denominación «clásica», modificaron sustancialmente su ámbito de intervención. De hecho, al contrario de lo que ocurriera en los siglos anteriores, estos ya no se limitaban únicamente a acoger a los expósitos, sino que también se ocupaban de llevar a cabo una acción puramente educativa, basada en dos ámbitos, el infantil y el parental.

En particular, en el ámbito pontificio, siguiendo el ejemplo de institutos seculares como el de Santo Spirito in Saxia de Roma y el Ospedale degli Innocenti de Florencia, se puede considerar el caso de la institución de Osimo, como emblema de la concepción moderna de la educación, fruto también de una fructífera colaboración establecida entre el poder temporal y el espiritual o, más bien, entre los principios fundamentales de la moral cristiana y los valores seculares del compromiso ético y civil. El proyecto del *brefotrofio* de las Marcas pudo llevarse a cabo gracias a esta colaboración, fuertemente respaldada por el cardenal Giovanni Antonio Benvenuti, obispo de Osimo desde 1828 y hábil diplomático, así como gracias al apoyo de numerosas personalidades laicas, entre las cuales destaca el conde de Macerata, Leopoldo Armaroli (todo el segundo capítulo del libro está dedicado a Benvenuti y Armaroli y a su clarividente y encomiable obra filantrópica).

El instituto de Osimo, creado para atender una emergencia comunitaria y económica específica, a lo largo de siglos de existencia se mostró capaz de llevar a cabo una intervención de atención y protección de la infancia, también destinada a poner en valor su misión. Este centro religioso, con su carácter de «pequeño instituto», también se creó como una alternativa válida al recurso de los «grandes institutos» de beneficencia, a menudo identificados no solo como centros de acogida, sino lamentablemente también de reclusión, opresión, propagación de enfermedades y abusos, dentro de los cuales era muy habitual encontrar una tasa de mortalidad infantil bastante elevada.

El mérito de esta institución y de otras similares de la época fue precisamente tratar de que los menores se relacionaran con el mundo exterior, asegurándoles en primer lugar un estatus legal en caso de haber sido abandonados y, en segundo lugar, fomentando su educación honesta y una formación profesional, principalmente a través de la obra de los cuidadores o los propios internados.

En definitiva, a raíz del periodo revolucionario que había invadido Europa, y que había comprometido seriamente la antigua hegemonía eclesiástica en el campo de la educación y la asistencia entre finales del siglo XVIII y principios del XIX, la Iglesia había intentado desarrollar una nueva forma del apostolado de la caridad, basado, como afirma Montecchiani, «ya no solo en los valores de la fraternidad y la solidaridad

cristiana, sino en una nueva concepción de la caridad entendida en sentido pedagógico. Esta debía ser un instrumento de educación cívica y de divulgación científica, símbolo de aquel proceso de modernización asistencial que fue necesario a raíz del avance liberal de la política, la cultura y la sociedad de la época» (p. 10).

En la segunda mitad del siglo XIX, tras la unificación nacional, la concepción de la caridad y la formación también se vieron obviamente inmersas en el proceso de secularización, que ahora respondía a lógicas centralizadoras y seculares, y que comprendía una transformación de las intervenciones sociales, ya no articuladas sobre la base del compromiso apostólico sino por iniciativa del Estado. En este contexto se pueden situar algunas medidas legislativas específicas (como, por ejemplo, la ley Crispi de 17 de julio de 1890 o el *Reglamento general para el servicio de asistencia a los expósitos* de 1923), en las que acertadamente y con gran conocimiento se centra el libro de Sofia Montecchiani, gracias a las cuales se pudo dejar definitivamente a un lado aquella antigua predisposición en virtud de la cual las instituciones dedicadas a la primera infancia se identificaban ante todo como simples centros de acogida, y no como instituciones para el desarrollo humano, educativo y cultural de los menores.

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MUJERES IMPRESCINDIBLES. EDUCADORAS EN LA VANGUARDIA DEL SIGLO XX

Por AUTORES VARIOS. Pontevedra: Editorial Kalandraka. Colección Biblioteca de Pedagogía, 2022, 222 páginas. ISBN; 978-84-1343-140-6. Prólogo de Antón Costa Rico y Manuela Rodríguez

El quinto objetivo de desarrollo sostenible (ODS), con el horizonte del año 2030, formulado por la Organización de las Naciones Unidas en 2015, se refiere al logro de la igualdad entre los géneros y al empoderamiento de todas las mujeres y las niñas, entendiendo que dicha igualdad no es solo un derecho fundamental, sino la base para un mundo pacífico, próspero y respetuoso con el medio ambiente. Este logro de la igualdad requiere la puesta en marcha de distintas medidas que afectan a variados ámbitos sociales, económicos, culturales, y por supuesto, educativos.

El libro que ahora nos ocupa, *Mujeres imprescindibles. Educadoras en la vanguardia de siglo XX*, supone una aportación relevante para la obtención de esa igualdad y empoderamiento femenino deseados: la visibilización de mujeres, en este caso docentes, que han contribuido de manera significativa al mundo de la educación, y que pueden actuar como referentes, siempre necesarios, que iluminen las decisiones y trayectorias académicas y profesionales de jóvenes y adultas. Esta publicación no es un elemento aislado. Dentro de la historiografía contemporánea, la historia de las mujeres – y, en su seno, de las docentes – es actualmente un poderoso ámbito de investigación y de conocimiento, como se percibe en la realización de múltiples congresos sobre dicho campo, en la atención prestada desde cada vez más publicaciones, tanto académicas como no académicas, y en la proliferación de colecciones editoriales en torno al feminismo y a su vertiente histórico-educativa.

Nos hallamos ante una monografía coral, abierta por un prólogo escrito por Antón Costa Rico y Manuela Rodríguez y seguida por nueve

capítulos, dedicado, cada uno de ellos, a una educadora «imprescindible» y escritos por personas de reconocido prestigio en la materia: Rosa Sensat, 1873-1961 (Joan Soler), María Barbeito, 1880-1970 (Ana Romero), María de Maeztu, 1881-1948 (Raquel Vázquez), María Luisa Navarro, 1855-1948 (Dolores Cotelo), María Sánchez Arbós, 1889-1976 (Víctor Juan), Justa Freire, 1896-1965 (María de Mar del Pozo), Elbira Zipitria, 1908-1982 (Miel A. Elustondo), Marta Mata i Garriga, 1926-2006 (Núria Simó) y Carmen Miquel i Diego, 1944-2019 (Carmen Agulló).

El prólogo de Costa y Rodríguez nos sitúa dentro del contexto en el que debemos ubicar a estas maestras, un siglo XX caracterizado por el reconocimiento de los derechos de las mujeres, gracias, entre otros factores, a la fuerte reivindicación que efectuó un núcleo de ellas. Dentro del mundo educativo, ambos autores resaltan algunos pasos emancipadores que se dieron a principios del siglo XX relacionados con las mujeres docentes, como la posibilidad para las mujeres de matricularse libremente en estudios superiores, profesionales y universitarios (1910); la creación de la Junta de Ampliación de Estudios e Investigaciones Científicas (1907), motor de europeización y modernización cultural; la creación de la Escuela Superior de Magisterio (1911) y la Real Orden, dictada en 1911, que facilitaba la escolarización de niños y niñas en las mismas aulas, entre otros. Además, desde el inicio de los años veinte, y continuando claramente en la Segunda República, se intensificaron estos avances. En el terreno de las influencias pedagógicas, la mayoría de las educadoras a las que se dedica el libro se van a sentir atraídas por las orientaciones pedagógicas de la Institución Libre de Enseñanza (ILE), la Escuela Moderna de Barcelona, con su ramificación a través de las escuelas racionalistas, y el movimiento pedagógico internacional de la Escuela Nueva. No es de extrañar, entonces, que muchas sufrieran más tarde la dura represión del franquismo.

Es importante señalar las principales líneas de conexión entre estas nueve docentes, incluidas en el prólogo, que ilustramos con ejemplos. Ellas nos servirán de hilo conductor en esta reseña. La primera de ellas es la *fuerte inquietud que poseen por la formación*, que transita de los estudios medios a los normalistas, y que prosigue a lo largo de sus vidas mediante lecturas, viajes para conocer experiencias innovadoras en Europa, con frecuencia impulsadas por figuras de renombre dentro del movimiento de la Escuela Nueva, y encuentros con otros profesionales

de la educación. Aquí, además, queremos reseñar el enorme papel que juega en un primer momento la familia, que permite e impulsa a estas mujeres al estudio. Un claro ejemplo es el de María Luisa Navarro, quien tuvo la suerte de que su padre, de clase media e ideas liberales, se planteara para sus hijas un futuro distinto al tradicional, que las destinaba a ser «madre-esposas», y les proporcionara una educación que les permitiera independencia y autonomía, eligiendo para ellas la Asociación para la Enseñanza de la Mujer. Dicha institución, de carácter laico y orientación krausista, dirigida por Fernando de Castro y pionera en la instrucción de las mujeres de clase media, proporcionaba una educación mucho más igualitaria que las generalizadas en dicho momento histórico. También es evidente en el caso de María de Maeztu, cuya madre, Juana Whitney, abrió un colegio femenino en Bilbao, la Academia Anglo-Francesa, en la que enseñaba idiomas y cultura general, y a la que asistió, por supuesto, María, compartiendo aula con hijas de intelectuales progresistas; una madre que la apoyó en todas sus iniciativas de formación en España y en el extranjero. O en el más reciente de Carme Miquel i Diego, hija de maestra y maestro, quienes se preocuparon en que su hija pidiera una beca, que consiguió, para continuar sus estudios en el Colegio de las Madres Escolapias. Aún hoy en día, el apoyo familiar resulta fundamental tanto para estudiar como para una elección realmente libre del futuro profesional, sin condicionamientos en virtud de estereotipos de género u otro tipo de factores.

Pero si la familia es importante, no hay que olvidar el enorme empeño, la pasión de estas mujeres por seguir formándose, por viajar y conocer nuevas experiencias en una sociedad, recordemos, con un fuerte carácter patriarcal, muy poco igualitaria. Aquí jugó, sin duda, un papel de primer orden la Junta de ampliación de Estudios (JAE), que, en muchos casos, les permitió esa magnífica oportunidad. Gracias a ella, en la década de los veinte del siglo pasado, encontramos a María Luisa Navarro completando sus estudios de Pedagogía en Alemania, y más tarde, visitando Francia, Suiza y Bélgica, país donde asiste a las clases de Decroly; o, en los treinta, a la gallega María Barbeito viajando por Francia, Bélgica, Holanda, Alemania, Suiza e Italia para conocer varias instituciones educativas.

Un segundo elemento que une a estas docentes excepcionales es su *enorme compromiso con la educación, especialmente infantil y juvenil, y*

con los valores democráticos. Son tantos los ejemplos, que es difícil seleccionar. Basten dos de distintos momentos históricos: Justa Freire, tanto como maestra del grupo escolar Cervantes, como más tarde del Grupo Escolar Alfredo Calderón, se caracterizó siempre por proporcionar una educación fundamentada en el respeto a la personalidad infantil y en la utilización de metodologías didácticas de carácter activo, las defendidas por la Escuela Nueva, y, en plena Guerra Civil, con un grupo de niños y niñas evacuados de la capital, lleva a cabo junto a Ángel Llorca, las denominadas «Comunidades Familiares de Educación», concibiendo la escuela como un hogar. Asimismo, tras la muerte de Franco, en una España democrática que iniciaba el siglo XXI, Marta Mata i Garriga siempre manifestó su defensa y empeño vital por una educación pública de calidad para todas las personas, en el marco de una pedagogía progresista y activa, en los numerosos cargos políticos que ocupó relacionados con la educación, como en el Consejo Escolar de Estado, del que fue presidenta entre 2004 y 2006.

Un tercer rasgo distintivo de este grupo de educadoras es la *orientación social reformadora de muchas de sus obras*. La *Escola del Bosc* de Montjüic (1914-1931), gran legado de Rosa Sensat, es una clara muestra del reformismo social y político, dirigida a alumnado con problemas de salud, una escuela fundamentada en la ciencia, el arte y la moralidad. El Niño Descalzo (1906) fue fundado por María Barbeito para solventar las necesidades de zapatos y ropa de escolares de A Coruña; además, ella también colaboró estrechamente en las Colonias Escolares desde 1912, una institución que contribuyó a la lucha contra las enfermedades pulmonares asociadas a la tuberculosis, y en la que participó también Justa Freire (1923-1928). Muestras como estas se pueden observar en la vida de estas mujeres que enfocaron su vida como un compromiso con la creación de un mundo mejor, más justo, y no escatimaron esfuerzos.

Entender las escuelas donde se ejerce profesionalmente como espacios de vida es un cuarto elemento de conexión entre estas educadoras. Son personas vocacionales, entusiasmadas por la educación. Al respecto, cobra un gran interés acudir a los recuerdos de quienes fueron sus alumnos y alumnas, como en el caso de la vasca Elbira Zipitria. Gracias a ellos, sabemos de una maestra muy innovadora en metodología, que buscaba el contacto con la naturaleza, a través de las salidas y excursiones, como recurso pedagógico de primer orden; defensora de partir de la

realidad más próxima hasta llegar a la abstracción, y transgresora de las disposiciones organizativas más tradicionales de las aulas, impulsando a que niños y niñas trabajaran juntos e interactuaran en una clase sin mesas. O podemos mencionar el tesón de Carme Miquel i Diego quien, advirtiendo la ausencia de recursos didácticos en valenciano, y defensora de la introducción de las lenguas propias de las nacionalidades en la escuela pública, creó para el profesorado diversos libros y material en tal idioma. No se queda atrás María Sánchez Arbós, en cuyas publicaciones palpita una profunda emoción y pasión por la escuela, confiando en que, a través de ella, se podría transformar la sociedad en una línea emancipadora y justa para toda la ciudadanía.

El hacer de estas mujeres en la escuela se convierte siempre en praxis, porque está cargado de reflexión, quinto rasgo común a las nueve educadoras. A veces, escriben sus vivencias, como ejercicio indagatorio; otras muchas, publican artículos y libros como forma de intervención social y profesional sobre el presente. Así, María Luisa Navarro funda, junto con su marido Lorenzo Luzuriaga, la *Revista de Pedagogía*, el más alto exponente de la inquietud educativa en la España de los años anteriores y posteriores a la proclamación de la Segunda República; revista en la que colabora con escritos como ya antes había hecho en el *Boletín Escolar*; Justa Freire publicó diversos artículos, donde destacaba el concepto institucionista de «ambiente educador», donde se fundían ética y estética; Carme Miquel i Diego fue una autora muy prolífica, y encontramos libros, artículos, columnas de periódicos, en los que se advierte su objetivo de recuperación lingüística e introducción del valenciano en la escuela mediante una didáctica atractiva; y la lista continuaría con el resto de las protagonistas de este libro.

El último rasgo que introducen Costa y Rodríguez como definitorios de estas excepcionales mujeres, es la *preocupación por la formación del profesorado*, conscientes del papel fundamental que posee para el logro de la sociedad deseada. Nombrar, por ejemplo, la magnífica labor de Elbira Irastorza, quien se encargó durante su vida de formar a jóvenes maestras para capacitarlas en la docencia del euskera en forma casi ininterrumpida durante muchos años, y de reciclar a aquellas que ya tenían una base; o a Marta Mata i Garriga, que creó *L'Escola de Mestres Rosa Sensat* de forma clandestina en 1965, cuyos cursos de tarde y escuelas de verano fueron espacios formativos para el profesorado en

ejercicio más interesado por formase en métodos progresistas –dicha escuela fue el germen de la posterior creación de movimientos de renovación pedagógica en distintos lugares de España–; o a Carme Miquel i Diego, quien desarrolló su vertiente de formadora de formadores en instancias oficiales (Instituto de Ciencias de la Educación, Consellería) y, sobre todo, como parte de colectivos de renovación pedagógica.

A estos seis puntos en común que se señalan en el prólogo, añadiríamos uno que creemos que está presente de manera transversal en muchos de ellos: *el fuerte compromiso con el feminismo*, con la eliminación de cualquier discriminación en función del sexo. Rosa Sensat formó parte del movimiento feminista catalán del primer tercio del siglo XX que, con un carácter reformista, se ocupó de la mejora de la educación femenina, destacando su labor pedagógica en el *Institut de Cultura i Biblioteca Popular de la Dona*. María Barbeito sobresalió también por su actividad cívica y feminista, reivindicando los derechos de las mujeres a la igualdad en todos los aspectos, incluido el sufragio. María de Maeztu promueve, junto con otras mujeres, la asociación o círculo de reunión llamada el Lyceum Club Femenino, cuyo fin era defender los intereses morales y materiales de las mujeres, desarrollando todas las iniciativas culturales, científicas y económicas que redundasen en su beneficio. María Luisa Navarro funda la Agrupación Femenina Republicana, cuyo único objetivo era la defensa de los derechos de las mujeres y de la infancia. Elbira Zipitria militó en la Asociación Femenina del Partido Nacionalista Vasco, entre cuyos objetivos estaba la transmisión del euskera y la educación de niños y niñas. La enumeración podría continuar porque, fueran o no miembros activos de alguna organización claramente feminista, su propio ejemplo de vida era la mejor muestra de la interiorización de los principios de este movimiento.

Aunque algunas de ellas sí recibieron reconocimientos y honores, frecuentemente después de haber pasado también por grandes dificultades y obstáculos, como Marta Mata i Garriga, que fue presidenta del Consejo Escolar de Estado (2004-2006) o Carme Miquel i Diego, que fue nombrada miembro de la *Acadèmia Valenciana de la Llengua* en 2016, la biografía de estas nueve mujeres, sus valiosas contribuciones, siguen siendo desconocidas para la mayor parte de la población. Por ello, terminamos con estas palabras acertadas de María del Mar del Pozo, pensadas inicialmente para referirse a Justa Freire, pero claramente extensible

al resto de las protagonistas de este libro, con las que también comienza la obra. Ellas sintetizan el propósito general de esta imprescindible publicación dentro de la Historia de las mujeres: «Las generaciones del presente y del futuro tenemos la obligación y el deber moral de rastrear y contar su historia, de sacar a la luz sus ideales, de airear su ejemplo y de demostrar, en sus vidas, el inmenso poder de la educación para transformar el mundo».¹

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¹ María del Mar del Pozo Andrés. *Justa Freire o la pasión de educar. Biografía de una maestra atrapada en la historia de España (1896-1965)*. Barcelona: Octaedro (2013), 267.

MORAL AND POLITICAL VALUES IN TEACHER EDUCATION OVER THE TIME. INTERNATIONAL PERSPECTIVES

Por Nick Mead (editor). London-New York: Routledge, 2023, 192 páginas. ISBN 9781032113340

Esta obra colectiva, editada por Nick Mead y dirigida a formadores de maestros y docentes y a sus estudiantes, reúne las reflexiones de expertos internacionales en formación de profesores sobre cómo la conciencia histórica puede ser usada para mirar retrospectivamente, y cómo esta puede ofrecer mayor continuidad a los valores morales y políticos de los docentes dentro de su formación.

El neoliberalismo global genera retos comunes en la formación del profesorado en contextos históricos, sociales y políticos muy diferentes. Por ello, a lo largo de las casi doscientas páginas que ocupa este libro, investigadores que han trabajado y trabajan estrechamente con la práctica de la formación inicial y continua del profesorado, y que a la vez son representantes de diferentes contextos históricos, sociales y políticos de Norteamérica, Europa, Asia y Sudáfrica, ofrecen sus consideraciones sobre el desarrollo de valores morales y políticos de los profesores en activo y en formación en una era de neoliberalismo global, y en relación con el contexto geográfico e histórico más cercano.

Para la elaboración de cada uno de los capítulos se pidió a los autores una serie de reflexiones desde sus respectivos contextos, invitándoles al uso de fuentes primarias y secundarias tales como historias de vida, testimonios orales, materiales de archivo y bibliografía específica, para la elaboración de sus capítulos. La primera reflexión les incitaba a pensar, cada uno desde su contexto, sobre si una «visión a largo plazo» de la formación del profesorado podría hacer visible la presencia de conjuntos de valores de izquierdas, socialdemócratas y neoliberales que, en un

proceso dialéctico, tuvieran el potencial de crear nuevas concepciones para los profesores en formación. Todos los autores compartieron la percepción de que el neoliberalismo actual, aparentemente no ideológico y basado en el sentido común, no fomenta dicha dialéctica. En segundo lugar, se pidió a los participantes que reflexionaran sobre cómo la visión a largo plazo podría mostrar la resistencia a este tipo de neoliberalismo que crea formas instructivas de formación del profesorado. Finalmente, derivado de esta visión a largo plazo y de la propia conciencia histórica, se animó a los autores a cuestionar las prácticas actuales y a intentar responder a las siguientes preguntas: ¿la formación del profesorado en un país garantiza la existencia de una nueva dialéctica, incluso dentro de las crecientes presiones neoliberales mundiales? ¿Qué implicaciones tienen estas cuestiones para la política y la práctica de la formación del profesorado? ¿Qué pueden aprender unos países de otros al examinar estas implicaciones?

A partir de estos sugerentes puntos de partida, el libro presenta seis trabajos agrupados en cuatro grandes apartados que nos acercan contextualmente a cuatro continentes diferentes: Europa, América, África y Asia.

La primera parte del libro se dedica al impacto de la desaparición de los valores socialdemócratas en la formación del profesorado en el contexto europeo, y a la importancia de la conciencia histórica para el desarrollo de una formación del profesorado basada en valores. Bajo el título de «The Europea context: the impacto of the demise of social democratic values on the development of values in teacher education», se reúnen las aportaciones de Nick Mead, Gianfranco Bandini y Eugenio Otero, procedentes de Inglaterra, Italia y España respectivamente.

Nick Mead titula su capítulo «Beginnings values in teacher education in an era of social democracy in England». En él se refiere a un momento único vivido por los centros de formación de los años sesenta en Inglaterra, en el que se dieron las condiciones para una dialéctica entre los valores culturales tradicionales, los socialdemócratas y los pragmáticos en el aula en la formación del profesorado. Mead sostiene que la hegemonía neoliberal, disfrazada de «sentido común» y «facticidad», ha negado a los profesores en formación la oportunidad de desarrollar sus valores a través de dicha dialéctica.

Con el título «The Italian debate about the role of teacher within teacher education, a long dialectic between two opposing conceptions: educational intellectual or cultural employee», Gianfranco Bandini observa una fragmentación similar de un modelo orgánico de desarrollo de valores en la formación del profesorado tras el final del periodo «reformista» de los años setenta en el contexto italiano. Bandini no niega la pérdida de grandes temas educativos y un evidente giro hacia métodos de formación instrumentales; sin embargo, cree que, a pesar de ello, ha habido una dialéctica continua entre los profesores en formación, los profesores y los responsables políticos. Esta dialéctica se resume en las concepciones opuestas de los fines de la formación del profesorado: crear intelectuales de la educación o empleados de la cultura. Bandini combina en este trabajo la historia reglamentaria con la «historia desde abajo» (mediante testimonios de profesores), para destacar las similitudes y las diferencias entre ambos niveles y comprender mejor la presencia de valores e ideales conscientes e inconscientes en la profesión docente.

Eugenio nos ofrece su percepción, desde su propio contexto profesional, sobre el impacto que el conflicto entre los valores neoliberales y socialdemócratas está teniendo en aquellos a los que educa. En su capítulo titulado «The educational ideals of Spanish schoolteachers: training, professional tensions and future uncertainties» destaca cómo en España los valores morales y políticos de los jóvenes en formación y los de sus formadores pueden ser muy divergentes en lo que es un sistema neoliberal e instrumental de formación del profesorado. Se remite a los dos siglos anteriores para poner en evidencia los precedentes históricos de una fractura social e ideológica todavía no resuelta en España, que se remonta al siglo XIX, pero que se agravó y se polarizó con el Franquismo y no se resolvió con la nueva democracia, afectando profundamente a la formación de los maestros y a la configuración de sus mentalidades. Esta fractura ideológica ha derivado en una lucha histórica entre la izquierda y la derecha por el control del sistema educativo. Mientras la izquierda no ha sido capaz de encontrar una solución, la derecha ha recurrido a planteamientos neoliberales para justificar decisiones que deberían haber sido pedagógicas. En este contexto y con estos precedentes, el autor se plantea numerosos interrogantes a partir de propias observaciones y experiencias como formador de futuros maestros, hasta preguntarse hasta qué punto los jóvenes profesores y los que están formándose para ello se habrán impregnado de la mentalidad neoliberal.

La segunda parte de este libro, titulada «The American context: teacher educators who counter the neo-liberal accountability era by nurturing the values of long-term teacher researchers», se centra en el contexto estadounidense y en la resistencia a la influencia del neoliberalismo mediante el fomento de la formación en valores. Conformando esta segunda parte un único capítulo firmado por Elizabeth Currin con el título «The positive power of negative capability: long-term teacher researchers in the United States». Con un enfoque cualitativo y narrativo, a partir de historias de vida, Currin explora cómo los docentes investigadores, al reflexionar sobre su propio crecimiento profesional, pueden utilizar su práctica investigadora como forma de resistir la desconexión neoliberal de la dialéctica de valores que les ha sostenido en sus carreras docentes. Para su estudio recurre a profesores que empezaron sus carreras en distintos momentos de la era de la reforma educativa neoliberal: a principios de los ochenta, a principios de los noventa y a mediados de los noventa, respectivamente. Su procedencia tampoco es casual, pues representa, a través de Massachusetts, Virginia y Wisconsin, tres estados con colores y tradiciones políticas diferentes. A pesar de la variedad de participantes, la investigación de Currin manifiesta que la postura indagadora de los profesores investigadores funciona en contextos diversos y distintos, por lo que podría convertirse en un buen recurso para la renovación de valores en la formación inicial del profesorado.

La tercera parte del libro pretendía centrarse en contextos postconflicto y postcomunistas para valorar hasta qué punto los formadores de profesores pueden desarrollar valores transformadores en el personal docente que propicien la justicia social y el florecimiento humano en una sociedad renovada. En esta parte sólo se desarrolla un capítulo de Zahraa McDonald, que con el título «The South African post-conflict context: reproductive or transformative values in teacher education?», se centra en el contexto de Sudáfrica tras el Apartheid. Esta formadora de docentes e investigadora ve poco probable –aunque no imposible– una transformación de los valores morales y políticos de los profesores en formación, pues predomina la reproducción sobre el fomento de un discurso alternativo. Un segundo capítulo debería haber conformado esta tercera parte del libro; se trataba de una investigación propuesta por Olga Schihalejev, quien debido a los efectos del Covid no pudo culminar su trabajo. No obstante, en la presentación Nick Mead resume

cuál iba a ser el contenido de este capítulo. Schihalejev quería evidenciar cómo los periodos presoviético, soviético y postsoviético han conducido al rechazo de la ideología religiosa y política dentro de la educación, dando lugar a un abandono de la educación religiosa basada en valores. Esto ha conducido a una educación enfocada en habilidades y actitudes compatible con la aparición del sentido común neoliberal y el instrumentalismo, del que se ha apropiado.

Una cuarta parte se dedica a Asia mediante el capítulo «Shifting values in Japanese teacher development» de Mitsuharu Mizuyama, quien considera que la formación del profesorado en Japón está atrapada en una espiral negativa que refuerza aún más los valores neoliberales. Según él, en el año 2000 Japón trató de revalorizar el rendimiento educativo mediante un cambio de rumbo hacia el neoliberalismo frente al globalismo. La introducción de múltiples sistemas de elección de escuela, las pruebas nacionales de capacidad académica utilizadas para la clasificación de las escuelas y el requisito de que todos los profesores renueven su licencia cada diez años, ha creado un conflicto de valores. Mizuyama cree que los profesores en formación luchan por desarrollar sus valores en una intersección entre los valores colectivistas tradicionales y los valores neoliberales de la performatividad individual. Como resultado, los profesores se han vuelto emprendedores, pero también ansiosos y a menudo conflictivos entre sí, lo que provoca enfermedades y problemas de contratación y retención. La solución, según Mizuyama, pasaría por un replanteamiento del ideal que representa el punto de partida de la educación.

Finalmente, Mead nos ofrece unas últimas páginas de conclusiones, que se centran en la necesidad de defender la dimensión afectiva y la perspectiva histórica en la formación del profesorado, así como en la evidencia de que existe un interés común a nivel internacional de formar individuos equilibrados emocional, social, moral y políticamente para ejercer una profesión docente comprometida con una dialéctica de valores renovada.

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