

# LE RAGIONI DI ERASMUS

## 1

a cura di MARINA GEAT e VINCENZO A. PICCIONE



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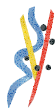
Università degli Studi Roma Tre  
Dipartimento di Scienze della Formazione

# LE RAGIONI DI ERASMUS, 1

a cura di  
MARINA GEAT e VINCENZO A. PICCIONE

Collana “Le ragioni di Erasmus”

*Ricerche e intersezioni scientifiche.  
Per l'educazione nel presente: le scienze umane,  
l'internazionalizzazione, le reti, l'innovazione*



Roma TrE-Press

2017

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Collana  
*Le ragioni di Erasmus*

Scopo della Collana è di contribuire ad intensificare e diffondere le azioni promosse dal Dipartimento di Scienze della Formazione nell'ambito dei programmi Erasmus ed Erasmus+. Tramite la pubblicazione di articoli sia dei ricercatori delle Università straniere legate al Dipartimento da accordi Erasmus o da altre relazioni di collaborazione internazionale sia dei docenti del Dipartimento che vogliono condividere i risultati delle proprie esperienze in *Teaching Mobility* Erasmus, nei progetti di collaborazione internazionale, in ricerche inerenti a programmi finanziati con fondi europei, con particolare riferimento ai programmi ERASMUS+, la collana *Le Ragioni di Erasmus* si propone in particolare:

- di mantenere costante nel tempo e nello spazio la rete dei rapporti internazionali multi-, inter-, trans-disciplinari di cui l'Ufficio Erasmus ha rappresentato negli anni uno dei nodi di sviluppo, affinché un maggior numero di docenti e ricercatori possa averne conoscenza e usufruirne per l'ampliamento dei propri rapporti di collaborazione in ambito europeo ed extra-europeo, mettendo successivamente in comune le proprie esperienze e collaborando così ad allargare e a dare vitalità a questa tessitura di rapporti scientifici di cui il Dipartimento è fulcro;
- di fornire agli studenti del Dipartimento di Scienze della Formazione, ai vari livelli di studio (triennale, specialistica, master, dottorato), spunti e contatti per allargare i propri ambiti di studio e di ricerca, consentendo loro di conoscere più ampiamente i filoni e i luoghi della didattica e della ricerca internazionali, i docenti stranieri cui fare riferimento, le possibilità che sono

loro offerte per sviluppare una visione vasta delle problematiche e delle collaborazioni che sono loro potenzialmente offerte;

- di offrire agli studenti intenzionati a partire per un'esperienza Erasmus o di studio/tirocinio/ricerca in un altro Paese informazioni utili per acquisire una preventiva e più approfondita consapevolezza dei luoghi in cui si recheranno, dei contatti più opportuni da stabilire, degli ambiti che maggiormente concernono i loro interessi formativi;
- di costruire un prezioso laboratorio di scambio, interazione, riflessione, esplorazione, ascolto di voci multi-, inter-, trans-disciplinari che provengono da aree diverse del mondo e che possono permettere di riflettere su contenuti scientifici originali, pertinenti e coerenti con il progetto culturale del Dipartimento di Scienze della Formazione.

*Tutti i volumi pubblicati sono sottoposti a referaggio in 'doppio cieco'. Il Comitato scientifico può svolgere anche le funzioni di Comitato di referee.*

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Marina Geat<sup>1</sup>

*Introduzione. Il senso della rete*

Il senso dell'Erasmus è il senso della costruzione di una rete, di una lenta e impegnativa tessitura che viene da lontano, che travalica i limiti tra le generazioni e i confini tra nazioni; la realizzazione di un progetto che, scaturito inizialmente nelle menti di alcuni Umanisti molti secoli or sono, è stato rilanciato e reso possibile dai pochi 'saggi' che vi hanno davvero creduto e che hanno contribuito a portare a compimento, fino ai nostri giorni, quello che è stato giustamente definito come un nuovo Umanesimo (ma ritorni indietro, 'ai secoli bui', sono sempre incombenti, come purtroppo dimostrano i troppi muri, fisici e spirituali, che da più parti si stanno costruendo). Le Università sono sin dall'inizio dei punti nevralgici e dinamici di questa tessitura. Come descrive ampiamente la bella ricerca diretta da Walter Rüegg, *A History of the University* (vol. 1, *Universities in the Middle Ages*), già alla fine del Medioevo la circolazione di uomini e di idee era intensa e continua tra le più prestigiose Università italiane ed altri importanti centri universitari francesi, spagnoli e inglesi, con particolare riferimento ad almeno sette di loro: Bologna, Parigi, Montpellier, Oxford, Padova, Salamanca e Cambridge.

A partire dal Quattrocento – spiega Maria Grazia Melchionni nel suo volume *Europa unita, sogno dei saggi* – nonostante o piuttosto proprio come reazione alle catastrofi provocate dall'uomo e dalla natura (la guerra dei Cento anni, la peste nera, e via di seguito) tanto il numero di questi centri di cultura quanto la pluralità degli scambi di pensiero che intercorrono tra di essi si amplificano sempre di più, allungandosi anche lungo assi che dall'Occidente e dal Centro si protendono verso Est (l'Università di Praga è il fulcro principale di

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irradiazione in questa nuova direzione). Analogamente si diffonde e si allarga sempre di più la consapevolezza, variamente modulata, di partecipare comunque, nonostante le tante lacerazioni della storia, ad una grande cultura comune che, all'epoca, aveva, oltre ai riferimenti classici e cristiani, anche il latino come comune idioma erudito di circolazione (Melchionni, 2001: 32).

Il 'sogno europeo' (Rifkin, 2004), come si sa, è proseguito nei secoli come aspirazione, come auspicio, talvolta come utopia fino a quando due guerre mondiali scoppiate al cuore dell'Europa non hanno sollecitato la politica a tentare di dare finalmente una possibilità di realizzazione concreta a questa Unione, regolamentando all'interno di un'unica 'comunità' i conflitti determinati dagli interessi economici nazionali: proprio in questi giorni del marzo 2017 si celebrano i sessant'anni del Trattato di Roma, che nel marzo del 1957 ha istituito la CEE, la Comunità Economica Europea, un passo fondamentale per creare le condizioni materiali all'attuazione di quell'antico 'sogni di saggi'. Rimaneva da formare su ampia scala nuove generazioni di uomini che si sentissero pienamente, profondamente, autenticamente europei, un problema cui il sistema educativo in primo luogo era chiamato a dare delle soluzioni. La risposta più efficace è stata certamente l'Erasmus: trent'anni fa, il 24 febbraio 1987 (coincidenza vuole che quest'anno si celebri anche questo anniversario), partiva ufficialmente il progetto che avrebbe portato milioni di giovani a svolgere una parte dei loro studi universitari in altre nazioni europee, ma anche a modificare il loro modo di guardare al mondo e alla vita, a valicare con più facilità antiche frontiere che nel frattempo andavano via via scomparendo<sup>2</sup> (e che oggi purtroppo ricompaiono), a muoversi in una dimensione linguistica e culturale di più ampia accoglienza, collaborazione e 'intercomprensione', un termine che, tecnicamente adottato proprio dalla linguistica, sottolinea l'importanza di saper riconoscere e valorizzare le molte analogie che ci uniscono (per i linguisti soprattutto le strutture e il lessico della lingua latina) al fine di gestire e cessare di aver timore dalle differenze.

Il problema dell'educazione dei giovani allo 'spirito internazionale' non è certamente semplice. Se lo pose con molto impegno lo stesso Jean Piaget quando era Direttore al Bureau d'Éducation della Société

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<sup>2</sup> Il trattato di Schengen che istituisce la libera circolazione dei viaggiatori in gran parte del territorio europeo è del 1985, ma la prima soppressione effettiva dei controlli alle frontiere avviene nel 1996 tra Belgio, Germania, Spagna, Francia, Lussemburgo, Paesi Bassi e Portogallo.

des Nations, constatando, a cavallo tra la Prima e la Seconda guerra mondiale, i fallimenti dell'approccio contemporaneo al conseguimento di questo obiettivo. Le sue indicazioni sottolineano l'inutilità di ogni morale imposta dall'altro, sollecitando al contrario l'esperienza della solidarietà e della reciprocità direttamente vissuta dai bambini e dai giovani come l'unica via in grado di motivare una mentalità aperta all'altro da sé, alla cooperazione, alla pace. La guerra ha rivelato definitivamente le correlazioni sempre più accelerate e strette tra le varie parti del mondo, spiega Piaget. Per far fronte a questa situazione (oggi certamente più evidente e incalzante rispetto ai tempi in cui egli scriveva) occorre sviluppare e diffondere una struttura di pensiero in grado di concepire pienamente le interconnessioni e le reciprocità tra i popoli. Valori cognitivi e valori morali (la solidarietà, la cooperazione) coincidono dunque, divengono sostanzialmente la stessa cosa: ho certi valori e certe regole di comportamento perché sono in grado di concepire pienamente la complessità e la specularità dei rapporti tra gli esseri umani anche al di là delle frontiere nazionali; e riesco a concepirli non perché me li hanno insegnati dall'alto, ma perché ne ho fatto io stesso l'esperienza diretta. Lasciamo ampiamente spazio alla parola dello stesso Piaget, perché non si potrebbe dire con maggior chiarezza, autorevolezza e accorata insistenza quanto afferma negli interventi con cui si proponeva (invano) di scongiurare una nuova guerra in Europa:

«[...] la construction d'un esprit international est avant tout affaire d'éducation: la difficulté paraît en effet si grande, pour les hommes habitués aux points de vue anciens, de penser et d'agir à l'échelle humaine actuelle qu'une éducation spéciale et organisée se révèle nécessaire». (Piaget, 1931: 56)

«La compréhension entre êtres humains n'exige-t-elle pas une technique dont l'école devrait se soucier? Lorsque l'enfant – et l'adulte lui-même – a saisi sur le vif les difficultés énormes de l'échange véritable de pensée, lorsqu'il constate la peine qu'il éprouve à se faire comprendre, n'est-t-il plus apte à comprendre autrui, et cette réciprocité intellectuelle ne constitue-t-elle pas l'instrument le plus précieux de toute pacification, quelle qu'elle soit?». (Piaget, 1931a: 23)

«L'éducation est un tout. L'enseignement, seul, peut être morcelé, encore est-ce douteux. Pour ce qui est de l'éducation elle-même, c'est-à-dire de la formation de la pensée et du cœur, de la raison théorique et pratique, on ne saurait pratiquer de coupures. [...] Celle-ci [la coopération internationale] [...] implique une méthode générale de compréhension: c'est-à-dire qu'elle est indissociable de l'éducation intellectuelle, comme de celle des sentiments. C'est une nouvelle attitude intellectuelle et affective qu'il nous faut créer. Une fois de plus se vérifie sur ce point le parallélisme de la logique avec la morale: là où interviennent nos passions et notre égocentrisme, comprendre autrui et respecter autrui ne font qu'un, l'objectivité impliquant le même désintéressement que l'altruisme lui-même». (Piaget, 1931: 67)

«Le nationalisme tient à une attitude d'esprit plus qu'à toutes les raisons historiques, ethnographiques ou linguistiques réunies. L'internationalisme est une autre attitude d'esprit, dont les racines demandent à être plantées plus profond qu'on ne le suppose parfois si l'on veut qu'elle soit capable de s'imposer aux tendances les plus naturelles et les plus élémentaires de notre nature bornée»<sup>3</sup>. (Piaget, 1931: 58)

«On a beaucoup parlé d'un enseignement de la solidarité [...]. Mais les leçons les meilleures resteront lettre morte si elles ne reposent sur l'expérience elle-même, de même que l'intelligence des lois de la physique est impossible sans le maniement d'un matériel concret. Or, l'expérience de la solidarité, il est nécessaire que l'enfant la refasse lui-même, car les expériences des autres – dans le domaine spirituel encore plus que dans le domaine matériel – n'ont jamais instruit personne, et par une fatalité de la nature humaine, chaque nouvelle génération est appelée à réapprendre ce que les autres avaient déjà découvert pour leur compte»<sup>4</sup>. (Piaget, 1931: 17)

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<sup>3</sup> Cfr. Piaget, 1931: 61: «Que nous soyons différents les uns les autres, c'est là, certes, un grand bien et la construction de la vérité, loin d'exiger l'uniformation des points de vue divers, suppose au contraire la coordination entre perspectives différentes. Du point de vue moral et affectif, l'on ne saurait penser autrement, et l'humanité ne doit sa richesse qu'à cette profusion d'expériences divergentes».

<sup>4</sup> Cfr. Piaget, 1931a: 17: «[...] il est nécessaire que l'enfant la refasse lui-même [l'expérience de la solidarité], car les expériences des autres – dans le domaine spirituel encore plus que dans le domaine matériel – n'ont jamais instruit personne, et par une

In quegli stessi anni, uno dei grandi ‘padri’ fondatori dell’Unione Europea (che, coincidenza vuole, della Société des Nations era stato Segretario aggiunto al momento della sua fondazione, dieci anni prima dell’arrivo di Jean Piaget alla direzione del B.I.E.), si poneva da un punto di vista politico e umano un quesito analogo: come rendere permanente tra le Nazioni la solidarietà dimostrata in guerra contro un nemico comune? Come renderle ancora solidali e coese una volta che questa motivazione ‘forte’ di difesa fosse cessata e forse giunta, finalmente, la pace? (Monnet, 1976).

L’istituzione dell’Erasmus è probabilmente la miglior risposta a queste esigenze. È la possibilità per i giovani di ripetere, generazione dopo generazione, l’esperienza dello spaesamento culturale, delle sfide poste dall’intercomprensione linguistica, ma anche di innamorarsi, di fare nuove amicizie, di aprire le menti e il cuore a nuove conoscenze, di bandire vecchi pregiudizi e estraneità. Di costruire, davvero, il ‘tessuto’ europeo, una ‘poli-lingua’ comune non soltanto in senso tecnico, ma proprio come destino. Lo affermava con molta semplicità e lucidità in una delle sue ultime interviste Umberto Eco, di cui ci piace ricordare le parole:

«La soluzione [...] sarà il lento diffondersi di un polilinguismo. Polilinguismo non vuol dire che uno parla tutte le lingue, ma che se la cava a capire un po’ anche le altre. Succede per le persone colte che si trovano intorno a un tavolo e ciascuno parla la propria lingua e un pochino ci si capisce. Un mio illustre collega francese, Claude Hagège, parla sempre di questo polilinguismo come il destino dell’Europa. E qual è una delle molle per arrivarci? È l’Erasmus. L’Erasmus, io l’ho sempre detto, ha due funzioni: una linguistica e una sessuale. La maggior parte dei giovani che vanno a fare l’Erasmus si sposano all’estero. Questo vuol dire che nel giro di trent’anni viene fuori una generazione bilingue. Quindi già questo è una cosa molto importante. E imparano a girare. I ragazzi che vanno a fare l’Erasmus finiscono magari in Spagna senza sapere la lingua all’inizio, poi s’aggiustano. [...] Nel lungo periodo, tanto più emergeranno le altre potenze, dall’Oriente, ecc., tanto più l’Europa si sentirà assediata, ma unita». (Eco, 2014, 3: 29 – 5: 15)

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fatalité de la nature humaine, chaque nouvelle génération est appelée à apprendre ce que les autres avaient déjà découvert pour leur compte».

Per questo motivo l'Erasmus è certamente una componente importante di quel Premio Nobel per la Pace che è stato attribuito all'Unione Europea nell'ottobre del 2012; è uno dei maggiori contributi che il mondo dell'educazione – e le Università in prima fila – dà, giorno dopo giorno e sul campo, alla costruzione consapevole e vissuta di una identità plurale, 'reticolare' se ci è consentita l'espressione, perché – parafrasando Piaget in uno degli interventi citati – l'internazionalismo è un'attitudine delle mente le cui radici devono essere piantate in profondità, affinché possa far fronte alle tendenze più elementari della nostra natura miope e limitata.

Il significato della collana di cui viene pubblicato in questo volume il primo numero proviene direttamente dall'esperienza dei Coordinatori Erasmus del Dipartimento di Scienze della Formazione e da quella dei loro colleghi stranieri del comitato scientifico che, ormai da anni, collaborano con l'Università Roma Tre grazie alle opportunità offerte da questo programma dell'Unione Europea. L'Erasmus, infatti, non riguarda soltanto gli studenti (anche se questi ne rappresentano certamente l'immagine più attrattiva e 'popolare'). L'Erasmus consente anche la mobilità dei docenti e grandi progetti internazionali. Ogni anno vengono presso il nostro Dipartimento decine di professori e ricercatori da ogni parte di Europa a dispensare alcune ore del proprio insegnamento, a diffondere la conoscenza delle proprie ricerche, a incontrare gli studenti che partiranno o quelli delle loro Università che studiano a Roma Tre, a discutere idee che si trasformeranno in progetti a venire. Analogamente, i nostri docenti partono e insegnano in altre Università, creando relazioni, e non di rado amicizie, che a loro volta rilanciano progetti e costituiscono *humus* per ulteriori mobilità di studenti, di ricercatori e di idee. La 'rete' è anche questa, in una tridimensionalità che riguarda tanto i ruoli, che il tempo, che lo spazio. La collana *Le Ragioni di Erasmus* si propone di consolidare e di mantenere traccia di questi passaggi (spesso soltanto di pochi giorni), pubblicando articoli dei nostri *partner* in Erasmus, affinché le loro ricerche e i loro ambiti di interesse continuino a rimanere patrimonio comune anche dopo la loro partenza da Roma. I nostri studenti *outgoing* in partenza per le Università straniere; i nostri tesisti in cerca di contatti internazionali per i loro studi; i nostri Dottorandi; i nostri ricercatori e docenti che guardano all'Europa per progetti su vasta scala come pure gli stessi colleghi stranieri uniti, o che si uniranno, al nostro Dipartimento tramite accordi bilaterali Erasmus, troveranno nei volumi de *Le Ragioni di Erasmus* idee, contatti, spunti cui attingere

per costruire nuove relazioni. Allo stesso modo, la pubblicazione di articoli sulle ricerche internazionali già in corso dei docenti del Dipartimento e il formato *open access* delle edizioni Roma TrE-press consentiranno una maggiore disseminazione dei loro risultati e dei loro studi, sollecitando presso i colleghi europei il desiderio di ulteriori collaborazioni con il dipartimento di Scienze della Formazione. Tutto ciò in un'ottica transdisciplinare e 'plurilingue' come negli auspici di Umberto Eco: ciascuno scrive nella lingua che preferisce, la cultura comune consentirà comunque l'intercomprensione.

Il primo numero de *Le Ragioni di Erasmus* ha volutamente lasciato liberi i partecipanti circa le tematiche dei loro interventi. Si trattava anche, infatti, di 'sondare' i nostri partner, di conoscerli meglio, di valutare la loro risposta all'iniziativa. Si sono così delineati a posteriori tre principali filoni di indagine, pur collegati tra di loro da molteplici punti di intersezione trasversali e transdisciplinari, a seconda che il centro di interesse della ricerca verta principalmente verso il sistema universitario e dell'istruzione superiore, verso la comprensione di fenomeni sociali oppure verso interventi nel campo dell'infanzia e del sistema scolastico primario. Nel primo gruppo tematico, Vincent Boly, Laure Morel, Mauricio Camargo, dell'Université de Lorraine, spiegano l'innovazione pedagogica messa in atto dall'ENSGSI (École Nationale Supérieure de Génie des Systèmes et de l'Innovation) della loro Università al fine di rispondere, con nuovi profili e adeguate competenze, alla formazione di risorse umane richieste dal mondo imprenditoriale attuale. Ossi Autio, Janez Jamsek, Mart Soobik, Gisli Thorsteinsson, Brynjar Olafsson, delle Università di Helsinki, Ljubljana, Tallinn e Islanda, descrivono le modalità e i risultati di una ricerca internazionale congiunta sul territorio dei loro quattro Paesi tra il 2012 e il 2015 e finalizzata alla valutazione di analogie e differenze nell'educazione tecnologica, sulla base delle differenze di genere, dell'organizzazione dei curricula e delle differenti tradizioni culturali. Sandra Chistolini, dell'Università Roma Tre, e Maria Helena G. Pratas, dell'ISEC, Instituto Superior de Educação e Ciências di Lisbona, propongono le loro esperienze e le loro riflessioni rispetto al valore aggiunto che la mobilità Erasmus dei docenti ha reso possibile in ambito pedagogico, con particolare riferimento alle rispettive Università e ai contenuti, metodi e strategie delle tradizioni educative italiana e portoghese. María-Teresa del-Olmo-Ibáñez, dell'Università di Alicante, pone al centro del suo intervento il concetto euristico di

‘biografia della città’, dimostrando perché e in che modo quest’ultima possa rappresentare un valido strumento didattico finalizzato alla mediazione e all’integrazione culturale, linguistica e sociale. María Ángeles Martín, dell’Università di Valladolid, infine, affronta le problematiche concettuali, epistemologiche e operative dell’EMI (*English Medium Instruction*) e dell’ELF, ossia dell’Inglese come Lingua Franca, mostrandone il funzionamento e i risultati per le politiche di internazionalizzazione degli Atenei, con particolare riferimento a quanto accade nelle Università spagnole.

Il secondo filone riunisce gli interventi di Ewa Sowa-Behtane dell’Akademia Ignatium di Cracovia, che si interroga circa i risvolti culturali e sociali dei matrimoni misti in Polonia, un fenomeno diffusissimo e in continuo aumento; di Aneta Wojnarowska, della Pedagogical University di Cracovia, che indaga più nello specifico il fenomeno delle famiglie miste italiano-polacche in Polonia, e riflette sui risvolti socio-educativi che queste implicano sia rispetto ai figli cresciuti in questi contesti sia riguardo allo status complesso delle donne, sulle quali soprattutto ricade la responsabilità e il peso di conciliare diverse dimensioni identitarie, in quanto madri e in quanto mogli di partner stranieri. Paweł Prüfer, dell’Akademia im. Jakuba z Paradyża di Gorzów Wielkopolski, Polonia, compie l’interessante esperimento di utilizzare il pensiero di Erasmo da Rotterdam per una maggiore comprensione degli sviluppi auspicabili della società contemporanea, coniugando la proiezione verso il futuro con la lettura del passato e l’impegno nel presente. Juan Ramón Moreno Vera, della Facultad de Educación dell’Università Alicante, esplora infine il genere figurativo del ritratto come chiave di indagine sociale, con particolare riferimento alla collezione artistica della regione spagnola della Murcia.

Nel terzo filone, Kinga Łapot-Dzierwa, dell’Università Pedagogica di Cracovia, affronta la tematica, molto sentita nella pedagogia polacca, della preparazione universitaria dei docenti di arte per le prime classi della scuola elementare. Grazia Giacco, docente di Musica e di Didattica dell’educazione musicale e Sonia Lorant, docente in Psicologia Cognitiva, entrambe dell’ESPE dell’Université de Strasbourg, descrivono un innovativo progetto di Didattica della creazione artistica, indagandone le metodologie e gli aspetti cognitivi, emozionali e conativi nel bambino, e tracciando un bilancio dopo due anni di ricerca. Andrea Rácz, dell’Università Eötvös Loránd di Budapest, presenta i risultati delle sue ricerche in merito alle pratiche educative e di cura messe in

atto dallo Stato ungherese, indicando futuri sviluppi e cambiamenti necessari per assicurare ai bambini un ottimale inserimento sia nella vita adulta che nel mercato del lavoro contemporaneo. Antonella Poce e Maria Rosaria Re, dell'Università Roma Tre, presentano le attività di ricerca del Laboratorio di Pedagogia Sperimentale e del Centro di Didattica Museale dell'Università degli Studi Roma TRE nell'ambito del progetto Erasmus+ KA2 DICHE (*Digital innovation in cultural and heritage education in the light of 21st century learning*). Il loro articolo mostra come l'innovazione digitale in ambito museale influisca positivamente, presso alunni della scuola primaria, sullo sviluppo di competenze trasversali quali la creatività, la comunicazione, la collaborazione, il pensiero critico. Viviane Devrièsère, dell'ISFEC d'Aquitaine sviluppa infine la sua riflessione sulle caratteristiche e il funzionamento degli stereotipi nell'ambito della letteratura per ragazzi di argomento esotico. La sua analisi ha per oggetto in particolare l'album illustrato *Maman-Dlo* d'Alex Godard, ambientato in Guadalupa, molto utilizzato nelle scuole francesi, suggerendo una metodologia didattica in grado tanto di comprendere lo stereotipo che di oltrepassarlo.

Ai contributi fin qui citati e alla mia introduzione si aggiungono le considerazioni di Vincenzo A. Piccione, con il quale abbiamo immaginato il progetto de *Le Ragioni di Erasmus*. Il significato, le implicazioni e gli auspici espressi dal sottotitolo della collana *Per l'educazione nel presente: le scienze umane, l'internazionalizzazione, le reti, l'innovazione* sono spiegati nel modo più efficace dalle sue parole.

Una rete di donne e di uomini, una rete di idee: è questo il senso dell'Erasmus al quale vogliamo dare, anche con questa collana, il nostro contributo.

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*Academic teaching, internationalisation, innovation*

ABSTRACT:

The project of the new series *Le ragioni di Erasmus* took up a challenge. In its subtitle, *Supporting education in present times: human sciences, internationalisation, networks, innovation*, are the crucial issues of that challenge: on one side, thematic networks and suggestions, thematic interconnections and networks of meanings; on the other side, pedagogical, educational, didactical choices, the idea of metaphorical and actual networks, the idea of living, within universities, a crucial historical moment: the moment of modifying strategies, methodologies, technics, tools of academic teaching, the moment of supporting new research models.

KEYWORDS: academic teaching, interdisciplinary research, pedagogical approach.

Il progetto della nuova collana *Le ragioni di Erasmus* raccoglie una sfida. Nel suo sottotitolo, *Per l'educazione nel presente: le scienze umane, l'internazionalizzazione, le reti, l'innovazione*, sono presenti i motivi della sfida: le reti tematiche, le interconnessioni tematiche, le reti di significati si intrecciano con ragioni pedagogiche, educative, didattiche, con l'idea della rete come metafora e come realtà, con l'idea che questo sia, per le università, un momento storico cruciale: il momento di modificare strategie, metodi, tecniche, strumenti dell'insegnamento accademico, il momento di promuovere nuovi modelli di ricerca.

PAROLE CHIAVE: insegnamento accademico, ricerca interdisciplinare, approccio pedagogico.

1. *An introduction. Didactics and the impact of changes on learning*

The idea of a new series – *Le ragioni di Erasmus. Supporting education in present times: human sciences, internationalisation, networks, innovation* – was fostered by the international experiences of a very wide network of European academics. The meetings, the Erasmus+ mobility, the common research projects, the congresses / conferences /

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symposia, the deep and significant discussions were their implemented core activities. Academic teachings, university students' training needs, the quality of delivered subjects, the updated contents of delivered curricula, the interactions with the labour markets were the core topics. The two parts of this paper summarize the reasons why a new series was projected / designed, the reasons why those activities were implemented, the reasons why those topics were discussed. For the sake of synthesis, the focus of both parts is on a specific issue: the analysis of the impact of present changes asks for modifying academic teaching and support to research. The first part answers to the question «Why and for whom do we have to modify our teaching styles?», the latter is my proposed answer to the question «How could we do it?». But both parts state that the question «What do we have to do, if we want to modify our teaching style?» can have a first, unique answer: if the definition of a technical set of tools is designed or expected to be designed, it is better to plan for a different profession; academic teaching is now much more than showing technical competences and having scientific knowledge.

In the last decade several scientific fields have been discussing about the statute of their reference subjects; it is, perhaps, a consequence produced by interdisciplinary approaches, or, perhaps, by the need of adopting interdisciplinary approaches, or, perhaps, by the need of better defining additional designs / directions of research. Here, we do not need to deepen or justify the reasons of this debate, but stress that it impacts on academics' didactics and on the assessment of their didactics. My opinion is that a debate on scientific areas' statutes cannot give any significant suggestion; actually, it focuses its attention on teaching styles and on the central position of academics in all educational and training settings. Here, the aim is of defining the totally different reasons why didactics need to re-discover, renew, innovate. In general, my position is: as universities do not exist because of the existence of academics but do exist because of the existence of students, we must state that dealing with learning styles is a priority; and that teaching styles must be re-discovered, renewed and innovated as they depend on the present characteristics of learning styles. My position is supported by more specific and detailed reasons, of course; some of them are complex, phenomonic reasons (De Kerckhove, 1993; Pinto Minerva & Gallelli, 2004; Baldi, 2003; Anolli, 2006; Iori, 2006; Piccione, 2012:

23-141), some of them are concrete reasons (Brandimonte, 2002, 2004; Bruner, 2000; Rifkin, 2000; Piccione, 2013: 75-116); in the next pages, they will be synthesised.

First: the way we have been studying and learning, up to a dozen years ago, and the way, at present, our university students study and learn, are so distant that never before, in human history, the risk was so strong of reducing both the meaning of academic studies and the opportunities of improving research. This does not mean that the quality of academic teaching and researching is going to be lower and lower, but that the impact of academic studies and research can be lower and lower (Laporta, 1977; Capano & Meloni 2013; EMN, 2013). In short, in concrete, some examples. First: we have been taught that the manipulation of knowledge is the strategy that can produce significant effects on the quality of learning. What does it mean? That we were taught a learning style concentrated, at least, on deducing, inducing, making inferences, analysing, synthesizing, representing, solving problems, using logical and thematic connections, etc. Second: we have been explained subjects by the use of sequentiality. What does it mean? That our teachers and profs, wherever and whenever, from primary school to university, explained with sequential procedures all formal contents of subjects. In other words:

- humanities, or, better, the 'historical' subjects, obeyed to a red thread: history, art, literature, philosophy were 'narrated', explained, commented, from ancient times to present ones; and geography was narrated with a lightly different red thread: from all that is 'close to me' to all that is very 'far from me';
- logical-scientific subjects obeyed to a 'technical' red thread: arithmetic, maths, physics, chemistry, ..., were narrated explained, commented, from simple to complex.

At the moment, the above-mentioned cognitive strategies aren't anymore sufficient to learn effectively: in other words, deducing, inducing, making inferences, analysing, synthesizing, representing, solving problems, using logical and thematic connections, sequentiality aren't sufficient, anymore. Following the logical connections which we are used to, with a red thread from wide to small factors: because of social phenomena? Yes. Because of changes in communication and languages? Yes. Because of interdisciplinary approaches? Yes. Because

of changes in learning styles? Yes. Because of present technological advanced tools? Yes.

The list could be far longer, but the listed aspects are representative. Philosophically, we could say that, first of all, the changes in the perception of time and space in terms, respectively, of intensity instead of duration, and orientability instead of distance (Piccione, 2012: 23-34; Elias, 1986; Fraser, 1991; Iori, 2006; Kern, 1995), and, second, the new perception of virtuality as a socio-educational setting (Lévy, 1997; Maldonado, 1994; Piccione, 2013: 61-74) can summarize the changes and explain several significant impacts. Those changes added – to the traditional reference categories of duration, eternity, stability, distance and border – new reference categories, such as, at an individual level, flexibility, interlink-ability, logic and procedural sequentiality, simultaneity, permeability, reliability, dependence, interdependence, reachability, manipulability (Maldonado, 1994, 2005, Galimberti, 1999; Benasayag & Schmit, 2004; Bertolini, 2002); and, at a social level, intensity, simultaneity, orientability, adaptability, mobility, permeability, reliability (Bauman, 2006; Beck, 2000; Lévy, 1997; Pinto Minerva & Gallelli, 2004). In concrete words, all of these change modified the perception and the organization of knowledge, the effectiveness of knowledge and the expectations we have from it, the points of view and the narration of knowledge, the elaboration of knowledge for our own purposes. Therefore: why, in a short time, should we modify our teaching styles? There are, at least, ethical, social, cultural reasons, of course, and they all belong to our profession, or, better, to the way we perceive our profession, to the way we make researches, aim at scientific objectives, expect scientific results; in short, it belongs to our professional projects, therefore to the reasons why we study, plan researches, update our competences, have classes (Massa, 2005; Postman, 1997; Salomone, 1997; Sansone, 2003). If we all do not understand the impact of changes now, changes will introduce themselves, clearer and clearer, in a short time. In other words, the students who, at present, attend secondary schools, could only need a couple of years to become our university students; and those who, at present, attend primary schools, will only need ten years or less to become our university students. They all are the bearers of the impact of changes. Within the above-defined context, the role of the Sciences of Education is extremely important; actually, they are asked

to confirm their interdisciplinary scientific nature; to demonstrate to be able to read present educational problems; to give, again, significant didactical answers to the need of fostering, within all educational settings, interest, curiosity and motivation; to suggest how to avoid the risk of strengthening the perception of knowledge as a set of technical, transmissible notions (Cambi, 2002, 2006; De Kerckhove, 1993).

Our students live, belong to, participate, communicate, interact within traditional educational settings, whose social, communication-al, linguistic, formal, non-formal, informal messages are coherent with academics' competences and knowledge, models and lifestyles. And, at the moment, generally speaking, academics' teaching styles are either widely traditional or semi-traditional. The former model is rather transmissive, managed according to the following procedure: as adults and experts think they are the total owner of knowledge and experience, day by day, they speak, ask full attention, have their classes and courses, deliver knowledge, make questions, evaluate. The latter is the model of those academics who think that the use of laboratories / seminars / advanced technologies / facebook / whatsapp, the reports on some research results, the description of the competences required by the labour market are what they are expected to do, to be and become innovative. Within all the other educational settings (parallel schools, according to the pedagogical lexicon), our students receive widely similar messages: academics' wisdom, expertise and experience are undeniable, sometimes models and lifestyles are unjustifiable but their roles, wisdom, expertise, competences and experience are undeniable.

Second: now, two short considerations more profound and meaningful, on what is labelled 'transmission of knowledge'; I already came on them more than once (Piccione, 2011, for example), and I'll be back on them again. The former: as never before in human history, younger generations, at present, have a kind of knowledge, the technological one, about which the adult generations are not unique and total holders. Adult generations don't know and can't transfer its contents, instructions for use, usability and re-usability, meanings, cognitive strategies involved in managing it, communicational codes and channels, specific languages. The latter: younger generations, at present, have at their disposal a kind of knowledge, the technological one, which gives an additional instrumental potentiality. Its use allows, as never before in human history, the pure access to any other knowledge

without the necessary physical presence of adult generations. It doesn't matter if it is a deeper or a more superficial knowledge, as its quality depends on the user's approach and on the motivation to learn. By these two facts, several extremely significant consequences have been produced: the perceived usability of knowledge, the perception of its updatability, the way of memorizing, processing, giving a meaning, the way cognitive strategies are used.

What I mean is: educational professions and roles cannot ignore the impact produced by social phenomena and by the pure presence of technological tools that have been modifying our lifestyles and learning styles. They must have a specific competence: reading and understanding why, how, for whom, with whom the perspective of the access to knowledge and of the experimentation of critical thinking are, at present, totally different. In other words: the change of traditional educational settings, of parallel school and of their perception influenced the transformation of the categories of, at least, symmetry, stability, argumentative sequentiality, linearity, causality, predictability. And, again, what I mean is that knowledge cannot be considered a deliverable and transmissible product anymore; that educational roles cannot be considered as technical, anymore. This does not depend on pedagogical reasons; this depends, at least, on a different reason: the human need of perceiving future as a promise and not as a threat (Benasayag & Schmit, 2004: 28-30; Morin, 2001; Castells, 2009).

## *2. The teaching approach of academics: a case*

One of the main problems discussed so far within the above-mentioned European networks of academics was teaching methodology. The distances among their different opinions / positions were very specific: on one side the academics who teach humanities, on the other side all the rest of academics. Those distances were explained by their answers to a unique question: is methodology currently perceived / confused with procedures? Usually, my answer as a pedagogist was positive; and I usually stated that the most significant impact of my answer falls on teaching approaches, therefore, at least, on teaching communication styles, on selected didactical technics / tools, on formative objectives. My position was: methodology is the reason why I decide to use procedures; actually, methodology impacts on:

- the thematic sequence of my lectures;
- the management of my lectures / seminars / laboratories / advanced tools;
- the developed didactical materials;
- the students' group management.

In short: approaches define methodologies; and methodologies suggest how to design procedures; procedures make us select technics and tools; and all of them impact on the quality of teaching. The debate was very intense over the months of the implementation of a project that I was selected to participate in; and the impact of that debate was extremely clear over the following operational phases.

This part of my paper focuses on that international experience and on the above-mentioned problems. I was selected with some European academics to participate in a European project that was implemented in the three Romanian Universities of Timisoara, Bucharest, Sibiu. The project *Universitaria*<sup>2</sup> generally aimed at promoting, among Romanian academics, a specific attention to the pedagogical and didactical approach to academic teaching. It is interesting to report a short introduction to it, as my pedagogical proposal in that project is strictly linked to my present pedagogical proposals; of course, collected information and data will be shortly introduced and commented because, though selected to be member of it, I was a guest and the project was thought, designed, implemented by someone else.

I was given the task of directing and managing the activities of a small group of academics of the Metropolitan University of London; their support and competences were so high that my job could be implemented with extremely significant results. We have been working for one year to design, develop, produce, deliver materials in the area of 'Student group management'. In short: 'our students', the involved Romanian academics, beyond their specific scientific and disciplinary fields, in the following months, have been attending face-to-face and online classes, were provided with four workbooks, were asked to give feedbacks and undertaking written / critical tasks on the following subjects:

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<sup>2</sup>The project, supported by the European Social Fund, Sectoral Operational Programme, Humann Resources Development 2007-2013, Priority Axis 1, Education and training in support for growth and development of knowledge based society; its name and reference number are *Universitaria*, School of higher education teaching and advanced reasearch, POSDRU/157/ 1.3/S/135590.



- A. Student group management:
- managing the learning environment through a student-centred approach;
  - effective interaction with different groups of students;
  - adapting teaching styles to different learning styles of students;
  - prevention and/or management of educational conflict that may occur in groups of students.
- B. Modern methods of teaching lectures and seminar activities:
- assessing and selecting different teaching methods within the course and seminar activities that promote active learning of students;
  - selecting and applying the effective assessment methods to monitor and evaluate students' learning;
  - selecting and using different teaching methods based on objectives, taught contents and characteristics of groups of students;
  - using of ICT and software in teaching activities with the aim of fostering students' active and conscious learning.
- C. Developing specific didactical materials for university education:
- developing learning materials specific to higher education in order to support students in achieving their learning goals;
  - selecting and using instructional technologies to facilitate students' learning processes;
  - developing evaluation tools to enable the effective assessment of students' achievement and provide a formative feedback;
  - critical analysis on the development and use of didactical resources specific to higher education in terms of teaching specific educational theories and their own experience.
- D. Curriculum design process of university education:
- designing long, medium and short term of the academic disciplines/subjects, using the theoretical models provided by various models of curriculum development and designing models of instruction;
  - designing instructional activities using instructional models;
  - redesigning teaching activities according to the connections between instructional objectives, concrete results of the assessment

and student needs;

- critical reflection on designed activities from the perspective of curriculum development models, instructional designed models and experience.

In the week of face-to-face classes, 156 professors and a dozen tutors were distributed over 6 groups; additional colleagues have been attending an online class planned in the following weeks. The immediate feedback was actually significant, as, at the end of both F2F / online classes, the debates were lively and deep. 95% of academics demonstrated to be interested in the pedagogical and didactical approaches, agreed with the pedagogical reading of the reasons for renewing academic teaching. 5% was rather sceptical: professors' scepticism was due to their opinion about one of the already commented topic of 'transmission of knowledge', namely the 'transmission of technical knowledge and of notions'. All of them demonstrated a great availability in participating in the course: actually, it cannot be forgotten that they, as academics coming from different faculties and departments, were asked to listen and interact with a university professor coming from a different country and with a kind of specialisation concretely distant from theirs. All the tasks that were uploaded by the Romanian academics onto the project platform have witnessed a substantial lower number of sceptical. At the end of August 2015, 111 tasks were sent to me and I had the opportunity of reading interesting comments, besides observing a significant quantitative convergence in some of the answers.

The tasks were focused on three topics, commented with short preliminary key-sentences before the specific questions. The topics and preliminary sentences are the following:

A. Managing students' groups:

- Managing a group always asks for different responsible approaches and activities; managing students' groups asks for additional objectives and behaviours.
- Managing a group asks managers to know all the members of a working group, all their characteristics, their weaknesses and their strengths; managing students' groups asks the same.
- Managing students' groups asks professors to be aware of the fact

that their scientific competences and knowledge, their research and papers are not sufficient to be effective, efficient academics.

B. Setting a convincing and significant didactical setting:

- Teaching means commenting and explaining contents because students need to know, need to use their knowledge, need to know what, how, why, when, for whom, with whom.
- The main risk for teaching is technicalisation and standardisation; even practice depends on thinking. Without thinking, without comparing, without linking, practice and practical competences are technical tools. An example: students can perfectly know a mother tongue and a foreign language, but if they do not have ideas, if they do not think, if they do not know what to say, their linguistic competences will remain useless.

C. Self-assessment:

- You surely have been preparing slides for your classes. Select one of the files you usually adopt in your classes, whose contents are basic notions, and read it.

My three objectives were to foster 1) a perception of students in terms of individuals, groups and generations, 2) a perception of the risks of technicalisation and of the traditional model of transmission of knowledge; 3) the perception of the importance of self-assessment.

2.1. *Reading the collected data*

The answers of all the professors were significant, deep; all of them took care of lexical choices, demonstrated a great attention to details, used a compared analysis of their experiences as academics and as 'students', commented after a deep consideration of the real aim of questions, have been repeatedly asking a feedback.

Some of the questions were always or quite always answered in the same way. It cannot be denied that some of the answers – and their comparably high number – are rather unsatisfying or unexpected. The first key-sentences stressed some of the characteristics that, I think, a professor who manages one or different groups of students should have. I mean: sense of responsibility in selecting approaches and

activities, perception of reality in a classroom where students are not the same as five / ten / fifteen / twenty years ago; perception of the existence of an ethical level in all teaching professions.

At the core of the first group of six questions there were, directly and indirectly, several problems: the clear perception of the existence of teaching models and of the role of all the teaching responsibilities; the sense of knowledge as something that must be transmitted just like a box that must be given to someone who must accept it without knowing what to do with it; the perception of efficiency and efficacy in teaching professions; the meaning of research and academic availability to share objectives and clearly communicate the investigated issues. The idea of research was indirectly mentioned from a social point of view: the perception of a group, the management of a group, the attention in the management of all group members' competences and roles.

Table 1 – *Managing students' groups*

Questions	I agree	I disagree	Total
My scientific knowledge and subject do not fit key sentences	16	95	111
My scientific, technical, practical knowledge can only be transmitted to students	1	110	111
My research only focuses on concrete solutions, I cannot be asked to explain how my thinking has been producing them	2	109	111
Academics must find time and opportunities to observe their students and know their learning styles	109	2	111
Without explaining and thinking, no one can teach effectively and efficiently, no one can manage students' groups effectively and efficiently	111	0	111
Without understanding and thinking, no one can learn effectively and efficiently, no one can be member of a group	107	4	111
	346	320	666

The kind of quantitative and qualitative information given by the first group of answers is interesting: over 111 academics, only 1 or 2 or 4 disagree with the idea that knowledge can be transmitted, even in the case of technical and practical knowledge; in other words, even in the case of professors of the Faculties of Arts and Design, of Chemistry and Biology, Geography, Medicine, of Law and Administrative Sciences, of Economy

and Business Administration, Physical Education and Sport, of Physics, Mathematics and Informatics state that they have been teaching with different styles according to generations of students. Actually, the distances between the humanities and the other sciences is visible in the first and second answer. 86% of professors states their subject does not fit the idea of knowing and managing the learning processes of students. Their following comments translated the sense of their answers: the traditional teaching of their scientific areas, some decades ago, was purely transmissive; in the past 15 years at least, they perceived that the impact of a purely transmissive model did not allow reaching significant didactical objectives and that the impact on students' learning was lighter than in the previous years. They all refer about the need of modifying their communicational and lexical styles, their teaching tools and techniques. 2 professors of the remaining 14% still refer to the impossibility of managing a group of students and state: «I have classes in the same way my professors had classes. Their teaching was efficient and effective, mine must be; if it is not, it depends on students». The distance between the two groups of academics cannot be uniquely explained by their being psychologists or dentists; what I perceived in the face-to-face class is just a reduced ethic availability to change. It is not, of course, a minor fact, but the presence of 2 'conservatives' over 111 can be considered an acceptable number.

The [second table](#) of data and information is even more interesting. Its issues could be referred to pedagogical and didactical approaches. But, actually, the real concrete issues are somewhere else: the availability in considering pedagogy and didactics as independent transversal sciences; the risk of technicalisation; learning always needs thinking, commenting, interpreting, comparing, even when notions are delivered.

Table 2 – *Setting a didactical setting*

Questions	I agree	I disagree	Total
Didactics is a science without technical solutions; all academics must have their own approaches to didactics	53	58	111
Didactics is a strategy that needs to be updated, year by year	106	5	111
To the role of university professors belongs the duty of fostering thinking	111	0	111
Didactics, at university, cannot ignore thinking and explaining reasons; actually, no subjects can ignore thinking and explaining reasons	110	1	111
Concrete and practical solutions are always personal solutions; scientific and in-novative solutions are always the product of individual thinking and groups' thinking	95	16	111
Setting a convincing and significant didactical context means knowing the cultural and linguistic competences of students	109	2	111
	584	82	666

What is concretely discussed, here, is the availability to interact, to know and appropriately use pedagogical and didactical approaches, to update formal/non-formal/informal competences and skills, to attribute to all sciences the characteristics of sciences, to accept the idea that humanities are not less significant than the other sciences. It can be stated that the 111 professors demonstrated a high attention to all the aforementioned crucial issues. It is actually extremely important and significant that all of them state that academics must foster thinking, that 110 state that professors must explain and comment reasons, that for 109 it is necessary to know the cultural and linguistic competences of their students, that for 106 professors pedagogical and didactical competences must be updated. The small numbers of disagreeing professors must be related to the same ones of the previous comments.

Some problems have been emerging even in face-to-face classes when the idea was expressed of considering even practical solutions as the result of thinking. Again, 86% of professors agreed and the rest mentioned the genius of a few scientific fathers that can be neither imitated nor understood (I did not understand the exact logical connection between the aspects, and do not now; but opinions must be accepted as they are). In this case, as well, the weakly resisting positions can be considered potential supporters of the idea. In fact,

the written comments of the tasks have already shown some softer disagreements. The answers to the sentence 'Didactics is a science without technical solutions; all academics must have their own approaches to didactics' are rather surprising and contradicting the other answers. I think that the above-mentioned risk of technicalisation is hidden here. A perception that I did not have in face-to-face classes and that I had while reading written comments is that 'didactical solutions' risks to be perceived as 'didactical tools'. Actually, the majority of the agreeing professors state that the use of slides is one of the best didactical solutions they know and that they use them widely. They use them to synthesize notions and explanations, sometimes to foster ideas. But the reasons for the use of slides or of hypertexts<sup>3</sup> were totally ignored, by both agreeing and disagreeing.

In short, for agreeing and disagreeing academics, the datum is rather converging: there are the professors who use slides and the professors who speak; there are the professor who deliver notes by slides and the professors who remember what to say. Here, all that I have been commenting about digital tools, their usability, their impact on learning styles of youngsters should be introduced again.

This is confirmed by the answers to the questions of the [third table](#). Though informed about the fact that the concerned issue was self-assessment, no one considered slides just as an example, as it actually is. In short: they did not think at the strategies and methods focused in face-to-face classes and only considered the technical positive impact that slides, as a short set of synthetic notes, can have on the quality of their communications to students. However, several positive and significant points can be stressed here.

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<sup>3</sup> I never mentioned, with 'the students', additional advanced didactical tools. Actually, the didactical tools are of course irrelevant. The problems that I aimed at thinking about were somewhere else.

Table 3 – *Self-assessment*

Questions	Yes	No	Total
You are sure: all your students are able to understand the slides, without taking notes	74	37	111
You are sure: all your students will never make questions about them, because they are clear	3	108	111
You are sure: your slides are so clear and focused on basic notions that they can be used year by year, with different generations of students	6	105	111
You are sure: your slides are so analytical that they can correctly represent a synthesis of your classes and of the students' study programme	101	10	111
You are sure: your slides are significant because all their contents give explanations and suggestions that students can find nowhere else	18	93	111
You are sure: your slides are extremely important because they are open to integrations, support a research attitude, foster students' thinking, reduce the risk of technicalisation and standardisation	95	16	111
You are sure: your slides are interesting as they meet students' cultural and scientific expectations	104	7	111
	401	376	777

All academics confessed not to have observed before the impact that slides have on their students learning; they did it after our face-to-face classes. And: 67% of professors states that delivered slides reduce students' taking notes; 97,50% observed a reduction of questions about formal knowledge introduced by slides; 95% denies the usability of the same slides academic year by academic year; 91% states that such a great attention is paid to the elaboration of slides that formal study programmes are well represented and synthesised; 85% is satisfied by the personal integrations that allow students to find in slides something that cannot be found elsewhere; 92% is convinced that the contents of their slides are able to reduce the risk of standardised issues and to foster ideas and thinking; 94% was convinced that slides meet students' cultural and scientific expectations.



### 3. *A student-centred pedagogical approach*

Considering what we have previously stressed, what learning and knowledge, what cognitive competences and tools do we have to refer to? Do we have to ignore subjects and disciplines because information and data are already in the internet? Then, do we need to encourage the search for knowledge by interest, motivation and procedural memory? Maybe, we should do. But then, is it really necessary to know whether and how formal knowledge is important, or if subjects need to change, or is it a really false question? In my opinion, all these questions are embarrassing, because the problem does not exist, actually, if it is posed in terms of subjects and of knowledge. In other words: we need notions and formal knowledge to strengthen meanings. We can't think without notions and formal knowledge. Without them, we can only be generic thinkers or generic producers of embarrassing opinions.

Someone says that education and schools are dying, or that they already died (Postman, 1997). Someone says that educational responsibility is needed in all educational settings and that creativity will do the rest. Among pedagogists and educators, manicheism still survives. And, too often, they do forget their being adults and the nature of their roles. My idea is that both academics and pedagogists have to start again fostering a *projectual thinking* – their own and their students' – or they will disappear, too poor and unuseful to be credible. Academics and pedagogists, I think, do not have many options: either their projectual thinking decides to meet and understand the strategic, methodological, logical, critical, linguistic, communicative competences that new generations have and will have, or their aspirations will be totally unsuccessful. As academics, educators, pedagogists or adults, we should be interested in something else. We have to aspire again to our true role, fostering interest, motivation, pleasure in learning and meeting, because those who are interested in knowledge and motivated to learn are, as well, competent and aware. We all have to be pedagogists, to know what pedagogy is. We have to support new generations:

- in their attempt to overturn homologation;
- in their interacting while using technological tools and communicating with a large vocabulary;
- in their relating with peers within multiple social networks, real and online;

- in accessing the natural world and the technological world;
- in demonstrating to be aware and dynamically competent, able to manage the consequences of mistakes.

A student-centred pedagogical approach (Cambi, 2002, 2006; Massa, 2005; Piccione, 2013, Rivoltella, 2003; Salomone, 1997; Zannini, 2008), according to me, should therefore support students in, at least:

- accessing to learn. In short: cognitive strategies needed to access learning don't change, humanity doesn't change, the need for meaningful relationships doesn't change. Changes produce, on the one hand, the integrated complexity of tools, the integrated complexity of relationships, the integrated complexity of self while living relationships, the integrated complexity of formal / non-formal / informal skills, the complexity of the time and space of educational settings while experiencing learning (Albanese, Ligorio & Zanetti 2012; Antonietti, 1995). On the other hand, change produces a non-linear use of cognitive strategies, a non-sequential access to knowledge, the use of a deconstruction / reconstruction based on an argumentative, semantic and systemic thinking, integrated with a sequential use of logic competences, with hypertextuality and interactivity, interdependence and cooperation, connection and contamination (Bertolini, 2006; Johnson-Laird, 1994; Cadamuro, 2004; Castells, 2004; De Kerckhove, 1993; Brandimonte, 2004). The predictive, prescriptive, representative, projective, mediative, trans-generational roles should be focused on, independence in thinking should be strongly fostered;
- perceiving to learn. Here, our main, cultural and scientific, reference point is actually pedagogical: Walter Ong's (1982) and Marshall McLuhan's (1964) lessons taught us how deep are all implications concerning the connections between transmission of knowledge and sensory perception. Present technological tools let us already foresee that the touch and the psychomotor dimension will be involved and interested in all future processes of teaching and learning (Pinto Minerva & Gallelli, 2004), with good opportunities for taste and smell. Deep analyses will be required, at least with the aim of reducing the usual pessimistic points of

view about the impact of technologies (Spitzer, 2013): advanced tools will be more and more advanced and the pedagogical focus will no longer deal with the processes of imitation activated by media such as television, but with the processes of simulation and experimentation of virtual reality instead. Why should such involvement and interest worry or be a limit? In my opinion, there are no reasons: neither for the possibilities offered to sensory perception, nor for the perception of self, nor for the perception of the psychomotor self, nor for the perception of one's own and others' identity. The further integration and contribution of an improved tactile and psychomotor perception may lead to more refined networks or webs of knowledge. And, finally, the contribution of neurosciences will be recognised as useful, even interesting, even necessary (Rivoltella, 2012). The main target contents for researchers, at present, should therefore be the analysis of the additional associative, analogical, interpretative, representative, etc., procedures concerned with the sensory perception, even with the amplified role of skin ego (Anzieu, 1996) interacting with a thinking ego. In other words, researchers should study the perception of a material, visible and tangible self, and a projected, visible but intangible body. For the sciences of education, the target contents and words do not change: a thinking style able to open to difference, interconnections, interdependence, transition, transformation, projectuality, participation, responsibility, active eco-citizenship, use of individual and collective memory (Maldonado, 1994, 2005; Pinker, 2000; Castells, 2004; Baddeley, 1995), use of cognitive strategies. And, furthermore: the pedagogical attention should focus on anti-dogmatic, problematic, ethical, aesthetic, scientific thinking;

- interacting to learn. I won't argue here about the attention of pedagogy to the processes of socialisation and interaction, which are of course pedagogical priorities both in F2F and online actions. My aim in this part is to introduce some methodological and strategic approaches that in the recent years have been trying to suggest some interesting ideas on how innovating traditional educational settings. Some of them revisit and propose a facilitated and participatory learning, assuming that facilitated learning doesn't intend simplification / reduction /

impoverishment of contents, notions and meanings, and that participatory learning doesn't intend the pure manipulation of knowledge instead of a meaningful learning (Cambi, 2006). One of those proposals, the pedagogy of care, seems to have the promising perspective of fostering added values to problem solving, brainstorming, roleplaying, focus group. Supported by a scientifically critical approach, the pedagogy of care is a model focusing on the reading of man and of his future, and is set out according to pedagogical fundamentals, categories and points of view (Cambi, 2006). It is an approach that claims the depth of pedagogical observation and reading, that states the central position of the individual in his own personal, social, ethical and biological life, that summarises the idea of pedagogy and didactics as actual settings where reflecting on man's growth. Its phenomenological methodological point of view focuses both on the idea of deconstruction and reconstruction of the individual and collective narrations as care of selves, as care of human being, of his education, expertise, interactions, emancipation (Massa, 2005);

- knowing to learn. Besides the different issues already discussed here, my specific aim is to add some short considerations on e-learning as mediated/integrated training model, on the formal dimension of ICTs. Much time seems to be passed the European Commission have since defined e-learning as tomorrow's education and training. For this pan-European body, teaching and training means to plan, select, manage, encourage, promote and valorise<sup>4</sup> specific individualised educational paths. Since e-learning adopts synchronous, asynchronous and collaborative teaching methods, since it includes some training approaches to encourage motivation and interest, since it favours spreading and sharing, constant updating, individual and social working processes, then mediation and integration characterise: the use of ict tools and of different virtual spaces; the selection of educational and didactical approaches, strategies, techniques and methodologies; the collaboration of experts, professionals, teachers, trainers, stakeholders,

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<sup>4</sup> Technically, according to a European meaning, *valorisation* should here be intended as synthesis of *dissemination* and *exploitation* of updated scientific, cultural, didactic, methodological, strategic information.

users; the simultaneous and consecutive activation and fostering of learning processes; the opportunity of training actions providing scientific, cultural, experimental and projectual contents; the process of storing a social, cultural, professional and experimental capital (Castells, 2000, 2004; De Kerckhove, 1993). The technical concerns about using e-learning are related to the processing of the electronic page, the relationship between the interactors of the teaching and learning processes, the assessment of the educational paths and modules quality. Doubters argue either that the pure typing of an electronic text doesn't allow the strengthening of important psychomotor skills, or that the act of deleting co-presence limits proxemics and reduces the improvement of interpretative competences of human behaviours, or that the impact of educational contents on users' needs can't be defined, tested, valued, reviewed, understood in terms of quality and efficiency (Spitzer, 2013). Two main concerns should be referred to, here. The former: compared to the printed text, chirography reduces the value of writing as communicative movement, mood, energy and personalization. The dynamism of hand and of its articulations and the mechanisms of chirographic processes actually disappear during the elaboration of an electronic text; however, other mechanisms invest movement, actions, automatism and control. Moreover, customisation can be achieved through the use of different tools and means. It isn't, I think, the decreasing quality of a product to be replaced, it is only the presence of additional procedures of text processing (Maldonado, 1994, 2005; Rifkin, 2000). The latter focuses on the problem of the educational relationship based on the professor's and student's co-presence. Supporters of direct interaction argue that eye contact, proxemics and gestures, supra-segmental traits of voice as well as the warmth of communication can't be guaranteed by distance. Even though this is a complex issue, it doesn't seem so difficult to explain the problem again: we can only say that the e-learning tools are not e-learning. Distant class has the same expectations, personalization of the relationship, multiple communicative tools with their codes and features. Detractors of distant training fall in a methodological mistake, confirmed by their idea that education and training are rather simple procedures aiming at transmitting knowledge. The

strategies of blended learning or online conferencing, for example, can easily change any prejudice or concern. In addition, even without choosing between the one or the other position, it is undeniable that the two just mentioned strategies allow surmounting any additional theoretic-scientific side. It's simple to say again that e-learning, as mediated and integrated training, can be a system that is coherent with, and functional to, all the processes the main learning theories prefer. Briefly: a) according to behaviourism, adaptation produced by the interaction with the environment form the man. In e-learning, those processes are encouraged by an approach including the use of a pc or laptop together with the 'computer based' or 'computer assisted' education, on the basis of contents and assessments on an electronic support, online or not. Of course, behaviourists' proposed interaction must include a constant connection with the whole reality, not with one of its parts or some of its means and technologies; b) according to cognitivism, privileging mental action, the action of cognitive abilities and of mind, any educational action or approach of e-learning, online or not, in 'e-conferencing' or by 'blended learning', can be a strategy fostering thinking, insight, the use of different cognitive styles, the dialogue with self, the intense dialogue with the other and the others, and more than that, the two above mentioned strategies amplify the opportunity of relational, intellectual and experimental meeting, as well as enhancing the quality of impact on immediate or secondary users' cognitive sphere<sup>5</sup>; c) according to constructivism, considering the learner's centrality in his intentional development by dynamic actions, mental actions and the intra-subjective and inter-subjective relationship, all activities or teaching approaches to e-learning can be part of a strategy that encourages intentionality, autonomous use of learning processes, consciously clear knowledge, relationship with e-tutors, academics, trainers and other learners. The indicators of quality of e-learning can't be simply identified with those of presence and distance, of tangibility and virtuality, of the times of the traditional or parallel schools. Such aspects must be considered from a methodological

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<sup>5</sup> Technically, the immediate user is the one who is directly co-interested in the theme and contents of a product. Secondary user is the one who can benefit from culture, science, methodology, strategy, etc., thanks to the transversal study of themes and contents, even not belonging to his specific scope.

and strategic, organizational and instrumental point of view. To delete all possible doubts, it is necessary to specify the quality of his reference criteria. As to reasons: logical and phenomenological coherence, adequacy, authority, availability to mediate and cooperate, sustainability of meaning, interest, motivation. As to contents: logical and argumentative coherence, suitability, reliability, actuality of purposes and functionality of tools, understandability, consistent modularity, flexibility, usability and reusability, customisability, contextuality, updatability, plurality of viewpoints. As to methodologies: logical and organizational coherence, systematicity, propaedeuticity, malleability, intentionality. As to resources and settings: logical and instrumental coherence, usability, finalisability, flexibility, experimentability, dynamism, availability to cooperate, synchronicity and asynchronicity.

### 3.1. *New requests to didactics*

First, a very general statement, linked to all the previous contents: the universality of the rights to education can't be pedagogically explained only by referring to some generally accepted principles; in other words, it isn't enough to declare the importance of equal opportunities, to support the idea of the promotion of the uniqueness of students among the uniqueness of all other students. Paradoxically, these principles, which must be respected wherever and whenever, place the students in a position of dependence on adults: not that consistent, natural, obvious dependence on adults' training role that someone is still stating, but the kind of dependence for which the student's valorisation risks to be limited. In other words: if the respect for the universality of a right and its principles must have a complete meaning, if a student has the right to mature according to himself, if he has the right to social, cultural, geographical and historical integration, then his position in the world must have a meaning consistent with present times. His time asks for formal, non-formal and informal skills, participation, innovation, autonomy, critical thinking; they are difficult goals, far from being even perceived in some world areas, but necessary and essential for our future and theirs, for a true sense of uniqueness. And then, again, the principle of an advanced educational challenge must be uniqueness: a student can't just be the bearer of a

right to knowledge, but also a subject that carries with him, like everyone else, a capital of competences and aspirations, skills and projects, a person that, like everyone else, lives and manipulates knowledge, rights, duties and values that he breathes in adult settings and then customises in the course of his existence as he better can and wants. The pedagogical approach has to accept the challenge of changing and contributing to

- identify new forms of coherence with the social, institutional orientations of communities;
- reinforce the new principles of a new liveability and a pro-active eco-citizenship in countries, in towns, in cities, in the countryside, in deserts, within all formal, non-formal, informal educational settings, etc.;
- restore the true sense of the roles and functions of educational professionals, namely the one of being promoters of motivation, interest, curiosity;
- delete the position of professors as kings who transmit knowledge and skills to listeners, with the aim of meeting new teachers who consider their knowledge neither as a purpose of their profession nor as the ambitious aim of their users, but as tools and techniques;
- recognize to new generations a role in history that nobody has ever had before and understand the implications and consequences that will actually arise from it;
- valorise the importance of fostering thinking styles, communicational styles, research habits, social relationships within F2F and virtual settings, life projects;
- support students in perceiving the right to the uniqueness of their voice, life, thinking.

Actually, these points can be summarised in two great problems: on the one hand, the pedagogical reasons and the human significance of the role and function of all the educational professionals; on the other hand, the biological, physiological and neurological reasons of the human equality of our present and future students (Bruner, 2000; Cambi, 2002, 2006; Boffo, 2006). The first issue to deal with is the pedagogical approach to the reasons why some adults are invested with the role and function of bringing students to maturity, so that they can be citizens, available to socialisation,



main actors of their thinking styles, competent in behaving independently, ethically engaged and responsible in their attitudes and behaviours, independent in the context of labour markets. Here, I prefer not to give a specific contribution defining educators' role and function; I'll follow a different path. What has been so far said about the universal right to education is of course not enough: we can say that a right is universal only if we are sure that parity and equality exist. The basic pedagogical implications are therefore connected with the clear ideas that we should have about the way humans use cognitive strategies, manipulate (instrumental, technical, conceptual, procedural, strategic, methodological, etc.) knowledge, read the meanings of phenomena, use projectual competences.

These issues are essential to address a wider problem concerning the reliability of education: I think that we risk, at present, to address the false problem of the distinction between preferable knowledge and truly educative knowledge; it's clear that encyclopaedic knowledge is of no use to anyone, that the continuous update of knowledge is functional to man's life in his own time, that the tools disseminating information and knowledge radically changed in qualitative and quantitative terms, that the relationships between orality and writing and among the cognitive effects produced by technologies changed and should be re-defined, that the categories of linearity and sequentiality need additional definitions, that the representation of the silent, still, concentrated student who reads and accesses information and knowledge on written, silent, still pages can be imagined no longer. We should now prefer the perception of students as creators and manipulators of plots, as intentional and projectual individuals, as individuals aware of the metacognitive dimensions of self-observation, self-evaluation, self-assessment, self-orientation; as individuals able to have both a logical and a nomadic access to knowledge, to parallel and non-linear processing (Maffesoli, 1973; Logo, 2001; Morin, 2001; Gardner, 2000, 2002).

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## Parte prima

### I problemi dell'educazione e della didattica



Sandra Chistolini<sup>1</sup> and Maria Helena G. Pratas<sup>2</sup>

*Bridging the distance and discovering the value of education  
in European common heritage*

ABSTRACT:

The Erasmus mobility of teachers between Portugal and Italy was a relevant opportunity to innovate our higher systems of education according to the European recommendations. We had the real experience of learning how to develop new streams in our demand and offer of education taking into consideration the cultural heritage in which Pedagogy and Didactics are rooted. Both countries convey ideas of renovation in terms of contents, strategies, methods. We learned politics in school and society about problems of migration and refugees, distress of families and children bringing enormous hopes for the future. From consolidated pedagogical theories and experimented workshops we shared knowledge helpful to prepare our students to be self-confident for a very high level of teaching performance and social participation. The purpose of this contribution is to discuss our mutual academic results achieved.

KEYWORDS: Erasmus mobility, higher systems of education, teacher training, citizenship and human rights.

## 1. *Introduction*

The epistemological context of the Italian and Portuguese cooperation has been developed in a wide range of research permanently conducted from 1999 to 2016 as documented at the end of this article. Some of our works were already published in comparative studies and others are still under elaboration. For the purpose of this article we decide to select one field of mutual interest defined as citizenship education and the teacher training. The common field is hereby presented according to the following six sections of analysis:

- Methodological framework and philosophy of teaching;
- Research and action in teaching and learning to improve the

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- professional competence;
- Democratic citizenship and human rights;
- Curriculum renovation;
- Teacher training course in Portugal;
- Citizenship education and teachers professionalism at university and in school in Italy.

The Italian contributions concern the first, the second and the sixth sections. The Portuguese contributions regard the third, the fourth, and the fifth sections. Conclusions are jointly written.

The initial sections are aimed to define the methodological framework of the Italian university in relation to the Erasmus mobility experimented between Roma Tre and ISEC Instituto Superior de Educação e Ciências. Research and action allowed to interpret citizenship within the context of teacher education. The theoretical study of citizenship has been verified in real life in the sense that the students had the opportunity of learning contents of the democracy, they developed knowledge and they shared experience of communication and respect amongst countries. In this paper we compare our philosophy of teaching and consider the lessons of Portugal designed to broadening the concept of citizenship education from the point of view of school curriculum and according to national and European Documents. The critical perspective emerges from the recent survey amongst students who underline the importance of teaching and learning human rights and social justice issues, respect of diversity and full inclusion both at university and in school. The Erasmus mobility represents an enormous help for the construction of open societies and educates the mutual understanding amongst generations, professionals of culture, and countries. In this regards we have achieved the best results thanks to the long lasting fruitful cooperation.

## *2. Methodological framework and philosophy of teaching*

The philosophy of teaching we share is humanistic, personalistic, active and interactive. The roots of theoretical teaching refer to Authors such as Erasmus of Rotterdam (Erasmus, 1517) and E. Mounier (Mounier, 1950); as regards methodology, it follows the

path of modern historicism of W. Dilthey (Dilthey, 1914), active school of G. Pizzigoni (Pizzigoni, 1937) and symbolic interactionism of J. Dewey (Dewey, 1938), J.S. Bruner (Bruner, 1983), H. Blumer (Blumer, 1969), N.K. Denzin (Denzin, 1970). From the past to the present time the red line is drawn by the freedom of learning in a meaningful context of teaching governed by interest and by curiosity for knowing. The discovery of the freedom of knowing leads to mastery of oneself. In this active process are essential interpersonal relationship and attention to situations of real life.

The main purpose of our teaching is to 'render the university an environment of knowledge, research and innovation'. Task of each student is also to participate through study, research, workshop and knowledge. The students describe their personal courses of study, interaction with the teachers, both internal and from abroad, and fellow students and with the learning environments. They outline the knowledge achieved and that will be useful from an educational point of view as persons and teachers. The Erasmus Mobility allow to enter in other contexts of study and research and students are satisfied to present their achievements prior to the oral exam and they understand that this itinerary is formative in terms of European and International dimension of education and it is part of the final evaluation.

The classroom presentation started with the Humanism of Erasmus of Rotterdam (1517). We noted how the reasons for peace education are related with the intercultural issue. Value training, such as mutual respect, is a democratic reply to everyone's human needs and, more specifically, a reply to situations in which possible conflicts are detected as a result of the difference between the wish for active participation and the real possibilities of becoming part of a community, the integration into which sometimes requires a long time for acceptance. The meeting of different cultures is created through the communication of values that find the right ambience for manifesting themselves in school; children are introduced to knowledge about the personal and group histories through which behaviours of mutual respect, attention to others and education to human solidarity are fostered. Teachers who have experiences of intercultural and international education within their university training and combine this experience with the methodological innovation offered by the course teacher show a higher degree of satisfaction in their studies, participate

with enthusiasm and steer their learning towards preparation for the teaching role at school. The appreciation of studying increases when students participate in methodological decisions, know the course route and are successful in the test evaluations.

In order to know at what point intercultural education in Italian primary schools stands today, a short survey has been taken jointly with university students attending the degree course in Primary Education Sciences. Some students are following both the first-year course on general Pedagogy and the third-year course on Intercultural Pedagogy and citizenship. The course on general Pedagogy is dedicated to the subject of peace education, with an exam on educational theory and actions for prevention and resolving conflicts at school. The course on intercultural education and citizenship has been dedicated to defining intercultural in relation to matters of human rights, the migratory phenomenon, prejudice and re-conceptualisation of the meaning of intercultural from the post-second-war period to date, with specific reference to placing intercultural in the discipline of international comparative studies.

### *3. Research and action in teaching and learning to improve the professional competence*

Ten objectives in learning and teaching intercultural and citizenship education combining professional culture and preparation to work in schools as teachers:

‘Using research elements to achieve excellence in teaching’:

- In the first place, topics were presented in the classroom, hereby encouraging the opening up of dialogue with the world outside the university, specifically national situations, with respect to which intercultural questions must necessarily be faced. For example, the landing of children at Lampedusa and their placement in the island schools has had to be confronted. This objective forms part of the theory that examines the school-world relationship, according to the ‘experimental method of education of Pizzigoni Renewed School’.

‘Combining theory and practice, relevance and scholarly excellence’:

- In the second place, an endeavour was made to present the topics in the classroom, encouraging the opening up of dialogue with the world outside the university, specifically international situations. Colleagues from other institutions of higher learning and universities in Cyprus and Portugal were invited to present concepts and practices of interculturality in their countries. This objective forms part of the theory that examines the preparation of courses of ‘international pedagogy at university’.
- In the third place, the possibility was offered to integrate theoretical studies with field experience, by submitting a short, open-response questionnaire to those teachers willing to collaborate. This objective forms part of the theory that examines the relationship of ‘theory and practices in teaching and learning processes’.
- In the fourth place, it is deemed important to have students come into direct contact with the intercultural experienced at school and related by the teachers, hereby supporting the exchange between school and university, and between active teachers and teachers in training. This objective forms part of the theory that examines the ‘professional and intergenerational communication’ among teachers.

‘Applying innovative teaching methods’:

- In the fifth place, positive interaction was developed within the group both inside and outside the classroom hereby applying the M.I.T.E. method - Multiple Interaction Team Education. This objective forms part of the theory that examines ‘symbolic interactionism’ as a time of learning significant, cultural symbols.
- In the sixth place, the students were given the chance to directly experience the qualitative research methodology, in both an initial and exploratory stage of application. This objective forms part of the theory that examines the one that Dewey calls inquiry-based learning and ‘learning by doing’.

‘Applying problem-based/problem-oriented’:

- In the seventh place, debate in the classroom was encouraged before, during and after the interviews with the teachers. The replies were compared to what could be deduced from a relevant,

widespread part of the literature on intercultural education in Italy during the period of 1992-2013. This objective forms part of the comparative theory of 'problem approach'.

'Achievements in encouragement of critical thinking':

- In the eighth place, the plan was to steer the study and research towards the intersection of peace and intercultural topics and organise the contents of the teachers' responses; understood from the first surveys was how they were combining educational actions in the commitment of schools to encourage education based on building up a society in which people can live together well. This objective forms part of the theory of training to 'critical thinking'.

'Sustained commitment to teaching excellence, rather than one-off':

- The ninth objective was to organise the entire itinerary within a 'logical thought structure', by articulating pedagogical theory and methodology of research.
- The tenth objective was to produce a written text, both autonomous and personal, where the matter studied and the results of the survey were stated. This objective forms part of the theory of the 'development of personal creativity'.

#### *4. Education for democratic Citizenship and Human Rights in Portugal*

The Comprehensive Law on the Education System in Portugal (1986) sets out the right of every Portuguese citizen to education and culture, and the duty to promote democracy in education as the key feature of equality of opportunity. The current regime for the autonomy, administration and management of state pre-school education and basic and secondary schools is fundamentally based on the general principles of democracy and participation. There is a tendency to broaden the space for participation in the running of the school, with respect to the role of students, parents, teachers, and local communities: a series of legislative measures led to a progressive accentuation of the importance of student participation and to overcoming the purely advisory function of families (Figueiredo & Santos Silva, 2000).

In Portugal, in School Curricula, Education for Citizenship is present in an interdisciplinary manner, in all cycles of basic education. After the Curricular Reform (1989) and with the revision and reorganization of basic education (2001), citizenship became a broad concept including democracy, social cohesion, diversity, interculturality, education for peace, environmental sustainability, human rights, equity.

Education for citizenship is considered: a high priority of all educational, training, and cultural policies; an essential and transversal component of formal and non-formal contexts; one of the main pillars of the construction of a school of citizens based on the construction of a new paradigm – life-long learning and education for all (Salema, 2003).

The Citizenship Education Guidelines state:

«Citizenship translates into attitude and behavior, a way of being in society that has the human rights as a reference, notably the values of equality, democracy and social justice. As an educational process, Citizenship Education vows to contribute to the development of responsible, autonomous and solidary people that know and exercise their rights and duties through dialogue and respect for others, with a democratic, pluralist, critical thinking and creative spirit» (Directorate-General for Education, 2013: 1).

The Citizenship Education Guidelines refer to different dimensions of Citizenship Education involved: human rights education; environmental education/sustainable development; road safety education; financial education; consumer education; entrepreneurship education; education for gender equality; intercultural education; education for development; education for defense and security/peace education; volunteering; media literacy; European dimension of education; health and sex education (Directorate-General for Education, 2013).

As it also happens in other countries, in Portugal the study of human rights is not a priority theme in the majority of primary and secondary schools, not even at University. Students should know their rights and responsibilities as an important element of democratic society, but there isn't an interdisciplinary human rights education Programme. Since its setting up in 1990, the Council of Europe's North-South Centre, in Lisbon, has been engaged in Global Education, which encompasses the global dimensions of education for democratic citizenship and human rights education as well as

global youth work. Global education is a holistic education that opens people's eyes to the realities of the world, and awakens them to bring about a world of greater justice, equity, and human rights for all. It encompasses development education, human rights education, education for sustainability, education for peace and conflict prevention and intercultural education, all of which represent the global dimensions of education for democratic citizenship (Silva *et al.*, 2010).

The annual Lisbon Forum on Human Rights, held by the North-South Centre since 1994, is a platform for dialogue and for sharing experiences, expertise and good practices between Europe and the other continents. It focuses on human rights, democracy, the rule of law and intercultural dialogue. In 2008, it was devoted to the principle of the universality of human rights and its implementation, in relation with the 60th anniversary of the Universal Declaration of Human Rights<sup>3</sup>. The 2009 Lisbon Forum focused on «Creating a culture of human rights through education».

The North-South Prize ceremony is a most important aspect of the Centre's role in advancing human rights. This Prize is awarded annually to two persons, one from the North and one from the South, for their outstanding and exceptional merits in the field of human rights in a North-South context. The Prize ceremony takes place in the Portuguese Parliament<sup>4</sup>.

One of the Portuguese priorities has been on intercultural Education, as, in the last decades, there was an increase in the alien population. An important effort has been made against racial discrimination and to combat racism and intolerance, in terms of legislation and specific actions. The mass media are also involved in promoting tolerance, multiculturalism and combating racial discrimination. Inter-ministerial programs have been set up to promote the values of co-existence and integration and the production of multicultural teaching materials. Seminars and workshops on human rights education and racism have also been conducted. Material for teachers are distributed free of cost to promote these values.

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<sup>3</sup> *Universal Declaration of Human Rights*, in <<http://www.un.org/en/documents/udhr>> (last access 06.07.2016).

<sup>4</sup> NORTH-SOUTH CENTRE OF THE COUNCIL OF EUROPE, in <[http://www.coe.int/t/dg4/nscentre/default\\_en.asp](http://www.coe.int/t/dg4/nscentre/default_en.asp)> (last access 06.07.2016).

### 5. *Education for Citizenship: intended and implemented curriculum*

A study on education for democratic citizenship in Southern Europe, states:

«The recognition of the importance of EDC within curricula is, by itself, no guarantee of its actual implementation. Indeed, there appears to be a gap between the intended curriculum and the implemented curriculum that is perhaps greater than the one usually found for other areas of school education» (Losito, 2003: 10).

Curriculum research has shown that there is often a gap between what curricula formally envisage and the students' actual opportunities to learn. The case studies carried out in the first phase of the study stress, in various ways, the gap between intended and implemented curriculum. The Portuguese case study underlines the gap between the aims of the intended curriculum and student awareness in relation to the learning processes actually developed. Their awareness of democratic issues seemed to depend on the special characteristic of the teacher or the occurrence of an exceptional event (Menezes *et al.*, 1999).

Actually, teachers are a fundamental aspect for the success of any educational policy and of innovation processes. This also holds for Education for Citizenship. From a perspective that sees Education for Citizenship as the result of the educational action of the school as a whole and of the experience of participation that students gain inside their school, the training issue concerns (or should concern) all teachers and not just the ones of a few school subjects that can be considered as being more directly related to Education for Citizenship. Teacher-training should be carried out on several levels: curricular contents, teaching methodologies, management skills, and – last but not least – relational skills. Most of the degree courses for primary school teacher training and some particular schools for secondary school teacher training include some specific teaching and contents relevant to Education for Citizenship. However, in the field of both initial and in-service teacher training, there seemed to be insufficient attention to the Education for Citizenship issues. The largely decentralized nature of the in-service teacher-training system makes it difficult to draw a sufficiently precise picture of the existing situation of in-service



training. There are several in-service training experiences in Education for Citizenship. Teachers are asked to teach skills and democratic attitudes, but there is little in the training of these instructors to give them the necessary skills to play their role; and it is difficult to evaluate the effectiveness of the existing training activities (Losito, 2003).

In order to help Teachers and Teacher Trainers and reduce this gap, guiding documents have been recently created by the Portuguese General Directorate for Education – or are being created – about ‘Education for Development’, to raise awareness and understanding of the causes of development problems and of inequalities, locally and globally; ‘Education for Gender Equality’, to promote equal rights and duties; ‘Human Rights Education’, focused, essentially, in democratic rights and responsibilities and in the active participation in the civic, political, social spheres of society; ‘Financial Education’, to develop essential knowledge and skills to make their future decisions and generate a multiplier effect of information and education within families; ‘Education for Security, Defence and Peace’, to the preservation of civil rights and freedoms in the context of the interdependency and solidarity among the peoples in the world; ‘Volunteering’, to promote active solidarity, mutual help and social cohesion; ‘Environmental Education/Sustainable Development’, to support environmental awareness and the promotion of ethical values towards the environment; ‘Media Literacy’, to use and decipher the media, the access and use of information and communication technologies, aiming to the adoption of attitudes so as to safely and critically navigate the Internet and use the social networks; ‘Health and Sex Education’, to give the knowledge, attitudes and values that help to make choices and decisions appropriate to their health and physical, social and mental well-being; ‘Consumer Education’, contributing to more responsible behavior; Entrepreneurship Competence, about concepts, policies and initiatives; ‘European Dimension of Education’, strengthening the European identity and values and promoting a greater knowledge of Europe and its institutions, the European natural and cultural heritage, and the problems that Europe faces nowadays; ‘Intercultural Education’, promoting recognition and appreciation of diversity as a source of learning for all, in respect for the multicultural nature of society today, encouraging social interaction and a sense of belonging to humankind (Directorate-General for Education, 2013). These

documents are of great interest to work with the students, debating important problems of our society.

#### *6. Education for human rights and peace in teacher training: an experience*

The experience I am going to describe occurred in a teacher training course at the Department of Education of ISEC, Lisbon, Portugal. The participants were 83 students training to become Elementary School teachers. The students, aged 20 to 27 years old, were taking a course on Ethics and Education, as part of their senior year of the Initial Teacher Education Program. The purpose of the course was to inform and to stimulate the students to reflect on the theoretical basis of the theme, and on activities and strategies that might be used in the various curricular areas.

The Council of Europe Project 'Education for Democratic Citizenship', as well as a number of published theoretical references, pedagogical materials and identified and published practices, served as a basis for the training. The students reflected on the importance of building peace and educating for peace. Peace is not just a matter of diplomacy or of acquiring social skills and communication. The promotion of peace is essentially a cultural task and its primary context is education. They worked on the theme of peace building and education for peace: they have read documents, discussed various issues and have carried out various activities. These activities were focused on issues such as promoting human rights, the need to live truth, justice, love and freedom as pillars of peace and social order. The students presented works and debated about development and solidarity as keys to peace, openness to reconciliation, dialogue and forgiveness; the importance of respect for the dignity of the person, including minorities, and dialogue between cultures.

A source of reflection, in particular, were the messages of the World Day of Peace, which provide a rich and deep analysis of the topic in question, going to the roots of the problems and their solutions. They examined how the peace should be built on these four columns: Truth, Justice, Love and Freedom (John Paul II, 2003). They addressed the issue of education for legality, since law favors peace. They studied the United Nations, which has helped to promote respect for human

dignity, freedom and development of nations, and they tried to develop an awareness of being a family of nations. The United Nations Charter declares that the recognition of the innate dignity of all members of the human family, as also the equality and inalienability of their rights, is the foundation of liberty, justice and peace in the world. They also reflected about the two broad categories of Human rights: civil and political rights and economic, social and cultural rights; they are closely connected, being the expression of different dimensions of the human person. The defense of human rights is essential for the construction of a peaceful society.

To educate on peace and solidarity is not only to describe concepts or communicate values, but to promote thinking and actions that provide experience and help to create habits of solidarity. Thus, students were invited not only to reflect but also to live experiences of peace and solidarity. The proposal has been welcomed: some preferred to pursue a theoretical approach; many others realized volunteer activities in neighborhoods of the city, in hospitals, or cooperated with associations of social solidarity. They studied various ways to achieve a true peace education, beginning in their classroom and their school and through contact with other schools.

The results were quite positive: they became more aware of these problems, more awake to act with greater respect for human rights, which are obligations. They had a clearer awareness of the dignity of all human beings, defeated the inertia to devote time to others, even when they felt they had no time to give. In conclusion, solidarity is learned only when it is lived!

The training module helped the participants to reflect upon the theoretical bases of their practice and to develop teaching activities and strategies that may be used in different curricular areas. It was successful in helping students to develop teamwork skills and the ability to work in interdisciplinary contexts, making them more aware of social issues. It also resulted in them becoming more involved in school-related civic action.

## 7. *Citizenship education and teachers professionalism at university and in school in Italy*

Within the European project known as «CiCe, Children's Identity and Citizenship in Europe, Erasmus Academic Network/Jean Monnet» was carried out the study entitled 'Practice/Research in Citizenship Education in Teacher Education' at the Università degli Studi Roma Tre, Italy. Through quantitative and qualitative survey students attending the fourth year of university course (2015-2016) evaluated their own experience of learning citizenship education at two levels of analysis: as university experience and as school experience.

Most of the students give a positive feedback, considering usually useful the pedagogical and didactics support they received, and have also a positive comment towards developing their own project when they begin employment as a teacher in school. Students' suggestions to primary school teachers to improve the teaching and learning of citizenship education attribute special attention to raising awareness of human rights in theory and in practice. Students would like primary school teachers to introduce a variety of topics related to peace education and enlarge opportunity to discuss in class topics related to justice in modern societies. Social and political issues and studying the Constitution are not of great interest.

Prevailing is the statement: «Develop practical projects in class, so that children are able to learn how to become part of the community and interact within it in a positive and functional way». An additional suggestion is «to begin with the world events that surround the children and sensitise them to discussion, criticism and in-depth thought». A critical point was the university preparation to become an active citizen in society. Approximately 50% of the sample agreed about «providing professionally qualified teachers for my preparation in theory and in practice», and 26% found that it is important to «organise a university curriculum related to what they will teach in primary school under the title citizenship education»; 21% underlined that university is offering opportunities for action research while they are studying at University. Some added:

«I would suggest that my University organise a curriculum that is more related to what we will teach in primary school concerning knowledge of citizenship education and human rights, by

offering a variety of opportunities to change our points of view about tolerance, cultural diversity and human rights».

## 8. *Conclusions*

The recent United Kingdom referendum of 23 June 2016, known as Brexit gives new reasons for implementing Erasmus Mobility across the continent and empower the citizenship education in the future. All grades of school are involved in teaching brotherhood and social inclusiveness. Young people are overall pro human rights and feel social justice a common target.

Italian and Portuguese cooperation under Erasmus Teacher Training Mobility worked in that sense and we trust to continue to follow the same content implementing the opportunities of discussion differences and similarities. Academic exchanges are the key of the innovation and the mutual understanding depends on our ability to communicate in a positive way (Ross, 2015).

Future goals concern the modernisation of higher educational teaching in agreement with European recommendations (Vassiliou *et al.*, 2013) and imply to form mind-sets favourable to teaching of humanistic studies through research and action. We think that this is a project of hope, responsibility and sustainability. It should include all children, teachers, and people of goodwill.

We would like to share the words of Alistair Ross, Jean Monnet *ad personam* Chair in European Citizenship Education, London Metropolitan University, who is sending emails from London to all over Europe alerting the urgent need of citizenship education:

«I would like to hope that this e-mail chain will help, in a small way, to kick-starting a strike back – to restoring faith in the European project. I'm sure we have the talent, the knowledge, the power – and above all, the moral authority, to do this, to strike back against the authoritarian and reactionary forces that are gathering, and to ensure that the young people of today, and the next generation, are empowered to create a more egalitarian and optimistic future, for us all» (Ross, 2016).

*Erasmus Mobility achievements*

Erasmus Mobility in Rome 26-27 November 2012, Maria Helena Guerra Pratas, theme: *Education for Citizenship, Human Rights and Peace in teacher Training in Portugal*, Instituto Superior de Educação e Ciências ISEC, Lisbon, Portugal.

Erasmus Mobility in Lisbon, 23-29 September 2013, Sandra Chistolini, conference: *Conflict resolution and the tasks of school education*, lessons themes *Ideas and materialization of Pedagogy from the past to the present time: Giuseppina Pizzigoni and the renovation of Infant school and Comparative studies on Ethics and professionalization of teachers*, bilateral agreement Lifelong Learning Programme 2012-2013 Erasmus Teachers' Mobility, Instituto Superior de Educação e Ciências, ISEC, Lisbon, Portugal, School visits in Lisbon 23-27 September 2013: Boa Ventura Montessori Nursery School São Pedro de Estoril; Jardim de Infância do Lumiar; Escola Básica Quinta dos Frades, Agrupamento de Escolas Prof. Lindley Cintra; Colégio Planalto Pré-Escolar (dos 3 aos 5 anos) projecto Optimist.

Erasmus Mobility in Rome, 01-06 December 2014, Maria Helena Guerra Pratas, theme: *Pre-school Education in Portugal: some teaching methods*, Instituto Superior de Educação e Ciências ISEC, Lisbon, Portugal.

Erasmus Mobility in Rome, 16-18 November 2013, Maria Helena Guerra Pratas, theme: *João Deus educational model for schools in Portugal; Learning for global citizenship, intercultural and human rights education in Portugal*, Instituto Superior de Educação e Ciências ISEC, Lisbon, Portugal.

Erasmus Mobility in Rome, 22-28 March 2015, Susana Gonçalves, theme: *Cultural encounters and intercultural dialogue*, Instituto Politécnico De Coimbra Escola Superior de Educação, Coimbra Portugal.

Erasmus Mobility in Rome, 26-30 October 2015, Paulo Louro, theme: *Educating cities: the importance of the concept in the work of the educator. The experience of Lisbon; Prevention rather than remediation: strategies for community intervention. The experience of Lisbon*, Instituto Superior de Educação e Ciências ISEC, Lisbon, Portugal.

Erasmus + in Lisbon, in progress, Higher Education Staff Mobility for Teaching Mobility Agreement, Università degli Studi Roma Tre, Italy and Instituto Superior de Educação e Ciências ISEC, Lisbon, Portugal.

*1999-2016 Cooperation between Italy and Portugal*

1999

*Presentation Du centralisme à l'autonomie en Italie*, International Seminary *École et territoire: le cas de l'Europe du Sud*, Fondation des Treilles, Centre d'étude du Bassin Méditerranéen reconnue d'utilité publique, Tourtour (Francia) 30.09.1999-3.10.1999, other meetings Generalitat de Catalunya, Conseil Escolar de Catalunya, Barcelona 14-17.01.1999, Universidade de Lisboa, Faculdade de Psicologia e de Ciências da Educação, Lisbon, 25-28.03.1999.

2007

*A workshop on methodology for a comparative study in Italy, France, Turkey, Portugal about teacher professional status*, communication at the Ninth European Conference CiCe (Children's Identity & Citizenship in Europe). A European Commission Socrates Programme Thematic Network Project. Ninth European Conference, *Citizenship Education in Society*, Departement de Sciences de l'Éducation / Department of Educational Studies Université Paul-Valéry Montpellier 3/University of Montpellier III Paul-Valery, Montpellier, France, 23-26 May 2007.

2009

*Learning citizenship for the new society in Europe. From theory to practice in the university qualification of teachers in service*, in S. Gonçalves (ed.), *Creativity and Innovation. Proceedings IWE2009, 6th International Week of ESEC, Celebration of 2009, European Year of Creativity and Innovation*, Coimbra, Escola Superior de Educação de Coimbra (ESEC), pp. 165-174, ISBN 978-972-95072-8-1.

2011

*Presentation The meaning behind studying and the value of teaching in secondary school*, Thirteenth Annual Conference CiCe Erasmus Academic Network, University of Dublin, Dublin, Ireland, 9-11 June

2011, *Europe's Future: citizenship in a changing world*, Symposium *The perceived and the experienced curriculum in secondary schools in light of citizenship education. Comparative research in five European countries: Cyprus, Germany, Italy, Portugal, Romania*.

2013

*Solidarity and active citizenship learned from a natural disaster: the school experience after the May 2012 earthquake in Italy*, in P. Cunningham, A. Kamara (Eds.), *Identities and citizenship education: controversy, crisis and challenges*, Selected papers from the fifteenth Conference of the Children's Identity and Citizenship in Europe Erasmus Academic Network, Lisbon, Portugal, CiCe Institute for Policy Studies in Education, London Metropolitan University, pp. 385-398, ISBN 978-1-907675-20-1, ISSN 1470-6695.

2013

Presentation *Solidarity and active citizenship learned from a natural disaster: the school experience after the May 2012 earthquake in Italy*, CiCe Children's Identity and Citizenship in Europe, Erasmus Academic Network, *Identities and citizenship education: controversy, crisis and challenges*, Lisbon, University of Lisbon, Portugal 13-15 June 2013.

2014

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2015

Research in progress, Università degli Studi Roma Tre and Instituto Superior de Educação e Ciências ISEC, *Education and the paradigm of tolerance in our schools*.

2016

Presentation *La pedagogia di Giuseppina Pizzigoni e l'Asilo nel bosco in Italia, The pedagogy of the Jardim-Escola João de Deus, Conflict resolution, Education to tolerance, research in selected Portuguese schools*. Erasmus + Lifelong Learning Programme. Reference number: 2015-1-IT02-



KA103-013270, Instituto Superior de Educação e Ciências ISEC, Lisbon, Portugal, 18-24 September.

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## *The internalization of universities and the English language*

### ABSTRACT:

The teaching of non linguistic disciplines in English is a growing practice in European universities. This is popularly known as ‘bilingual degrees’ but English Medium Instruction (EMI) is the most suitable and precise denomination.

The connection between EMI and the internationalization of universities is evident since English is now the *Lingua Franca* for academic communication. This chapter reflects on the role of English in the internationalization of universities from these two phenomena: EMI and ELF. Conceptual overviews of EMI and ELF in European academic contexts are presented. Secondly, the reasons and forces behind EMI and ELF are discussed. Some of the main challenges and achievements to date are summarized, with special reference to the Spanish context.

KEYWORDS: English Medium Instruction; Bilingual degrees; Internationalization; Tertiary Education

### 1. *Internationalization*

Internationalization is a ubiquitous word at universities. However, the concept is a disputed one. Internationalizing a university can be understood in the narrow sense of attracting and admitting foreign students or even attracting and employing international faculty staff. Internationalization can mean much more than this. The multifaceted process on internationalization is defined as «the policies and practices undertaken by academic systems and institutions – and even individuals – to cope with the global academic environment» (Altbach & Knight, 2007: 290-291).

According to Haug (2010), internationalization encompasses aspects that reach beyond mere mobility. The dimensions include

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«the internationalization of studies, of the campuses and of the institutions of higher education themselves in their search for higher quality, more relevance and stronger international competitiveness» (Haug, 2010: 1).

These ideal aims and aspirations have unfortunately undergone significant change. Internationalization based on international co-operation has frequently shifted in a tendency of self-economic interest of maximizing profit and capturing student market by expanding institutional reach in other countries. The result is competition in the international higher education market which has led to the marginalization of teaching-learning, assumed to be the central role of educational institutions (Wadhwa, 2016).

In the European scenario, the Bologna Process involved a profound re-thinking of the goals and organization of Higher Education. One of the aims was to establish a more uniform structure for Bachelor's and Master's degree programs and hence to facilitate the mobility of students and internationalization of universities. This curricular harmonization has led to the removal of numerous bureaucratic obstacles for mobility, and to the design of joint programs (Bologna Declaration, 1999). In addition, this is causing increased international research collaboration.

Haug (2010) identifies three phases in internationalization: mobility, internationalization of studies and, finally, the most complete, complex and demanding, the institutional internationalization. The process of internationalization of European universities is now an unquestionable fact at least for the first two phases. The internationalization process is inextricably related to the need to promote multilingualism. Thus, a decade ago, when the European Higher Education Area (EHEA) was still being planned, Tudor anticipated

«The EHEA will become a reality only if students, researchers, academics and administrative staff in Higher Education institutions across Europe are able to communicate effectively with one another, and this depends crucially upon their knowledge of languages» (Tudor, 2004: 1).

Equally, Greere and Räsänen (2008) report on the potential of speaking languages for going international and for successful employability. Measures taken by both higher education institutions and the

European Union to contribute to the competence and competitive edge of graduates are of invaluable relevance to achieve this aim.

In this context, and given the undisputable role of English as *lingua franca* (Crystal, 2003; Graddol, 2006), English has become a key instrument to accomplish the many aspects of the internationalization. This chapter reflects on the increasing use of English as *Lingua Franca* (ELF) and English as a medium of instruction (EMI). The chapter aims to assist non linguists to understand the role of the English language in the internationalization scenario and to focus attention on some practical issues.

## 2. *English as a Lingua Franca in internationalization*

Universities have already shared an international language in the history of Europe. Nastansky (2004), quoted in Coleman (2006), reports that lecturing or publishing in the vernacular rather than in Latin was censured in the Middle Ages and Renaissance. Some consider English as the new Latin (Dearden, 2015). This section presents the concept of *Lingua Franca* and provides arguments in favor of English as the *lingua franca* for internationalization. The dangers and discussion about this hegemony are considered as well as some balanced alternatives.

### 2.1. *The concept of lingua franca*

Kirkpatrick provides a historical recount of the origin of the term:

«'lingua franca' stems from when Germanic Franks moved into Gaul in the 5th century and adopted the local language, which became known as the language of the Franks, or *lingua franca*. The term then came to mean an unofficial language of wider communication and was first used in the Levant during the medieval period, when the 'Franks' went on crusades» (Kirkpatrick, 2011: 1).

Safari & Razmjoo (2016: 40-41) provide a reflection on different definitions of *lingua franca*. The most basic meaning comes from Crystal (1995: 454): «a medium of communication for people who speak different first languages». McArthur (2002) extended this to comprise «a language common to, or shared by many cultures and communities at

any or all social and educational levels, and used as an international tool» (McArthur, 2002: 1). A key component was added by Modiano (2001: 170): «*lingua franca* is a mode of communication which allows people to interact with others without aligning themselves to ideological positioning indicative of specific mother-tongue speech community». This lack of alignment is a crucial feature given the controversy regarding English hegemony which is further explained in section 2.3.

Thus, English at university level acquires the role of *lingua franca* as it functions as the primary vehicle of communication among those in academia who do not happen to share their mother tongue.

## 2.2. *Why English?*

English proficiency is a key priority in international communication in different areas: technology, science, business and finance, for instance. Access to the latest scientific and technological developments of today's modern world is facilitated with English. In academia, English is the language for international research and publications across disciplines.

However, those not coming from western European cultures do not see an intrinsic reason for this: «The significance and legitimacy that English has gained is due to the fact that it is the tool of globalization, the language of science and technology and nothing else since other languages could have this position too» (Safari & Razmjoo, 2016: 148). The spread of English for the global, political, cultural, and economic exchanges seems so natural that nobody even questions its legitimacy as the *lingua franca* (Chang, 2006), but any other major language could have achieved this status.

## 2.3. *Risks of the hegemony of English*

In the last two decades, linguists have positioned in two stances (Lasagabaster, 2012). The first group includes those who consider the global spread of English as linguistic and cultural imperialism of English speaking countries. This would be a manner to exert their dominance, power, culture, ideology and language over the periphery countries (Phillipson, 2009). From the linguistic point of view, this hegemony could bring devastating consequences: loss of minority

languages, identities and cultures. For this reason, the English language has received negative nick names: *lingua franca* trap, *lingua Frankesteinia*, tsunami, *Tyrannosaurus rex*, pandemia. The linguistic conflict between English and minority languages may interfere with the multilingual language policy being fostered at different universities worldwide (Phillipson, 2009; Lasagabaster, 2012).

The second group of linguists accepts the hegemony which turns English into a *lingua franca*. This aspect is further expanded in section 2.4.

#### 2.4. *English as Lingua Franca: a variety on its own*

Interestingly, ELF is a legitimate variety of language in its own (Graddol, 1999; Jenkins, 2006) which is more and more attracting the attention of linguistic researchers. These linguists are questioning whether the native speaker has to be the standard model or, on the contrary, local varieties have to be considered. This latter stance has caused numerous research activities trying to establish the features of English as a *Lingua Franca* (ELF) at phonetic, lexical, morphological and pragmatic level in search for those elements which could constitute a *Lingua Franca Core* (LFC). The aim of these investigations is to guarantee the mutual intelligibility among the different speakers (Jenkins, 2003, 2006). However, designers of teaching materials for English as a Foreign Language are not taking into account the advances in ELF and continue to include British and American varieties. In order to assist research on ELF, the *Vienna Oxford International Corpus of English* (VOICE, 2009) has been compiled with samples from non-native speakers who are effective users of the English language in a variety of professional and communicative contexts. These speakers are not seen anymore as learners but as users. That is to say, VOICE attempts to show how the language used by non-native speakers. By questioning whether the English usage norms would be that of the native speaker or those of the non-native (the majority of speakers) ELF may cause what Graddol (1999) denominates «the decline of the native speaker».

#### 2.5. *The need for a balanced diglossia*

This global acceptance of English, though predicted for years, encounters resistance because of the concomitant phenomenon of language lesser



use or even death. An example of this tension at university is the Nordic debate about the diglossia. The Swedish government warns about the needed balance:

«English is both essential and welcomed in Nordic universities. Students, lecturers and researchers must be able to understand academic English and use it regularly. However this use of English must not be allowed to result in the Nordic languages disappearing from universities. We should be aiming for parallel use rather than monolingualism» (Nordic Council of Ministers, 2002; original in Swedish, quoted and translated in Airey, 2009: 209).

### 3. *English Medium Instruction*

#### 3.1. *Concept*

The variety of terms referring to this phenomenon is an indicator of its complexity. Some examples are English used as *Lingua Franca* in Academic settings (ELFA), English as International Language (EIL), English in ICLHE context (Integrating Content and language in Higher Education). The proposal by Dafouz and Smit (2014) deserves special attention. They defend a label which is semantically wider than the previous one, as it does not specify any particular pedagogical approach or research agenda: English-Medium Education in Multilingual University Settings (EMEMUS). By adding multilingualism, the monolingual English centered perspective of the former acronyms is now eliminated.

This chapter cannot go deeper into the methodological aspects, results or expectations on each one of these models, but it becomes necessary to highlight a common feature of most of the forms of bilingual education at tertiary settings. These practices cannot enter the category of prototypical CLIL (Content and Language Integrated learning) programs because they lack the fused pedagogical teaching aims of content and language (Smit & Dafouz, 2012).

As regards the main feature of EMI concerning language learning aims, the following quote makes explicit the distinction with other bilingual education approaches:

«There is an area where CLIL and EMI diverge from each other; this is the attention that each of them pays to language learning. While CLIL is a dual focused process, aiming to overtly develop both language and content knowledge, EMI focuses mainly on subject learning and exploits the language of instruction as a mere neutral tool to perform that goal» (Francomacaro, 2011: 34).

This difference has relevant pedagogical implications. The adoption of English as a vehicular language does not entail language learning objectives, which means that language learning is left to the incidental. This means that the aim of EMI courses is to learn content, and not to learn English, although an improvement in linguistic skills is expected.

### 3.2. *Forces behind EMI*

Internationalization is then one of the main reasons for using EMI in European universities. As commented, language learning is not the aim and remains of secondary importance. Coleman (2006: 5-6) identifies another five main forces driving EMI at the EHEA:

- student exchanges, with ELF;
- teaching and research materials, without forgetting the dominance of English in research publications and data bases;
- staff mobility (to increase institutional and professional prestige);
- graduate employability (which is usually a criterion of university rankings);
- the market in international students.

These five categories summarize the reasons for which governments, institutions and even individuals are adopting EMI.

### 3.3. *Achievements*

The first achievement is the exponential growth of EMI courses in the last decade. An increasing number of universities in non-English speaking countries include in their academic offer bilingual graduate and post-graduate programs in which teaching, communication and assessment is through English. This is a strategy in order to be more competitive. Data from 2007 indicate around 3,000 programs through English (Wächter & Mainworn 2008; Doiz, Lasagabaster & Sierra, 2012). This implies a

340% increase in relation to the previous figure at the beginning of the XX century. More specifically, 60% of post-graduate courses in Europe are being taught through EMI (Macaro, 2014). A quite updated list of the academic offer in Spain is available at Ministerio de Educación, Cultura y Deporte (2013). All these programs have the potential to attract international students from any country, give the use of English as a *lingua franca* for communication, teaching and learning.

A second main achievement affects the content lecturers (that is to say non-language specialists) who deliver these programs. The challenges of this are commented in section 3.4. Lecturers with EMI experience report that it meant a personal challenge and an opportunity to improve personally and professionally as teachers and to advance their research careers (Dearden, 2015; Martín del Pozo, 2014). This implies that in EMI contexts not only students but teachers too can become international.

A vigorous research activity is the third achievement (Pérez Cañado, 2012). An EMI Research Centre has recently been set up to collaborate with institutions worldwide with the purpose of establishing a sustainable evidence base for future policy decisions (Dearden, 2015). The current EMI policy is primarily driven from the British Council and the University of Oxford.

In conclusion, as it had been predicted before the EHEA, «English is the most dominant L2 medium of instruction, with its position forecast to strengthen further» (Marsh & Laitinen, 2005: 2). The growth, extension and speed of the spread is such that some scholars talk about «The Englishilization of Higher Education» (Coleman, 2006; Kirkpatrick, 2011) and others predict «The end of modern languages» (Graddol, 2006) seeing English as a threat to plurilingualism.

### 3.4. *Challenges*

The number of courses being taught through English in European universities continues to grow at a very fast rate. However, a recent study about 55 countries worldwide concludes that

«[...] policy makers in many countries insist on introducing EMI for reasons of economic growth, prestige and internationalization without considering the teaching resources needed to ensure its proper implementation such as sufficiently trained teachers, materials and assessment» (Dearden, 2015: 24).

Regarding the training and accreditation of their teachers in this area, Halbach & Lázaro (2015) report about how Spanish universities are dealing with this main challenge. This study aimed to follow a previous one (Halbach, Lázaro & Guerra, 2013) which reported Spanish universities to be aware of the relevance of English language proficiency to facilitate students international mobility and graduate employability. In consequence, numerous universities had established initiatives to achieve this aim. Results revealed heterogeneity, confusion and contradictions regarding the required level of English and the accreditation system. The 2015 study (50 Spanish universities were polled) showed considerable improvement due to the coordination of two supra-university institutions: the Mesa Lingüística in CRUE (Conferencia de Rectores de Universidades Españolas) and ACLES (Asociación de Centros de Lenguas en la Enseñanza Superior).

Spanish universities are making an effort to foster foreign language competences. However, Halbach and Lazaro warn that formation (having received some training) must not be confused with qualification (having achieved a competence level).

Additional challenges identified in this study are the centralization of linguistic policy competence in only one person or body and the unification of information about internationalization and linguistic policies of Spanish universities in institutional web pages.

The authors recommend the development of a clear linguistic policy under the supervision of a university body specifically appointed for that purpose. The designation of an institutional budget for linguistic accreditation is also desirable.

Another challenge in the same line of internationalization policies is the level of English of university administration staff, mainly of those in positions related to international relations (Halbach & Lázaro, 2015).

In addition, more research is clearly needed, for example to develop descriptors of quality assurance, or for the development of international accreditation tools and procedures. Finally, it is imperative to bring to attention that teaching subjects through English is much more than simply translating class content into a second language (Cots, 2012; Dafouz *et al.*, 2007, Martín del Pozo, 2014). The introduction of EMI requires a significant shift in methodology apart from linguistic upskilling.

In response to these challenges, Universidad Complutense de Madrid presents a cutting edge initiative in Spain. The UCM developed a Plan for Curricular Internationalization which is centralized at the Vice-rectorate

for International Affairs and Cooperation and is led by the Vice-rector and the Advisor to the Vice-Rector for International Affairs, a special new created position for the purpose of internationalization. In addition, as an integral strategy of the UCM other Vice-rectorates are directly involved in its effective implementation.

Also in Spain, the Commission for internationalization in CRUE is to present the conclusions of a report by mid 2017. This document will include a group of recommendations which will serve as guidelines to implement more or less homogeneous linguistic policy in Spanish universities.

#### 4. *Summary and conclusions*

The borderless EHEA where nationalities with various languages and cultures co-exist requires a shared linguistic code or an international language. This has caused the rapidly growing global phenomenon of English medium instruction (EMI). Therefore, teaching subjects through the medium of English is widely considered to be an essential tool in the internationalization policies of universities. We find the classic situation of a snake biting its tail: «While the global status of English impels its adoption in HE, the adoption of English in HE further advances its global influence» (Coleman, 2006: 4).

In Europe, Internationalization means Englishization (Kirkpatrick, 2011, Marsh & Laitanen, 2005; Phillipson, 2009). In consequence, and first conclusion, the adoption of English as a *Lingua Franca* seems a must for any university to take an active role in the global, academic and scientific market.

Secondly, if internationalization is not any more a privilege and all universities should have an international perspective, there is a need for planned policies with aims affecting each part within university structure. Situations differ widely across European countries (national language use, levels of language teaching, managerial and decision-making traditions for instance).

A third conclusion derives from these differences. One specific model of language policy is unlikely to be equally appropriate in all

contexts. In consequence, a high-quality policy should depart from the analysis of the linguistic, cultural and academic challenges of each context, which leads directly into the fourth conclusion: the need for research projects and quality assurance of EMI practices.

There are 26 levers (Marsh, Pavón & Frigols, 2013) which provide indicators and recommendations for quality English degrees. Space restrictions of the present paper impede a detailed consideration of these levers but they are a recommended checklist for those readers interested in a state of the art regarding quality assurance. Besides, a second relevant source of updated studies about EMI programs is the scientific production of the INTE-R-LICA research project. The linguistic, cultural and academic challenges and impact of bilingual degrees are being empirically analyzed from an interdisciplinary perspective which comprehends linguistic, content, pedagogical and sociological factors.

Finally, if internationalizing the higher education system is a high priority and languages play a key role, language learning is not an option. The choice refers to 'what' language. Michavila relieves the concern of those less supportive of the hegemony of English:

«La universidad europea es multilingüe. La norteamericana no lo es, pero la europea lo es y lo será. El multilingüismo debe ser considerado como un valor añadido, una riqueza adicional que poseemos, y debemos valorar los europeos» (Michavila, 2012: 21).

For those who are fond of the English language or at least do not find it objectionable, this consideration of these less thought about advantages may draw their attention:

«It is an undeniable fact that English has become the current lingua franca which means that university students and faculty are 'required' to have a good command of English, but if this is achieved, this requirement comes along with multiple benefits. English has become the language of academia and the educational revenues cannot be overlooked» (Doiz *et al.*, 2012: 214).

Thus, the educational revenues of ELF and EMI are one of the 'reasons for Erasmus'.

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Vincent Boly, Laure Morel, Mauricio Camargo<sup>1</sup>

*Innovation management: twenty-three years of higher education  
in a French engineering school*

ABSTRACT:

Innovation management is a major educational concern within business schools as well as in engineering schools. Besides technical, economical or marketing skills, new abilities are required in companies for people in charge of R&D-I services, the elaboration of the technological strategy or the piloting of innovative projects. As a consequence, new courses are continuously being developed to prepare future top managers to assume innovation responsibilities.

The École Nationale Supérieure of Génie des Systèmes et de l'Innovation (ENSGSI) has twenty-three years of experience teaching innovation to engineering students. The objective of this paper consists in going into deeper detail about the process of elaboration of the educational program and in exposing the main characteristics of its pedagogy. The ENSGSI program has been elaborated using two main conceptual foundations. The first one is the modeling of the processes to be managed within innovative companies. This model integrates: the main innovation management practices in the form of operational levels that decision-makers focus on and the corresponding methodologies (Boly, 2009). The second foundation is an Employment Competencies Referential. It consists of a list of skills and attitudes established in collaboration with human resource managers of international companies and French SMEs.

As a result, attention is directed toward these two paramount foundations when establishing and renewing: the nature of the courses, the pedagogical objectives and the evaluation approach of each module, and the links between the different modules.

KEYWORDS: innovation, technology management, education, competencies, pedagogy.

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## *Introduction*

Innovation management is now a major educational concern within business schools as well as in engineering schools. Within innovative companies, people in charge of R&D-I services generally attest to a great experience in terms of technology, the specific needs of the company's customers, or the functioning mode of the organization. They are involved in the elaboration of the technological strategy and/or the supervision of projects. But as attention is more directed toward innovation, many companies propose assignments in the field of innovation to young people: they collaborate on new product development studies or get more responsibilities, mainly in small and medium companies where knowledge about innovation processes is weak. Besides technical, economic, or marketing skills, new abilities are required in companies for people in charge of these processes and it can be hypothesized that particular jobs have emerged. Moreover, innovation processes have a highly evolutionary character due to competition, new strategies developed by companies and a better understanding of innovation processes through academic production (McGee & Thomas, 2007). Thus corresponding responsibilities are moving. Some recent phenomena may be highlighted, including: openness (companies collaborate with partners to innovate; these may be customers, other companies, social networks, or internet contributors) (Chesbrough, 2003), interdisciplinary activities (innovative concepts emerge at the boundary between different technical and scientific disciplines) (Guang, 2016), and agile design (new operational sequences between studies and material artifact elaboration) (Roucoulès and Tichkiewitch, 2015). As a result, new educational programs are proposed to train people involved in innovation tasks. This paper is based on the experience of one French team of former innovation process researchers: they launched an engineering school dedicated to innovation management. Since 1993, Ecole Nationale Supérieure en Génie des Systèmes et de l'Innovation (ENSGSI-Nancy-France) has been providing training courses for engineers of three years and five years in length (integrated course with an option for two preparatory years on top of the three-year engineering course) (Castagne, 1987). ENSGSI-Nancy-France has today achieved an average of 75 students per course. Final employment areas of the engineers cover a large range: manufacturing and services. The employment rate before obtaining the

final diploma is 65 percent on average and the maximum employment search period after school is six months, corresponding to very good outcomes in the current European context.

To fulfill the global educational objectives, a structured approach has been established in order to go into deeper detail in the description of the professional skills required. This approach is regularly renewed to adapt to recent labor market trends and theoretical models are used to organize updating programs. One special interest is taking into account all the different forms of in situ situations (designer tasks versus strategic tasks, long-term versus short-term activities among others). More precisely two referentials are proposed to define a fundamental corpus in terms of education (Yanez, 2010). One referential consists in a theoretical model representing the innovation processes: the aim is to describe the «domain to be managed». The second referential lists the general competencies required to manage uncertain processes. Then, by combining the general necessary skills with the constraints of the process model, it is possible to define the ad-hoc skills: «what an engineer has to master in order to pilot innovation within companies».

*The first educational referential: the five innovation process management operational levels*

One referential is used to go into deeper detail about innovation piloting activities, and consists in establishing the description of the tasks to be managed, with consideration for: the type of people in charge, a temporal dimension, and the associated methodologies. This referential helps to define the different professional profiles related to innovation management (a designer does not have the same tasks and objectives as an R&D & Innovation department head) and as a consequence a training structure has to distinguish different courses. Secondly, innovative projects are complex as decisions about product, production processes, sales modes, and the business model are interdependent. Moreover, decisions at the top management level are interconnected with those made at the design team level. Then, students have to understand the interrelation between the different

training modules and, consequently, teachers have to visualize the relation between their training and the rest of the program. Innovation processes appear in industrial systems in the form of technological innovation management actions, knowledge management practices, and organizational change operations (Linton, 2009).

Thus, five innovation process management operational levels are proposed by Boly *et al.* (2014), each constituting a sub-process, an area of action. This theoretical model is then valorized to distinguish five different types of interconnected courses. More precisely, it is possible to elaborate the structure of the program by a cross approach between the general competencies to be mastered and the five fields of coherence and coordination.

The innovative object itself represents the first level. It is the artifact of the process. It can be a technology, a process, a service, a product, or even a business model. Its nature evolves during the process: from an idea to a technical or marketing concept, a specification form, a sum of solutions, a prototype... As a consequence, the status of the new object is alternatively a sum of knowledge or a concept. The process may be modeled with any representation describing a technological system, with the concept of Intermediary Design Object representing the sequence of material aspects taken by the new products (Tichkiewitch & Brissaud, 2000), or through the concept of product lineage (Le Masson *et al.*, 2006).

Individual and collective stakeholders inside the company with their mental activities represent the second level. It is the level of learning processes and cognitive assets (Baharadwajb, 2000). Depending on how he views his role within the company, an employee may become an important actor, influencing only his immediate surroundings or spreading newness all over the organization. This level is concerned with learning the knowledge required to master new technologies: newness appears when designers succeed in solving new problems and, as a consequence, when they learn from a new experiment or when they acquire new knowledge before trying to overcome a new obstacle. Moreover, «think different» is a basic assumption in innovation, meaning all approaches and behaviors that help people to adopt new

reasoning modes are important. The main logical sequences developed by innovators constitute cognitive processes to be known by students. They also have to be aware of their cognitive approaches in order to develop mental ruptures.

The third suggested level is the innovative project. It is the design activities support level. The project is a complex system made up of acting employees, means, and actions. These elements are assembled in order to satisfy a demand from marketing or top management. There are several starting points for innovative projects, including: customer demands, technological survey outcomes, and ideas emerging from creativity. The major characteristic of the project level remains its time constraint. Project management is a major concern at this level, but differences between innovative and non-innovative projects have to be taken into account: a high level of uncertainty, information incompleteness, and intellectual property among others.

The fourth level relates to the company globally and its particular way of managing innovation. It is the global mastering level of the unit's innovative potential. Among others: know-how, methods, experiences, and incentives. This domain is concerned with strategy, culture, and general organizational schemes (Koc & Ceylan, 2007). In contrast to the previous level, it is a permanent process.

The external environment of the firm and its networks constitutes the fifth level. There are two dimensions at this level: institutional and industrial. Government through various structures stimulates innovation in their territory. The management of these structures in relation with companies and entrepreneurs attests to particular tasks. Finally, open innovation, co-innovation, and partnership induce specific collective sequences of activities in order to launch new interconnected activities and products (Huizingh, 2009).

Hence, from an educational point of view, teaching innovation management corresponds to being prepared to manage these five sub-processes. The model is then transformed on the basis of five professional objectives and the innovation training is organized for five related modules.



The five-level referential finally consists in considering innovation as processes. And consequently the aim is to develop the student's abilities to manage these particular processes. Indeed, innovation can be considered as a non-linear chain-linked model, characterized by the following aspects:

- Two temporal dimensions considering that, in parallel with permanent tasks, some activities include time limits. More precisely, students may be able to pilot projects with a beginning and an end. Moreover, the innovation process integrates permanent data collection and treatment approaches in order to prepare future projects. Both technological strategy definition and improvements to innovation practices are ongoing activities. Consequently, students will be confronted with the management of a permanent organization dedicated to innovation. Moreover, they will have to deal with a complex contextual organized process. In fact, the nature and quality of both the innovation process and its results are highly dependent on the external environment of the company and on the culture of acting employees (internal environment).
- The confrontation between routines and non-routines. The innovation process mainly corresponds to a knowledge creation process (Shu-hsien, 2008). Students then face a paradox: how to reinforce the technical capacities to manage the innovation process and thus to generate routines, and simultaneously, how to change the referential at the firm's global level in order to break the routines and, as a result, favor creativity?
- The C-K properties: This model is a new theory of design called C-K theory, elaborated by Hatchuel and Weil (Hatchuel and Weil, 2003). According to this theory, designing products requires an interaction between a knowledge set (referred to as K) and a concept set (referred to as C). Knowledge space (K) gathers propositions which have a logical status for a designer or a group of designers. A proposition's logical status is its degree of confidence (true, false, or fuzzy value). Concept space (C) gathers propositions which have no logical status relative to K (K-relativity). According to C-K theory, design

is the process that consists in transforming concepts from C space into other concepts or into knowledge in K space. Consequently, students have to master formal approaches and logical demonstrations, but also creative developments.

- A cooperative dimension: The innovation process necessitates both collective and organizational learning. Because innovation can be found in every person but involves colleagues and multi-functional teams as well as external partners within open innovation processes (Chesbrough, 2003), managerial skills are major concerns in innovation educational programs.
- Uncertainty is a major aspect of innovation. Evidence of a necessary constructivist approach in SMB innovation management emerges from in situ observations (Boly, 2003).

### *The second educational reference: the competence referential*

Taking these aspects into account, the ENSGSI-Nancy-France program has been elaborated using an Employment Competencies Referential. It consists of a list of skills established in collaboration with researchers and human resource managers of international companies and French SMEs. Note that this approach is complementary to those of Mallick and Chaudhury (2000), representing a benchmark of present Management of Technology education programs. More precisely, researchers and practitioners are asked to give a realistic description of the professional skills requirement relating to each characteristic of the previous list. Three connecting items were investigated:

- Description of industrial cases corresponding to one aspect of the list: for example, experts describe an experience where people in a company face a necessary operation of industrial process optimization (routine) and a complementary situation where optimization failed and newness was the solution (non-routine).
- Census of the tasks achieved by people involved in these industrial cases. Also, census of the main decisions made by these people.

For example, what are the principal activities of engineers optimizing the industrial process (project gantt), and those of the designers of the innovation solution? Moreover, what are the decisions made by these people and by top managers during the optimization projects and then the innovative project?

- Elaboration of a list of competencies and behaviors required to achieve these tasks and make these decisions.

Table 1 gives examples of data collected in a winery.

Table 1 - *Example of data collected to describe the interrelations between professional activities and required skills*

In situ situation: problem faced	Activities achieved by people in the company	Decision taken during the project	Required skills
All grape producers deliver to the company (winery) at exactly the same time. And quality is heterogeneous.	<ul style="list-style-type: none"> <li>- Interviews of the stakeholders</li> <li>- Census of all the problems</li> <li>- Study of the variables influencing grape maturity</li> <li>- Proposition of supplementary tests of maturity in the fields</li> </ul>	<ul style="list-style-type: none"> <li>- To use FMECA methodology</li> <li>- To launch a chemical study about grape compounds</li> <li>- To invest in some adapted solutions in measurement equipment</li> </ul>	<ul style="list-style-type: none"> <li>- Ability to manage FMECA (Failure Modes, Effects and Criticality Analysis)</li> <li>- Ability to process chemical data</li> </ul>
Production lost due to fermentation before the start of the winery process. Complementary objective: reduce additives.	<ul style="list-style-type: none"> <li>- Systemic description of the upstream production steps</li> <li>- Experts' enquiry about cause analysis</li> <li>- Elaboration of the specification of a new unitary operation within the winery process</li> <li>- Benchmarking of technology in different domains</li> <li>- Multicriteria analysis to select a candidate technology</li> <li>- Elaboration of a prototype and test in partnership with an equipment supplier</li> <li>- Financial analysis</li> <li>- Employee training</li> </ul>	<ul style="list-style-type: none"> <li>- To innovate through the adoption of a new technology replacing one step of the former process</li> <li>- To invest in innovative equipment</li> <li>- To pay for the employee training</li> </ul>	<ul style="list-style-type: none"> <li>- Out of the box thinking</li> <li>- Ability to model industrial processes (material flows, information etc.)</li> <li>- Functional analysis of a machine</li> <li>- Technological intelligence capability</li> <li>- Ability to manage a cross functional team</li> <li>- Ability to achieve a technical survey in the field of biological processes</li> <li>- Ability to manage the adequation between required skills and competencies at disposal in the company</li> </ul>

By means of this approach, a list of in-situ situations is obtained. Based on behavioral theories, this catalog describes the competencies (knowledge and know-how) and attitudes (personal competencies) relating to innovation activities. Consequently, this reference highlights the learning, technical, and cognitive skills that any student has to develop as part of his or her course curriculum. Finally, a classification is established in order to aid the further step: elaboration of the training program.

Two generic competencies have been defined:

- The ability to identify, express, and formalize a problem with all its characteristics (technical, economic, organizational, managerial) in such a way as to identify action levers and priorities.
- The ability to solve a problem and to integrate, implement, and distribute the problem-solving methodology within the business context. One characteristic is that the solution set is not limited. Classical solutions as well as new combinations of previous solutions and brand new options constitute the solutions space.

This can then be divided into four main functions/activities that have to be specific to innovation when teaching them:

*Activity 1: Describe.* This relates to activities upstream of the innovation process. The innovation process may start with a highly candid and entrepreneurial approach up to a highly informed position. Description activities concern different domains: marketing, use, technology, and regulation, among others. It focuses on trends, problems, and opportunities. Moreover, there are two temporal scales: present and future. Description is based on data collection (observation and reading), data treatment and modeling.

*Activity 2: Design.* This is the center of the process where new concepts and knowledge emerge. These activities relate to studies, realization, and tests. In the case of innovation, this activity is highly uncertain and newness is the main characteristic of the artifacts.

*Activity 3: Pilot.* As innovation mobilizes people and different types of means, including material and financial resources, coordination is required. Piloting is a challenge as efficiency is targeted, in addition to creativity and initiative. Supervision integrates simultaneously being coherent and agreeing that people may break the rules.

*Activity 4: Develop.* The innovation capacity of a company can increase or decrease considering its strategy and inner management but also the policies of its competitors and the evolution of the environment. Thus some practices aim at sustainability in the emergence of new products, linked with human resources, investments, and links to the surroundings.

*Program curriculum*

Affecting all the competencies listed (and classified through four activities) in the five sub-processes of innovation, it is possible to elaborate a structured training program. The interrelations between the modules are visualized. In [Table 2](#), only innovation centered subjects are discussed as technology centered knowledge depends on students' background.

Table 2 - *Innovation training program at ENSGSI-Nancy-France*

Competence: to be able to do	Company network	Global company level	Project level	Product level	Learning and cognitive level
Activity 1: Describe	Partner identification, Open innovation process description.	Corporate technology forecasting and planning, technology foresight, innovation capacity evaluation, Technology diagnosis and strategy definition, New product development process (NPDP) description.	Business plan, Business model, Value management, Marketing, Technological survey, Macro-environment diagnosis.	Scientific abilities, Failure mode and Effect Analysis, Newness degree and nature diagnosis for innovative product, Morphological analysis, Data collection and treatment, Benchmarking.	Listening, reading, observing environment trends.
Activity 2: Design	Design of external supply chain, Preparation of partnership with customers, academics... Preparation of customers integration in the innovation process, Plannig on the internet open innovation,	Change management, Intellectual property strategy definition,	Adapted new Product development process (NPDP) definition, Development of various creativity approaches, Use of decisions taking methodologies, Experimental design.	Ergonomic, System anlysis, Finding and implementing design methodologies, Mathematic model development, Management of different types of tests, prototyping.	Creativity, Change management Learning and Self directed learning process.
Activity 3: Pilot	Management of consortium, Finding and implementing collaborative methodologies,	Knolegde management, Change management and strategic vision diffusion, Use of indicators	Project management, Put in place a supervision process (stage gate), Value/Risk management and use of indicators	Performance evaluation,,	Learning, Entrepreneurship,
Activity 4: Develop	Collaboration legal frame definition, Outsourcing,	Innovation capacity development.	Team management	Fostering of technologies in the field of communication and information.	Human resources management.

This three-year program represents 1,350 hours of teaching and 2,000 hours of working on real projects. A vertical analysis of each column highlights the specific abilities between each operational level and the necessary global vision for innovative top managers. Some abilities are common to several domains, including FMEA (as the default may be analyzed on product and project management) or data treatment (as data may concern the market, technical testing, or environmental trends). Skills are specific to innovation (creativity and intellectual property strategy definition, among others) or declination of capacities also valorized in other domains (project management and business planning, among others).

### *Conclusion*

This paper highlights the approach to elaborating an innovation management training program. This program aims at being a declination of management of technology contents promoted by the IAMOT association (International Association for Management of Technology) through the International MOTAB accreditation. Particularities exist between educational structures due to the context, the objectives, and also the profile of students (business or engineering). Thus, program elaboration methodologies are still a major concern. In this case, a structured and adapted template is obtained through two main referentials, a professional competencies list elaborated with researchers and practitioners, and a theoretical five-level model of the innovation process. Regular evaluation (during the training and post-diploma) with students and companies attests to the pertinence of the approach. However, the training elaboration methodology requires a continuous application, as companies' needs and innovation management background evolve. Consequently, this methodology is resource consuming and has to be integrated into the strategy of the education board as well as the day-to-day functioning mode of the training staff.

Pedagogical methods have to be coherent with the program itself. Through the role given to students, the relation between teachers and students, and the pedagogical approaches, it is possible to influence the personal skills of the future innovation managers. The aim is to stimulate behaviors in line with innovation. One aspect concerns entrepreneurship.



This behavior is often difficult to promote (Carayannis *et al.*, 2003), therefore training workshops on real industrial projects or company creation contests may be complementary options (Okudan & Rzasa, 2006). Attention must also be directed toward some other managerial skills such as customer-oriented conduct (Athaide & Klink, 2009).

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## Parte seconda

La pedagogia e la didattica come scienze interdisciplinari:  
letture e interpretazioni



María-Teresa del-Olmo-Ibáñez<sup>1</sup>

*La biografía de ciudades como instrumento pedagógico y didáctico  
para la mediación e integración social y lingüística*

RESUMEN:

Existe un subgénero biográfico cuyo rasgo definitorio, además de los componentes de su categoría general, consiste en que el sujeto sobre el que se construye la historia de vida es una ciudad. Los elementos que dotan de identidad a la Biografía hacen de ella un género idóneo para la mediación y la integración cultural, social y lingüística. Partiendo de un concepto general de ‘mediación’ y, específicamente, del de ‘mediación lingüística’ tal y como queda establecido en el *Marco Europeo de Referencia*, se pretende describir aquí las posibilidades concretas de rentabilización de la Biografía de ciudades como instrumento didáctico con una intención finalista de integración social.

PALABRAS CLAVE: Biografía, Biografía de ciudades, Didáctica de la Lengua y la Literatur, Mediación, Mediación lingüística, Integración social

ABSTRACT:

There is a biographical subgenre, which defining feature, in addition to the components of its general category, is that a city is the subject of its history of life. The elements that provide the Biography with an identity make it an ideal genre for mediation and cultural, social and linguistic integration. Based on a general concept of ‘mediation’ in a broad sense of areas and, specifically, of ‘linguistic mediation’ as is established in the *CEFR*, it is intended to describe here the concrete possibilities of return on the Biography of cities in relation to mediation for social integration.

KEYWORDS: Biography, Biography of cities, Teaching Language and Literature, Mediation, Mediation Social integration linguistic

*Introducción*

El asunto en el que se centra este artículo es la rentabilización y explotación de la Biografía de ciudades como herramienta didáctica para la mediación e integración en un abanico de ámbitos necesitados

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de mediación comunicativa lo más amplio posible. Las reflexiones que aquí se presentan pertenecen a una pedagogía de formación global y para la integración social mediante la Biografía de ciudades. Este tipo de texto reproduce situaciones comunicativas reales, en entornos reales en los que los individuos establecen su ipseidad por las relaciones con e influencias de sus alteridades y contextos.

No es preciso recordar cómo el ser humano se hace y se relaciona a través del lenguaje; cómo los valores personales, sociales, culturales, éticos, tradicionales... se transmiten en la lengua y en la literatura. En la literatura infantil, en la literatura popular y anónima, en la más culta y elaborada o científica, la intencionalidad comunicativa y la transmisión de valores e ideas son inherentes. Tampoco hace falta, siquiera, resumir aquí la relación entre las modalidades enunciativas, los modos de enunciación y los géneros literarios (del-Olmo-Ibáñez y Díez Mediavilla, 2016: 57-58). Únicamente diremos, teniendo esto en cuenta, que el carácter ensayístico de la Biografía permite la inclusión de todos los tipos de discurso y modalidades enunciativas, y que admite la presencia del resto de géneros literarios en cualesquiera formatos (del-Olmo-Ibáñez, 2016: 114-115).

El género de la Biografía presenta unos rasgos definatorios (del-Olmo-Ibáñez, 107-121) que lo constituyen en idóneo para su utilización en la enseñanza en muy diferentes aspectos. Por otra parte, la inserción social es inseparable de la cultural y lingüística; y en la tarea formativa la función mediadora es una de las dinámicas propias del proceso de enseñanza/aprendizaje. En cuanto a los rasgos generales de la Biografía (yo hablo de otro), son de interés todos ellos, puesto que, frente y junto a la Autobiografía (Pozuelo Yvancos, 2006 y Senabre, 1986) (yo hablo de mí mismo), ofrece la confrontación y el descubrimiento de la ipseidad, de la alteridad, del universo existencial y entorno situacional de la persona, y de las relaciones intersubjetivas que se establecen entre todos estos elementos (Piccione, 2012: 152-165 y 2015: 119-143)<sup>2</sup>. Y este proceso se realiza, asimismo, tanto como aprendizaje primario, en la adquisición de la lengua materna, o secundariamente cuando se trata de otra lengua.

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<sup>2</sup> Para las experiencias de la narración y la narración del 'sí mismo' en una interpretación pedagógica formativa.

Como objetivo general se ha establecido el de presentar la Biografía de ciudades en cuanto que instrumento pedagógico para la integración social y lingüística. Esta meta principal se explicita en una reflexión metodológica para la explotación de este subgénero biográfico desde un planteamiento global y susceptible de aplicación en las diversas situaciones que requieren una integración a través de la competencia comunicativa. Además, se parte del concepto de mediación en su origen y evolución hasta los casos en que se hace precisa en el mundo actual.

La metodología que seguimos es de carácter epistemológico en la síntesis del estado de la cuestión sobre los conceptos fundamentales que pretendemos conciliar: el de 'mediación', el de 'mediación lingüística' y el de 'Biografía de ciudades'. Por otra parte, puesto que la perspectiva es pragmática, el estudio progresa desde lo general hacia lo particular en cuanto que la propuesta metodológica avanza teniendo en cuenta posibles concreciones en diversos procesos de integración. En absoluto pretendemos considerar aquí todos los espacios requeridos de mediación, pero la pretensión es general, en primer lugar, por las condiciones impuestas por la globalización y, especialmente, por la movilidad de las personas; segundo, por la apuesta de la sociedad a favor de la integración de todos sus miembros; y, tercero, por lo que de universal tiene la función esencial comunicativa del lenguaje, con todo lo que ésta implica.

La estructura del contenido se ha dispuesto de acuerdo a las siguientes partes: primero, el concepto general de mediación, con una referencia a su historia y evolución; en segundo lugar, la inseparabilidad de las mediaciones lingüística y cultural; tercero, la mediación lingüística según el MERC; cuarto, el silencio como espacio de escucha; quinto, la literatura como herramienta de mediación lingüística y cultural; sexto, los componentes de la Biografía de ciudades a partir de los de la categoría superior de Biografía y su aplicación como instrumento de mediación e integración lingüística, cultural y social; y, por último, se elaboran las conclusiones.



*Una concepción general de la mediación. Breve historia y evolución de la mediación hasta el presente*

La mediación se ha manifestado como imprescindible en prácticamente todos los ámbitos de la actividad humana hoy en día. Sin embargo, la actividad mediadora es propia del hombre desde mucho antes de que se reflexionara sobre ella y de que quedara conceptualizada. Evidentemente, hay profesiones en las que la mediación es una de sus funciones principales y, en algunos casos, una de las causas posibles de su aparición (el sacerdocio, la medicina, los medios de comunicación, la enseñanza...) Por otra parte, se hace ineludible en toda situación de conflicto o dificultosa (Brown, 2016). Pero, especialmente hoy en día, se han hecho precisas las actividades mediadoras en casi todos los espacios en los que se desenvuelve el ser humano, y como tal queda ya testimoniado en la literatura y el cine (Durante, 2016). Vertientes esenciales de la mediación se dan en la medicina (García-Beyaert y Serrano Pons, 2009), en la formación del emprendedor empresarial, el mundo de los negocios<sup>3</sup> y todos los ámbitos de la sociedad actual en los que algunos seres humanos se encuentran en desventaja por motivos sociales, económicos, de salud, de formación, desplazados de sus países de origen, por situaciones políticas... Otra de las evidencias de nuestro tiempo es asimismo la toma de conciencia, reflexión y acción que muchas fundaciones o instituciones gubernamentales, no gubernamentales y religiosas se fijan como objetivos para intentar paliar todas esas situaciones; en las que la mediación siempre aparece como necesaria para el entendimiento (Social Justice Secretariat at the General Curia of the Society of Jesus, 2013).

No es posible enumerar aquí todos los contextos en los que se ejerce la mediación en el presente, pero sí subrayar que su importancia última estriba en la integración social de la persona, especialmente cuando existen discapacidades, en las personas migrantes y en todas aquellas en riesgo de exclusión social. Este es uno de los factores principales que subyacen en el trabajo que aquí se presenta, en esa idea de formación global de la que ya se ha dejado constancia.

<sup>3</sup> Muestras fácilmente accesibles de esto se pueden constatar en el programa de divulgación *Emprendedores*, que emite rtve los sábados por la mañana y que se puede ver en la página web de la cadena en internet: <<http://www.rtve.es/alacarta/videos/emprende/>> (consultado el 07.07.2017).

La mediación en cuanto que actividad del ser humano, está claro que se trata de una función inherente a la intersubjetividad de sus relaciones. Como muestra, en la historia de España, el trabajo de Iciar Alonso Araguás (2006) establece una similitud entre los movimientos migratorios actuales y la variedad lingüística y cultural de la península ibérica desde la Reconquista hasta la actualidad, pasando por la colonización de las Indias y el contacto con todas las sociedades indígenas, como asimismo ocurrió en la colonización del norte de América por otros países europeos. En su comparación entre la historia y el presente, además, la autora equipara o considera inseparables mediación lingüística y cultural.

En cuanto al interaccionismo social, se ha señalado como inicio de su estudio las teorías de Vigotsky y sus conceptos de ‘Zona de desarrollo próximo’ (ZDP) y de ‘mediación’ (Vigotsky, Itzigsohn y Piaget, 1977). Los aspectos de esa teorización que nos parecen esenciales aquí son la idea de que el aprendiz debe alcanzar un nivel inmediatamente superior al de su competencia en el momento de adquirir los conocimientos; y, en segundo término, que el mediador, sea el que sea, debe acompañar en el aprendizaje de manera que facilite el acceso a ese estadio superior. Así pues, el mediador tiene que encontrar estrategias para proporcionárselas al sujeto con el fin de que éste sea capaz de progresar gradualmente en el desarrollo de sus capacidades. Esta propuesta responde a una idea de la psicología educativa en la que se sincretizan psicología cognitiva y humanismo, y mantiene que la adquisición del conocimiento y la percepción del mundo se realizan por la interacción con un entorno desde el momento del nacimiento.

### *Inseparabilidad de mediación lingüística y cultura*

Iciar Alonso (2006) señala como similitudes entre la actividad mediadora del pasado y la del presente el recurso al lenguaje no verbal y la necesidad de intérpretes (cualificados o no) cuando la interlocución se realiza en un desconocimiento mutuo de las lenguas respectivas de los sujetos. Sin embargo, estas soluciones no resultan eficaces por sí solas y ponen en evidencia que, para posibilitar el entendimiento, se requiere, además, un conocimiento considerable de los usos sociales de los gestos. Incluso, que se pueden producir muchas confusiones

debidas a los diferentes registros culturales que comportan las lenguas. En su definición de ‘mediador’ están incluidas las ideas de ‘mediador lingüístico’ y de ‘mediador cultural’ y designa con ese término al ‘intermediario’, profesional o no, que permite superar las barreras culturales o lingüísticas entre dos ‘interlocutores’. Éste es, asimismo, un término polivalente, en cuanto que engloba a personas, pueblos, culturas... En esta definición contempla los conceptos de algunos de los principales autores de la literatura sobre el tema -Castiglioni, Roberts, Slapp... y subraya que la figura del mediador trasciende la simple traducción o interpretación verbal, y que debe considerar las especificidades de los contextos y las percepciones del mundo que subyacen en los enunciados de una lengua. Por esto, el mediador debe poseer competencias culturales concretas que le permitan tender puentes entre las distintas culturas, cuando es el caso; habilidades sociales y personales mediante las que pueda descubrir coincidencias y establecer lazos entre posiciones contrapuestas o de difícil conciliación; o presentar el mundo como accesible a las personas con discapacidades. Y así se podría seguir...

Para avanzar en la concreción que nos hemos propuesto, hay que abordar aquí la necesidad de la mediación en el aprendizaje de una lengua cuando no es la materna, de la materna cuando se vive con determinadas discapacidades y ante la imposibilidad de entender una lengua sin comprender la cultura y viceversa. Hace unos años Daniel Cassany (1996) daba cuenta del alcance de este hecho y apuntaba al mediador lingüístico como una nueva figura profesional. Su reflexión es importante en el mismo sentido que la de Icíar Alonso. La globalización hace imprescindible el conocimiento de las lenguas y de las culturas, pero Cassany, como también Piccione (2012: 23-34 y 2015: 21-66) en los textos citados, se detiene en especificaciones referidas a la comunicación y al intercambio en las condiciones que imponen o favorecen las nuevas tecnologías<sup>4</sup>. Como consecuencia de este panorama, explica el autor que aparecen nuevos intereses por parte de los gobiernos, instituciones y empresas en cuanto al cuidado del uso de la lengua y sus registros. Unos años más tarde, Gracia-Beyaert y Serrano Pons (2009), en el artículo ya referido, establecen diferencias entre mediador, intérprete y traductor que hacen

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<sup>4</sup> En este sentido nos parece imprescindible el análisis que defiende Vincenzo Piccione en cuanto a la transformación de los conceptos de espacio y tiempo impuesta por la interacción de las realidades ‘real’ y virtual.

posible una definición específica para cada una de estas figuras. La utilización de conocimientos culturales y lingüísticos para la intermediación comunicativa es común en esas actuaciones. Lo que las haría distintas sería la intervención creativa para interactuar eficazmente entre las partes en el caso de la mediación, mientras que en la traducción e interpretación se trataría de una función vehicular sin que exista una aportación del intérprete puesto que las partes gestionan su intervención autónomamente. Si bien la complejidad del concepto y asunto de la traducción excede ampliamente esta simplificación que, sin embargo, puede ser de utilidad para el propósito de este trabajo.

La evolución de las circunstancias europeas en cuanto a multiculturalidad y plurilingüismo ha sido vertiginosa y casi inesperada recientemente. Nos parece muy útil en cuanto a la mediación lingüística se refiere considerar el modelo de las *Summer Schools* de Middlebury College, Vermont, Estados Unidos, que sintetiza en sus programas, a nuestro entender, todas las necesidades de las que venimos hablando en cuanto a formación cultural y lingüística: cultura, tradición, comunicación, contenidos gramaticales y atención específica a la expresión oral y la escrita en función del objetivo comunicativo. Para ello se crea un espacio de inmersión ('la burbuja middleburiana' en la que existe el compromiso en profesores, colaboradores y estudiantes de no utilizar otro idioma que no sea el de la escuela en la que se participa) prácticamente en todos los sentidos que consideramos necesarios (además del lenguaje, el arte, la gastronomía, el teatro, el cine, el folklore, las costumbres...). Además de por las razones anteriores, uno de los factores que nos parecen esenciales para considerarlo paradigmático es la duración de los cursos, entre cinco y siete semanas, puesto que constituyen una muestra manejable para su análisis que permite apreciar fácilmente lo que venimos sosteniendo.

### *La mediación lingüística según el MERC*

Un texto ineludible en toda cuestión referida a la enseñanza de lenguas es el del *MERC*, no solo en el espacio europeo sino en cualquier entorno, pensando en un horizonte de internacionalización y plurilingüismo. Dentro de la globalidad de los contenidos de este documento,

aparece también el concepto de mediación y una detallada enumeración y descripción de las actividades y estrategias lingüísticas que se activan en su desarrollo.

Una diferenciación de importancia que recoge el texto es entre ‘multilingüismo’ y ‘plurilingüismo’<sup>5</sup>. Lo que implementa el último es que concibe la enseñanza de idiomas en la concepción didáctica de una competencia plurilingüe. Ésta permitirá a los aprendices aplicar las competencias que tiene adquiridas en una lengua a la otra, y poder interactuar cuando las situaciones comunicativas se producen en ausencia de un mediador cualificado. Consecuentemente, podría decirse que el mediador será capaz de rentabilizar en su profesión esas mismas competencias que ya tiene adquiridas y que incluirán, igualmente, todas las capacidades lingüísticas.

El *MERC* establece, en primer lugar, que la mediación es una de las actividades lingüísticas que pone en funcionamiento la competencia comunicativa, a saber: comprensión, expresión, interacción y mediación. Las dos primeras son primarias en tanto que son imprescindibles para que se produzca interacción. Ésta requiere de al menos un par de individuos para que se realice un intercambio por la alternancia o la simultaneidad de ambas. La mediación, también, hace posible el intercambio comunicativo en la expresión y la comprensión, pero en este caso se realiza entre personas que, por los motivos que sean, no pueden establecerla

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<sup>5</sup> *MERC*, Centro Virtual Cervantes, <[http://cvc.cervantes.es/ensenanza/biblioteca\\_ele/marco/cap\\_01.htm#p13](http://cvc.cervantes.es/ensenanza/biblioteca_ele/marco/cap_01.htm#p13)> (consultado el 03.09.2016): «El multilingüismo es el conocimiento de varias lenguas o la coexistencia de distintas lenguas en una sociedad determinada. Se puede lograr simplemente diversificando las lenguas que se ofrecen en un centro escolar o en un sistema educativo concretos, procurando que los alumnos aprendan más de un idioma extranjero, o reduciendo la posición dominante del inglés en la comunicación internacional.

Más allá de esto, el enfoque plurilingüe enfatiza el hecho de que conforme se expande la experiencia lingüística de un individuo en los entornos culturales de una lengua, desde el lenguaje familiar hasta el de la sociedad en general, y después hasta las lenguas de otros pueblos (ya sean aprendidas en la escuela o en la universidad, o por experiencia directa), el individuo no guarda estas lenguas y culturas en compartimentos mentales estrictamente separados, sino que desarrolla una competencia comunicativa a la que contribuyen todos los conocimientos y las experiencias lingüísticas y en la que las lenguas se relacionan entre sí e interactúan. En situaciones distintas, una persona puede recurrir con flexibilidad a partes diferentes de esta competencia para conseguir una comunicación eficaz con un interlocutor concreto».

directamente entre ellos. Con respecto a la diferenciación que se ha visto arriba entre mediación e interpretación o traducción por García-Beyaert y Serrano Pons, en el documento europeo las dos últimas están incluidas entre las operaciones de mediación junto a otras como la paráfrasis, las anotaciones y el resumen; si bien distingue entre mediación oral y escrita.

*El silencio, un espacio 'de y con' identidad personal y cultural, también en la mediación*

Dice Rocío Garriga (2015: 545) que «Todo parece indicar que la noción de silencio se comporta como espacio resonante o –si se prefiere– como espacio para la resonancia, como instancia expresiva. En ella se dan: cambio, transformación, producción de sentido». Aunque su trabajo se centra en la presencia del silencio en el arte y, más concretamente, en el arte de las vanguardias históricas, su enunciado es válido aquí en dos sentidos. Por una parte, en cuanto que recoge la significación del silencio en ese tiempo de grandes guerras y sus consecuencias en el arte y en la sociedad. Y uno de los factores en los que apremia trabajar la mediación es en el entorno de los refugiados cuyo desplazamiento es debido a conflictos bélicos. En segundo lugar, porque coincide con el concepto de silencio que es posible derivar de la Teoría de la recepción (Iser, 1987 y Jauss, 1987) y de los de presuposición (Levinson, 1989) e implicatura (Grice, 1991) de la Pragmática a partir de las ideas de 'lo no dicho' pero sí comunicado.

Es inexcusable la observación del silencio en cualquier reflexión sobre la situación comunicativa, y más todavía lo es en aquéllas en las que se precisa un mediador. Hay que desarrollar, entre las habilidades de la competencia comunicativa, la capacidad para discernir y comprender los significados implícitos tanto en los enunciados como en la ausencia de ellos. Existen pausas y vacíos de sonidos, en los que el emisor no transmite información verbalmente, pero que tienen intenciones y contienen significados con valor semántico en sí mismos (Poyatos, 2003).

El silencio, además, tiene una identidad cultural triple para la mediación. Primero, porque en la actuación del mediador debe tener

tanto peso como importancia tiene la escucha: para salvar distancias es precisa la paciencia y la receptividad, la capacidad de empatizar con el otro, por encima de la propia palabra. En segundo lugar, porque la intervención en el intercambio comunicativo tiene una dinámica de turno de palabra y de organización de las pausas y una jerarquización de los interlocutores determinados por la cultura de cada sociedad. Y, por último, porque el significado que cada persona y cada cultura otorga al silencio es uno de los componentes que el mediador debe conocer como parte de su formación y de las habilidades que tiene que desarrollar (Vivas Márquez, 2011).

Para terminar, las enunciaciones van acompañadas de gestos, de actitudes, de una forma de presentarse la persona, de su estilo de vestir...; y también en el silencio adquieren una significación que es necesario interpretar. Desde hace tiempo esos aspectos están naturalmente incluidos en todos los trabajos sobre comunicación y análisis del discurso (Hall, 1959). Sin embargo, su descripción ya fue considerada en la retórica clásica (Reyes, 1961), en la que se explican como parte de la formación del orador en tanto que componentes del acto de comunicación. En España, Gregorio Marañón (1973), en *Psicología del gesto y Psicología del vestido y del adorno*, amplía sus investigaciones sobre estos asuntos en lógica consecuencia del concepto humanístico y holístico que asume en el ejercicio de su profesión médica. Para Marañón hay que estudiar al enfermo globalmente y considerar todas sus aristas como ser humano. Para este autor, la existencia de esos aspectos gestuales y actitudinales en la comunicación y lo inherente del lenguaje al ser humano es tan evidente que en su paradigma biográfico entre los componentes del personaje biografiado están su morfología (en la que distingue entre la 'física' y la 'prestada') y sus rasgos de habla y comunicativos (del-Olmo-Ibáñez, 2016: 78). En este sentido sus ensayos deben ser tenidos en cuenta desde la perspectiva de la mediación sanitaria.

Para terminar, todas estas consideraciones sobre 'lo no dicho' son imprescindibles en cualquier actividad de mediación, sea en el ámbito que fuere.

*La literatura como mediación lingüística y cultural*

Las posibilidades que ofrece la literatura como fuente de información y de transmisión cultural en su didáctica y en la de lenguas son sobradamente conocidas y no es objeto primordial de este trabajo entrar en ello. Pensamos, sin embargo, que son útiles unos breves apuntes en función de su instrumentalización para la actividad mediadora. M<sup>a</sup> Victoria Reyzábal (1997) presenta un análisis de la cuestión cuyas líneas generales pueden resultar muy eficaces para la integración cultural y social. En su enfoque, desde un punto de vista funcional, define la literatura como ámbito interdisciplinar e integrador con tres aspectos esenciales: el comunicativo, el literario y el de su unicidad, que precisa de desciframiento en cuanto que se construye con un código. La literatura registra la evolución de la sociedad puesto que es portadora de información implícita, tanto en la lengua con la que se construye, como en la temática que desarrolla, como en los modelos discursivos y genéricos que presenta. En resumen, la literatura impone una descodificación del significante y el significado; y, además, cada texto precisa un enfoque lingüístico-literario que convierte al lector en coautor.

Por otra parte, Pozuelo Yvancos (1988) establece entre los ‘rasgos comunicativo-literarios’ de relevancia la ‘transducción’ en el circuito de comunicación literaria. Es decir, una operación de transmisión transformadora en la que la obra es procesada continuamente en su recepción, almacenaje, traducción... Y, por tanto, la recepción es en realidad una ‘mediación’ y transmisión activa.

La lectura de textos literarios implica en sí misma la puesta en funcionamiento de una serie de operaciones cognitivas y de establecimiento de relaciones del lector con su entorno y con el contenido de la obra. Por esta razón, la literatura constituye un elemento esencial en la mediación lingüística y para la integración social y cultural.



*Los componentes de la Biografía de ciudades a partir de los de la categoría genérica superior de Biografía. su aplicación como instrumento de mediación e integración lingüística, cultural y social*

Los rasgos que presenta la Biografía de ciudades, por su pertenencia a la Biografía, y ambas a la categoría del Ensayo, hacen de ella un género idóneo para la mediación intercultural y la integración social. En el amplio espacio que abren sus rasgos ensayísticos, entre otros, aparece la sujeción a los hechos y a la historia, a los que la realidad y la existencia del personaje biografiado obligan. Pero también la reflexión libre, la interpretación, la subjetividad y la fantasía (del-Olmo-Ibáñez, 2016). Venimos sosteniendo que todos los atributos que definen el género biográfico son de gran utilidad para el proceso formativo global, tal y como se entiende desde una concepción humanística que contempla la totalidad de los constituyentes del ser humano (del-Olmo-Ibáñez, 2016: 105-131). La biografía, sin olvidar nunca que es creación literaria, y el personaje biografiado lo es aun con el anclaje en su realidad y en su historia, incluye todos esos componentes del sujeto a los que debe atenderse en su formación.

La primera consideración atiende al ingrediente didáctico, que es uno de los rasgos genéricos de la Biografía desde sus comienzos. En sus orígenes clásicos, e incluso en sus antecedentes, ya está presente la intencionalidad ejemplarizante, cuya continuidad se ha podido constatar hasta en las muestras más representativas del siglo XX y en la actualidad. Por esta razón entendemos que, de por sí, la Biografía es un género cuya explotación didáctica puede ser especialmente productiva. En el caso de la Biografía de ciudades, la pedagogía opera entre el personaje biografiado, la población real de la que se trate, y el lector, a partir de los componentes con los que se construye el primero.

Esta variedad de ciudades, si bien existe como subgénero biográfico y se conocen muestras de ella desde época clásica y hasta la actualidad, no es una de las más cultivadas, por lo que aquí tomamos como paradigmas unas obras concretas: los ejemplos de Toledo y París, de Gregorio Marañón (1967: 711-715; 1968: 703-706 y 1973: 473-474) y de Ramón Gómez de la Serna (2005) respectivamente, para su explotación en niveles de educación medios y superiores. Para la

didáctica en niveles de primaria e infantil, con aprendices con discapacidades o iletrados, y para el aprendizaje de lenguas extranjeras (Segura Palomares, 2009; Carratalá Marco, 2009 y Llin Ruiz, 2009) nos parecen idóneos los textos de Miroslav Sasek *This is.../Esto es...*<sup>6</sup>. Estos textos quizá no fueron concebidos como biografías exactamente, sin embargo, su planteamiento, los aspectos que recogen, las ilustraciones y el tratamiento que da su autor a las ciudades permiten considerarlos como tales. Además, la obra de Sasek en la web<sup>7</sup> aparece acompañada de posters, postales, diversos objetos y versiones narradas de algunas de las obras en vídeos asequibles. Por otra parte, sus textos están editados en varios idiomas. Como decimos, son modelos que se proponen para utilizar directamente o como paradigmas para adecuar las actividades a las necesidades de los diferentes grupos.

Tomando como referente el esquema del personaje de la Biografía (del-Olmo-Ibáñez, 2016: 131), iremos desde los elementos previos hasta la constitución del personaje, que en nuestro caso es una ciudad. Todo el desarrollo de esta figura está enmarcado en un espacio y un tiempo que no termina con la muerte, como ocurre con el sujeto histórico, sino que contiene implícitas su transcendentalidad y su proyección social en el futuro. En cuanto a los factores previos, tanto en el caso del ser humano como en las ciudades, existen la genealogía y la herencia que le son dadas ya en el momento de su aparición como sujetos.

El segundo grupo de componentes genéricos constitutivos del personaje biografiado los hemos considerado como ‘determinantes’ y hemos incluido en ellos las ‘circunstancias’. Están integrados por la ‘formación’ personal tanto como por la académica o intelectual, y por unos cuantos factores emparejados cuyas relaciones se establecen entre la interioridad del sujeto y su entorno: universo existencial-vida anímica, contexto-alteridad, sistema de vida-intersubjetividad y proyección social. En el caso de las ciudades también es posible identificar dichos componentes y sus manifestaciones en su proceso formativo, que reflejan el de sus habitantes y de su comportamiento social. La formación personal correspondería a la gestación de su personalidad y su forma, en tanto que posee una identidad societaria y una fisonomía; y en la

<sup>6</sup> <<http://www.miroslavsasek.com/index.html>> (consultado el 09.09.2009).

<sup>7</sup> <<http://www.sasekfoundation.eu/en>> (consultado el 09.09.2009).

académica o intelectual habría que considerar su historia y sus características culturales. Las relaciones entre el sujeto y su entorno están vinculadas con el sistema axiológico de su sociedad, y la dinámica de su organización social, tal y como queda reflejada en la de la ciudad, como entidad espacial y física; y en sus relaciones entre los vecinos o con los visitantes (turismo, discapacitados, inmigrantes...).

A partir de esa primera parte de determinantes, el individuo presenta un comportamiento que, en su vertiente social, hemos denominado 'actuación social'. En ésta se manifiesta la trascendentalidad, la significación profunda y la esfera intelectual del personaje. Y esos mismos elementos es posible identificarlos en los núcleos urbanos, en los que se pueden definir por sus rasgos o por la inexistencia de ellos. Es decir, al igual que se habla de la superficialidad o profundidad de las personas, por ejemplo, es posible calificar así a algunas ciudades. Hasta aquí, ya se ha construido una identidad del personaje.

Pero, para determinar su trayectoria de vida, son necesarias las acciones, siempre en sentido aristotélico (acciones y pensamiento). Lo que habrá que contemplar es la 'conducta total', que es lo que se entiende ya como 'objeto biográfico'. Y con esta consideración se habrá identificado la trayectoria de vida o biografía, en la que aparece, asimismo, una 'pretensión de universalidad'. No obstante, para crear un personaje biografiado hay que incardinar todo lo anterior en una prosopografía y en una etopeya que resulten en la representación literaria del personaje biografiado, que es su retrato. En lo que a las ciudades respecta, éstas presentan una identidad, y las acciones realizadas por sus habitantes pueden conformar una conducta de conjunto para su urbe, lo que permite tomarlas como objeto biográfico, cuya vida/historia de vida describe una trayectoria y en las que es posible también aceptar un sentido de universalidad. Final, y definitivamente, es preciso elaborar para la ciudad, como para la persona, ese retrato conformado por material etopéyico y prosopográfico (Gamarra, 1981). Aquí es preciso volver sobre la premisa de que se trata de un género literario y que, por tanto, no existe el requisito del rigor, sino que el género biográfico admite el falseamiento en grado diverso, la subjetividad o la parcialidad en cuanto que un personaje puede quedar retratado mediante una de sus partes. El retrato estará muy vinculado

inevitablemente a los condicionamientos del universo existencial y del entorno situacional tanto del autor de la biografía como del objeto de la misma. Y, como en el caso de la biografía, es frecuente que los autores elaboren un retrato mediante la descripción o que incluyan tanto los literarios, tomados de otros escritores, como los pictóricos, incluyendo ilustraciones en sus obras. Esta práctica es muy extrema en el caso de Gregorio Marañón y lo mismo en el caso de Sasek, quien dibuja las ciudades y sus habitantes en sus libros.

Decíamos al comenzar esta descripción del personaje biografiado que la trayectoria vital está enmarcada en un tiempo y en un espacio. Y algunas observaciones a este respecto son necesarias. En primer lugar, una precisión fundamental ateniende a los nuevos conceptos de espacio y tiempo derivados de las condiciones de la realidad virtual, sobre todo por lo que concierne a los nativos digitales. Piccione (2012: 16-34 y 2015: 16-66) describe muy acertadamente la nueva perspectiva de estos dos parámetros, analiza sus repercusiones en el proceso de narrativización y los interpreta para una actualización pedagógica. Ya no es posible calibrar las coordenadas de tiempo y espacio en ninguna reflexión que pretenda seriedad sin tener en cuenta que la realidad virtual es un entorno en el que las nuevas generaciones establecen relaciones intersubjetivas reales (interpersonales y con el entorno) y éstas influyen en su construcción como personas y en la de sus procesos cognitivos y reflexivos.

Pero, en el planteamiento genérico de la Biografía, espacio y tiempo son también dos de sus rasgos definitorios. Este género abarca todos los tiempos puesto que recoge el pasado del personaje en tanto en cuanto relata toda su vida y puesto que el sujeto ya ha completado su círculo vital con la muerte. Es un pasado también con respecto al lector y al autor. Sin embargo, éste realiza la biografía en su presente pensando en un futuro, ya que la obra está dirigida a un lector. Mientras, el lector debe tener en cuenta dos pasados, con sus universos existenciales y entornos situacionales respectivos: los del personaje y los del autor; y también dos presentes: uno, que determina la lectura de la biografía según las coordenadas de su época, y el otro, desde su presente personal. Finalmente, el futuro aparece en la proyección social y trascendente del personaje, en la que concibe el autor al escribir su obra y en la influencia que ésta ejerce en el lector y las sucesivas lecturas que de ella se hagan ulteriormente.

En esta cuestión del tiempo hay que señalar dos matices que aportan tanto Marañón como Gómez de la Serna. Los dos coinciden, también, con Zweig, en señalar el hecho de la recurrencia de biografías de los mismos personajes en diversas épocas. Gómez de la Serna (2001: 313-328) lo denomina ‘milagro de la renovación multibiográfica’, según la cual el personaje revive con cada nueva biografía; y Marañón (1968: 690) estima que la suma de todos los rasgos recogidos por diversos autores termina por dar la verdadera esencia del sujeto. Además, Marañón amplía su concepto del tiempo al previo al personaje y lo extiende al de la historia de la humanidad.

Junto con el tiempo, el espacio define los universos existenciales y los entornos situacionales de los personajes de la biografía. Y como el tiempo, intervienen igualmente en la elaboración y en la lectura de la obra los espacios del autor y del lector. Además, en los espacios hay que considerar los geográficos de nacimiento y de trayectoria de vida, y los espacios vitales cotidianos, es decir, el hogar, el lugar de trabajo, los entornos en los que se establecen las relaciones con la alteridad y los espacios virtuales en la actualidad. En lo que respecta a las ciudades, Idoia Arbillaga (2005: 119-136) ha tipificado la retórica de su descripción en el género de los Libros de viaje. Establece sus elementos a partir de dicotomías: Exterior / Interior y Ámbito natural / Ámbito poblado, que se desdobra, a su vez en la consideración de: a) Naturaleza deshabitada, la Naturaleza concebida como Exterior / b) lo Poblado, la Ciudad entendida como Interior. La autora distingue, por una parte, los procesos elocutivos concretados en las écfrasis; y, por otra, cómo se plasman tematológicamente mediante una serie de *topoi* identificados con los sitios italianos más destacados y frecuentes en los relatos de los visitantes, según los términos que siguen: la Naturaleza/ la ciudad italiana/el arte. Dentro de la ciudad también descubre Arbillaga la oposición Interior/Exterior. En lo exterior hay que considerar ‘el fuera’ o ‘desde fuera’ y los recursos descriptivos más utilizados son las visiones panorámicas o las impresiones generales aéreas de las localidades mediante enumeraciones, para representar su aspecto de conjunto y la disposición de las calles. En cuanto a los elementos de las mismas, los más frecuentes son: calles, avenidas, jardines, zonas verdes de recreo, plazas, mercados, zonas de comercio, monumentos de interés (puentes, estatuas, anfiteatros...) y los que despierten curiosidad

o asombro en el viajero. En cuanto a construcciones, las oposiciones que presentan son entre lo Sagrado/lo Profano: catedrales, iglesias y edificios píos en general/museos, universidades, palacios, restaurantes, domicilios, etc.; y entre los criterios de *Docere/Delectare*: bibliotecas, museos, universidades y construcciones académicas/restaurantes, palacios privados, domicilios, teatros, etc. El método descriptivo es igual en los dos casos: desde el exterior (fachadas, aspecto de los materiales, cubiertas de los edificios, etc.) al interior de las construcciones, en las que es habitual la écfrasis artística (elementos arquitectónicos, escultóricos, pictóricos y artes menores como inscripciones, mosaicos, altos y bajos relieves, orfebrería, colecciones de vasos, tallas o medallas), las plantas, la distribución de las estancias, la disposición de los pisos, columnas, etc.; pinturas, grabados, reproducciones de bustos, tallas de madera, mármoles, bronces...

Como es evidente, solo esta parte de la biografía de ciudades, correspondiente a su morfología de acuerdo al esquema del personaje biográfico, ya proporciona un cauce al aprendiz para su familiarización con el entorno en el que debe desenvolverse. No hay duda de que puede suponer un primer paso de conocimiento para su integración en el espacio meta o en el espacio de la lengua meta. Si bien ya han aparecido los otros rasgos de este subgénero en su relación con el tiempo y el espacio, vamos a situarlos a continuación para el personaje de la ciudad. Existe un entorno situacional que está reflejado en el pasado y en el presente de las poblaciones en su historia y en las construcciones o modificaciones debidas a las distintas épocas. En cuanto al universo existencial, ocurre lo mismo puesto que es posible su identificación sincrónica para los momentos históricos que corresponden a las zonas de la localidad. También la transcendentalidad de la ciudad como personaje es innegable: se le puede atribuir significados específicos con respecto a sus habitantes, a otras ciudades, en relación con su papel en la historia, por las facilidades de accesibilidad para personas discapacitadas, inmigrantes, o por el trato que reciben en ellas las personas excluidas o en riesgo de exclusión social... Incluso es posible identificar en la ciudad una teodicea. Como en el ser humano, la percepción de Dios y la relación que con Él mantienen sus habitantes determina la relación de la urbe con su entorno y con las personas: el número de edificios religiosos y sus características, o la ausencia de ellos, así como

el grado de humanización en su concepción urbanística, imponen el carácter de sus relaciones. Asimismo, las construcciones, religiosas o civiles, denotan la organización social, económica y política de la ciudad y son el entorno en el que el sujeto construye su ipseidad, descubre la alteridad y establece sus relaciones intersubjetivas. Todos estos rasgos aparecen en las obras de los tres autores propuestos, quienes además aplican una hermenéutica evidente en su interpretación de las ciudades y la forma de presentarlas a los lectores.

Todo lo que antecede no ofrece dificultad cuando se trata de lectores expertos, de biografías propuestas en niveles medios y superiores en una primera o en una segunda lengua. Sin embargo, la mediación se hace necesaria cuando se pretende la utilización del subgénero de la Biografía de ciudades con un objetivo didáctico. O, a la inversa, este subgénero ofrece posibilidades excepcionales para facilitar la mediación lingüística o social en L1 o L2..., para la inserción de personas discapacitadas, inmigrantes o en riesgo o situación de exclusión. La presentación, acercamiento, interpretación, explicación... de todos los componentes enumerados y descritos en lo que antecede sobre la Biografía de ciudades constituye un medio privilegiado que favorezca el conocimiento de una lengua, sus registros de acuerdo a las situaciones diversas; la familiarización con los usos sociales y la capacidad de empatía con los habitantes a partir de la comprensión de sus conductas, etc.

### *Conclusiones*

En este trabajo se ha pretendido demostrar la utilidad de la Biografía de ciudades como instrumento pedagógico en actividades de mediación en diversos ámbitos. Al relacionar conceptualmente 'mediación', literatura, géneros ensayísticos y Biografía desde una perspectiva humanística, se ha establecido asociaciones entre sus componentes que derivan en una aplicación didáctica en actividades cuyo objetivo último es la integración, a partir de la mediación lingüística.

El estado de la cuestión sobre la mediación se ha presentado tanto con respecto a su idea general como a las especificaciones en las diversas actividades del ser humano. Además, conocer su pasado permite comprender el presente, y una breve reflexión sobre la intervención

de mediadores y su actividad en épocas anteriores nos ha situado en una realidad contrastable con la nuestra. No obstante, el análisis de las investigaciones sobre este tema actualiza los elementos que intervienen en los procesos cognitivos y de pensamiento y advierte de modificaciones sustanciales en las concepciones del tiempo y del espacio por influencia de las tecnologías y sus continuas transformaciones.

Sin embargo y a pesar de cualquier modificación reciente, la interacción se establece siempre entre un sujeto personal y su entorno. Y este entorno se materializa en un espacio que comparte con otros sujetos. Con el espacio y entre ellos se relaciona intersubjetivamente desde sus especificidades en unos límites temporales. Por esta razón, hemos puesto como objetivo finalista la integración de la persona en su entorno y, atendiendo a la perspectiva humanista e inclusiva, se ha visto cómo se hace precisa la mediación en los espacios de educación, sanitario, político, social, de conflictos o guerras, de migraciones, de necesidades concretas por discapacidad... Igualmente, ha quedado expuesta la importancia de la competencia comunicativa, en su sentido amplio y completo, en las acciones mediadoras puesto que solo son posibles a través de la comunicación. Por tanto, se ha precisado particularmente la importancia de la mediación lingüística entre interlocutores que no comparten un mismo código, pero subrayando la inseparabilidad de las subcompetencias lingüística y cultural. Asimismo, en lo que se refiere a estas dos, se ha detallado la significación de los lenguajes no verbales y se ha subrayado el valor que conceden las diferentes culturas al silencio y el significado con que lo introducen los individuos en sus discursos y en sus relaciones personales.

Así, han quedado definidas la mediación, frente a interpretación y traducción de acuerdo a diversos estudios y según el *MERC*; la inseparabilidad de las mediaciones lingüística y cultural y un desglose de la funcionalidad de la literatura como transmisora de contenidos culturales y universos existenciales.

Todo lo previo pretende encontrar su concreción en la Biografía de ciudades. Como género ensayístico permite la inclusión de todos los tipos de discurso, de todos los géneros literarios y de todas las modalidades de enunciación que aparecen en las situaciones comunicativas reales del ser humano. Como Biografía, propicia la reflexión sobre uno mismo, en el elemento autobiográfico que forma parte de ella, y sobre



el otro en cuanto que se trata de un texto sobre una alteridad concreta. Es así que en todos los elementos que la componen puede reconocerse el lector y evidencian en el personaje biografiado relaciones con otras personas y con el entorno entre las que puede establecer paralelismos. La Biografía de ciudades nos parece especialmente idónea para las actividades de mediación lingüística con finalidad integradora porque en la ciudad está reflejada la cultura, la historia, las relaciones sociales, la teodicea de sus habitantes; tiene una proyección y una trascendencia, una morfología e identidad que permiten que sea considerada como personaje. Los componentes de tiempo y espacio poseen en este caso una importancia destacada para la integración lingüística en L1 o L2, para la integración social mediante el conocimiento del entorno relacional, la integración de personas con diversas discapacidades o en situaciones de exclusión, y para migrantes.

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Antonella Poce e Maria Rosaria Re<sup>1</sup>

*Tecnologia critica e didattica museale. Il progetto Erasmus+ DICHE*

ABSTRACT:

Nel seguente contributo sono presentate le attività condotte dal gruppo di ricerca LPS (Laboratorio di Pedagogia Sperimentale) e CDM (Centro di Didattica Museale) dell'Università Roma Tre nell'ambito del progetto Erasmus+ KA2 DICHE (*Digital innovation in cultural and heritage education in the light of 21st century learning*). Destinatari privilegiati sono gli alunni di Scuola Primaria, che, grazie all'innovazione digitale in ambito museale, hanno la possibilità di sviluppare competenze trasversali quali la creatività, la comunicazione, la collaborazione e il pensiero critico. La formazione dei docenti in servizio e in formazione nonché degli operatori museali circa le nuove metodologie didattiche risulta fondamentale per assicurare la progettazione di percorsi educativi innovativi e inclusivi.

PAROLE CHIAVE: Didattica museale, Strumenti digitali, Competenze trasversali, Scuola Primaria.

ABSTRACT:

The present report describes the activities foreseen by the Erasmus+ project DICHE (*Digital Innovation in Cultural and Heritage Education in the light of 21st century learning*) carried out by LPS (Laboratory of Experimental Research) and CDM (Centre of Museum Education) research group – University Roma TRE. The DICHE project's aim is to integrate digital resources and opportunities in primary education in general, and in cultural and heritage education in particular. This way, children have the opportunity to develop their transversal skills like Creativity, Communication, Collaboration and Critical Thinking. Moreover, teachers, prospective teachers and museum educators are educated about the use of digital tools in order to promote the design of innovative teaching methods in cultural and heritage education.

KEYWORDS: Museum education, Digital tools, Transversal skills, Primary School.

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## 1. *Il progetto DICHE*

Il progetto Erasmus+ KA2 DICHE (*Digital innovation in cultural and heritage education in the light of 21st century learning*) ha preso avvio in settembre 2015 e vede la partecipazione di sei partner provenienti da quattro diversi Paesi europei (Paesi Bassi, Belgio, Gran Bretagna e Italia): Marnix Academie, Stichting Landschap Erfgoed Utrecht, ATIT, Loughborough University, Società Cooperativa Culture, LPS - Laboratorio di Pedagogia Sperimentale e CDM – Centro di Didattica Museale dell'Università degli Studi Roma Tre.

Fino a febbraio 2018, il partenariato sarà coinvolto in attività di sviluppo e promozione di risorse digitali nell'educazione al patrimonio artistico e culturale nazionale e internazionale, soprattutto nell'ambito della Scuola Primaria. Docenti in servizio, futuri insegnanti, educatori museali e alunni entreranno in contatto con percorsi didattici innovativi in cui la fruizione dei beni artistici e culturali di un territorio si sviluppa grazie all'utilizzo di strumenti digitali, tecnologici e interattivi.

Tali linee di azione risultano coerenti con gli obiettivi che l'Unione Europea ha definito in campo educativo, tramite la pubblicazione della Raccomandazione 2006/962/CE<sup>2</sup> del Parlamento europeo e del Consiglio, del 18 dicembre 2006, relativa a competenze chiave per l'apprendimento permanente (Gazzetta ufficiale L. 394 del 30.12.2006, p. 10): la necessità di integrare i sistemi di apprendimento odierni con le nuove strumentazioni digitali risulta fondamentale in vista dello sviluppo di competenze di cittadinanza attiva. I docenti e i futuri insegnanti, prendendo in considerazione i suddetti obiettivi, devono essere in grado non solo di utilizzare gli strumenti tecnologici, ma anche di costruire percorsi didattici in cui il loro utilizzo sia promotore di sviluppo di competenze trasversali e sostenitore di una costruzione di conoscenza critica della realtà. Il progetto DICHE presenta, infatti, tra le sue finalità anche lo sviluppo delle competenze digitali, nonché delle competenze di insegnamento (progettazione, valutazione, analisi) dei docenti (in formazione e non), con l'obiettivo di formare insegnanti che sappiano promuovere nei propri alunni le competenze necessarie per vivere nella realtà del 21° secolo.

Gli alunni, a loro volta, veri destinatari degli scenari di insegnamento ideati e realizzati all'interno del progetto DICHE, avranno la

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<sup>2</sup> <<http://eur-lex.europa.eu/legal-content/IT/TXT/?uri=celex:32006H0962>> (ultimo accesso: 13.02.2017).

possibilità di sviluppare la propria conoscenza del patrimonio culturale, artistico e museale, locale e internazionale, in percorsi di apprendimento costruiti *ad hoc* per lo sviluppo di competenze trasversali e disciplinari. In particolare, si intende sviluppare le cosiddette *4C skills* (Pensiero critico, Creatività, Comunicazione e Collaborazione), già definite da Trilling e Fadel (2009) come quell'insieme di conoscenze, abilità e attitudini fondamentali per lo sviluppo di competenze più complesse, nonché per la realizzazione personale, l'inclusione sociale e l'occupazione futura.

Gli scopi prioritari del progetto sono riassumibili nei seguenti punti:

- sviluppare un insegnamento di alta qualità, rendendo i docenti consapevoli riguardo l'uso delle nuove tecnologie nell'insegnamento e le nuove metodologie didattiche;
- far fronte alle sempre più complesse realtà delle classi scolastiche diversificando i percorsi di apprendimento in base ai diversi background sociali, culturali e personali. La creazione di unità didattiche in cui sia centrale la tematica dell'inclusione permette alle varie diversità di diventare il centro promotore della cultura e dell'esperienza educativa, nonché occasione di confronto e discussione. Contemporaneamente, le risorse digitali assieme al patrimonio artistico-culturale possono contribuire alla manifestazione vivida della diversità, sia essa in modi e tempi storici diversi, contribuendo alla costruzione di nuova conoscenza.
- adottare nuove metodologie didattiche e strumenti digitali in ambito educativo, promuovendone lo sviluppo anche in contesti accademici e, conseguentemente, rendendo i futuri docenti consapevoli delle potenzialità.

Gli obiettivi specifici del progetto DICHE sono i seguenti:

- sviluppare una *Common Research Agenda* sull'uso di strumenti digitali nell'educazione al patrimonio artistico e culturale per lo sviluppo delle competenze del 21° secolo;
- ideare e realizzare un menu digitale di scenari di insegnamento per docenti e futuri docenti in cui l'utilizzo di strumenti digitali avvenga in contesti di promozione di musei e siti archeologici e di sviluppo delle competenze del 21° secolo;
- attuare una fase pilota del progetto in cui realizzare gli scenari di insegnamento ideati in contesti scolastici nazionali;



- condividere i risultati e avviare la creazione di un partenariato che continui la collaborazione nell'ambito dell'innovazione tecnologica in ambito artistico-culturale, soprattutto in riferimento alla Scuola Primaria.

I partner coinvolti nel progetto hanno tutti esperienze nei tre campi dell'educazione al patrimonio artistico e culturale, dello sviluppo dell'uso delle tecnologie in ambito educativo e della didattica per la scuola primaria. La diversa formazione di ricerca ed esperienza favorisce la presenza di approcci diversi e complementari agli obiettivi principali e specifici del progetto, alle attività e ai prodotti finali.

## 2. *Stato dell'arte*

La competenza digitale è una delle otto competenze richieste al cittadino europeo alla fine del percorso obbligatorio di scuola. L'acquisizione di tale competenza non deriva esclusivamente dal saper utilizzare gli strumenti digitali: la tecnologia evolve e cambia quotidianamente e lo studente deve essere in grado di declinare le proprie capacità nell'utilizzo di strumenti sempre nuovi e diversi. Inoltre, le nuove tecnologie e, in particolare, gli strumenti del Web mettono a disposizione del fruitore una quantità elevata di informazione di cui tutti possono diventare produttori, al di là delle competenze specialistiche e settoriali, aumentando i rischi legati all'autorevolezza delle fonti e contribuendo alla diffusione di una cultura priva di profondità perché basata sulla rapidità e transitorietà dei dati (Poce *et al.*, 2015). Lo studente di oggi, adulto del domani, deve imparare a usare le TIC per reperire, conservare, valutare, produrre e scambiare dati e informazioni, comunicando con altre persone in rete e attraverso l'uso di specifici strumenti digitali.

La didattica da tempo si è interrogata circa le modalità di superamento di tali problematicità legate alla tecnologia. Da diversi anni, il Laboratorio di Pedagogia sperimentale del Dipartimento di Scienze della Formazione dell'Università di Roma Tre ha avviato una linea di ricerca finalizzata allo sviluppo e alla promozione di una tecnologia critica e intelligente, con l'obiettivo primario di avviare gli studenti ad un uso critico della tecnologia che, al tempo stesso, incrementi

il proprio pensiero critico (Poce *et al.*, 2012). Applicando modelli e strutture consolidate in diverse applicazioni interdisciplinari del progetto, gli studenti sono stati coinvolti in molteplici attività di analisi e riflessione, individuali e di gruppo, su diversi argomenti: dalla presentazione di contenuti culturali e disciplinari strutturati secondo la *lectio magistralis* medievale (es. Descartes, Rousseau) alla valutazione di materiali didattici online ad accesso gratuito (i *Massive Open Online Courses* - MOOC). L'obiettivo di questi progetti di ricerca è stato fornire agli studenti una base strutturale e strumentale di lungo periodo, adattabile a diversi contesti e che superasse «l'enfasi posta nel sostenere le potenzialità educative delle proposte strumentali, troppo spesso sulla base di analogie e suggestioni di breve durata» (Vertecchi, 2012: 7). Le ricerche effettuate finora hanno evidenziato come la creazione di percorsi educativi realizzati *ad hoc*, destinati allo sviluppo di specifiche competenze e strutturati con rigore pedagogico sostengono lo sviluppo del pensiero critico e di competenze quali le capacità argomentative, di ricerca, di comunicazione e progettazione.

Nello stesso tempo, il ruolo della creatività e dell'innovazione nello sviluppo della persona umana è essenziale, nonostante sia ancora inadeguatamente preso in considerazione dalle politiche educative, soprattutto nel mondo occidentale. Secondo le dichiarazioni di Siøvoll (Skogen Siøvoll, 2010), l'istituzione, nel 2009, dell'Anno Europeo della Creatività e dell'Innovazione, durante il periodo di crisi finanziaria, ha rafforzato l'idea della forte connessione esistente tra questi due elementi: il loro uso è considerato essenziale per sviluppare nuovi modi di conoscenza, nuove opportunità e nuove idee, nonché ulteriori competenze, come l'imprenditorialità.

Il patrimonio artistico e culturale è per sua natura portatore e promotore di competenze significative per la vita dell'uomo: l'opera d'arte e i monumenti storici comunicano con il fruitore di ieri e di oggi, in un dialogo continuo e contemporaneamente diverso. Nel contempo, entrare in contatto con le opere dei grandi autori e delle civiltà passate consente lo sviluppo non solo di competenze disciplinari (storia, storia dell'arte) ma anche di quelle trasversali, *in primis* la creatività. Non a caso, le Indicazioni Nazionali del primo ciclo d'istruzione (D.M. 254 del 16 novembre 2012 in G.U. n. 30 del 5 febbraio 2013) sottolineano l'importanza dell'arte e della creatività per lo sviluppo completo dell'alunno, fin dalla scuola dell'infanzia:

«I bambini esprimono pensieri ed emozioni con immaginazione e creatività: l'arte orienta questa propensione, educando al piacere del bello e al sentire estetico. L'esplorazione dei materiali a disposizione consente di vivere le prime esperienze artistiche, che sono in grado di stimolare la creatività e contagiare altri apprendimenti. [...] L'incontro dei bambini con l'arte è occasione per guardare con occhi diversi il mondo che li circonda. I materiali esplorati con i sensi, le tecniche sperimentate condivise nell'atelier della scuola, le osservazioni di luoghi (piazze, giardini, paesaggi) e di opere (quadri, musei, architetture) aiuteranno a migliorare le capacità percettive, coltivare il piacere della fruizione, della produzione e dell'invenzione e ad avvicinare alla cultura e al patrimonio artistico»<sup>3</sup>.

L'importanza della sperimentazione diretta in contesti artistici, quali i musei, è sottolineata anche da Van Boxtel (2009): l'incontro con gli oggetti museali non solo rende la storia tangibile agli studenti, ma contribuisce a un coinvolgimento diretto degli alunni stessi. Essi immaginano come tali oggetti erano nel passato e si sentono collegati alle civiltà, ai luoghi e alla società di un tempo. Questa sensazione di *connectedness* (connessione) stimola la motivazione intrinseca dello studente ad imparare, intensificando l'elemento educativo del patrimonio artistico e culturale.

Date tali premesse, l'applicazione delle risorse digitali nel campo dell'educazione al patrimonio artistico e culturale per la scuola primaria risulta essere una sfida di innovazione: la didattica museale, da anni interessata a ricerche in questo campo, ha la possibilità di allargare gli ambiti di integrazione delle tecnologie e, nel contempo, sviluppare nuove metodologie didattiche per i fruitori più piccoli. Contemporaneamente, la diffusione di una metodologia didattica efficace, ideata anche in ambito accademico e tra gli insegnanti di scuola primaria, consentirebbe una migliore conoscenza e preparazione della futura e attuale classe degli insegnanti e, inoltre, di valutare nell'immediato le possibili conseguenze nel contesto dell'insegnamento, oltre che dell'apprendimento.

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<sup>3</sup> *Indicazioni Nazionali per la Scuola dell'Infanzia e del Primo Ciclo di Istruzione*, p. 20.

### 3. *Il Ruolo dell'Università degli Studi Roma TRE*

Il Laboratorio di Pedagogia Sperimentale (LPS) e il Centro di Didattica Museale (CDM) sono i due centri di ricerca dell'Università degli Studi Roma Tre coinvolti nel progetto DICHE. I contributi dei gruppi LPS e CDM si concentrano sia nella parte teorica del progetto (sviluppo della *Research Agenda* e delle *Research Questions*), sia nella fase di progettazione degli scenari d'insegnamento che in quella di realizzazione della fase pilota. Nello specifico, l'esperienza maturata dal gruppo LPS nell'ambito dell'apprendimento a distanza e dell'inserimento delle tecnologie in campo educativo risulta importante per lo sviluppo di tutte le attività progettuali; il CDM, grazie alla collaborazione con organismi internazionali (ICOM) e le numerose ricerche effettuate nel campo della didattica museale, fornisce l'apporto specifico necessario alla definizione dei percorsi da sperimentare.

L'impianto teorico alla base del progetto, definito da tutti partner, è stato racchiuso in un documento di ricerca (la *Research Agenda*) realizzato dall'Università degli Studi di Roma TRE in collaborazione con Loughborough University. Il programma di ricerca, nato grazie ai contributi dei vari Paesi partner, presenta le questioni oggetto di indagine, le basi teoriche e pratiche fino ad ora sviluppate negli ambiti di interesse del progetto e le specificità didattiche e culturali dei vari Paesi, al fine di definire le linee di sviluppo delle attività progettuali.

Per quanto concerne la fase pilota del progetto, l'Università degli Studi Roma TRE contribuirà con circa 235 partecipanti, dei quali 25 studenti del Corso di Laurea in Scienze della Formazione Primaria, che saranno formati in merito all'uso delle tecnologie per l'educazione al patrimonio artistico culturale nella scuola primaria, 200 bambini di scuola primaria che assisteranno alle elezioni ideate e realizzate dagli studenti universitari e 10 insegnanti in servizio che parteciperanno alle attività di formazione e progettazione didattica.

### 4. *La Research Agenda*

Come specificato precedentemente, la *Research Agenda* è il documento che definisce le basi teoriche di tutte le attività ideate e che si andranno a realizzare nel progetto DICHE; attraverso tale documento, le

università, gli insegnanti e gli educatori museali hanno a disposizione un quadro di riferimento per l'utilizzo di strumenti digitali nell'educazione al patrimonio e, contemporaneamente, una base di partenza per nuove ricerche accademiche e sperimentazioni future. La *Research Agenda*, gli obiettivi del progetto DICHE e le attività devono essere visti alla luce del processo di apprendimento nel 21° secolo, in cui risulta necessario fornire metodi innovativi per lo sviluppo di competenze di base e trasversali.

Date tali premesse, il documento è stato creato includendo i seguenti punti:

- domande accademiche e di ricerca, nell'ambito dell'educazione al patrimonio culturale, che richiedono ulteriori approfondimenti;
- panoramica generale dello stato dell'arte;
- ricognizione della letteratura accademica sulle modalità di valorizzazione delle competenze del 21° secolo;
- casi di studio prodotti dai partner DICHE circa l'uso di strumenti digitali in ambito educativo;
- elenco di risorse digitali già disponibili e collegate a ciascun caso di studio prodotto;
- rapida panoramica dei sistemi educativi dei paesi partner del progetto;
- un glossario audio-video riguardante le *4C skills*: Creatività, Comunicazione, Pensiero critico, Collaborazione.

I principali destinatari del documento realizzato sono i docenti e futuri docenti di scuola primaria, gli educatori museali e i ricercatori universitari. Le domande di ricerca, lo stato dell'arte circa l'integrazione di strumenti digitali nell'educazione al patrimonio culturale e la ricognizione della letteratura accademica riguardante lo sviluppo delle competenze del 21° secolo possono essere utilizzati dai ricercatori come base teorica da cui sviluppare nuovi progetti di ricerca. I casi di studio prodotti dai partners e la raccolta di risorse digitali possono aiutare insegnanti, futuri insegnanti ed educatori nella creazione di percorsi di apprendimenti innovativi in cui l'obiettivo principale sia lo sviluppo della comunicazione, della collaborazione, del pensiero critico e della creatività degli alunni destinatari. Gli educatori, inoltre, hanno a disposizione una rapida panoramica dei sistemi educativi di diversi Paesi partner del progetto, grazie alla quale possono approfondire i diversi sistemi didattici, culturali e di diffusione degli strumenti digitali in Europa.

Per quanto concerne la definizione delle competenze del 21° secolo, il partenariato ha deciso di utilizzare uno specifico modello di classificazione: il *KSAVE model*, molto diffuso nella comunità tecnologica e scientifica. Le dieci competenze trasversali vengono raggruppate in quattro diverse categorie:

#### Modalità di pensiero

- Creatività e innovazione
- Pensiero critico, capacità di risolvere problemi, capacità decisionale
- Imparare ad apprendere, meta-cognizione

#### Modalità di lavoro

- Comunicazione
- Collaborazione (*teamwork*)

#### Strumenti di lavoro

- Competenza informativa (comprende la capacità di accedere alle risorse alle fonti, riconoscere l'attendibilità o non attendibilità delle evidenze)
- Competenze inerenti alle tecnologie dell'informazione (*ICT literacy*)

#### Vivere nel mondo

- Cittadinanza – locale e globale
- Vita e carriera
- Responsabilità Personale e sociale – compresa la competenza e consapevolezza culturale

Tale modello è stato realizzato a partire da una nuova concezione di competenze chiave nel 21° secolo, concezione legata a una nuova e contemporanea idea di conoscenza e uso delle tecnologie. La diffusione di informazione e la comunicazione attraverso le nuove tecnologie hanno modificato la vita e il lavoro di ognuno di noi: la condivisione di dati e informazioni, la collaborazione con altre persone e l'utilizzo di strumenti digitali sono parte integrante della quotidianità. Contemporaneamente, la realtà economica e lavorativa cambiano velocemente e ognuno di noi deve risolvere problemi sempre più complessi, al fine di creare nuove conoscenze per una produttività futura. Il *KSAVE model* risulta innovativo in quanto

raggruppa un insieme di conoscenze, abilità, atteggiamenti, valori indispensabili per il cittadino del 21° secolo: esso è un importante approccio teorico alla definizione delle competenze e per tale motivo è stato scelto dai partner del progetto DICHE.

Al fine di definire il fulcro di tutte le attività del progetto DICHE, sono state individuate e inserite nella *Research Agenda* le domande di ricerca (*Research Questions*), che saranno analizzate ed esplorate durante tutto il corso del progetto:

- quali sono gli approcci digitali che sviluppano al meglio le competenze del 21° secolo e l'educazione al patrimonio culturale?
- quali competenze dei docenti devono essere sviluppate per garantire un approccio pedagogico efficace nell'utilizzo degli strumenti digitali in ambito educativo?
- quali pratiche educative promosse da docenti e futuri docenti possono sviluppare al meglio le *4C skills* negli alunni?

La *Research Agenda* è stata resa disponibile dal mese di settembre 2016 sul sito del progetto<sup>4</sup> ed è continuamente aggiornata grazie ai contributi dei partner. Grazie alla pubblicazione online, tutti i possibili fruitori possono entrare in contatto con le ricerche e i testi prodotti dal partenariato DICHE, approfondendo le proprie conoscenze e rimanendo aggiornati circa gli ambiti di studio affrontati.

## 5. *Il Menu digitale di scenari di insegnamento*

Il menu digitale di scenari di insegnamento è lo strumento alla base della fase pilota del progetto DICHE. Partendo dalle basi teoriche e dalle domande di ricerca contenute nella *Research Agenda*, i partner hanno ideato un database online in cui sono contenuti una serie di scenari di insegnamento per l'educazione al patrimonio artistico e culturale attraverso l'uso di strumenti digitali. App, smartphone e tablet, sensori digitali sono inseriti in percorsi di apprendimento strutturati per lo sviluppo di competenze negli alunni dai 6 ai 13 anni, in cui i musei e i siti archeologici risultano i luoghi promotori dei processi educativi.

Il menu, realizzato tecnicamente dal partner ATIT, è stato reso

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<sup>4</sup> <[http://www.diche-project.eu/documents/DICHE\\_research-agenda\\_v2016-03.05.pdf](http://www.diche-project.eu/documents/DICHE_research-agenda_v2016-03.05.pdf)> (ultimo accesso: 13.02.2017).

disponibile sul sito del progetto<sup>5</sup> a partire dal mese di settembre 2016: docenti, futuri docenti ed educatori possono effettuare ricerche di scenari didattici in base all'età degli alunni, allo strumento digitale da utilizzare e al luogo in cui sviluppare il percorso educativo (classe, museo, sito archeologico). Gli scenari didattici inseriti nel menu e consultati costituiscono la base di sviluppo per la realizzazione di nuovi scenari e percorsi didattici in contesti diversi.

Durante la fase pilota del progetto DICHE, docenti, futuri docenti ed educatori verranno istruiti circa le funzionalità del menu e le potenzialità di sviluppo dei percorsi educativi proposti: impareranno a conoscere i diversi strumenti digitali, il modo migliore attraverso il quale promuovere l'educazione al patrimonio culturale, le attività che maggiormente contribuiscono allo sviluppo delle competenze di base e trasversali, le nuove metodologie didattiche (quali l'*Object Based Learning* e il *Digital Storytelling*) assieme alle modalità di valutazione delle competenze e delle conoscenze acquisite.

#### 6. MOOC, tecnologia critica e didattica museale: la prima attività pilota di Roma TRE

Nell'ambito delle attività del progetto DICHE, il gruppo di ricerca LPS e CDM ha ideato e realizzato durante il corso dell'anno accademico 2015-2016 una prima attività pilota destinata agli studenti del Corso di Laurea in Scienze dell'Educazione. Nello specifico, è stato ideato e realizzato un Corso di Tirocinio Interno dal titolo *MOOC, tecnologia critica e didattica museale*, in cui gli studenti sono stati chiamati a ideare, realizzare e valutare percorsi MOOC (*Massive Open Online Courses*) nell'ambito della didattica museale.

Gli obiettivi del Corso di Tirocinio sono i seguenti:

- partecipare a gruppi di discussione critica in rete su argomenti specifici;
- approfondire tematiche di interesse didattico sotto la guida di un tutor online;
- sviluppare e creare corsi MOOC in ambito della didattica museale;
- sviluppare e applicare strumenti di valutazione specifici per l'istruzione a distanza;

<sup>5</sup> <<http://www.diche-project.eu/resources>> (ultimo accesso: 13.02.2017).



- saper utilizzare una piattaforma elettronica per l'istruzione a distanza;
- saper utilizzare un foglio di scrittura condivisa per l'ideazione di un progetto di gruppo;
- conoscere i MOOC e le loro potenzialità.

I 42 studenti partecipanti sono stati impegnati in una serie di attività singole e di gruppo, sia in presenza che a distanza: l'ideazione di un percorso didattico MOOC destinato ad alunni di scuola primaria riguardante un oggetto museale conservato in un museo della città di Roma, la realizzazione di uno dei video del MOOC progettati nell'attività precedente, la valutazione dei percorsi didattici MOOC e dei video, prodotti dagli altri gruppi di studenti, attraverso l'utilizzo di un apposito strumento di valutazione.

Le attività a distanza sono state realizzate attraverso la piattaforma *Orbis dictus* ([www.orbisdictus.it](http://www.orbisdictus.it)), ambiente virtuale che ha consentito la condivisione di materiali tra membri appartenenti allo stesso gruppo, la comunicazione attraverso forum di gruppo e generale, la consultazione di materiale fornito dai tutor e la consegna dei lavori prodotti. La scrittura del progetto e del percorso didattico è stata effettuata tramite un programma di scrittura condivisa (GoogleDocuments©) mentre la realizzazione del video attraverso un programma on-line (Powtoon©) che consente anche la condivisione del lavoro attraverso il canale YouTube.

L'attività di valutazione, realizzata tramite la metodologia del *peer assessment*, ha permesso ai ricercatori LPS di venire in possesso di una serie di dati interessanti circa l'analisi e la valutazione dei lavori prodotti dai gruppi di studenti. La qualità dei corsi ideati dagli studenti ha ricevuto una valutazione positiva, soprattutto in base alla relazione tra contenuti proposti e destinatari del percorso didattico e al design e alla qualità grafica dei video. Le competenze su cui maggiormente si sono focalizzati i progetti educativi sono stati quelli di collaborazione e creatività; lo sviluppo del pensiero critico è stato preso in considerazione dai percorsi didattici multidisciplinari, in cui le conoscenze circa un oggetto museale o un sito archeologico sono state messe in relazione con altri ambiti disciplinari, quali le scienze fisiche, la musica, l'architettura.

I dati che emergono dal questionario di valutazione del Corso di Tirocinio, compilato dagli studenti durante l'ultimo incontro in presenza, rivelano che il prodotto digitale MOOC, prima della frequentazione

del corso, era sconosciuto al 77% degli studenti. Al termine del corso, l'89% degli studenti ritiene che utilizzerà programmi di realizzazione di video durante il futuro lavoro di educatori, il 53% userà piattaforme destinate all'educazione a distanza e il 72% ha dichiarato di voler costruire un percorso MOOC. Nel complesso, gli studenti hanno dichiarato che il corso di tirocinio ha sviluppato in loro competenze trasversali quali creatività e comunicazione, oltre a competenze specifiche del percorso di studi, quali analisi, progettazione, realizzazione e validazione di percorsi didattici e strumenti valutativi, non che l'utilizzo di strumenti digitali in ambito educativo.

**Prima di partecipare al tirocinio, avevi mai sentito parlare di MOOC?**

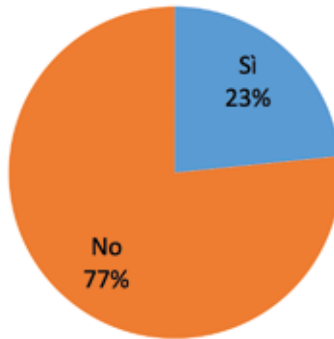


Figura 1 – Grafico a torta delle risposte alla domanda 1 del Questionario di Valutazione del corso

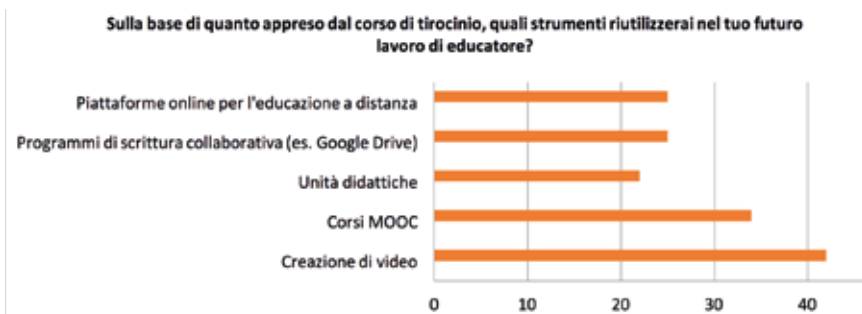


Figura 2 – Grafico delle risposte alla domanda 7 del Questionario di Valutazione del corso

Si riportano qui di seguito le parole di uno studente che ha frequentato il Corso di Tirocinio Interno *MOOC, tecnologia critica e didattica museale*:

«Ho imparato ad utilizzare uno strumento per insegnare, per comunicare in modo migliore i contenuti didattici. Ho imparato ad utilizzare il MOOC e ho imparato nozioni utili a livello didattico. In più attraverso la valutazione degli altri MOOC e l'esposizione dei contenuti didattici connessi ho imparato cosa è meglio fare e cosa non sia il caso di fare. La piattaforma online per educare a distanza è un'idea fantastica e interattiva».

Il corso di tirocinio qui descritto è stato riproposto durante l'anno accademico 2016-2017, con una struttura simile e con la possibilità, da parte degli studenti, di partecipare alla competizione di carattere internazionale *CECA Best Practice Award*. Gli studenti impegnati nella competizione, dovranno stendere una proposta progettuale a partire dal percorso educativo da loro ideato e realizzato e presentarla per la competizione internazionale: nel caso di vittoria, parteciperanno alla conferenza internazionale annuale del gruppo ICOM CECA (*International Council Of Museum - International Committee for Education and Cultural Action*).

## 7. *Sviluppi futuri: la fase pilota in Italia*

La fase pilota del progetto DICHE sarà effettuata in Italia e in Olanda per opera di quattro dei sei partner totali. In Italia, l'Università degli Studi Roma TRE lavorerà in stretto contatto con il partner Coopculture per l'ideazione e la realizzazione delle attività previste dal progetto.

A una prima fase di reclutamento, destinata al contatto e alla selezione di scuole primarie e secondarie di primo grado interessate a partecipare al progetto, è seguita, a partire dal mese di ottobre 2016, una fase di formazione di docenti e studenti del corso di laurea in Scienze della Formazione Primaria. Il gruppo di ricerca LPS e CDM ha organizzato delle lezioni aventi come tematiche la didattica museale, l'innovazione digitale attraverso l'educazione al patrimonio artistico e culturale, le nuove metodologie didattiche (*Object Based Learning* e *Digital Storytelling*), le basi teoriche del progetto DICHE e il funzionamento del menu digitale degli scenari di insegnamento.

I docenti e gli studenti universitari che prenderanno parte a questo ciclo di lezioni saranno poi affiancati da educatori museali in una serie di visite guidate ai musei del circolo Musei di Roma: le uscite sul campo hanno la finalità di mettere in contatto i docenti e i futuri docenti con il sito museale e gli oggetti che saranno il focus delle attività didattiche da progettare e costituiranno l'occasione di mettere in pratica i percorsi educativi innovativi realizzati.

L'ideazione di tali percorsi, effettuata a partire dagli scenari innovativi di insegnamento a disposizione, sarà effettuata dagli studenti del corso di laurea in Scienze della Formazione Primaria e la loro realizzazione avverrà grazie all'aiuto dei docenti delle scuole selezionate per la fase pilota. Solo successivamente, i percorsi didattici verranno proposti agli alunni che, quindi, entreranno in contatto con il patrimonio artistico e culturale di Roma in maniera innovativa e attraverso l'utilizzo di strumenti digitali.

Tabella 1 - *Tabella riassuntiva del numero e tipologia dei partecipanti alla fase pilota del progetto DICHE*

Partecipanti	COOPCULTURE	UNIROMATRE
Alunni di Scuola Primaria	-	200
Docenti di Scuola Primaria	-	10
Studenti Roma TRE (SFP)	-	25
Alunni di Scuola Secondaria di Primo Grado	400	-
Docenti di Scuola Secondaria di Primo Grado	20	-

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Kinga Łapot-Dzierwa and Robert Małoszowski<sup>1</sup>

*The model of instructing students of pedagogy in the field of education through art*

ABSTRACT:

This article presents an original concept of pedagogy students' education in the field of education by art. It shows the meritocratic competence and practical training of the future kindergarten and elementary school teachers. The program was prepared by a team of researchers of the Institute of Preschool and School Pedagogy (Department of Artistic Education).

The basic question is: who can be entrusted with the conduction of art classes in early childhood education? This is a very current topic, inspiring a lot of emotion, especially among teachers, always recurring during the important changes taking place in the Polish education system.

KEYWORDS: competencies, education through art, teacher

*Introduction*

The article is devoted to the presentation of the author's original concept of instructing students of pedagogy in the field of education through art. It demonstrates the way in which the substantive and practical competences of future kindergarten and grade 1-3 teachers are developed. The program has been prepared by a team of scientific employees of the Institute of Pre-school and School Education (Department of Artistic Education) of the Pedagogical University of Cracow.

The basic question is, who, in early childhood education, should be entrusted with the task of conducting art classes? It is a very current topic, arousing a lot of emotions, especially among teachers, always coming back during important changes in the Polish system of education.

I will try to base my considerations on my many years of experience

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as a university teacher – on the one hand, an educated, active artist, and on the other hand, a pedagogue working in the area of artistic education. This experience has allowed me to make some summaries and has also given me an opportunity to take a specific stand.

Therefore, let us look for an answer to the question posed at the beginning:

- Who should conduct art classes in early childhood education?

The answer seems simple. It is contained in the provisions of the Core Curriculum of 2008, where we can read the following:

«In grades 1-3 of primary school, the education of the children shall be entrusted to one teacher. The task of conducting classes in music education, artistic education, physical education, computer science, and a modern foreign language may be entrusted to properly qualified teachers. Health education classes may be conducted with the participation of a specialist in the field of public health or nutrition – a nurse or a school nurse»<sup>2</sup>.

This simplicity is only apparent.

The key to solving this problem may be competences, which are a prerequisite for a well-performed profession (in this case, one of a teacher).

### *The competences of teachers*

The idea of competences has been and will be the subject of discussion for many researchers.

In *Encyklopedia pedagogiczna XXI wieku* [The 21st-century Encyclopedia of Pedagogy], we can find the following definition:

«[...] one of important teaching concepts, to which it is difficult to assign a clear meaning due to the colloquial connotations of this term, strongly rooted in the pedagogical thinking, and, as a result, its susceptibility to interpretation with value judgments».  
(Pilch, 2004: 693)

One may be tempted to say that the competences of teachers are a compilation of personality characteristics (certain predispositions),

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<sup>2</sup> <[http://bip.men.gov.pl/men\\_bip/akty\\_prawne/rozporzadzenie\\_20081223\\_zal\\_2.pdf](http://bip.men.gov.pl/men_bip/akty_prawne/rozporzadzenie_20081223_zal_2.pdf)> (last access: 30.03.2014). Own translation – KŁD.

knowledge, and skills (gained in the course of professional preparation, as well as during actual work). Therefore, what should be the competences of a teacher implementing a curriculum in the field of artistic education in grades 1-3?

The Core Curriculum clearly specifies the objectives that should be accomplished at this level of education; these in turn determine the area of competence.

«A student graduating from grade 3:

1. in the field of artistic perception:
  - a) defines his or her cultural affiliation through contact with selected works of art, monuments, and with tradition in the family, local environment, and at school; participates in the cultural life of these environments, is aware of the existence of cultural institutions operating for their benefit,
  - b) uses media messages; uses their creations in his or her artistic activities (in accordance with elementary knowledge of the author's rights),  
and further:
  
3. in the field of artistic reception:
  - a) distinguishes between such areas of human artistic activity as: architecture, visual and plastic arts, and other specified disciplines of art (photography, film) and media messages (television, the internet), as well as artistic crafts and folk art,
  - b) recognizes selected works of architecture and visual or plastic arts being part of the Polish and European cultural heritage; describes their characteristics (using basic terms proper to these areas of artistic activity)»<sup>3</sup>.

### *The teacher as the first guide to the world of art*

To children, their teachers become the first guides to the world of art, helping discover and explore its mysteries. Proper preparation for work together helps successfully accomplish the tasks set. Each encounter with

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<sup>3</sup> <[http://bip.men.gov.pl/men\\_bip/akty\\_prawne/rozporzadzenie\\_20081223\\_zal\\_2.pdf](http://bip.men.gov.pl/men_bip/akty_prawne/rozporzadzenie_20081223_zal_2.pdf)> (last access: 30.03.2014). Own translation – KŁD.



a work of art should be an effective and professional activity, leaving a permanent mark (not only in the form of a product, but also in the processes of internal transformation); therefore, first and foremost, what we should require from teachers is their awareness of values emerging from work on an artistic creation, as well as specialist knowledge and specific skills. This knowledge is related to (at the basic level) knowledge of selected artistic and cultural phenomena or works of art, and the ability to use professional terminology (characteristic of particular artistic disciplines). At a higher level, it pertains to gaining qualifications in the field of analyzing works, their forms and contents.

This approach allows the teachers to consciously work on educational strategies. It also helps them professionally develop and shape a sense of connection with national traditions in their pupils, which is to serve as an attitude of respect and tolerance for its diversity, and a belief in the need for participation in cultural life. Moreover, it will also introduce the children into the world of art, in which they will discover not only its branches and disciplines, but also their characteristics. This is the first, professional encounter, in which the ability to assimilate values and operate symbols, and to use the language of art (at the basic level of accessibility by children) is developed. The teacher's task is to create an opportunity for pupils to actively participate in culture by means of taking part in permanent and temporary exhibitions organized by museums and other cultural institutions, by means of taking part in important artistic events organized at school and outside of it, and giving them the possibility of publicly presenting their artistic works.

Another task of teachers is to develop children's expression. As we can read in the Core Curriculum,

«In the field of expression through art:

- a) [a student graduating from grade 3] undertakes creative activity, using such means of artistic expression as shapes, colours, texture in flat and spatial compositions (using specific materials, tools, and artistic techniques),
- b) completes simple projects in the field of applied art, including ones helping shape his or her identity and environment, and spreading culture in the school environment (using specific tools and media creations)»<sup>4</sup>.

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<sup>4</sup> <[http://www.nck.pl/files/2012-08-02/men\\_tomom\\_7.pdf](http://www.nck.pl/files/2012-08-02/men_tomom_7.pdf)>, p. 38, (last access:

Here another scope of teachers' competences is found – the ability to properly design the learning process in the field of artistic education. For this purpose, one needs knowledge of developmental psychology and psychology of creativity. The detailed issues are concerned with the creative process, in which such phenomena as imagination – the basic factor of artistic creativity-, perception – the basis of shaping creative imagination-, and expression – revealing the need for artistic creation-, appear.

Another element is knowledge about the gradual conceptions of the development of artistic creativity in children. It is this knowledge that allows the teacher to be aware of their creative abilities, conditioned by their overall psychophysical development. Thus, he or she may rationally observe and control the changes that occur during the creative process. As a result, the teacher can properly stimulate them, developing the children's potential talents, or correcting their deficits. Here appears the ability to 'read' children's works; more specifically, the ability to analyze them in terms of the language of artistic expression through insightful and multi-faceted identification of the characteristics of creative expression. This analysis is concerned with such issues as:

- determining the level of skill in using means of artistic expression in the field of composition, characteristics and values of iconic forms, spatial presentations, graphic and colour values;
- determining the level of the child's artistic expression, including his or her ease, spontaneity, and fluency in using means of artistic expression, the existing inhibitions, constraints, or deficits, the emotional level and the contents of the works;
- determining the creative values.

An accurate analysis allows an insightful and detailed identification of all aspects of the work. It helps the teacher discern the great value of children's art, the essence of which is contained not only in a spontaneous gesture aimed at the world, at the viewer – the image created by the child is a meaningful example of his or her multiple competences, including the ability to explore the world and to transform his or her experiences into an intelligent message.

The ability to read children's drawings is also helpful while assessing their works – the teacher is able to determine whether the task

(according to the curriculum) has been completed and whether the resulting product complies with standards set out for a given age group. In this way, he or she avoids dangerous, subjective assessment.

For the learning process in the field of art to take place, it is necessary to know the ins and outs of techniques and forms used while working with children. Working with children is an idiosyncratic activity often requiring, in addition to traditional solutions, the application of untypical and non-standard techniques. The selection of those should be conscious, subject to the implemented curriculum, so that the children can understand them through practical implementation (learning through fun, learning through action, learning through independent solution of problems).

In artistic education at the level of kindergarten and grades 1-3 of primary school, we usually use the following techniques:

- drawing techniques;
- painting techniques;
- sculpting and modeling techniques;
- graphic techniques;
- paper techniques – flat and spatial;
- combined/mixed techniques.

Each of these groups of techniques utilizes specific means of expression. Their conscious use helps the children understand the language of art and affects their development processes. By drawing, painting, modeling, tearing, or cutting (working with different materials and tools), the child learns, above all, the fluency of movements, exercising his or her hand and finger muscles; he or she practices coordination, develops reconstructive and creative imagination, as well as expands his or her social and emotional space. It all helps achieve the best results possible (not only in the field of artistic creativity), guaranteeing better academic performance.

The knowledge of the mysteries of art requires that the teacher have appropriate practical preparation, as it is the creative process in which he or she can discover his or her own creative capabilities and 'touch' artistic issues. In direct contact with matter, the teacher can verify his or her own creative abilities in the artistic medium.

Therefore, I will now return to the question about who should conduct art classes in kindergarten and in grades 1-3. Among the people who could conduct such classes, there are three groups of teachers:

- specialists in the field of pre-school and early childhood education;
- specialists in the field of artistic education;
- artists with pedagogical preparation.

*The preparation of future early childhood teachers for conducting art classes*

My further considerations will be focused on the first group. Undoubtedly, in this case such a teacher should be 'prepared' from basics. Usually, pedagogy students have little knowledge (concerning artistic issues) and scarce practical skills – it is caused by the low quality of artistic education at particular stages of education. It can be proved by surveys conducted among students of the first years of pedagogy (major: pre-school and early childhood education), which clearly demonstrate the cultural illiteracy of the young generation.

«In the years 2010-2012, 320 people participated in the survey<sup>5</sup>. The questions asked were as follows:

1. Name at least five Polish artists (and their works) that you know.
2. Name at least five world-renowned artists (and their works) that you know.
3. Describe the characteristics of the culture and art of the region in which you live. If you can, name the most important monuments located in the area of your residence.

The collected results were in line with the predictions – it turned out that the long-term collapse and huge negligence in the artistic education of the young generation have caused its cultural illiteracy. None of the surveyed students were able to name the maximum number of artists, neither Polish nor foreign ones. Problems appeared also in case of attributing works to the proper artists. The most frequently named Polish artist was Jan Matejko (appeared in 95% of the answers). Then, there was Stanisław Wyspiański (70% of the answers). There were also single answers such as Olga Boznańska, Józef Chełmoński, Julian Fałat, the Kossak brothers, Jacek Malczewski, Nikifor Krynicki, Witkacy.

Among world-renowned artists, the most frequently named one was Pablo Picasso (80% of the answers), then Vincent van

<sup>5</sup> The survey was conducted among students of the first years, in the years 2010-2012. Its aim was to determine the extent of the young people's knowledge about selected cultural phenomena.

Gogh (75%), Michelangelo (60%), Leonardo da Vinci (62%), Salvador Dali (30%); single answers concerning less-known artists also appeared. Here, the respondents were more successful in attributing particular works to their authors.

The third question tested the respondents' knowledge about the nearest art and culture. The majority of them were able to name the characteristics of a given region (this information is all the more valuable that our students come from different parts of Poland). However, naming examples of this art was not as easy – few students enumerated examples of regional art or named folk artists living in a given area». (Łapot-Dzierwa, 2013: 138)

Another problem surfacing during the process of educating students of pedagogy is their scarce awareness of their own creative capabilities. Such classes are a great challenge to them, in which the process of opening to art in a conscious way takes place.

Therefore, how should a future early childhood teacher be prepared to conduct art classes? He or she needs to be equipped with proper knowledge and skills that will prepare him or her for independent, creative use of selected artistic concepts for the purpose of carrying out art classes with kindergarten and grade 1-3 children.

Therefore, the curricula should include concepts of the theory of art and culture. This field of knowledge will enable the students to become familiar with selected cultural and artistic phenomena in the context of artistic education of small children – this context is of great importance here and needs to be accentuated, as it is the knowledge necessary to implement the concept of education through art (in kindergarten and grades 1-3). Not only do young people organize their knowledge, but they also have the possibility of shaping their analytical and interpretation skills in terms of works of art, which allows them to make conscious choices of works for the process of education, developing the ability to classify them with the use of the right key (that is, with the use of all functions of the work). Therefore, it is important to introduce concepts related to the basic language of artistic expression (works of art).

Then, the students should learn the basics of the development of creative processes in children. Here, knowledge of developmental psychology and psychology of creativity (including the psychological basics of the creative process) is vital. Introduction of these concepts helps the students understand the specificity of young children's

artistic activities, and illustrates how these processes take place and why children's works of art are the way they are – surprising and incorrect, yet charming. As a result, it helps them carefully analyze the works and design activities on the basis of methodological assumptions (typical of artistic education in the pre-school and early childhood period).

Another stage should be about broadening knowledge and developing skills in the field of the objectives and curriculum of artistic education, the forms and methods of class organization, the design, organization, and implementation of educational directions, and the promotion and presentation of children's art. As a result, the students are able to prepare for independent, creative development and implementation of learning processes in the field of artistic education.

An important element is the introduction of concepts related to the use of electronic media, including computer and information technologies, into the artistic activities of children.

The most difficult area in the education of students of pedagogy is their own creative activity. This proposed 'encounter' with arts is full of uncertainty caused by the lack of faith in their own abilities. It is not surprising, because in most cases artistic instruction (practical) at lower stages of education (kindergarten, primary school, junior high school) is a seriously neglected area, and the student's own activity is limited to a small number of techniques, and thus, only a small range of means of artistic expression. Moreover, in the process of education a significant break occurs; it takes place in the period during which important changes occur in the artistic activity of a young person. After passing the stage of ideoplastic art and embarking on the stage of physioplastic art, after the period of the crisis of one's own art, each secondary school student can define himself or herself in the field of art. Unfortunately, he or she is robbed of this possibility, as in school curricula there is no place for artistic creation. Therefore, we begin our meetings with students with their re-introduction into the world of art. The first stage involves gaining knowledge and practical skills related to artistic forms and techniques (for the purpose of working with children). Aside from some basic knowledge, the students develop their skills in the field of artistic techniques and their means of expression. We begin with uncomplicated examples in order to proceed to more diverse forms, and finally to experimental and unusual solutions. In terms of their topics, the tasks are related to the material covered in kindergarten and grades 1-3 – they are concerned mainly with teaching

artistic literacy, and aimed at the development of imagination, dexterity, and emotions; namely, at development in the field of the language of artistic expression.

Another stage is participation in classic workshops – the students are able to experience the process of drawing and painting from nature and models. They perform such tasks as drawing or painting still life compositions, portraits, or figures, as well as develop their skills in the field of using diverse and experimental artistic techniques and their means of expression for the purpose of independent creation of the form and content of an artwork.

### *Conclusions*

Therefore, what guarantees the proper preparation of students of pedagogy for conducting art classes in kindergarten and grades 1-3?

Above all, well-prepared study programs providing for the introduction of the abovementioned content. These programs, on the basis of which the students will be able to gain knowledge and skills indispensable for their future professional work, as well as – most importantly – to develop social competences, including their own cultural awareness.

«Since the dawn of time, the development of cultural identity has been entrusted to the elites of a given country. They, as the best educated environment, show the way for the whole society to follow. This task is still important today, as the political changes of the last decades, difficulties in acclimatizing to the new reality, and looking for one's own place in united Europe have put this concept in the shade. Meanwhile, one should note that culture is a value that enables whole nations to exist – one may say that there is no society without culture, and there is no culture without society; culture makes a young generation become a nation, and a country – its homeland» (Czapski, 2000: 31).

Research projects carried out by students, in which the field of exploration is broadly-defined artistic education in kindergarten and in grades 1-3, prove that a properly managed process of education in this area is possible. A well-prepared (equipped with knowledge and skills) graduate of pedagogy is able to earnestly conduct such classes.

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*Pour une didactique de la création artistique:  
Axes, projets, bilan (2014-2016)*

RÉSUMÉ:

La «Didactique de la création artistique» représente un champ et un questionnement complexes, impliquant diverses problématiques et approches inépuisables. Le projet Di-CrA (Didactique de la création artistique), a été lancé en 2014 par Grazia Giacco, lauréate de l'appel à projets IdEx «Attractivité» de l'Université de Strasbourg. Ce projet était né dans le but de concevoir une transposition innovante des axes méthodologiques de la recherche en art au domaine de la didactique des arts. Plusieurs axes sont développés: l'épistémologie de chaque discipline amenée à être objet de création, l'étude des champs didactiques et l'étude des relations entre création artistique et aspects cognitif, émotionnel et conatif chez l'enfant. Nous souhaitons présenter les grandes lignes du projet et offrir aux lecteurs un premier bilan de nos deux années de recherches, menées en équipe avec d'autres enseignants, enseignants-chercheurs et artistes.

MOTS-CLÉS: création, créativité, recherche-crédation, didactique des arts.

ABSTRACT:

«Artistic creation teaching» is a complex field and represents a complex questioning, involving various inexhaustible problems and approaches. The DiCrA project (Didactique de la Création Artistique or artistic creation teaching), was launched in 2014 by Grazia Giacco, winner of the IdEx «Attractiveness» call for projects from the University of Strasbourg. This project was born with the aim of conceiving an innovative transposition of the methodological approaches of research in art to the field of didactics of the arts. Several topics are developed: the epistemology of each discipline as an object of creation, the study of didactic fields and the study of the relations between artistic creation and the cognitive, emotional and conative aspects in children. We wish to present the outlines of the project and offer readers an initial review of our two years

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of research, conducted in teams with other teachers, teachers-researchers and artists<sup>3</sup>.

KEYWORDS: creation, creativity, research-creation, artistic creation teaching.

## 1. *Contexte et question de recherche*

À l'Université de Strasbourg, grâce à l'EA 3402 ACCRA<sup>4</sup> et au GREAM<sup>5</sup>, la recherche sur la didactique de la création artistique se développe depuis quelques années au sein d'une équipe dynamique, constituée d'enseignants-chercheurs en musique et en arts visuels. En 2014, le projet de recherche DiCrA<sup>6</sup> (Giacco, Didier & Spampinato, 2017) a été lauréat du Fonds IdEx de l'Université de Strasbourg dans le but de définir et approfondir de nouveaux axes méthodologiques en didactique des arts. La collaboration avec Sonia Lorant, enseignante-chercheuse en Psychologie cognitive, a permis l'ouverture sur un champ transdisciplinaire: les avancées de ses premières recherches feront l'objet de la deuxième partie de cet article.

En prenant appui sur les plus récentes activités scientifiques dans le domaine de la 'recherche-crédation' et de la pratique créative (selon la terminologie anglo-saxonne de *creative practice*), le projet DiCrA contribue à concevoir une transposition innovante des axes méthodologiques propre à la 'recherche-crédation' (*practice as research* ou de *practice-led research*, recherche menée par la pratique) au domaine de la didactique des arts. Les objectifs de cette recherche visent à prendre en compte le potentiel de la création et de la créativité en pédagogie: créativité et processus créateur en tant que sources de connaissance; créativité et création comme outil pour un réinvestissement didactique transdisciplinaire; créativité, création et impact sur les processus sociocognitifs. La recherche sur la didactique de la création artistique interroge la posture du créateur (de l'artiste mais aussi de l'enseignant ou de l'élève), le processus de création et les processus de transmission dans les enseignements artistiques, afin de dégager une méthodologie

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<sup>3</sup> Abstract traduit par Nicolas Daigneault.

<sup>4</sup> Approches contemporaines de la création et de la réflexion artistiques, <<http://arts.unistra.fr/equipe-de-recherche/>> (dernière consultation: 07.07.2016).

<sup>5</sup> Groupe de recherches expérimentales sur l'acte musical. <[www.gream.unistra.fr](http://www.gream.unistra.fr)>, (dernière consultation: 07.07.2016).

<sup>6</sup> Didactique de la création artistique, <<http://espe-formation.unistra.fr/arts/2015/04/07/dicra-didactique-de-la-creation-artistique-idex/>> (dernière consultation: 07.07.2016).

propre à la didactique des arts et autour des processus de didactisation des œuvres issus des divers champs artistiques.

Si l'objet de la recherche se pose comme but d'analyser les liens entre 'recherche-création' et didactique de la création artistique, la question de recherche peut ainsi être formulée: comment étudier le processus de création (théories, démarches, méthodologie de la recherche-création) afin de développer une didactique de la création artistique? Cela prend son origine d'un questionnement plus vaste<sup>7</sup>, qui ne sera pas développé ici, sur la posture de l'artiste-pédagogue (comment l'artiste assure une transmission?) et sur celle du 'chercheur-musicologue' aujourd'hui, à savoir une posture de 'médiateur' entre le créateur et le récepteur, en particulier quand ce dernier se retrouve dans une situation d'apprentissage (par exemple, un élève de collège ou d'école primaire durant une séquence d'arts visuels ou d'éducation musicale). La création, donc, non plus analysée seulement comme objet d'étude mais intégrée, dans le cadre d'une didactique de la création artistique, dans un processus de création qui implique un processus d'apprentissage – création qui est alors habitée de l'intérieur, activement vécue et non seulement aperçue.

### 1.1. *Objectifs de recherche*

L'une des missions des Écoles Supérieures du Professorat et de l'Éducation, en France, est celle d'assurer la formation des étudiants à l'éducation culturelle et artistique<sup>8</sup>. Le projet DiCrA contribue à la formation et à l'encadrement des étudiants inscrits dans les masters MEEF (Métiers de l'enseignement, de l'éducation et de la formation) de l'ESPE<sup>9</sup> de l'Université de Strasbourg. Nous avons aussi favorisé

<sup>7</sup> Ceci fait l'objet d'une recherche en cours menée actuellement par Grazia Giacco en vue de l'obtention de son HDR (habilitation à diriger des recherches), sous la direction de Pierre Albert Castanet, musicologue et Professeur de musicologie à l'Université de Rouen et au CNSMD de Paris.

<sup>8</sup> Cf. *Circulaire Le Parcours d'éducation artistique et culturelle*, n° 2013-073 du 03.05.2013 MEN – DGESCO <[http://www.education.gouv.fr/pid25535/bulletin\\_officiel.html?cid\\_bo=71673](http://www.education.gouv.fr/pid25535/bulletin_officiel.html?cid_bo=71673)> (dernière consultation: 07.07.2016).

<sup>9</sup> Les Ecoles supérieures du professorat et de l'éducation, créés en 2013 par le Ministère de l'Éducation Nationale et le Ministère de l'Enseignement supérieur et de la recherche, sont des composantes des universités et ont pour mission de former les étudiants se destinant aux métiers de l'enseignement et de l'éducation. <<http://www.education.gouv.fr/cid72796/espe-les-ecoles-superieures-du-professorat-et-de-l-education.html>>

des échanges avec d'autres enseignants-chercheurs de l'ESPE et avec des enseignants des 1<sup>er</sup> et 2<sup>nd</sup> degrés, intéressés par la réflexion sur la portée applicative de notre recherche. Il est nécessaire que la formation des futurs enseignants puisse se fonder sur des recherches solides et innovantes: comment dès lors, dans le champ de la recherche, activer un regard scientifique sur la question de la didactique de la création artistique? La créativité étant une composante d'un processus de création – et non l'inverse – nous nous sommes focalisés sur les diverses théories du processus créateur, en particulier sur la 'dynamique de création' de Pierre Gosselin (Gosselin *et al.*, 1998). Les objectifs spécifiques de la recherche DiCrA sont: l'avancement des connaissances dans le domaine de la recherche-création appliquée à la didactique de la création artistique et l'approfondissement de la recherche théorique dans le domaine de l'éducation artistique, conçue dans une approche pluri-disciplinaire, en développant les échanges entre composantes de l'université et acteurs du monde culturel et artistique.

## 1.2. *Approche méthodologique*

De par la nature du projet, interdisciplinaire, pluriartistique et appliqué, une démarche heuristique a permis d'assurer un réseau d'axes et d'objectifs partant de la notion de créativité (Passeron, 1989; Lubart, 2003; Sternberg, 2012) pour se focaliser ensuite sur le processus de création lui-même. Initialement, il avait été nécessaire de mener une étude comparative entre les axes et méthodes actuellement reconnues en recherche-création<sup>10</sup> et les méthodes pédagogiques mises en œuvre dans le cadre de l'éducation artistique: la pratique artistique en tant que telle

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(dernière consultation: 07.07.2016).

<sup>10</sup> Le Conseil de recherches en sciences humaines du Canada définit ainsi la recherche-création: «Approche de recherche combinant des pratiques de création et de recherche universitaires et favorisant la production de connaissances et l'innovation grâce à l'expression artistique, à l'analyse scientifique et à l'expérimentation. Le processus de création, qui fait partie intégrante de l'activité de recherche, permet de réaliser des œuvres bien étoffées sous diverses formes d'art. La recherche-création ne peut pas se limiter à l'interprétation ou à l'analyse du travail d'un créateur, de travaux traditionnels de développement technologique ou de travaux qui portent sur la conception d'un curriculum. Le processus de recherche-création et les œuvres artistiques qui en découlent sont jugés en fonction des critères d'évaluation du mérite établis par le CRSH.» <<http://www.sshrc-crsch.gc.ca/funding-financement/programs-programmes/definitions-fra.aspx#a25>> (dernière consultation: 07.07.2016).

mais aussi l'approche interdisciplinaire *Art in Education*<sup>11</sup>, c'est-à-dire l'art comme support pour l'apprentissage (Burnard & Murphy, 2013).

Dans la recherche en arts, notre méthode a privilégié l'aspect qualitatif, dans une approche phénoménologique et poétique du fait artistique. L'étude des méthodes en didactique des arts qui investissent les travaux de création autour d'un artiste-pédagogue ou d'une démarche d'artiste ont été fondamentales (Gosselin, 2006; 2011; 2014). Grâce aux travaux de Pierre Gosselin et aux échanges réguliers avec lui, nous avons été encouragés à croire dans les potentialités propres aux disciplines artistiques, en matière de méthodologie.

Notre hypothèse de départ qui consistait à trouver dans le champ de la recherche-crédation tous les outils nécessaires pour développer une didactique de la création artistique, a trouvé un écho favorable dans ses écrits, comme par exemple dans ce passage consacré aux méthodologies de recherche en pratique artistique:

«Toutefois, nous considérons que notre travail, hormis celui lié aux éléments de contenu mentionnés plus avant, se situe également et peut-être davantage dans un rôle d'accompagnateur guidant les différents processus de recherche afin qu'une forme de cohérence interne s'instaure entre intention et proposition de recherche, entre pratique et théorie, entre sujet connaissant (l'artiste-chercheur) et objet de connaissance. En fait, pour nous, résoudre et élucider la question méthodologique, ne consiste pas à importer des méthodologies toutes dessinées provenant des autres champs disciplinaires. Cela consiste plutôt à "habiter" – et non à revendiquer – un espace situé à l'intérieur du champ d'investigation qu'est la pratique artistique afin que le développement de méthodologies s'instaure à même ce terrain de pratique». (Gosselin & Laurier, 2004: 22-23)

### 1.3. *Bilan et diffusion*

La réflexion qui a été menée tout au long de ces deux années a réuni enseignants-chercheurs (musique et arts-visuels<sup>12</sup>), enseignants du 1<sup>er</sup> et

<sup>11</sup> UNESCO, *Road Map for Arts Education*, The World Conference on Arts Education: Building Creative Capacities for the 21st Century, Lisbonne, 6-9 mars 2006, <[http://portal.unesco.org/culture/en/ev.php-URL\\_ID=30335&URL\\_DO=DO\\_TOPIC&URL\\_SECTION=201.html](http://portal.unesco.org/culture/en/ev.php-URL_ID=30335&URL_DO=DO_TOPIC&URL_SECTION=201.html)> (dernière consultation: 07.07.2016).

<sup>12</sup> En particulier, pour les arts visuels: Stéphane Mroczkowski, enseignant-chercheur, ESPE, Université de Strasbourg et artiste, <<http://stephanemroczkowski.tumblr.com/>>

2<sup>nd</sup> degré (école primaire et collège/lycée), représentants d'institutions culturelles (comme Christophe Rosenberg, Coordinateur pédagogique, Cité de la musique – Philharmonie de Paris, Pôle Education ou encore Margaret Pfenninger, conservatrice et responsable du service éducatif et culturel des Musées de Strasbourg), chercheurs, artistes-chercheurs et artistes-pédagogues<sup>13</sup>. La collaboration avec l'équipe de l'UER<sup>14</sup> Art et technologie de la HEP de Lausanne, guidée par John Didier<sup>15</sup>, exprime la nécessité de mettre en place un travail collaboratif sur cette question transversale et fondamentale dans le recherche en didactique des arts, particulièrement autour de la création artistique. Pour la diffusion des résultats, nous avons prévu plusieurs moyens – publications, journées d'études, workshop<sup>16</sup>, rencontres avec des artistes<sup>17</sup>, répartis selon les diverses phases du projet. Nous avons aussi soutenu la diffusion des projets réalisées sous formes variées: performances publiques et mise en ligne sur le site<sup>18</sup> de l'ESPE des vidéos des journées d'études. Parmi les publications (Giacco, Didier & Spampinato, 2017), signalons l'article co-écrit avec une jeune enseignante en école primaire et *Soundpainter*, Solène Coquillon, autour du processus de création sonore grâce à la pratique du *Soundpainting* dans une classe de CM1 (Giacco & Coquillon, 2016). Cet article a pu exposer les cadres théoriques de la didactique de la création artistique, en se focalisant sur la création en musique, et en proposant différents modèles du processus de création. Une classe de CM1 avait été suivie durant six mois, pendant la mise en place d'un projet de création sonore conçue par les enfants eux-mêmes (sons vocaux,

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(dernière consultation: 07.07.2016).

<sup>13</sup> En ligne, le programme et la bibliographie des intervenants: <<http://espe-formation.unistra.fr/arts/2015/04/07/dicra-didactique-de-la-creation-artistique-idex/>> (dernière consultation: 07.07.2016).

<sup>14</sup> Unité d'enseignement et de recherche.

<sup>15</sup> <<https://www.hepl.ch/cms/accueil/formation/unites-enseignement-et-recherche/didactiques-art-technologie/equipe-et-contacts/john-didier.html>> (dernière consultation: 07.07.2016).

<sup>16</sup> Il s'agissait d'un workshop autour de l'improvisation sonore et gestuelle avec le pianiste et compositeur François Rossé, dans le cadre du projet inter-artistique #Jardin (*perdu-retrouvé*) <<http://espe-formation.unistra.fr/arts/2015/05/21/jardin-perdu-retrouve/>> (dernière consultation: 07.07.2016).

<sup>17</sup> En ordre alphabétique: Abril Padilla (compositrice), Aurélien Peilloux (cinéaste), François Rossé (pianiste, compositeur).

<sup>18</sup> <<http://espe-formation.unistra.fr/arts/2015/04/07/dicra-didactique-de-la-creation-artistique-idex/>> (dernière consultation: 07.07.2016).

percussions corporelles), autour du thème des quatre éléments (air, eau, terre, feu) inspirée de la théorie de la GdL (*Globalité des langages*) de Stefania Guerra Lisi et Gino Stefani (2010), et en utilisant la technique du *Soundpainting*<sup>19</sup>.

## 2. Du concept d'imagination au concept de création

C'est au début du XX<sup>ème</sup> siècle, avec Binet, que la prise en compte de l'imagination s'effectue par l'intermédiaire de l'évaluation de l'intelligence. Puis, dans les années 1950, Guilford parle de créativité et considère qu'elle nécessite des capacités intellectuelles spécifiques: identification des problèmes, analyse, évaluation, synthèse, le tout accompagné d'une pensée flexible et fluide. Il a été le premier à inventer des tests de créativité, avec l'idée sous-jacente que les compétences créatives sont présentes chez tous les êtres humains mais à des degrés différents. Il a donc essayé de comprendre sur quelles aptitudes se basait cette créativité et conclue qu'il existe chez l'Homme une pensée dite divergente, qui tend vers la recherche de toutes les solutions possibles, mais aussi une pensée convergente qui tend vers la recherche de la solution. Puis, ce courant de pensée se poursuit dans les années 1970, avec le test de pensée divergente créative (*Torrance Test of Creative Thinking*). Dans les années 1990, la notion de contexte environnemental apparaît. Ainsi, Sternberg et Lubart (1992) définissent la créativité par la capacité à réaliser une production qui soit à la fois nouvelle et adaptée au contexte dans lequel elle se manifeste. On suggère donc que l'idée, le concept, ou la production artistique doivent se distinguer des autres et satisfaire les contraintes de l'environnement où ils s'expriment. Plus récemment les neurosciences nous donnent des indications supplémentaires avec les travaux de Christoff *et al.* (2009), qui ont mis en évidence que si l'on permet à nos pensées de vagabonder, d'errer au cours d'une tâche un peu difficile, alors cela donnerait accès à des idées qui échappent le plus souvent à la réflexion consciente et ferait émerger des combinaisons intéressantes de ces idées. Pour que le vagabondage des

<sup>19</sup> Le *Soundpainting* a été créé par Walter Thompson dans les années 1970: c'est un langage de signes qui permettent une composition en temps réel (adaptable à toutes les formes artistiques, et pas uniquement en musique), dans une interaction constante entre le *Soundpainter* et les musiciens-improvisateurs). Signalons son ouvrage de référence: W. THOMPSON, *Soundpainting: The art of live composition, workbook 1*. Thompson, New York, 2006 <<http://www.soundpainting.com>> (dernière consultation: 07.07.2016).



pensées se traduise en termes de créativité, encore faut-il être capable de prêter attention à ses propres rêveries.

### 2.1. *Mais comment cultiver ces qualités chez l'enfant, mais aussi chez l'élève?*

A l'aune de l'évolution de la société du XXI<sup>ème</sup> siècle, l'enjeu majeur dans l'actualité de la refondation de l'École est de créer des citoyens éclairés et capables d'adaptation dans un monde qu'ils auront à construire. Il semble donc indispensable de reconsidérer le sens, les enjeux et les plus-values de la formation proposée aux élèves. Ainsi, on peut se questionner sur un contexte plus large, à savoir quel environnement va favoriser la formation d'élèves éclairés, créatifs, motivés, pourvus de sens critique et de prise d'initiative? Comment les rendre capables de réels choix qui leur permettront de s'adapter aux nouveaux défis qui seront les leurs? Cette question de l'adaptation anime toujours la communauté scientifique et trouve des prolongements dans les textes officiels de l'Éducation nationale. On peut donc lire dans «Le socle commun des connaissances et des compétences»<sup>20</sup>, que la compétence «autonomie et initiative» s'acquiert tout au long de la scolarité, dans chaque matière et chaque activité scolaire. En la développant, l'élève se donne les moyens de réussir sa scolarité et son orientation, de s'adapter aux évolutions de sa vie personnelle, sociale et professionnelle. Puis avec «Le nouveau socle commun de connaissances, de compétences et de culture à la rentrée 2016»<sup>21</sup>, ce dernier doit ouvrir à la connaissance, former le jugement et l'esprit critique, développer les capacités de compréhension et de création, les capacités d'imagination et d'action. Ainsi, on voit apparaître un lien entre imagination, création et adaptation, qui est un lien bien établi dans les travaux de recherche depuis des décennies.

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<sup>20</sup> Décret n° 2006-830 du 11 juillet 2006. <[http://www.education.gouv.fr/cid2770/le-socle-commun-de-connaissances-et-de-competences.html#Un\\_nouveau\\_socle\\_commun\\_de\\_connaissances\\_de\\_compétences\\_et\\_de\\_culture\\_a\\_la\\_rentrée\\_2016](http://www.education.gouv.fr/cid2770/le-socle-commun-de-connaissances-et-de-competences.html#Un_nouveau_socle_commun_de_connaissances_de_compétences_et_de_culture_a_la_rentrée_2016)> (dernière consultation: 07.07.2016).

<sup>21</sup> Décret n°2015-372 du 26 novembre 2015. Enseignements primaire et secondaire: Programmes d'enseignement du cycle des apprentissages fondamentaux (cycle 2), du cycle de consolidation (cycle 3) et du cycle des approfondissements (cycle 4). *Bulletin officiel spécial*, 11. <[http://cache.media.education.gouv.fr/file/MEN\\_SPE\\_11/35/11/BO\\_SPE\\_11\\_26-11-2015\\_504351.pdf](http://cache.media.education.gouv.fr/file/MEN_SPE_11/35/11/BO_SPE_11_26-11-2015_504351.pdf)> (dernière consultation: 07.07.2016).

Selon Lubart (2005), dans son approche multivariée de la créativité, chaque individu a un potentiel de créativité plus ou moins élevé et 4 facteurs en modulent l'expression: le facteur cognitif, lié aux connaissances et aux aptitudes intellectuelles; le facteur conatif, lié aux styles cognitifs, aux traits de personnalité de l'individu et à la motivation; le facteur émotionnel et le facteur environnemental, lié à l'influence de la famille, des parents, de l'école, des amis, ...

De plus, quatre composantes identifiées par Torrance (2004) sous-tendent la créativité:

- la flexibilité: c'est la capacité à appréhender un seul objet, une seule idée, sous des angles différents, la sensibilité aux changements ainsi que la capacité à se dégager d'une idée initiale pour explorer de nouvelles pistes (Georgsdottir & Lubart, 2003). La flexibilité et la créativité sont en lien, ce qui reflète l'idée comme étant quelque chose de modifiable pour arriver à son but, la créativité n'est donc pas figée;
- l'originalité: capacité à trouver des réponses inhabituelles mais pertinentes;
- la fluidité: capacité à produire un grand nombre d'idées;
- et l'élaboration: capacité de développer, élargir embellir des idées.

Dans ce contexte scientifique, nous étudierons l'impact de la mise en place d'un projet de création artistique à l'école primaire, sur certains aspects cognitifs, conatifs et environnementaux.

Nous émettons les hypothèses suivantes, pour les aspects cognitifs: 1) les élèves de classes primaires qui participent à un projet créatif vont avoir de meilleures progressions aux différents scores de pensée divergente et convergente, de fluidité et d'originalité, que les classes témoins qui n'ont pas participé à un projet de cette nature; 2) les élèves de classes primaires qui participent à un projet créatif vont avoir de meilleures progressions aux différents scores de raisonnement abstrait, de persévérance dans une stratégie, de flexibilité et de planification que les classes témoins.

Pour les aspects conatifs, nous émettons l'hypothèse que les élèves de classes primaires qui participent à un projet créatif, vont avoir de meilleures progressions aux différents scores du questionnaire de motivation (motivation intrinsèque, motivation extrinsèque, compétence perçue, autodétermination, sentiment d'efficacité perçue scolaire,

motivation à la réussite, motivation à l'accomplissement), que les classes témoins.

Pour les aspects environnementaux, on suppose que les enseignants qui estiment à l'aide d'un questionnaire, avoir des pratiques pédagogiques d'enseignement en lien avec le développement de la créativité des élèves, avec la pensée critique et la prise d'initiative au quotidien dans leur classe, devraient avoir des élèves avec de meilleurs scores à l'EPoC et au WCST, que les autres enseignants s'estimant moindre.

## 2.2. *Méthodologie*<sup>22</sup>

La population étudiée concerne des élèves de 9-11 ans, car la seconde phase de développement de la créativité chez l'enfant s'effectue à cette période. Cependant, il est important de noter que Torrance constate dans ses études une chute moyenne significative pour chacun des indices de pensée divergente. Cette chute serait due à l'environnement social, avec l'intention des enfants à se conformer aux règles scolaires et à se concentrer uniquement à des raisonnements académiques (Lubart & Lautrey, 1996; Lubart, 2003). La classe test et la classe témoin seront issues du même groupement scolaire afin d'avoir les mêmes types d'élèves.

Les aspects cognitifs sont évalués d'une part, par le test EPoC (Evaluation du Potentiel Créatif) de Lubart, Besançon et Barbot (2011), et d'autre part, par le test WCTS (*Wisconsin Card Test*) de Heaton, Chelune, Talley, Kay et Curtiss (2007). L'EPoC se compose d'épreuves verbales et non verbales, dites graphiques et impliquent deux modes de pensée divergente-exploratoire et convergente-intégrative. Ce test est destiné aux enfants d'âge scolaire de 5 à 12 ans et possède deux formes de passations A et B. Le choix de ce test se justifie par le fait qu'il reprend l'ensemble des concepts annoncés précédemment et qu'il est étalonné avec des élèves d'âge scolaire. Le WCTS permet d'évaluer le raisonnement abstrait et l'aptitude à adopter une stratégie cognitive en fonction des modifications de l'environnement, tout en faisant appel à l'organisation et à la planification du sujet. C'est l'aspect 'planification' qui est essentiel dans une démarche de création. Pour répondre correctement, le sujet doit retenir les informations concernant l'essai précédent et les utiliser pour

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<sup>22</sup> Ce paragraphe méthodologique concerne le projet mené par Sonia Lorant en psychologie cognitive.

guider son comportement aux essais suivants. Le traitement de ce type d'informations est caractéristique des fonctions du lobe frontal.

Les aspects conatifs sont envisagés sous l'angle motivationnel, à l'aide d'un questionnaire de motivation (Lorant, Fenouillet & Lieury, 2016; Lieury, Lorant, Troseille, Vourc'h & Fenouillet, 2014). On constate que les individus diffèrent sur la nature et la force de leurs désirs à s'engager dans une activité (Runco & McGarva, 2013). En effet la motivation est le processus qui va réguler l'investissement dans l'action créative.

Les aspects environnementaux sont étudiés grâce à l'importance du rôle de l'environnement scolaire (Sternberg & Lubart, 1995; Besançon & Lubart, 2015) dans le développement des ressources cognitives et émotionnelles qui seront employées durant un processus de création (Lubart, Mouchiroud, Tordjam & Zenasni, 2015). Au sein de cet environnement plusieurs aspects sont à prendre en compte, l'enseignant (ses attitudes et préférences) mais aussi le type d'école dans lequel l'enfant est scolarisé (traditionnel ou proposant une pédagogie alternative). Les enseignants seront donc interrogés sur ces différents aspects à l'aide d'un questionnaire (Besançon, 2006), afin de contextualiser les résultats et de mieux comprendre l'impact de divers dispositifs.

Les tests cognitifs et le questionnaire de motivation seront passés aux élèves en début d'année scolaire et ces données constitueront la base du pré-test. Le projet de création artistique s'effectuera tout au long de l'année et les élèves seront à nouveau testés en fin d'année scolaire et ces données constitueront le post-test. Le questionnaire destiné aux enseignants sera rempli en fin d'année afin d'avoir plus d'objectivité sur l'année passée avec leurs élèves, comme un bilan. Cette procédure s'appliquera aux classes tests et témoins.

### *3. Ouvertures et prolongements*

Le projet DiCrA a été marqué dès ses débuts par son potentiel interdisciplinaire, encourageant des liens prometteurs entre recherche en art et recherche en psychologie cognitive. Ce projet nous a aussi permis de tisser des liens avec des chercheurs nationaux et internationaux, en particulier avec Pierre Gosselin<sup>23</sup> de l'Université du Québec, au Canada,

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<sup>23</sup> Professeur à l'École des arts visuels et médiatiques, Faculté des arts, Université du

l'un des chercheurs le plus actifs dans le domaine de la recherche-cr ation et de la didactique des arts. A l'automne 2015, Grazia Giacco et John Didier (HEP Vaud, Lausanne) ont initi  un groupe de r flexion nomm  CREAT (Cr ation et Recherche dans l'Enseignement des Arts et de la Technologie), groupe qui se r unit r guli rement et qui prolonge le travail d marr  avec DiCrA. Gr ce   l'engagement et   l'int r t d'autres chercheurs et doctorants de l'EA 3402 ACCRA (parmi eux: St phane Mroczkowski, Thibaut Honor , Fr d ric Verry, Katrin Gattinger), un axe de recherche sera consacr  pour le prochain plan quinquennal de l' quipe   la probl matique qui r unit 'recherche-cr ation et m thodologies didactiques', mettant en place un r seau dynamique entre plusieurs centres de recherches. Cet axe concerne les diff rentes formes de cr ation artistique (arts visuels, arts plastiques, design, architecture, arts du son, arts du spectacle, cin ma, arts des m dias...) et aussi les disciplines li es   la cr ation d'objets techniques. Deux sont les orientations compl mentaires, pas exclusive l'une de l'autre: 1) recherche sur l'analyse des processus de cr ation et 'recherche-cr ation'; 2) recherche sur les m thodologies qui concernent la p dagogie dans les arts – par les arts, au sens large, et m thodologies didactiques. Les deux instances (groupe CREAT et EA3402 ACCRA) envisagent des travaux communs, mais aussi d'autres projets sont pr vus avec d'autres musicologues, Christine Esclapez (Universit  d'Aix-en-Provence) et Pierre Albert Castanet (Universit  de Rouen), suite   l'organisation de la premi re Acad mie d' t  (4-6 juillet 2017, Lausanne), autour des axes recherche-cr ation et didactique de la cr ation artistique.

L'un de nos objectifs, dans les ann es   venir, sera de d velopper la recherche en didactique de la cr ation artistique, en recherche-cr ation et en psychologie de la cr ativit , et de consolider les collaborations entre les  quipes de recherche (particuli rement entre l'ACCRA de l'Universit  de Strasbourg et le CREAT de la HEP de Lausanne)<sup>24</sup> afin de d velopper cet axe novateur initi  avec DiCrA en 2014. De plus, les retomb es du point de vue p dagogique sont encourageantes, compte-tenu du fait que la pratique artistique, de l' cole   l'universit , m rite un examen approfondi du contexte d'action, des moyens engag s, des probl matiques li es   la place des arts dans le contexte institutionnel, depuis le

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Qu bec, Montr al, Canada. <<https://eavm.uqam.ca/gosselin-pierre.html>> (derni re consultation: 07.07.2016).

<sup>24</sup> <<http://www.hepl.ch/cms/accueil/sites/institutionnel/accueil/actualites-et-agenda/actu-hep/academie-dete-recherche-creatio.html>> (derni re consultation: 21.07.2017).

processus de Bologne et la conséquente réforme du cadre académique. Les nouveaux programmes de l'école primaire et du collège (Ministère de l'Éducation nationale, 2015), en France, intègrent les activités de création, mais il reste tout de même un travail à faire pour former les enseignants à de nouvelles approches didactiques, en arts, et à la pédagogie de projet. Avec les équipes UER Arts et technologies et l'UER Pédagogie et psychologie musicales de la HEP Vaud de Lausanne, le travail de recherche démarré durant l'IdEx DiCrA s'axera sur les pratiques de création dans l'enseignement artistique et technologique<sup>25</sup>.

#### 4. Conclusion

Les quatre journées d'études DiCrA qui ont eu lieu à Strasbourg entre 2014 et 2016 ont lancé la problématique d'une didactique de la création artistique, tant dans le milieu de la recherche que dans le champ des pratiques pédagogiques<sup>26</sup>. L'équilibre entre de réflexions centrées davantage sur la partie théorique et celles concernant plutôt les applications pratiques a garanti une dynamique fructueuse, permettant de réunir plusieurs enseignant, chercheurs et acteurs institutionnels. Les ressources bibliographiques en matière de recherche-création permettent d'interroger la création et ses enjeux – compétences, objectifs, critères d'évaluation – lorsqu'elle se confronte au milieu académique et à des démarches scientifiques de recherche. Ces interactions (création  $\leftrightarrow$  recherche) peuvent nous donner des perspectives quant aux processus mis en place pour des projets de création et par rapport aux compétences qui seront évaluées dans le cadre d'un processus de création (évaluer le processus et/ou évaluer le 'produit' ou 'œuvre' réalisés). La création couvre un large champ d'applications, de réflexions, de questionnements. Au départ, elle est un voyage, et

<sup>25</sup> Il est important de partager et confronter notre recherche sur les méthodologies didactiques de la création artistique avec les chercheurs des deux équipes 'Arts' de la HEP, en particulier avec John Didier (Professeur formateur en Activités créatrices et techniques, Unité d'enseignement et de recherche Art et Technologie, HEP Vaud, Lausanne, Suisse), qui est actuellement en fin de post-doctorat au centre de recherche en Psychologie de la connaissance, du Langage et de l'Emotion d'Aix-en-Provence. Nos axes de recherche se rejoignent, John Didier étant focalisé sur le développement d'une didactique de la conception et le processus créatif.

<sup>26</sup> G. Giacco, J. Didier & F. Spampinato (eds.) (2017). *Didactique de la création artistique: Approches et perspectives de recherche*. Louvain: EME.

non seulement pour l'artiste: à l'arrivée, psychologues, philosophes, musicologues, pédagogues, historiens, scientifiques... tous ceux qui s'intéressent à la création (re)prennent le large pour une destination inconnue. Concevoir une didactique de la création artistique est une errance sans fin, faite d'essais, d'expérimentations, d'assemblages et comparaisons, d'une multitude de projets possibles.

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*Craft and Technology Education Curriculums and Students'  
Attitudes towards Craft and Technology in Finland,  
Slovenia, Estonia and Iceland*

ABSTRACT:

The research is based on a comparative study of craft and technology education curriculums and students' attitudes towards craft and technology in Finland, Slovenia, Estonia and Iceland. The study was undertaken by the Helsinki University, University of Ljubljana, University of Tallinn and University of Iceland during years 2012-2015. A literature review was completed, in order to examine and compare the curriculums of craft and technology education in Finland, Estonia and Iceland. In addition, a quantitative survey was subsequently distributed to 864 school students in Finland, Slovenia, Estonia and Iceland. It consisted of 14 questions, which aimed to ascertain students' attitudes towards craft and technology. The survey showed substantial differences in students' attitudes towards craft and technology education in the three countries: these differences may be explained by differences in the national curriculums, the different pedagogical traditions and cultural differences in the field of technology. However, for deeper understanding, the quantitative findings need to be examined further with different research methods.

KEYWORDS: Technology education, Craft education Attitudes towards technology, National curriculum

## 1. *Introduction*

Compulsory education in Finland is intended for students from 7 to 15 years old. In addition, all 6 year olds are entitled to pre-school education for one year, prior to starting basic education. Primary school

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teachers teach students aged 7 to 13 years old (grades 1-6), while specialist teachers teach children aged 13 to 15 years old (grades 7-9). Secondary schools educate students aged 16-19 years and these schools are divided into general education (upper secondary schools) and vocational education (vocational schools). Upper secondary schools prepare students mainly for higher education, while vocational schools instruct students for specialised vocational training (Framework Curriculum Guidelines, 2004).

The general aim of Finnish technology education is to increase students' self-esteem by developing their skills through enjoyable craft activities; it also aims to increase students' understanding of the various manufacturing processes and the use of different materials in craft. Furthermore, the subject aims to encourage students to make their own decisions in designing, allowing them to assess their ideas and products. Students' practical work is product orientated and based on experimentation, in accordance with the development of their personality. The role of the teacher is to guide students' work in a systematic manner. They must encourage pupils' independence, the growth of their creative skills through problem-based learning and the development of technical literacy. In addition, gender issues are important throughout the whole curriculum (Framework Curriculum Guidelines, 2004).

Slovenian primary school technological education is compulsory for pupils aged from 9-13 years. D&T curriculum is based on standards and was last time reformed in 2011. Students are directed in carrying out activities such as design, preparation, technological processing, product testing, assessment, and product presentation as well as its price determination (economics) and evaluation (also environmental). Students discover and learn simple engineering and technological problems and to find ways to solve them by using simple tools. The general objectives stimulate students to develop their abilities at designing and finding new solutions where creative linking of science and technological knowledge with practice is encouraged. Teachers are recommended (by the curriculum) to implement experiential, problem and project based learning to gain students active work through data and information collection, exploration, experimentation, guided work and reflection. An important innovation in curricular reform since 1999 are technological activity days. They are distributed throughout the nine-year education in an average 4 days per year. These days allow

student consolidation and integration of the knowledge obtained from the subject and cross curricular. Students work inclusion is more active and motivational, and therefore encourages students' curiosity and creativity. The same reform also reduced amount of handicraft and practical work in the obligatory subject and introduced elective subjects (woodworking, plastic working, metalworking, electrical engineering, electronics in robotics, robotics in engineering, technical drawing and physics & engineering projects) which are implemented in the 7th-9th grade and are not compulsory to select. Execution of the elective subject is rather poor so the majority of the students only gain design and technology basic knowledge and the more contemporary themes are left out (Falkin, 2011).

In Estonia, school attendance is mandatory for all children from age 7 until the pupil turns 17. In basic school, the allocated time for covering the curriculum is nine years. The stages of study in basic school are: 1st stage of study – grades 1 to 3; 2nd stage of study – grades 4 to 6; 3rd stage of study – grades 7 to 9. The standard period of study in upper secondary school is three years (Andersen, 2003; Põhikooli- ja Gümnaasiumiseadus, 2010). After graduating basic school, students can continue their studies in a vocational school. After obtaining secondary education in a vocational school or in an upper secondary school, students can move on to the higher education level, opting either for an institution of professional higher education or a university (Eesti Vabariigi Haridusseadu, 1992).

Subjects taught in the domain of technology in Estonia enable students to acquire the mentality, ideals, and values inherent to the contemporary society. They learn to understand the options they have in solving tasks or creating new products; find and combine various environmentally sustainable techniques. In lessons, students study and analyse phenomena and situations, as well as use various sources of information, integrate creative thinking and manual activity. As a part of the study process, students generate ideas, plan, model, and prepare objects/products and learn how to present these. Students' initiative, entrepreneurial spirit, and creativity are supported and they learn to appreciate an economic and healthy life style. Learning takes place in a positive environment, where students' diligence and development are recognized in every way. Teaching develops their skills in working and cooperating, as well as their critical thinking and the ability to analyse and evaluate (Ainevaldkond "Tehnoloogia", 2011).

There are four levels of education in Iceland: playschool, compulsory school, upper secondary school and higher education (this is similar to the educational systems in other Nordic countries). Education in Iceland is mandatory for children aged 6-16 and is organised into a single, structured system; i.e., primary and lower secondary education are both part of the same school level and are generally housed within the same school. Upper secondary education (aged 16-20 years) is not compulsory, but anyone who has completed compulsory education has a right to study at this level. Upper secondary schools offer both general academic studies and vocational training. General academic studies are of four-years' duration, leading to a matriculation examination, while the length of vocational courses varies: they may last from one semester to ten semesters; the four-year courses are most prevalent (The Icelandic National Curriculum, 2007).

The present national curriculum for the subject of craft and technology in Iceland places an emphasis on individual-based learning. It also gives teachers the freedom to run an independent curriculum in school, which is based on the national curriculum. As in Finland, the subject is product based and students learn via traditional craft activities. Students' work is based on craft tradition rather than technology; however, innovation and idea generation are an important part of the Icelandic curriculum. There are also the aims of developing students' manual skills, instructing them in the manufacturing processes and training them to organise their own work. The national curriculum also incorporates outdoor education, working with green wood and sustainable design (Olafsson & Thorsteinsson, 2010).

Thus, as seen above, there are many similarities between the national curriculums in Finland, Slovenia, Estonia and Iceland; however there are also some differences. In the following sections, the authors will try to ascertain whether there are any differences in practical level between the four countries, with regards to students' attitudes towards craft and technology.

Main part of the study was to recognise the origin of craft and technology education in Finland, Slovenia, Estonia and Iceland. This was done by a literature review based on the different curriculums. The empirical part of the study was, however, to find any differences in students' attitudes towards craft and technology in Finland, Slovenia, Estonia and Iceland. The research questions were:

1. What are the origins of craft education in Finland, Slovenia, Estonia and Iceland?

2. Are there differences in students' attitudes towards craft and technology in Finland, Slovenia, Estonia and Iceland?

## 2. *Empirical research*

The aim of the quantitative aspect of the research was to answer the question: Are there differences in students' attitudes towards craft and technology in Finland, Slovenia, Estonia and Iceland?

The most common definition for attitudes is: Attitudes are psychological tendencies that are expressed by evaluating a particular entity with some degree of favor (Eagle & Chaiken, 1993). According to de Klerk Wolters (1989) the attitude towards technology is «a certain feeling with reference to technology, based on a certain concept of technology, and that carries with it an intention to behavior in favor of or against technology». Dyrenfurth (1990) and Layton (1994) state that technology is determined and guided by human emotions, motivation, values and personal qualities. Furthermore, they are using the concept 'technological will' – students will to take part in lessons and technological decisions. Whether or not the attitude towards technology contains the cognitive dimension is often discussed and according to Árdies, De Mayer & van Keulen (2012) technological knowledge may have a certain correlation with the attitude towards technology.

The research on students' attitudes toward technology has a long history. PATT (Pupils Attitudes Towards Technology) is the first instrument specifically made for this purpose. This instrument was first conducted in the Netherlands and since 1984 researchers have been using it in several different formats and a number of different instruments have been made for measuring an attitude in the field of technology (Garmiere & Pearson, 2006).

In order to evaluate students' attitudes towards craft and technology in Finland, Slovenia, Estonia and Iceland, a questionnaire was devised, consisting of 14 statements. For each Likert-type item, there were five options, from 'Strongly Disagree' (= 1) to 'Strongly Agree' (= 5). The questionnaire also featured some questions about students' backgrounds, in addition to questions that attempted to gauge students' motivation and success, in terms of craft and technology education classes. The questionnaire was based on the PATT standards

(Pupils Attitudes Towards Technology), which were designed and validated by Raat & de Vries (1986) and van der Velde (1992). Totally 864 students took part in the survey. The age of the student-respondents was 11-13 years.

According to Autio (1997), de Klerk Wolters (1989), Fensham (1992) and Lauren (1993) we could assume that there would be differences in individuals' attitudes towards technology. Therefore, we tried to find out whether there were statistical differences between the respondents. This was done by conducting the one tailed t-test, with the same variance, on boys and girls. In the entire Finnish, Slovenian, Estonian and Icelandic groups, we employed the two tailed t-test, as we had no hypothesis based on the previous research.

### *3. Results*

Several differences in students' attitudes towards craft and technology were found in the four countries. The average response in our Likert-style (1-5) questionnaire to all 14 items was among Finnish girls 3.25, Slovenian girls 3.17, Estonian girls 3.55 and Icelandic girls 3.67. Significant statistical difference was found between boys and girls, whereas the average response of boys was in Finland 3.75, Slovenia 3.73, Estonia 4.00 and Iceland 3.87. Estonian boys had the most positive attitude towards technology, whereas the lowest attitude was found among Slovenian girls. The difference between boys and girls was definitely the smallest in Iceland. The averages for all 14 items in each country are presented in [Figure 1](#).

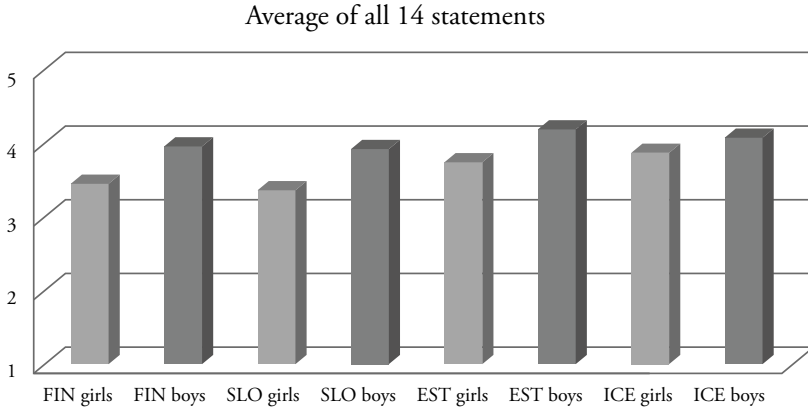


Figure 1 – Shows the average values of all 14 statements

The highest average values in the whole questionnaire were found in statement: Both boys and girls may understand engineering-related phenomena. The highest average responses were among Icelandic girls 4.82, Finnish girls 4.62 and Icelandic boys 4.60. Any significant statistical differences were found between boys and girls. This is a clear sign that gender issues in technology education are adopted by both boys and girls. The averages for statement: Both boys and girls may understand engineering-related phenomena are shown in [Figure 2](#).

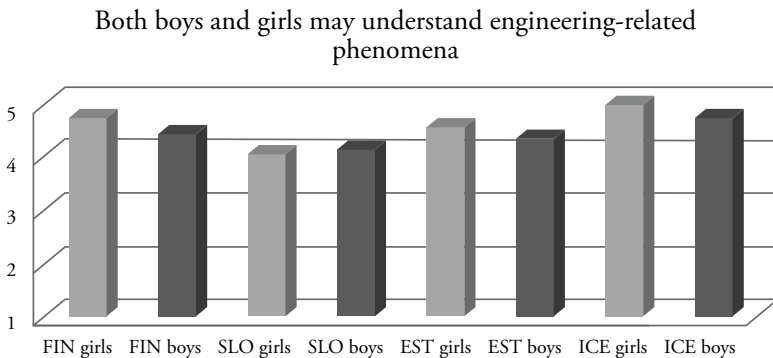


Figure 2 – Shows the average values in statement: Both boys and girls may understand engineering-related phenomena



Another statement with high loadings was: Technology education/craft lessons considerably contribute to the development of manual skills. The highest average responses were among Icelandic girls 4.66, Estonian boys and girls 4.56 and Icelandic boys 4.50. Interestingly there was a significant statistical difference when compared with Finnish girls 3.75 and Slovenian girls 3.87. In general, it seems that it is not surprising that both boys and girls are attracted to craft and technology education because they enjoy working with their hands and like the independence and chance for creativity provided by these classes (Silverman & Pritchard, 1996). It seems that several other school subjects have more motivational problems than technology education. The averages for statement: Technology education/craft lessons considerably contribute to the development of manual skills are shown in [Figure 3](#).

Technology education / craft lessons considerably contribute to the development of manual skills

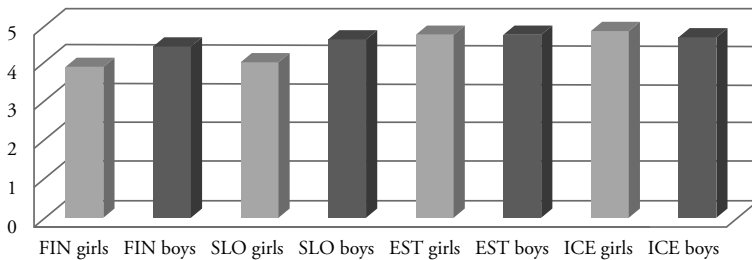


Figure 3 – Shows the average values in statement: Technology education/handicraft lessons considerable contribute to the development of manual skills

The lowest value was found in statement: Spends a lot of time with engineering-related hobby activities. The average response among Estonian girls was 2.02 followed by Slovenian girls 2.16. Difference between boys and girls was statistically very significant whereas Icelandic boys scored 3.58 and Estonian boys 3.44. The averages for statement: Spends a lot of time with engineering-related hobby activities are presented in [Figure 4](#).

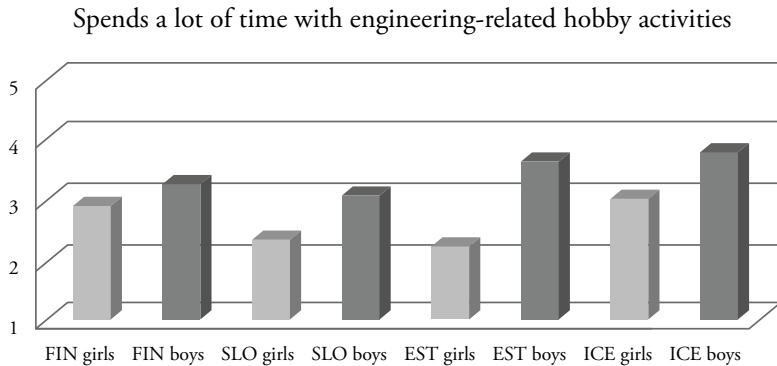


Figure 4 – Shows the average value in statement: *Spends a lot of time with engineering related hobby activities*

Another statement with low values was: In the future would like to choose a speciality or a profession related to engineering. The lowest average responses was among Slovenian girls 1.82, followed by Finnish and Estonian girls 2.40. Again, statistically very significant difference was found whereas Estonian boys scored 3.39 followed by and Icelandic and Finnish boys 3.25. This is consistent with Eccles (2007) who states that males will receive more support for developing a strong interest in physical science and engineering from their parents, teachers and peers than females. In addition, all young people will see more examples of males engaged in these occupations than females. The averages for statement: In the future would like to choose a speciality or a profession related to engineering are presented in [Figure 5](#).

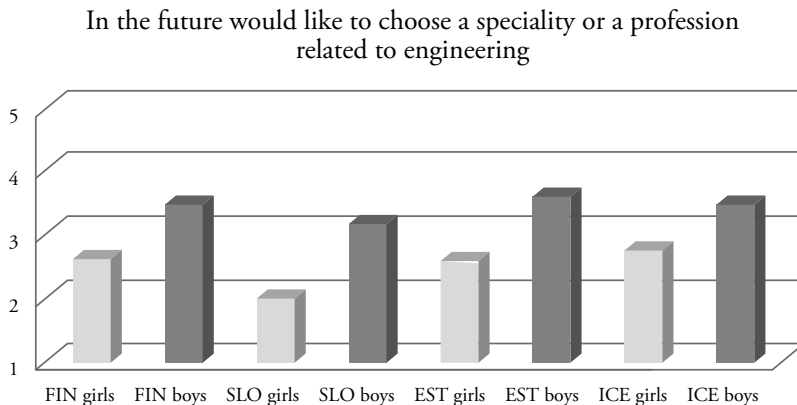


Figure 5 – Shows the average values in statement: *In the future would like to choose a speciality or a profession related to engineering*

The highest correlation (0.76,  $p < 0.001^{***}$ ) to the average of other statements was found in statement: *Is interested in engineering and the phenomena related to it*. In the factor analysis this statement explained 57.7 % of the total variance. The statistical difference between boys and girls was also the highest in this statement. Highest value was found among Estonian and Icelandic boys 4.40 followed by Finnish boys 4.30. Lowest value was scored by Slovenian girls 2.99, followed by Finnish and Estonian girls 3.32. The difference between boys' and girls' interest areas can be seen in practice, at least in Finland, where boys still want to choose technical craft studies and the girls textiles (Autio, 1997; Autio, 2013). The averages for statement: *Is interested in engineering and the phenomena related to it* are presented in [Figure 6](#).

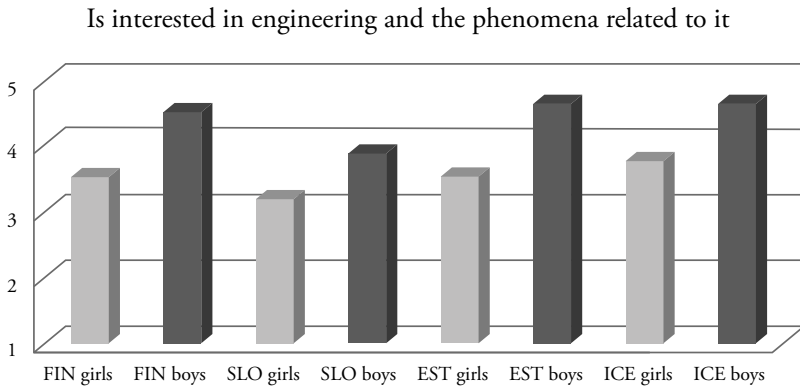


Figure 6 – Shows the average value in statement: *Is interested in engineering and the phenomena related to it*

#### 4. Conclusions and Discussion

Craft education in Finland, Slovenia, Estonia and Iceland originated over 140 years ago and was influenced by the Scandinavian sloyd pedagogy. In the beginning, the subjects largely focused on students copying artefacts, using a variety of handcraft tools: the purpose of this was to improve their manual skills, rather than their thinking skills. At that time various types of tools were made in craft lessons, e.g. surfaced pointers, tin dustpans, which were needed either at school or in the household. In 1960's, especially in Estonia, an important aim was to guarantee that students familiarize themselves with the most important contemporary industrial and agricultural sectors and to ensure a tight connection between teaching and public work, as well as to cultivate communistic approach to work in the young generation. Also in Finland one of the main aims was to prepare young people, who in the future would mostly become laborers and start working in a public economy sector. However, today the focus is much more on developing students' thinking skills, which enables them to work through various handicraft processes (from initial ideas to the final products). This work is based on the idea generation of students and is thus expected to increase their self-esteem and ingenuity.

Despite the origins of craft education in Finland, Slovenia, Estonia and Iceland being similar, nowadays the Slovenian, Estonian and Icelandic national curriculum place greater emphasis on technological aspects, design and innovation, whereas the Finnish national curriculum focuses on the development of students' personalities and gender issues. What's more, in Finland there is just one subject - Craft education -, but it is in practice further divided into technologically based technical work and artistically oriented textile work. In Slovenia there is also just one subject for both boys and girls. Problem seems to be, especially for older girls, that students are not allowed to choose subjects based on their interest area. In Estonia and Iceland the curriculum allows more flexibility. In Iceland two different subjects: art based textile education and innovation based technology education, compulsory for both sexes, seem to be relatively good setup for gender equity as the difference in attitudes was the smallest in Iceland. In Estonia technologically based 'technology' and 'handicraft / home economics' give students an opportunity to choose study groups based on their wishes and interests, and allows students to study in greater detail the subject that they are interested in.

In the quantitative part of the research several differences in students' attitudes towards craft and technology were found in the four countries. Definitely, the smallest difference between boys and girls was found in Iceland. This finding corroborates with comparable results from Autio & Soobik (2013) and Autio, Thorsteinsson and Olafsson (2012) which shows that Icelandic girls performed better attitudes than Slovenian, Estonian and Finnish girls. This is an interesting finding as the Finnish curriculum has put large emphasis on gender equity since 1970, but still Finnish girls had more negative attitudes towards technology. Finnish girls seemed to be aware of the gender equity and their highly agree with the statement: both boys and girls may understand engineering-related phenomena. However, only a few girls are willing to challenge stereotypes about non-traditional careers for women, as it could be conducted from responses to the statement: in the future would like to choose a speciality or a profession related to engineering.

This phenomenon seems to be true also in Slovenia and based on these findings a justifiable question of other point of view in equality arouses: are all students in Finland and Slovenia without any regard to sex given an opportunity to choose study groups based on their wishes and interests, which

allows them to study in greater detail the subject that they are really interested in? Gender-based segregation and falling recruitment for scientific and technological studies are common phenomena in all the Nordic countries. However, it is a paradox that the inequity is noticeable in Finland where for decades gender equality has been a prime educational goal.

In addition, only few girls seemed to have technological hobbies or had interest in technological articles. What's more, in Finland the boys still want to choose technical craft studies and the girls textiles (Autio, 1997; Autio, 2013). A practical solution to get both sexes to choose both subjects has not been found, although it is obvious that boys and girls have different interest areas as seen in responses to the statement: Is interested in engineering and the phenomena related to it. Finnish, Slovenian and Estonian craft and technology education curriculum could benefit from Icelandic system with two different subjects: art based textile education and innovation based technology education, compulsory for both boys and girls.

The Estonian boys' attitudes towards craft and technology were most positive. It indicates that the Estonian curriculum that includes two different craft subjects: the technologically based 'technology' and 'handicraft / home economics' is still a relatively motivated setup especially for boys, because they can concentrate in greater detail to the subject that they are really interested in. In addition, the innovation and technology part: technology in everyday life, design and technical drawing, materials and processing with exchanged study groups works fine for both boys and girls. On the other hand, motivation in technology education can be significantly improved by developing special programs, where teachers are aware of the differing interests of both genders and consider ways of making the environment and the subject attractive to all.

The critical side of the study is that the study group consisted only from 11-13 year-old students and in Estonia only 11-year-olds. This concentration only in the younger students may have had a small effect in the results in Estonia. Although students' attitudes are assumed to be rather stable during the school years (Arffman & Brunell, 1983; Bjerrum Nielsen & Rudberg, 1989); Autio, Thorsteinsson and Olafsson (2012) found that there was significant statistical difference between 11 and 13 year old Finnish girls in attitudes towards technology. Furthermore, no statistical difference was found between younger and older Finnish and Icelandic boys or between Icelandic younger and older girls.

Another critical point of the quantitative part was the use of a relatively small sample of students compared to whole population. In addition, the amount of students varied a little bit between countries. However, 864 students seemed to be enough as the results are consistent with previous studies (Autio, 1997; Autio & Soobik, 2013; Autio, Thorsteinsson & Olafsson, 2012). As the whole technological culture is different in these four countries, we must notice that the questionnaire measures only students' attitude, not their absolute technological will, which is shaped and guided by the whole society, human emotions, motivation, values and personal qualities. The concept attitude is just a single one part of a larger concept, which is 'technological competence'. However, attitude is a crucial part of the competence as it has a remarkable effect on technological knowledge and technological skills in real life situations.

The reasons behind the dissimilarities found between the four countries may be due to differences in the curriculums and in different pedagogical traditions. Besides, in Estonia there was still some influence from Tsarist Russia with a tight connection between teaching and public work, as well as to cultivate ideological approach to work in the young generation. On the other hand, the political situation has considerably changed in Estonia and the motivation for further development seems to be ambitious also in education, including the syllabi of craft and technology education. However, further research is needed before the authors can reach their final conclusions. We are continuing our efforts in several related projects.

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*Le idee di Erasmo da Rotterdam, il maturazionismo lineare e ciclico, un riscontro sociologico contemporaneo*

ABSTRACT:

I cambiamenti nel mondo sociale sono nuove sfide per gli studiosi. La lettura e l'interpretazione delle vie dello sviluppo umano e sociale diventano una 'provocazione' per promuovere il progresso scientifico. Lo sviluppo è possibile attraverso uno sguardo al futuro, l'impegno verso il presente e la lettura del passato. Il pensiero di Erasmo da Rotterdam può esserne un esempio. Il suo contributo, letto con un punto di vista sociologico e considerato facendo specifico riferimento alla sua teoria del maturazionismo lineare e ciclico, potrebbe diventare l'ispirazione e la chiave interpretativa dell'attuale realtà sociale, culturale e educativa. Potrebbe diventare anche un impulso per sostenere i processi dello sviluppo integrale ed umano degli individui e della società.

PAROLE CHIAVE: sociologia, scienza, interpretazione, maturazionismo lineare e ciclico.

ABSTRACT:

Changes in the social world are a new challenge for researchers. The reading and interpretation of the paths of human and social development is a 'provocation' for further scientific and cultural progress. Development is possible by looking to the future, committing to the present and reading the past. Erasmus's thought can be an example of such logic. His achievements, recognized in the sociological interpretation and based on the original theory of the so-called linear-cyclic maturationism, may become an inspiration and an interpretation key of contemporary social, cultural and educational reality. It can also contribute and foster the processes of further integral and human development of individuals and society.

KEYWORDS: Sociology, Science, Interpretation, Linear-cyclical Maturationism.

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## 1. *Introduzione*

Erasmus da Rotterdam colpisce. Colpiva anche prima, cioè, nei suoi tempi, secoli fa. Considerando il fatto che nell'incontro tra la scienza e la vita sembra esserci uno stretto legame, si può prevedere che lo farà ancora. Non sembra ardua l'osservazione fatta da alcuni studiosi che il reale progresso umano non si realizza soltanto in modo spontaneo, ma esige soprattutto una certa metodologia e una riflessività degli attori professionali (Donati, 2011). L'eredità che si accumula, sempre grazie alle figure di ricercatori, intellettuali e scienziati, deve essere – con tanta saggezza e competenza – stimolata, organizzata, elaborata, progettata. Tutto ciò apre una discussione: in quale modo si potrebbero divulgare e affermare certe idee, affinché i processi del progresso possano realizzarsi realmente e con le conseguenze attese? Il corso del tempo non risparmia neanche l'eredità degli intellettuali e degli scienziati più profondi.

L'insegnamento del pensatore olandese, qui riportato e preso in considerazione, si basa soprattutto sulle ricche e profonde opinioni nell'osservazione della vita, condivise con alcune figure storiche polacche importanti nel suo tempo storico (per la maggior parte si tratta della raccolta della corrispondenza letteraria con loro). In una lettera, preparata e mandata dal re polacco Zygmunt I, come risposta alla lettera precedentemente inviata da Erasmo, troviamo una descrizione molto indicativa del modo in cui Erasmo stesso sia stato visto e colto dagli altri:

«Sei uomo di grande capacità intellettuale e di prudenza, e oltre ciò, il tuo cuore è onesto e premuroso nella ricerca della pace e della concordia cristiana. Mai abbiamo dubitato in questo, comunque in quella convinzione siamo stati ancora rafforzati grazie alla tua lettera. Riconosciamo in essa un'impronta della tua ragione cristiana. Non dubitiamo che tu sia così sempre: sia nelle opere umoristiche che nelle opere serie che scrivi»<sup>2</sup>.  
(Erazm z Rotterdamu, 1965: 113)

Andrzej Krzywicki, invece, vescovo di Przemyśl, lo chiama il «re dei colti» (Krzywicki, 1965: 37).

Alcuni pensatori non si preoccupavano se i loro progetti venivano riconosciuti o meno. Sembrava loro di scarsa importanza l'impegno di dare visibilità a tutto ciò che erano riusciti a proporre con il loro

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<sup>2</sup> Traduzione della citazione a opera di Paweł Prüfer.

lavoro, spesso molto faticoso e duraturo. Erasmo, di cui ci occupiamo in modo particolare nella nostra analisi, lo esprime con ironia e in due modi contrastanti: «[...] lodare se stessi è il massimo dell'assurdo e dell'arroganza. [...] fa bene a lodare se stesso chi non trovi un altro che lo elogi» (Erasmo da Rotterdam, 1996: 56-57).

Le indicazioni preparate e presentate da Erasmo nella sua vasta opera filosofica e umanistica, considerata attraverso uno strumento ermeneutico teorico sociologico, selezionato e reinterpretato tramite la cosiddetta teoria del maturazionismo lineare e ciclico (Crespi, 1998: 437), potrebbero far sì che nell'orizzonte del pensiero e della pratica educativa, socializzatrice e scientifica nascano alcune 'ragioni di Erasmo' come uno strumento per le attuali scienze umane, per l'internazionalizzazione, per le reti e l'innovazione. Il mondo sociale – come afferma Ludwik Gumplowicz – è unico e tutti i fenomeni che ci circondano hanno la stessa fonte ontologica, ma bisogna esaminare le questioni in modo dettagliato, quando quel mondo viene analizzato con lo strumento scientifico (Gumplowicz, 2008: 86). È proprio questo aspetto che vogliamo analizzare in questo contributo riferito al pensiero di Erasmo da Rotterdam, delineato in prospettiva ermeneutica orizzontale (attualità del contesto) e verticale (storia e avvenire).

## *2. Il concetto del maturazionismo lineare e ciclico come panorama ermeneutico dello sviluppo*

Il concetto dello sviluppo sembra avere uno schema molto semplice. La questione diventa più complicata quando le sue idee vengono trasformate in pratica, oppure quando dovrebbero essere trasferite dalla sfera teorica alla sfera della realtà. «Lo sviluppo dei popoli appare, [...], come uno degli impegni preminenti di questo secolo. Ma, malgrado notevoli sforzi ed immensi investimenti, i risultati rimasero sproporzionati e deludenti» (Carrier, 1997: 397). Non convince neanche il concetto dello sviluppo (in tale caso sociale) che ha dato il sociologo italiano Luciano Gallino, che propone uno schema:

«[...] dispiegamento che attraversa necessariamente uno stadio iniziale, di crescita della struttura; uno stadio di maturità; e uno stadio finale del declino, crisi ed eventuale dissoluzione, con la quale la struttura progressa cede eventualmente posto ad una struttura

consimile, ma provvista di maggiori potenzialità intrinseche [...]».  
(Gallino, 1993: 685)

Lo stesso Erasmo da Rotterdam, in una delle sue opere più brillanti, *Elogio della follia*, anche se in modo molto ironico, satirico e sarcastico, esprime una regola ciclico-lineare della vita. Il suo discorso si apre con la tesi che la vita migliore e più felice consiste nella capacità di non pensare, di non preoccuparsi di riflettere (bisogna ricordare che Erasmo attribuisce alla 'follia' il ruolo di protagonista di quel discorso). Il filosofo di Rotterdam lo presenta nel modo seguente:

«In primo luogo, come si fa a non capire che la prima età dell'uomo è di molto la più felice e la più gradita a tutti? Cosa c'è infatti nei bambini piccolissimi che ce li fa sbacuciare, abbracciare, proteggere con tanto entusiasmo che perfino il nemico porge aiuto alla prima infanzia, se non le lusinghe dell'irragionevolezza, conferite a bella posta dalla natura preveggenze ai nati di fresco, perché possano addolcire carezzevole il favore di chi li protegge, servendosi per così dire di una malleva del piacere? L'adolescenza poi, che succede all'infanzia, quanto riesce simpatica a tutti, con quanta schiettezza tutti la favoriscono, con quanto impegno la spingono innanzi, con quanta cortesia le danno una mano! Ma da dove proviene questo fascino della giovinezza, ditemi un po', se non da me? È per mio beneficio che non è affatto saggia e quindi per nulla ringhiosa. Invece non appena diventano adulti con l'esperienza e la maturazione culturale e cominciano ad appropriarsi di una virile saggezza, subito appassisce la bellezza, l'allegria si spegne, l'umorismo si raffredda, il vigore si affloscia, e quanto più ci si allontana da me [la follia], tanto meno si vive una vera vita, finché subentra la dura e gravosa vecchiaia, odiosa non solo per gli altri, ma anche per se stessi. Essa sarebbe del tutto insopportabile per chicchessia, se di nuovo non ci fossi io, propizia, accanto a chi ha un piede nella fossa, piena di compassione di fronte a pene così gravi, per ricondurlo all'infanzia nella misura del possibile, proprio come gli dèi poetici soccorrono i morenti con una qualche metamorfosi: e perciò non è fuori strada il popolo nel chiamarli rimbambiti. Se poi si volesse conoscere il modo con cui si attua la trasformazione, non nasconderò neanche questo». (Erasmo da Rotterdam, 1996: 63-64)

Nella lettera indirizzata a Piotr Tomicki, vescovo di Cracovia, troviamo comunque parole che completano l'elaborazione appena riportata. Erasmo, riconoscendo il suo stato anagrafico, la sua vecchiaia, la

definisce malattia naturale. Se le cose stanno in quel modo, le cure e le medicine – anche se molto raffinate – non possono nulla (Erasm z Rotterdamu, 1965: 281).

Dove stanno le cause principali del problema del declino, della decadenza oppure della dispersione dello sviluppo? Non è per caso un duro impegno per andare – necessariamente – sempre avanti, senza tornare a ciò che rimane del passato ma non si è esaurito, come i valori della rinascita della società e la forza dell'umano? Non è per caso il pensiero tipo: Erasmo? Una questione da dimenticare; i suoi, non sono tempi nostri? Il concetto del maturazionismo lineare e ciclico salva – secondo le nostre convinzioni – da tale opinione e dalle conseguenze dell'ignoranza in relazione alla prospettiva della conformità tra passato, presente e futuro. Quello che è stato compiuto e concluso rimane come oggetto di memoria. I processi prodotti dai fattori che agiscono nella contemporaneità diventano oggetto di sperimentazione. Quanto si realizzerà in futuro diventa, in questo momento, oggetto di riflessione immaginativa, di progettualità, di analisi (Sztompka, 2012: 535). Nel concetto dello sviluppo che corre in modo costante, migliorando i punti di vista, la vita degli individui e delle società, viene esaminato quel fenomeno come una certa unione tra memoria, sperimentazione e immaginazione, proponendola come una sorta di terapia riflessivo-ontologica (Prüfer, 2013: 65-118).

Si tratta di un insieme di processi visibili anche nel corso dello sviluppo educativo, nel susseguirsi delle varie fasi che – grazie ad un'osservazione retrospettiva e analitica – rivelano la direzione di processi che sembrano ciclici. Ma una sorta di replica, di ripetizione, di ritorno di alcuni stadi, elementi, caratteristiche, esprime una logica interna coerente: quelle tappe non sono sempre le stesse, identiche, ma asimmetriche, 'passanti', come decenni fa le aveva definite il noto sociologo polacco Stanisław Ossowski (Ossowski, 1976: 80). Il suo concetto viene completato da Piotr Sztompka, che descrive l'andamento dei processi sociali realizzatisi nel tempo come sequenza di fasi da osservare come se fosse plasmata e influenzata dalle fasi precedenti (Sztompka, 2005: 70). In tale prospettiva si possono intuire un ritorno, un ciclo, così come una reciproca indipendenza, anche storica, ma pur sempre realtà che interrompe ed esce dalla storicità. Emerge la consapevolezza che esiste un tessuto intra- ed inter-umano, una sostanza spirituale, relazionale, psichica e culturale, che costituisce per l'umanesimo il riferimento tra passato, presente e futuro (Sapelli, 2002: 2).

Il progresso ad andamento ciclico dei processi sociali è anche lineare. Anche se le due definizioni ‘ciclico’ e ‘lineare’ sembrano escludersi reciprocamente, in realtà esse cooperano per una sorta di ‘complotto’ che è anche logico e razionale. Può esserne un esempio l’osservazione dei sociologi riguardante il sistema scolastico italiano:

«[...] dalla sua fondazione a oggi, potremmo dire, innanzitutto, che il suo assetto ordinamentale è passato da una situazione iniziale di apertura – ossia di limitate disparità tra i rami nobili e quelli popolari dell’istruzione – e, tutto sommato, di contenuta selettività, a una situazione di maggior chiusura e di accresciuta selettività per tornare, nel corso degli ultimi trent’anni, a nuove e più pronunciate condizioni di apertura e di netta riduzione dei livelli di discriminazione formale». (Schizzerotto & Barone, 2006: 55)

Tutto sommato, il dinamismo che si realizza nel contesto dell’educazione, del mondo sociale, culturale, tecnico e mentale, esige sempre l’impegno nel vivere la contemporaneità, la capacità di accedere al tempo attuale, la prontezza nell’interagire con gli attori del presente – come osserva il pedagogista italiano Vincenzo A. Piccione (Piccione, 2015: 139).

Una volta analizzati i fenomeni prodotti da una certa ripetitività o ciclicità, occorrerebbe prendere in considerazione, come fenomeno sempre vivo, flessibile, dinamico, qualche elemento del passato. Esiste – secondo alcuni sociologi – qualcosa di immutabile, saldo e non cancellabile, che si pone al di fuori del tempo storico. Come esempio di tale fenomeno si potrebbe riportare una descrizione di Roberto Cipriani, che legge il fenomeno della religione, ovvero della cosiddetta ‘religione diffusa’. Il sociologo italiano sottolinea:

«rimane salda e costante quella sorta di involucro-contenitore, di guaina connettiva e tendenzialmente solidaristica, rappresentata dalla cosiddetta religione diffusa, tipica di ambiti sociali in cui una specifica confessione-credenza ha investito molto del suo capitale a livello di forze militanti, istituti formativi, canali di informazione, attività simbolico-rituali». (Cipriani, 1988: 11)

Processi di continuazione e ritorno e ripetizione, appena indicati, si evolvono in una materia che non sempre appare materiale e che non sempre viene presa in considerazione. La società non ‘è’, la società ‘diventa’.

### 3. *L'eredità di Erasmo da Rotterdam come fenomeno posto ed interpretato e come sfida da porre e da reinterpretare*

#### 3.1. *Scienza*

Nella scienza, anche in quella umana e sociale, esistono certe regole, anche se non codificate e non formalizzate. Esse costituiscono l'ethos dello scienziato che porta sulle sue spalle la disponibilità, nella totale dedizione alla missione che è disposto a realizzare. Il pensiero di Erasmo da Rotterdam è stato in alcune questioni superato, modificato e 'modernizzato', ma rimane integralmente vivo e fecondo. Tutto ciò che è riuscito a dare alle generazioni oscilla tra attualità e necessità di 'aggiornamento'. È una posizione vicina a ciò che constata Franco Ferrarotti:

«Decidere di fare lo scienziato, dedicarsi alla ricerca scientifica è una sorta di entrata in un sacerdozio laico. Contrariamente ai grandi scrittori, ai poeti, ai musicisti, i ricercatori scientifici non lavorano per l'eternità. Sanno che i loro risultati, per quanto brillanti, avranno vita relativamente breve. Sognano di essere superati e anche dimenticati, perché sanno che la loro vera, permanente vittoria consiste in un progresso scientifico che li renda al più presto obsoleti, piccoli, talvolta minimi gradini in uno sviluppo al quale nessuno può in anticipo assegnare un termine finale e insuperabile». (Ferrarotti, 2014: 9)

Lo scienziato è legato strettamente alla scienza. Compie i gesti personali verso il campo spersonalizzato (Ossowski, 1983: 237). I suoi risultati possono essere riconosciuti dagli altri scienziati e studiosi se agiscono seguendo il valore e il principio della intersoggettività (Czyżewski, 2005: 95-104). Esiste tra loro un legame inseparabile. Costituiscono un mosaico, una struttura. Se ci fosse un'invasione della critica totale proveniente dall'esterno, un attacco diretto verso lo scienziato, soffrirebbe e verrebbe ferita la scienza come tale. Se si imprecasse contro lo scienziato, si combatterebbe anche contro la scienza (Erazm z Rotterdamu, 1965: 54).

Da quanto appena rilevato nasce un modello di scienza come questione assionormativa, ossia etica. Non ardua diventa la tesi del noto sociologo italiano, molto conosciuto nell'ambiente scientifico polacco, Riccardo Campa, che nota: «[...] la scienza non solo non è amorale o immorale, ma costituisce anzi un importante modello etico» (Campa,



2004: 9). L'eticità della scienza consiste anche nella realizzazione dell'ethos professionale, che contiene un'esigenza di entrare in profondità nell'oggetto esaminato. Nel campo della scienza si pongono le varie domande che riguardano la natura dei fattori che si studiano, come si presentano, quando si sviluppano o quando periranno. Ma ci sono anche le domande che cercano di scoprire il senso, che verificano le vie del senso possibile – sono le domande sul significato. Ma ci sono anche interrogazioni sul 'perché', che radicalmente allargano e approfondiscono le sfere delle conoscenze che possono essere acquisite (Facchini, 2009: 132).

Lo scienziato riveste nella sua attività non solo un ruolo professionale, ma lo fa anche come persona totale, integrale. Nel suo 'manifesto sociologico', il sociologo americano Alvin Ward Gouldner affermava: «[...] the roots of sociology pass through the sociologist as a total man, and the question he must confront, therefore, is not merely how to work but how to live» (Gouldner, 1970: 489). La vita dello scienziato diventa quindi una missione, un sacrificio, una specie di dono offerto all'umanità intera, indipendentemente dal tipo di ricerche realizzate.

La sua missione scientifica sembra tale se si assume in un'ottica interpretativa il maturazionismo lineare e ciclico. Erasmo da Rotterdam lo afferma anche attraverso certi piccoli atteggiamenti, i quali diventano anche gli esempi che testimoniano la consapevolezza dell'esistenza dei legami tra storia e presente in prospettiva futura. Nel campo della scienza essi sono vari. Uno di questi è presente nella lettera indirizzata a Jan Łaski. Erasmo sostiene che è meglio pubblicare le opere degli scrittori antichi, degli scienziati del passato – che per vari motivi sono stati pubblicati con errori e contaminati dall'ignoranza di copisti, editori, redattori – invece di divulgare delle opere nuove (Erazm z Rotterdamu, 1965: 90).

Il potenziale dello scienziato, le sue capacità e la sua dedizione hanno un grande valore nella pratica professionale che si realizza nel tempo in cui egli vive. Altrimenti si trasformerebbe in disprezzo del suo presente, una mancanza di responsabilità verso la storia e verso la società, affermerebbe la posizione dello scienziato pigro, poco dedicato e poco onesto. Erasmo da Rotterdam recrimina con il conte polacco Jan Łaski, che doveva affrontare un viaggio lungo: tutto questo tempo avrebbe potuto essere sfruttato meglio dedicandolo allo studio (Erazm z Rotterdamu, 1965: 46).

Nella ricerca scientifica un ricercatore cerca di interagire con gli altri, anche per convincerli che occorre, con tutte le forze, difendere l'ethos della scienza e promuoverla. Non ha nessun valore e nessuna importanza il profitto personale rispetto al bene che egli realizza nella sua missione. Semmai, la ricompensa materiale, il prestigio ed il rispetto degli altri, rimangono una questione secondaria (Erazm z Rotterdamu, 1965: 29).

Quando Erasmo invia la sua opera *Lingua* – come egli stesso dice – «nel mondo», si rallegra, perché in realtà, egli stesso potrebbe tacere, mentre la sua opera avrebbe parlato con voce propria (Erazm z Rotterdamu, 1965: 31). Dedicando la sua vita alla scienza e all'idea di trasformare il mondo in un ambiente più umano, egli è consapevole che tutto ciò che scrive e proclama è povero, vulnerabile e di relativa qualità. Comunque, si stupisce quando persone importanti, nobili, istruite, lo leggono, discutono, cercano di farlo proprio nella pratica di vita e di lavoro (Erazm z Rotterdamu, 1965: 35).

### 3.2. *Educazione*

L'educazione è un fenomeno sociale e strettamente individuale, personale. Tutti vengono toccati dal fenomeno educativo; si formano così anche gli 'esperti' (Baczko-Dombi, Żóltak, 2012: 63). Essa diventa pure – sia in concreto che in teoria – una sfida reale, molto eterogenea, multidimensionale, creativa e responsabile. Diventa tale anche quando viene esaminata tramite strumenti sociologici. L'educazione è – come altri fatti presenti nella vita della società – un'attività di alcuni verso e con gli altri (Znanięcki, 2001: 3). Tale attività è composta da elementi separati ma anche legati tra loro.

Per avere un riferimento concreto e utilizzando un linguaggio sociologico, il fenomeno della scuola va mostrato nella sua complessità formale ed esecutiva:

«Una scuola può essere definita come un'organizzazione specializzata nell'istruzione formale, vale a dire nella trasformazione riflessiva, sistematica e sequenziale, a opera di un corpo di specialisti appositamente addestrati e selezionati, di schemi di pensiero, di metodi di apprendimento, di conoscenze teoriche, generali e astratte, e di capacità tecniche riguardanti una serie più o meno ampia di discipline». (Schizzerotto & Barone, 2006: 15)

Il carattere multidimensionale della scuola, dell'istruzione e dell'educazione non esaurisce comunque la sua missione e il suo fine. Alcuni sociologi indicano anche la necessità di introdurre, nel sistema educativo, l'«arte» della vita ragionevole (Szczepański, 1973: 13). Non basta dare strumenti o creare alcune circostanze naturali per introdurre i processi dell'educazione. La nascita nobile non significa che un bambino, poi giovane e adulto, diventerà una persona colta, buona, saggia, matura. È sempre indispensabile la buona educazione che lo porterà allo stato di maturità (Erazm z Rotterdamu, 1965: 198). È anche indispensabile il riconoscimento serio e soggettivo, la valutazione attenta degli approfondimenti personali dell'allievo, se si vuole far nascere in lui la curiosità ricercatrice e l'entusiasmo per comprendere meglio (Erazm z Rotterdamu, 1965: 167).

Introducendo anche la prospettiva del concetto di *empowerment*, rimane come una grande e bella sfida l'attività seguente: «[...] favorire l'autoapprendimento dei discenti, motivandoli a sperimentare e a ricercare, a collocarsi a proprio agio in questa società dotandoli degli strumenti concettuali e operativi per viverci dentro» (Burgio, 2003: 87). Erasmo lamentava, non raramente, che la pigrizia, la fannulloneria, il sottrarsi agli impegni, fossero diventati un grande pericolo per tutta la società, perché così inizia spesso una rivolta, si favoriscono conflitti e, in alcuni casi, addirittura, la guerra (Erazm z Rotterdamu, 1965: 263). Come la storia dimostra bene e come afferma il ricercatore italiano Alberto Lo Presti, «le guerre non producono vincitori, solo sconfitti» (Lo Presti, 2003: 6).

Il corso dello sviluppo dell'educazione può realizzarsi in una prospettiva 'incrociata' e 'gemellata' nelle sue due caratteristiche, cioè quella ciclica e quella lineare. Questa dicotomia, che in realtà è solo apparente, definisce in generale una bilateralità nascosta nel fenomeno dell'educazione, dell'istruzione e della socializzazione. Gli autori di un manuale sociologico, riguardante i problemi della differenziazione e della riproduzione sociale, scoprono tale aspetto dicotomico nella unicità e nella molteplicità. Essi dicono che l'educazione sembra una e molteplice. «Molteplice perché ve ne sono tanti tipi quanti sono gli strati in cui si articola una società. [...]. L'educazione tuttavia è anche una, perché tutti questi diversi tipi di formazione poggiano sempre su una base comune» (Bagnasco, Brabagli, Cavalli, 2001, 1999).

Esiste, quindi, una base, un fondamento, una materia genetica, che non si esaurisce, anche quando l'educazione va in crisi. Potenzialmente

essa sta nella tradizione, nel passato, realizzandosi soprattutto nelle brillanti figure del mondo educativo, dedicandosi totalmente alla realizzazione della loro missione pedagogica, culturale, scientifica. Non si disperde quella base, anche se in un certo momento storico, com'è nella fase della seconda modernità, ultramodernità e postmodernità, si afferma una frammentazione culturale, sociale, politica e religiosa. Nascono in tale contesto una sfida da affrontare e un'emergenza da risolvere. Una di tali proposte è stata formulata da Giuseppe Lorizio, nel titolo di un suo discorso: *Emergenza educativa e unità del sapere. La ricerca della verità nella prospettiva «sinfonica»* (Lorizio, 2010: 177-181).

Non mancavano nel passato, non mancano neanche adesso, diversi aspetti di crisi e di instabilità del sistema educativo. Erasmo da Rotterdam lo esprime con una certa amarezza, ma anche con spirito di ironia, sostenendo che la gioventù negli ambienti scolastici, fa tanta fatica e impara niente altro che la repulsione per lo studio (Erasmo da Rotterdam, 1965: 220). Prendendo in considerazione alcune opere recenti di sociologia dell'educazione, si nota una certa somiglianza con la tesi di Erasmo. Secondo Maria Cytowska, traduttrice di tante opere di Erasmo in lingua polacca, quasi tutti gli scritti si concentrano su un unico scopo: istruire, socializzare e formare l'individuo ed in ultima analisi educare tutta la società (Cytowska, 1970, 5). Certamente aprendosi ad altri campi, ma sempre nel contesto dell'educazione. Nel contesto polacco c'è una pubblicazione di Zbigniew Kwieciński che, già nel titolo, contiene un'espressione molto suggestiva che indica un'agonia dell'istruzione scolastica (Kwieciński, 1995). Nel contesto italiano invece, basta riferirsi allo studio scientifico di Norberto Bottani, che suggerisce le ragioni per cantare il *requiem* per la scuola (Bottani, 2013).

### 3.3. *Morale*

Nella vita della società sono soprattutto gli individui i principali fattori della sua qualità di vita. L'individuo precede la società (anche se in alcune tradizioni sociologiche non è così). Il parametro morale, quindi lo strumento usato anche nella ricerca scientifica, rinvia ad una vasta gamma di valori nella costruzione della società (Mariański, 2015: 11). Tale prospettiva vede in essa un organismo pieno di relazioni e di scambi reciproci: «Gli altri non sono appena strumenti di cui ci serviamo per realizzare fini concepiti in perfetta solitudine. Ogni aspirazione individuale, infatti,

matura e si definisce nello scambio interpersonale» (Genghini, 2005: 73).

Nello sviluppo di tale processo siamo sempre nella fase embrionale del maturazionismo lineare e ciclico. Le interazioni, l'apertura, la determinazione e lo sforzo quotidiano degli individui creano una specie di tessuto morale composto da fiducia, reciprocità, solidarietà, rispetto e giustizia (Czarnecka, 2016: 137). L'agire dell'individuo nel contesto della società civile. In Europa – secondo Alessandro Cavalli – siamo ancora in una fase iniziale (Cavalli, 2015: 20). Lo rende consapevole della necessità della sicurezza, delle interazioni con gli altri, lo spinge ad atteggiamenti di apertura, alla creatività e all'innovazione. Si diventa un cittadino e non solo abitante del paese e passeggero senza biglietto (Sztompka, 2016: 12).

L'individuo, con il suo senso di soggettività, è disposto anche a prendere su di sé alcune difficoltà, sacrifici, dolori. Nonostante i loro pesi, riesce a continuare, portare avanti e sviluppare il suo ethos umano, rimanendo moralmente sano. Erasmo ribadisce che le medicine amare – le difficoltà quotidiane – diventano indispensabili per sanare e far maturare una persona (Erazm z Rotterdamu, 1965: 67).

Altrettanto accade con le sofferenze fisiche e morali: il pericolo e la probabilità di cadere è sempre lo stesso. Ma le difficoltà e la fatica nell'uscirne sembrano più dure nel caso delle sofferenze morali (Zygmunt I, 1967: 113). Considerando la teoria del maturazionismo lineare e ciclico, e seguendo le più recenti ricerche psicologiche, mediche, pedagogiche, l'osservazione di Erasmo da Rotterdam si concentra su di esse. Secondo lui, le difficoltà di tipo morale, le sofferenze dell'anima, ci portano alla cattiveria e all'infelicità (Kowalska, Prüfer, Kowalski, 2014). La causa di tale stato è in noi stessi, quindi, per guarire, bisogna risolvere problemi che abbiamo dentro. Esiste ancora un'altra complicazione: più tragica moralmente è la situazione di qualcuno, meno presente sembra la voglia di essere aiutato dal medico, dall'intervento degli esperti (Erazm z Rotterdamu, 1965: 25). È sempre difficile – come nota Erasmo – ed in alcuni casi impossibile uscire dai vizi, dal potere della natura, dalle abitudini che abbiamo acquisito lungo la vita. Deve esserci un intervento straordinario nel processo di liberazione (Erazm z Rotterdamu, 1965: 231).

Vivere secondo dei valori significa anche essere pronto ad accettare il servizio verso la patria, la società, il popolo (Erazm z Rotterdamu, 1965: 33). La consapevolezza di essere membro della società non in maniera

statica ma in modo creativo, operante, permette di rivalorizzare lo scopo solidaristico e comunitario.

Negli anni sessanta del secolo scorso, è stata formulata, come descrizione etica, una nozione che si avvicina alla teoria del maturazionismo lineare e ciclico:

«Ma ogni uomo è membro della società: appartiene all'umanità intera. Non è soltanto questo o quell'uomo, ma tutti gli uomini sono chiamati a tale sviluppo planetario. Le civiltà nascono, crescono e muoiono. Ma come le ondate dell'alta marea penetrano ciascuna un po' più a fondo nell'arenile, così l'umanità avanza sul cammino della storia. Eredi delle generazioni passate e beneficiari del lavoro dei nostri contemporanei, noi abbiamo degli obblighi verso tutti, e non possiamo disinteressarci di coloro che verranno dopo di noi ad ingrandire la cerchia della famiglia umana. La solidarietà universale, che è un fatto e per noi un beneficio, è altresì un dovere». (Paolo VI, 1991: 296)

Questo aspetto teorico etico, in qualche senso anche ideale, non sembra troppo distante da osservazioni strettamente sociologiche. Anche le strategie sociologiche, fiduciose nei propri metodi e discorsi professionalmente corretti, non si distaccano dalla prospettiva assio-normativa. In un manuale sociologico italiano, gli autori ribadiscono un concetto, in cui ci sono elementi e semi oscillanti attorno al maturazionismo lineare e ciclico, coincidente molto con l'agire umano, sia individuale che collettivo:

«Ciascuno è un attore sociale che recitando una data parte – ossia svolgendo un dato ruolo – riproduce incessantemente il modello organizzativo societario in qualche punto nel quale risulta inserito. La realtà del sociale non è solamente data ai membri d'una società come una realtà materiale, capace di mostrare caratteri in vario modo affini agli oggetti fisici, come la durezza e l'indifferenza per le sorti di chi con essi si scontra; è anche costruita giorno per giorno col concorso di tutti». (Borgna, Ceri, Gallino, Garelli, Milanaccio, Scamuzzi, 2012: 33)

#### 4. *Conclusioni*

Il ritorno al pensiero dei classici, nel nostro caso alla eredità di Erasmo da Rotterdam, è motivato dalla convinzione che il vero sviluppo umano, integrale e sociale prosegue con le tappe che non si chiudono nel semplice schema, in cui si salgono, uno dopo altro, gradini sempre più alti e più sofisticati. Non convince l'opinione che vede il progresso dell'umanità in termini di percorso che permette di andare sempre più avanti, in una stretta via, secondo un ben definito orientamento dentro il quale tutto procede, ma dove solo alcuni progrediscono. Un vero progresso (che prende in considerazione anche il passato e l'attualità – maturazionismo) dovrebbe essere visto come un allargarsi della capacità di cooperazione e di relazione orizzontale. In altre parole, come constata il filosofo italiano Alberto Lo Presti, «Rimane la sostanza di un divenire dell'umanità non più intesa quale mera attribuzione zoologica, ma categoria viva che racconta di una ricerca incessante di unità nelle plurali forme di espressione che in essa convivono» (Lo Presti, 2005: 186).

Sembra necessario, insomma, uno sguardo indietro, l'esame profondo dei passi appena fatti. Nella vita sociale, moralmente corretta, tale ritorno sembra urgente e necessario, altrimenti perderemo un insieme ricco di risorse sociali, morali e umane, maturate e ricche in semi di saggezza generazionale. Franco Ferrarotti lo esprime così:

«Nessuno si sogna, ovviamente, di invocare il ritorno alla morale del villaggio, con tutte le sue angustie e chiusure, e neppure si nutre nostalgia per il potere discrezionale del patriarca della famiglia allargata tradizionale, che il contesto urbano moderno ha semplicemente eliminato. L'idealizzazione del passato sarebbe semplicemente un alibi per non fare nulla nel presente. Il ritorno, più che mai urgente, è il ritorno ai valori sui quali si è costruita la civiltà industriale occidentale: il rispetto della persona, la giustizia, la tolleranza verso il prossimo come misura di una lucidità morale condivisa e convissuta». (Ferrarotti, 2013: 10)

Il grande sociologo polacco Florian Znaniecki, analizzando la condizione della società nei tempi suoi, osserva e avverte che le prossime generazioni devono imparare in modo consapevole a condurre l'evoluzione e lo sviluppo sociale, culturale ed umano, se vogliono che la civilizzazione possa evitare delle catastrofi, degli scenari tragici. Se

lo capiranno e se faranno questo sforzo permanente, dovranno anche pensare a quali siano gli ideali culturali da privilegiare e da proporre alle generazioni future (Znaniiecki, 2001: 3).

Il pensiero di Erasmo da Rotterdam emerge come una delle proposte più adeguate all'appello urgente (anche se formulato quasi un secolo fa) dal sociologo polacco F. Znaniiecki. Certamente le opere di Erasmo non hanno un valore strettamente sociologico e portano in sé anche alcune debolezze. Florian Znaniiecki diceva, nel suo tempo, che lo stato della sociologia polacca era triste (Znaniiecki, 1984: 136). Una delle tendenze nate e sviluppate in essa è la contiguità con la filosofia, anche se la storia della filosofia non dice tanto a riguardo di Erasmo da Rotterdam (Domański, 1990: 14). Tale gemellaggio molto specifico favorisce un dinamismo interpretativo, ma non garantisce risultati certi. La sociologia non esprime tutto (Mariański, 2006: 479) e non riduce la necessità del dubbio (Szacki, 2004: 946). Il contributo di Erasmo sembra adeguato – se utilizzato in modo prudente e critico – per realizzare tale progetto non solo in forma ermeneutica, ma soprattutto in modo tangibile.

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Viviane Devrièsère<sup>1</sup>

*Exotisme et stéréotypes dans l'album Maman-Dlo d'Alex Godard*

RÉSUMÉ:

Les œuvres présentant les peuples exotiques mettent l'accent sur certains traits récurrents: la différence, l'étrangeté, des stéréotypes aisément repérables et livrant une vision positive du peuple observé. Mais souvent, il s'agit moins dans ces œuvres de valoriser ce dernier que de critiquer sa propre société. Le pays de l'Autre peut ainsi devenir le symétrique inversé de celui de l'auteur. L'exotisme réside avant tout dans un point de vue, qui est celui de l'Occident. Ce regard se pose, curieux, sur les autres civilisations et conserve en cela une trace du colonialisme et de la supériorité qui le caractérisait. En opposition à cela, l'auto-exotisation permet à un peuple de décider lui-même de l'image qu'il veut donner aux autres, et l'exotisme inversé de porter à son tour sur l'Occident un regard étonné. L'article étudiera le traitement de l'exotisme dans l'album *Maman-Dlo* d'Alex Godard.

MOTS CLÉS: exotisme, auto-exotisation, exotisme à l'envers, stéréotype.

ABSTRACT:

The books showing exotic peoples emphasize a few recurring lines: difference, strangeness, easily detectable stereotypes. They also give a positive vision of the observed people. But often, by of valuing this people, the author aims at criticizing his own society. So the other country can become symmetrically opposite the author's purpose. Exoticism is mainly a Western point of view. This inquisitive approach to the other civilizations betrays some colonialist mentality feeling of superiority. In opposition, auto-foreignization allows people to decide which image they want to give to the others; as for reverse exoticism, it helps them to have an astonished look upon the West. The article will study the process of exoticism in Alex Godard's album *Maman-Dlo*.

KEYWORDS: exoticism, auto-foreignization, reverse exoticism, stereotype.

Les professeurs de Maternelle et de l'école primaire proposent à leurs élèves de nombreuses œuvres de littérature de jeunesse. Parmi celles-ci figure souvent *Maman-Dlo* d'Alex Godard. Cet album raconte l'histoire d'une petite fille habitant en Guadeloupe: son père est mort

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et sa mère est partie travailler en Métropole. Cécette, qui vit avec ses grands-parents, se languit d'elle et part la retrouver à la fin de l'album.

Cette œuvre figure dans la liste d'œuvres préconisées pour le Premier Degré et proposées par le Ministère de l'éducation nationale en France jusqu'en 2016. *Maman-Dlo* est un album très vendu, selon son éditeur. Il est souvent étudié dans les classes.

Cette œuvre place donc son personnage principal dans un cadre exotique. Les œuvres traitant de thèmes exotiques intéressent les jeunes lecteurs. Il n'est qu'à se rendre dans une librairie pour voir combien la littérature de jeunesse regorge d'albums traitant de pays exotiques, de lions, de girafes... Pourquoi une œuvre traitant une thématique exotique provoque-t-elle cet intérêt? Ici, l'exotisme évoque une partie du peuple français, sa composante des DOM<sup>2</sup>. Nous avons déjà fait le constat, dans notre recherche précédente, que la représentation des peuples, dans la liste de référence, est le plus souvent stéréotypée (Devrièsère, 2017). Il en est de même pour les peuples qui sont présentés dans des lieux exotiques. L'exotisme lui-même reprend des stéréotypes, aisément reconnus par les lecteurs. Quelles sont les caractéristiques de l'exotisme dans cette œuvre et quelle est sa fonction? Ce sont les questions qui ont guidé notre recherche et auxquelles cherchera à répondre cet article.

### 1. *Les traits caractéristiques de l'exotisme*

L'exotisme présente plusieurs traits fondamentaux:

Comme le définit J.-M. Moura, l'exotisme suppose tout d'abord la différence.

«La littérature exotique cultive ce qu'Aristote appelait le *possible extraordinaire*: la différence, potentiellement merveilleuse, d'un lieu ou d'une culture réels mais autres» (Moura, 2007).

La subjectivité du voyageur ou du lecteur joue un rôle essentiel dans la prise en compte de la différence et de l'altérité, comme le souligne Victor Segalen dans son *Essai sur l'exotisme*. «Je conçois autre, et aussitôt le spectacle est savoureux. Tout l'exotisme est là» (Segalen, 1986: 37-42).

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<sup>2</sup> Départements d'Outre-Mer.

Partant, un autre point essentiel de l'exotisme est la notion d'étrangeté, ressentie à la découverte d'un lieu ou d'un peuple. J.-M. Moura fait de l'extranéité, c'est-à-dire de l'éloignement, à la fois symbolique (par rapport à une norme) et physique (par la distance) la base de l'exotisme (Moura, 1998: 23). Ce dernier repose sur l'éphémère: pour qu'une vision soit exotique, il faut que celui qui porte son regard sur un lieu ou un peuple n'ait pas eu assez de temps pour les connaître en profondeur. Sitôt cette connaissance installée, l'exotisme disparaît, comme le souligne Peter Mason: «la domestication de l'exotique le prive de ses qualités exotiques mêmes» (Gruzinski, 2007). L'exotisme ne correspond pas au premier temps de la découverte d'un peuple, car celle-ci pourrait entraîner une forme de peur; cette dernière n'a pas sa place dans une vision exotique. Le regard exotique est un regard qui n'a plus peur, qui connaît déjà, mais qui s'étonne et s'émerveille encore.

«L'exotisme ne peut pas être contemporain de la découverte. Il faut apprivoiser l'inconnu avant de pouvoir parler d'exotisme, car l'inconnu effraie, alors que l'exotisme est un sentiment lié au plaisir et à la jouissance». (Gautier, 2008: 52)

Une approche exotique ne prend pas en compte la diversité humaine: l'exotisme procède de stéréotypes, aisément repérables et identifiables par le lecteur. Mais si les stéréotypes, comme le souligne R. Amossy et A. Herschberg Pierrot, peuvent être négatifs à l'égard du peuple concerné, il n'en est pas ainsi des stéréotypes exotiques (Amossy & Herschberg Pierrot, 2011, 35). En effet, à la différence des stéréotypes concernant les peuples qui peuvent manifester (ou entraîner) une forme de racisme, l'exotisme livre une vision positive de ceux-ci. La vision exotique valorise, du moins dans un premier temps, les peuples ou les lieux qu'elle scénarise. Pour Tzvetan Todorov, «l'exotisme est l'envers du nationalisme»: il valorise un pays, sa culture; «les autres sont mieux que nous» (Todorov, 2004: 355).

Cependant, T. Todorov montre qu'il s'agit bien souvent, dans les œuvres exotiques, moins de valoriser le peuple évoqué que de critiquer sa propre société. Le pays de l'Autre devient un pays idéal, souvent le symétrique inversé de celui de l'auteur. T. Todorov explique ainsi l'intérêt de Michel de Montaigne pour les populations que son siècle découvre. Mais ce mythe du Bon Sauvage ne recouvre pas une considération des indigènes pour eux-mêmes; ceux-ci ne sont objets d'admiration que parce qu'ils



ressemblent aux anciens Grecs et Romains, références essentielles pour les Humanistes, et parce qu'ils présentent des comportements inverses de ceux de la société de Montaigne, qu'il critique. L'exotisme, ainsi, permet moins une véritable prise en compte de l'Autre qu'une réflexion sur soi. Il en est de même pour Denis Diderot, qui, dit T. Todorov, dans le *Supplément au voyage de Bougainville*, critique les vices et les dérives de sa propre société, ou de René de Chateaubriand, qui considère que connaître les autres peuples permet de s'améliorer soi-même, T. Todorov soulignant là «l'ethnocentrisme du Français et l'égoïsme de l'auteur» ainsi que son absence totale de curiosité à l'égard des autres peuples (Todorov, 2004: 399).

L'exotisme réside avant tout dans un point de vue, qui est celui de l'Occident. Le regard part de l'Occident et se pose, curieux, étonné, sur les autres civilisations. Il conserve en cela une trace du colonialisme et de la supériorité qui le caractérisait. L'exotisme recèle en effet des restes de cette supériorité dans le regard qu'il établit entre l'Occident qui juge et les autres peuples qui sont objets du regard; il est lié au pouvoir, et l'exercice de ce regard à sens unique en est une marque. Comme le rappelle l'auteur martiniquais Raphaël Confiant,

«ni le cocotier ni la plage de sable blanc ne sont exotiques dans mon vécu quotidien, mais, dès l'instant où, usant de la langue française, je m'attelle à les évoquer, je me retrouve littéralement pris en otage, terrorisé au sens étymologique du terme par le regard réifiant de l'Occident». (Schon, 2003: 16)

Le regard porté sur un peuple, quand on le considère comme exotique, est réifiant car il manifeste donc une relation de supériorité, une condescendance, qui ne s'appuie que sur quelques éléments stéréotypés retenus par l'Occidental.

Notons enfin qu'il y a dans ce regard exotique l'impression pour les lecteurs d'appartenir au même monde. Il repose, en effet, sur une division du monde entre Nous et les Autres, produisant une identité occidentale que l'on semble considérer comme allant de soi. Le fait de reconnaître l'exotisme à des traits identiques, partagés par les peuples occidentaux, produit cet effet.

L'exotisme, pour finir, est question de reconnaissance. On retrouve des traits connus déjà, ce qui explique sa dimension rassurante (Staszak, 2008: 17).

«L'objet exotique présente l'attrait de la chose certes bizarre, mais attendue, annoncée. Il relève du déjà-vu ou du déjà-lu, de la re-connaissance. Si le paysage exotique est pittoresque au sens propre, c'est-à-dire qu'on juge qu'il peut être peint ou pris en photo, c'est parce qu'on l'a déjà vu en image. On est heureux de le retrouver, préparé qu'on a été à cette rencontre, rassuré face à cette altérité déjà cadrée». (Staszak, 2008: 17)

Il est donc constitué de stéréotypes partagés et aisément reconnaissables, dont l'identification plaît au lecteur. Le stéréotype, en effet, appartient à la doxa, à l'opinion publique partagée par tous (Dufays & Kervynn, 2010: 51).

«Il est dans la nature de l'exotisme d'être stéréotypé, en série, au sens où il s'inscrit dans un processus de reproduction. L'objet ou le paysage exotique sont adéquats à un imaginaire dont ils constituent une déclinaison». (Staszak, 2008: 19)

## 2. *L'exotisme dans l'album Maman-Dlo d'Alex Godard*

L'œuvre *Maman-Dlo* d'Alex Godard présente un cadre exotique (Godard, 1998). Dès les premières pages, celui-ci est posé:

«Il est déjà midi.  
La tôle est brûlante, mais peu importe, Cécette attend. [...] Comme des yinyins, des mouchérons, tous s'agglutineront autour du canot pour avoir un kilo de poissons-souris, de poissons-chats, ou de poissons-perroquets».

Les pages suivantes poursuivent cette impression.

«A l'ombre d'un amandier, Papoli raccommode son filet. [...] Cécette flâne le long de la plage, puis traverse une partie de la mangrove, pour aller à l'Anse-Bois-d'Inde. Là, elle ramasse des coquillages, et aussi du sable rosé. [...] Avec Papoli, elle mange le court-bouillon de poisson-soleil que Man Ninie a préparé avant de partir». (Godard, 1998: 20)

Nous retrouvons dans l'œuvre la différence de cette région, différence qui laisse toute sa place à l'émerveillement devant la beauté de la

nature: ainsi en est-il du «sable rosé», du soleil qui brûle les maisons, des différentes espèces de poissons aux noms exotiques. Comme nous l'avons dit précédemment, les thèmes sont ceux attendus: la mer, le soleil, la plage, un pêcheur. Les lieux, tels «la mangrove», «l'Anse-Bois-d'Inde», sont eux-mêmes dépaysants. Les termes utilisés sont étranges, à tel point qu'il est à prévoir qu'un jeune lecteur ne les connaîtra pas tous, ce qui favorise cette impression d'éloignement, d'étrangeté, d'ailleurs. Le regard, quant à lui, est bienveillant et émerveillé devant cette nature. Au centre de l'album, il est fait allusion aux sirènes, à ces «Reines des eaux»: la présence de cette légende que se raconte ce peuple participe elle aussi à la dimension exotique de l'œuvre.

Mais dans cette œuvre, qui regarde qui? C'est du peuple français qu'il est question, mais plus particulièrement d'une composante de celui-ci, sa composante des DOM. Il ne s'agit donc pas d'un regard porté par l'Occident sur une autre partie du monde mais plutôt d'un regard posé avec curiosité par la Métropole vers une île du pays. L'analyse de Nathalie Schon qui concerne l'Occident peut s'appliquer aussi aux relations entre les différentes composantes d'un pays, dans la mesure où certaines régions peuvent paraître aussi éloignées, différentes et exotiques à de jeunes lecteurs que d'autres pays.

«Ce qui est exotique ne l'est donc que dans la bouche et les yeux de l'Occidental. Tel fruit, tel bois, tel poisson exotique n'ont rien de lointain ni d'étrange pour les habitants des pays où on les trouve. Si, dans bien des expressions, "exotique" est synonyme de tropical (voire colonial), c'est bien d'un point de vue issu de la zone "tempérée"». (Staszak, 2008: 19)

### *3. Les types d'exotisme dans l'album*

Rappelons qu'Alex Godard est né en Guadeloupe. Nous retrouvons dans son œuvre l'exotisme des pays chauds. Mais il est intéressant de voir que c'est un auteur issu de l'île elle-même qui fait le choix de reprendre ces éléments. Nous voyons dans l'album l'importance de la description telle que la concevait R. de Chateaubriand. C'est elle qui crée l'impression d'ailleurs, d'étrangeté. Le regard s'émerveille devant ce monde peu connu. Ce regard semble bien se porter, sinon de l'Occident sur le

monde, du moins de la Métropole sur une partie spécifique du pays, une de ses îles.

Mais la position de l'auteur ne nous mène-t-elle pas vers un autre type d'exotisme? En effet, ce n'est pas toujours l'Occident qui porte un regard exotique sur une région donnée. Un auteur de cette dernière peut faire le choix de s'approprier ce regard et de le faire sien. L'on peut rapprocher cette attitude de ce que Lionel Gautier appelle l'exotisme souverain: au lieu de subir un exotisme que lui imposeraient les autres, l'écrivain en choisit lui-même les composantes.

«En offrant un statut nouveau à l'indigène, un statut d'acteur détournant le regard occidental à son profit, l'exotisme souverain achève en quelque sorte l'un des derniers relents du colonialisme, le privilège de délimitation de l'exotisme. Au lieu d'être affublé d'un exotisme conceptualisé par un acteur exogène, l'indigène en énonce lui-même les conditions». (Gautier, 2008: 56)

Ce processus d'auto-exotisation lui permet de décider lui-même de l'image qu'il veut donner aux autres, comme le souligne N. Schon (Schon, 2003: 26). Cela peut être le fait de populations conscientes de leur dimension exotique et qui, pour des raisons commerciales, choisissent d'en jouer. Nicolas Bouvier relate une telle expérience dans sa *Chronique japonaise*: les habitants d'un petit village japonais utilisent les stéréotypes pour attirer les touristes; une fois ceux-ci partis, ils troquent leurs vêtements exotiques contre leurs habits habituels. «L'entreprise débrayait déjà et la moitié des figurants avaient troqué leurs tuniques colorées et leurs tiaras d'écorce de bouleau contre l'imper et la casquette de base-ball» (Bouvier, 2001: 210).

Il s'agit d'un exotisme post-colonial, dont les habitants se saisissent, refusant d'être réifiés ou faisant leur cette réification pour s'en servir à leur profit. L'exotisme étant constitué de stéréotypes, il leur suffit alors de maîtriser ceux-ci pour s'en jouer.

Cet exotisme souverain n'est pas le seul fait des indigènes à l'égard d'un regard que l'on porte sur eux et auquel ils se conforment sciemment et volontairement. Il peut en être de même pour les écrivains, au sein même d'un pays: ils peuvent eux aussi endosser un regard exotique pour

deux raisons, soit économique (ceci attire les lecteurs, heureux de retrouver des motifs connus) soit identitaires (les auteurs conservent certains traits qu'ils considèrent comme fondamentaux et qu'ils veulent revendiquer). Les deux motivations de cet exotisme, quoique fonctionnant de façon très similaire, sont de natures très différentes (Gautier, 2008: 56).

A. Godard a 33 ans quand il écrit *Maman-Dlo*. Il a écrit précédemment *Idora* (Godard, 1997), qui raconte l'histoire d'une girafe qui va voir la mer. Lors de son passage dans des classes, A. Godard est frappé de voir les stéréotypes des élèves et leurs attentes. Lorsque ces derniers pensent à des îles, il leur est difficile de les imaginer froides; ils ont immédiatement en tête des îles paradisiaques, ensoleillées et chaudes.

Quand A. Godard leur pose la question: «comment vous imaginez-vous la vie d'un enfant de votre âge sur Marie-Galante?», les réponses sont toujours les mêmes: «il se baigne, il fait des châteaux de sable». Jamais un élève ne parle de l'école. Quand A. Godard leur dit que les enfants de Marie-Galante ne font pas de châteaux de sable car ils n'ont pas de référence de châteaux sur l'île, que les gens vont peu à la mer et que les élèves vont à l'école comme eux, il remarque stupeur et déception. L'album *Maman-Dlo* procède donc de la volonté de l'auteur de répondre, au moins partiellement, aux attentes de ses jeunes lecteurs en créant le cadre idyllique et attendu d'une île. A. Godard s'est saisi des caractéristiques et des stéréotypes attendus pour créer son décor et ses personnages: l'île est chaude et ensoleillée, la nature est merveilleusement belle, les hommes sont des pêcheurs. Il a sélectionné ces éléments, partagés par tous, et s'est servi d'eux pour répondre aux attentes stéréotypées de son lectorat. Ce n'est donc pas un regard de la Métropole vers l'île qui échapperait à son auteur que nous avons dans cet album, mais une utilisation consciente des stéréotypes de l'île par un auteur qui en est issu, pour le plus grand plaisir de ces jeunes lecteurs.

Mais dans l'exotisme, la relation peut s'inverser complètement. L'exotisme peut être alors un exotisme à l'envers. Si, en effet, l'exotisme est souvent, encore maintenant, l'apanage de l'Occident, certains auteurs manifestent la volonté de présenter l'Occident, à son tour, comme l'objet du regard étonné des autres peuples. Cette notion d'exotisme à l'envers provient de V. Segalen. Selon L. Gautier, pour parler d'exotisme à l'envers, un certain nombre de conditions doivent être réunies:

- « - que le voyageur et l'indigène ne soient pas face à l'inconnu, qu'ils aient dépassé le stade de la découverte première;
- que les deux camps aient la certitude de leur supériorité et de leur centralité [...];
- que le visiteur et son hôte montrent un intérêt prononcé pour l'autre et sa culture;
- que cet intérêt soit teinté de condescendance». (Gautier, 2008: 53)

A. Godard reconnaît avoir voulu faire œuvre d'exotisme à l'envers quand il parle de la Métropole dans son album. Lorsque Cécette imagine le lieu où vit sa mère, il affirme avoir voulu présenter la France comme un pays exotique pour elle.

«Là-bas, les arbres perdent leurs feuilles. Drôle de manie! Elle n'oublie pas de mettre un gros soleil bien jaune, parce que là-bas, dit-on, il fait très froid. Cécette imagine des gens marchant dans un réfrigérateur». (Godard, 1997: 20)

Cette présentation fait écho à sa propre perception de la Métropole, quand il était jeune et vivait sur l'île Marie-Galante. Pour lui, la France, l'automne, avec ses feuilles qui tombaient, étaient exotiques, ainsi que certains fruits, comme la pomme, qui avaient un parfum étrange et qui l'attiraient. Dans l'œuvre *Maman-Dlo*, la France n'est pas une première découverte pour Cécette: elle en a entendu parler et pourtant, ce pays l'étonne, l'intéresse. En même temps, l'auteur témoigne dans l'album, avec la métaphore du réfrigérateur, d'une curiosité amusée. Si la Métropole est un lieu de travail, un lieu dont on a besoin pour vivre, ce n'est pas l'infériorité de l'île qui est présentée dans cet album, et l'exotisme à l'envers dont elle témoigne rétablit une forme d'équilibre.

#### 4. *La construction de l'œuvre autour des stéréotypes de l'exotisme*

L'album *Maman-Dlo* est, affirme A. Godard, construit tout entier autour de cette notion d'exotisme. Les stéréotypes de l'exotisme montrent ce monde merveilleux auquel tout le monde pense quand on évoque une île. Mais quand l'auteur a écrit cette œuvre, c'est pour témoigner que «même s'il y a du sable, du soleil sur ces îles, il y a aussi

des gens qui pleurent»<sup>3</sup>. La double page 24 et 25 est centrale. Tout l'album, dit A. Godard, a été écrit autour de cette page. Avant elle, ce sont les stéréotypes exotiques: le ciel est bleu, la mer est là, toute proche, pleine de poissons exotiques. A partir de cette page et du chagrin de Cécette, les couleurs s'obscurcissent: dans cette nature idyllique, comme partout dans le monde, il y a une enfant qui pleure.

L'auteur a voulu insister aussi sur le caractère enfermant de l'île. Il n'est qu'à regarder la Première de couverture, où Cécette de dos regarde vers l'infini. Quand lui-même est arrivé sur le continent, il a, dit-il, roulé sur des kilomètres et des kilomètres, pour jouir de cette sensation d'immensité. «L'île est aussi une prison pour ceux qui y habitent. On y attend toujours quelque chose, comme dans une prison. Elle est à la fois un lieu paradisiaque et un lieu où on passe son temps à rêver d'ailleurs».

Le vécu des habitants d'une île est différent de celui du continent, et c'est ce qu'a voulu souligner A. Godard dans son œuvre. De la Première de couverture à la dernière page de l'album, c'est l'itinéraire de Cécette qui est transcrit: elle passe du rêve d'ailleurs à son départ vers ce même ailleurs qu'elle rêve exotique. Elle quitte ainsi un lieu que les lecteurs voient exotique pour parvenir à un lieu exotique à ses propres yeux.

En reprenant les stéréotypes de l'exotisme, A. Godard a voulu montrer que les paysages peuvent être autres, merveilleux, mais que les gens sont toujours pareils, et que la peine existe partout, y compris dans les cadres les plus rêvés. «Là aussi, ils ressentent de la peine pour ceux qui sont loin». Pour mieux faire passer son message, l'auteur a, dès la Première de couverture, beaucoup insisté sur l'exotisme en reprenant tous les thèmes attendus: la mer, le ciel bleu, les coquillages, la carte postale et même l'étiquette de valise. Tout y est, pour montrer ensuite que l'essentiel n'est pas là, et qu'il faut regarder, au-delà, l'émotion qui gagne l'œuvre. «J'ai cherché à montrer à travers l'émotion comment les gens perçoivent leur univers. Avant la lettre, c'est ce qu'on voit avec les yeux. Après la lettre de sa maman, c'est ce qu'elle ressent. On ne voit plus de la même façon. On voit avec le cœur».

Les couleurs de la fin de l'album sont plus sombres. Elles ne redeviendront pas ce qu'elles étaient au début car, souligne A. Godard, les dernières pages annoncent le départ de Cécette.

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<sup>3</sup> Ces propos sont ceux d'Alex Godard, lors d'une interview du 29 juillet 2016.

Ainsi, les stéréotypes nourrissent la notion d'exotisme; ils en sont constitutifs mais n'ont pas la même fonction dans toutes les œuvres ni au sein même d'une œuvre. Généralement, les stéréotypes favorisent l'identification de soi et des Autres; ils permettent la constitution du groupe, qui partage les mêmes et se distingue en cela des autres. En même temps, ils sont souvent un motif de rejet de l'autre, perçu de façon restrictive et négative. Dans la vision exotique, les stéréotypes n'entachent pas la vision de l'autre, qui reste positive. Mais celle-ci ne constitue pas une vraie découverte d'autrui: elle n'en est qu'une vision superficielle qui sert d'autres desseins.

L'apparition d'un exotisme à l'envers est une initiative heureuse des peuples jusqu'alors considérés comme exotiques et qui se saisissent à leur tour de cette notion pour l'utiliser ou s'en jouer. Dans l'album *Maman-Dlo*, cet exotisme à l'envers répond à la fois à une volonté de correspondre aux attentes des jeunes lecteurs mais aussi de traduire l'identité de l'île, pour mieux approfondir ensuite, en dépassant ce cadre exotique, une douloureuse problématique humaine, celle d'une enfant qui s'ennuie loin de sa mère, partie travailler en Métropole. L'exotisme joue un rôle particulier dans cette œuvre, puisqu'il est à la fois le point de départ et la thématique dont l'œuvre appelle à se dégager page après page. Il est ce qui donne sens profondément à cet album, lequel s'attache, au-delà des apparences idylliques, à montrer la permanence des souffrances de l'être humain, où qu'il habite.

Une place essentielle est faite à l'émotion, émotion du personnage principal, centrale dans l'œuvre, qui la structure et l'explique, mais émotion aussi du jeune lecteur, qui partage les sentiments de Cécette tout au long de sa lecture. Texte et images y contribuent. L'album *Maman-Dlo* laisse une place importante aux images mais au texte aussi, d'une rare longueur pour un album. Les deux créent cette émotion. C'est ce qu'a voulu A. Godard en l'écrivant, lui qui dit que ce qui l'a le plus touché quand des élèves lui parlent de l'œuvre, c'est qu'ils parlent de Cécette comme de quelqu'un qu'ils auraient côtoyé et dont ils auraient partagé les sentiments.



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Juan Ramón Moreno Vera<sup>1</sup>

*Nuestros retratos: el género del retrato en la última década del siglo XX en la colección de arte de la Región de Murcia*

RESUMEN:

El género del retrato es uno de los más antiguos dentro del ámbito de la pintura; sin embargo el gran triunfo de este género se produjo durante el siglo XIX, cuando la sociedad civil comenzó a demandar un género hasta entonces reservado a las clases más altas. Durante el siglo XX el retrato fue buscando protagonistas entre aquellas personas que destacaban en la sociedad gracias a su genialidad artística o intelectual. Así, encontramos en la colección de arte de la Región de Murcia una interesante iconoteca realizada en 1998 donde se representan algunos de los personajes más relevantes de la sociedad.

PALABRAS CLAVE: Retrato, siglo XX, Murcia, contemporáneo, cívico.

ABSTRACT:

Portraiture is one of the oldest genre in painting, but the great triumph of the genre was during the 19th century, when civic society started to demand paintings only made for the high class until that moment. During the 20th century portraiture looked for its characters between people that stood out because of the artistic or intellectual genius. In the art collection of Region of Murcia we find an interesting iconotheque made in 1998, where there are represented some of the most relevant people in the society.

KEYWORDS: Portraiture, twentieth century, Murcia, contemporary, civic.

## 1. *Introducción*

En multitud de referencias bibliográficas del ramo encontraremos esta tipología tan heterogénea del retrato bajo la denominación de retrato civil, aunque nosotros preferimos usar ‘cívico’ tal y como hiciese Tittler (2007: 212), ya que une en una sola palabra la idea de representar personajes de la sociedad civil con la del concepto de civismo, intelecto o genio del que hacen gala sus protagonistas.

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Según West (2004: 87), los retratistas han pintado a personajes por el mero hecho de su distinguida reputación creativa o en el trabajo, pese a que fuesen personas vinculadas a clases sociales medias o bajas. Así existieron retratos de importantes filósofos y escritores desde la Antigüedad Clásica. Durante el Renacimiento algunos patrones también encargaron galerías con los imaginarios retratos de escritores y filósofos con un sentido de homenaje y admiración, aunque también con un objetivo educativo que sirviera de estímulo y ejemplo para sus hijos. West (2004: 87) piensa que este tipo de retratos que homenajean el 'genio' se multiplicaron a finales del XVIII cuando se comenzó a fraguar la idea del hombre noble que triunfaba gracias a su intelecto. Durante el siglo XIX esta idea aumentó gracias a las nociones románticas acerca de la genialidad vinculada a algunos escritores o pintores.

Durante el siglo XX y el XXI la idea del genio comenzó a caer en desuso en el mundo del retrato. Tampoco el *status* social o el poder económico han jugado un papel determinante en la producción de retratos como en los siglos anteriores. En estos siglos la idea que triunfa en la producción de retratos es la de la fama o la celebridad (Risid Museum, 2009: 114). Los famosos han surgido como importantes protagonistas del retrato gracias no a su economía o su intelecto, sino al sentido de unicidad que va unido a su estrellato.

Uno de los apoyos más importantes para el desarrollo de las grandes estrellas ha sido el de los medios de comunicación de masas. Si bien los periódicos desde hacía algunos siglos ya habían conseguido auparse a la fama a algunos personajes públicos como comerciantes, políticos o artistas, sería durante el siglo XX cuando, gracias al cine, la televisión, la radio, la fotografía o internet, las estrellas mediáticas lograron abrirse un hueco en el género del retrato. Sus vidas, sus imágenes, sus trabajos, sus estados de ánimo comenzaron a interesar al gran público, lo que propició también que se demandasen retratos suyos, siendo la fotografía el modo más sencillo y práctico para lograrlos.

Las nuevas corrientes comerciales creadas por la publicidad, la fama de las grandes estrellas, y las fantasías del gran público que soñaban con dejar lo cotidiano y llegar algún día al salón de la fama, se unieron a mitad del siglo XX con el nacimiento del *pop-art*. El retrato en este estilo se basaba en el parecido real de la representación y el protagonista, ya que el público debía reconocer fácilmente al personaje.

Así pues, nos encontramos ante una tipología dentro del género

del retrato que ha ido evolucionando con el paso del tiempo, desde un retrato cívico ligado al homenaje y la educación, pasando por un retrato de colegas de profesión, hasta llegar al final del siglo XX donde la idea de fama y celebridad se adhiere a esta tipología de retrato dentro de los grandes medios de comunicación de masas, evolucionando la libertad creativa del género del retrato (Moorhouse, 2013: 53).

## 2. *Nuestros retratos*

En 1998, la entonces Consejera de Cultura de la Región de Murcia, Cristina Gutiérrez-Cortines impulsó un taller de creación artística novedoso en la ciudad de Murcia cuyos resultados acabaron siendo el fruto de una exitosa exposición temporal y, más tarde, del paso de las obras surgidas en dicho taller a formar parte de la colección de arte oficial del Fondo de Arte de la Región de Murcia<sup>2</sup>.

El objetivo de este taller era que diversos personajes famosos de la Región posasen en la sala de exposiciones de la Iglesia de Verónicas para que los artistas les pintasen. Todo ello con las puertas abiertas para que el público entrase a ver el espectáculo ofrecido por artistas y modelos, participando con valoraciones y sugerencias.

Paco García explicó en el catálogo de la exposición como fue el proceso de creación de las obras:

«Empieza el taller. Primer encuentro con el pintor. Aproximación a ambos mundos, el suyo y el mío. Fotografías para estudiar los rasgos de la cara, las manos, los entornos familiares. Y la primera sesión en Verónicas. [...] El artista ha renunciado a la intimidad de su estudio y ha accedido a desarrollar una labor didáctica, a medirse con el resto de artistas que componen el taller en sana rivalidad. Crece día a día el interés por el trabajo que desarrollan los pintores, escultores y fotógrafos y se multiplican los visitantes de toda índole y condición. [...] Surgen una serie de complicidades entre artistas, modelo y público, que hacen del taller una experiencia viva». (Consejería de Cultura, 1998: 6)

<sup>2</sup> José García Martínez escribe un artículo en el catálogo de la exposición titulado *La venganza de la consejera* (Consejería de Cultura, 1998: 6) en el que explica de manera humorística el impulso hecho desde la Consejería de Cultura: «Bueno, hombre, al fin y al cabo, esta iniciativa de la consejera, así llamada, de Cultura, sirve para dar trabajo a los pintores, cosa que, tal como andan los tiempos, tampoco está de más».

### 2.1. *Encarnación Fernández*

El primer retrato que analizaremos en esta colección es el de la cantaora Encarnación Fernández (Figura 1). La obra es un óleo sobre lienzo que mide 92 por 65 cm. y que fue realizado por Ángel Baltasar – pseudónimo del madrileño Ángel López Santos. Oriundo de la Región de Murcia se inició en el informalismo, aunque en 1982 su pintura cambió hacia una figuración influida por la pintura de Francis Bacon.



Figura 1 - Ángel Baltasar, *Encarnación Fernández por tangos*, 1998. CARM.

La protagonista del lienzo es Encarnación Fernández Fernández, natural de Torrevieja pero afincada desde pequeña en La Unión – Murcia. Entre sus logros más destacados está el haber conseguido ganar dos veces, en 1979 y 1980, la Lámpara Minera del Festival de La



Unión; así como, haber ganado también el Melón de Oro del festival de cante flamenco de Lo Ferro en 1981. La obra representa la fuerza y el sentimiento que la cantaora introduce en sus cantos mineros. Se puede observar la influencia de Bacon gracias al fuerte expresionismo, y no sólo por el momento elegido en la obra, sino, también, por la elección de los colores tan intensos e irreales.

Aunque sin perder la figuración en ciertos aspectos Baltasar hace gala de una pintura post-picassiana reduciendo los contornos de la cara a unos pocos trazos geométricos. Sentada, y en pleno canto, la protagonista abre las manos y cierra los ojos dejándose llevar por el sentimiento que ella misma imprime a la música. Vestida de negro, aparece sobre un expresivo fondo verde y azul que imprime, si cabe, más fuerza aún a la obra de Baltasar.

En esta obra la fuerza expresiva del rostro de la cantaora destaca por encima de todo. Su valor evoca la posibilidad de interpelar al espectador, en cuanto que pueda imaginar la fuerza desgarradora del canto flamenco. En este sentido la expresión emocional del rostro de Encarnación representa la esencia del arte flamenco y las dificultades del trabajo en la mina, donde muchos de sus cantos nacieron.

## 2.2. *Ángel Montiel*

Otro de los retratos del conjunto es el dedicado a Ángel Montiel (Figura 2). Se trata de una obra de gran tamaño – 160 por 110 cm – y realizada uniendo la técnica del collage con el grafito sobre un soporte de papel maché. El artista que hizo el retrato fue Ángel Haro, un valenciano formado en Lorca y Murcia durante su juventud. Su estética, de raíz expresionista, se caracteriza por una lúcida emoción que logra transmitir un cierto sentimiento de tristeza, violenta en unos casos, más serena en otros. Ángel Montiel Martínez, el representado, nació en Lorca en 1958 y es un importante periodista del diario *La Opinión de Murcia* dedicado a las crónicas sociopolíticas, donde destaca su carácter incisivo.



Figura 2 - Ángel Haro, *Ángel Montiel*, 1998. CARM.

El retrato que hace Ángel Haro mezcla la técnica del collage y el dibujo, componiendo un collage a base de recuadros de colores sobre el soporte blanco, para después pintar con grafito un retrato monocromo,

a modo de estudio, del periodista lorquino en una actitud calmada y relajada. En posición reflexiva Montiel apoya su codo izquierdo sobre la rodilla y su cabeza sobre la mano izquierda, a la vez que con esta mano sostiene un cigarrillo. Sorprende la profunda sensación de calma que transmite la obra al usar de manera periférica unas tiras rojas y amarillas de color. Abajo, a modo de friso, Haro firma y fecha la obra con la siguiente inscripción: «A. Haro: Ángel Montiel. Murcia. Mayo. 1998».

### 2.3. *Aurelio Pérez Martínez*

En la colección *Nuestros retratos* el único personaje que es pintor y modelo al mismo tiempo es el alhameño Aurelio Pérez Martínez (Figura 3). El pintor formado en Madrid comenzó una importante carrera en los años 50 con un estilo que, sobre base estructural realista, se acerca los límites del simbolismo y la abstracción. Tras su aventura francesa, exponiendo en Marsella con una gran acogida, en 1961 decide instalarse en su villa natal donde obtiene una plaza como profesor de dibujo de Enseñanza Media.



Figura 3 - Aurelio Pérez Martínez, *Autorretrato con un par de botones*, 1998. CARM.

*Autorretrato con un par de botones* - 55 por 66 cm. - es la obra resultante de este taller de retrato y supone una mezcla entre el realismo del propio autorretrato y el guiño al *arte povera* que a la derecha muestra dos botones – uno de color rojo y otro de color negro- y un trozo de felpa roja. Él se representa de busto y girado hacia su derecha. De avanzada edad, puesto que tiene ya en 1998 casi setenta años, aparece pintado en unos cercanos y calurosos tonos amarillos. El amarillo es, sin duda, una de las obsesiones del pintor durante su carrera y en esta obra una vez más vuelve a aparecer, algo lógico puesto que el autor en su propio autorretrato no hace más que mostrar su propio universo personal (Reaves, 2009: 42). Los trazos cortos y rápidos dan forma a su rostro de semblante distante. Prácticamente sin cabello, usa grandes gafas y cubre su rostro una blanca barba con bigote.

#### 2.4. *Andrés Salom*

Uno de los retratos más originales del conjunto es el del escritor mallorquín Andrés Salom (Figura 4). Hecho con barra de óleo sobre papel, se divide en cinco pinturas independientes que forman en conjunto el retrato.

La más grande de las partes mide 162 por 70 cm. y representa una mirada general sobre el protagonista. Las otras partes de la obra representan detalles de su cuerpo: los pies con 70 por 50 cm.; la mano 28 por 35 cm.; la cabeza 50 por 40 cm; y por último, la oreja que mide sólo 15 por 15 cm.

Alejandro Franco es el artista al que se debe esta extraña estructura que ejemplifica la preocupación del artista por el arte de la deconstrucción mostrada ya en obras anteriores.

Salom es un murciano de adopción ya que nació en la localidad balear de Santanyí. Famoso flamencógrafo, dirigió durante años la revista *Flamenco* firmando sus artículos bajo pseudónimo. Además de sus libros sobre el flamenco, también es poeta y gran amante de los toros.

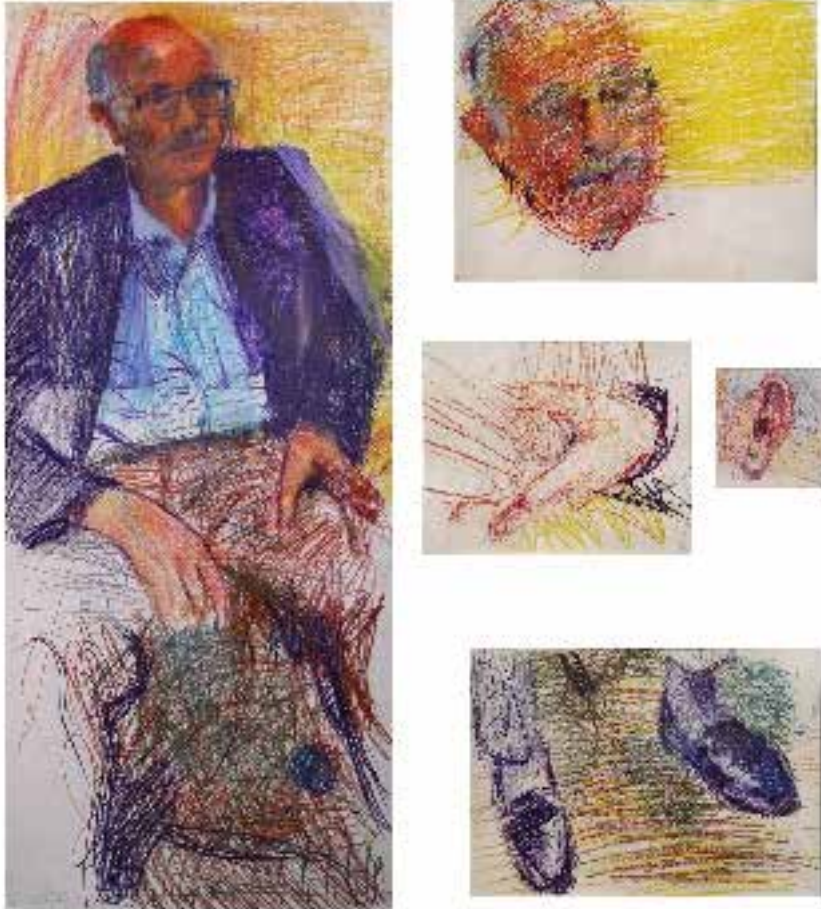


Figura 4 - Alejandro Franco, *Andrés Salom*, 1998. CARM.

La parte más interesante del retrato es el óleo más grande. Salom, casi de cuerpo entero, aparece sentado y vistiendo chaqueta y camisa azul. En posición prácticamente frontal aparece en un momento distendido en plena conversación. Las otras secciones del retrato son más fragmentarias y pequeñas, en una aparece otra imagen de Salom en la que solo se representa la cabeza.

En esta ocasión su rostro se gira hacia su derecha y está más esbozado que en la parte más grande. Las tres secciones restantes parecen

esbozos o estudios de algunas de las partes de su cuerpo; así, por ejemplo, podemos ver la oreja derecha en una, la mano izquierda en otra y, por último, los pies que eran la única parte del cuerpo que no llegaba a ser mostrada en el retrato de gran tamaño. La obra destaca por la gran velocidad de los trazos, que dan la apariencia de que la obra sea un mero estudio de aproximación para un retrato posterior.

### *2.5. Antonio Pérez Crespo*

Uno de los pocos políticos en ser representado en este taller sobre el retrato fue Antonio Pérez Crespo ([Figura 5](#)). El encargado de pintarle fue José María Falgas que realizó una acuarela que mide 59 por 47 cm. De Falgas ya destacaba su faceta dedicada al retrato oficial, con una técnica correcta; y aunque en esta ocasión pudo haber experimentado en su estilo, prefirió hacer un retrato a la manera de los oficiales que ya hizo anteriormente.



Figura 5 - José María Falgas, *Pérez Crespo*, 1998. CARM.

Pérez Crespo fue diputado en las Cortes Constituyentes de 1977 por UCD (Unión de Centro Democrático) y al año siguiente fue nombrado Presidente del Consejo Regional de Murcia, órgano preautonómico que realizó la transición entre la Diputación y la CARM. Pérez Crespo es, además, un excelente historiador.

El retrato que realiza Falgas bien se podría enmarcar dentro de la



serie de los retratos de presidentes que existen también en la colección. El protagonista aparece de busto y en posición casi frontal. Vestido de traje de chaqueta y con corbata posa de forma amable como si de un retrato oficial se tratase.

La iluminación blanca, tan mediterránea, inunda todo el retrato. La pincelada trabajada y larga, que sirve para componer el rostro, entra en conflicto con los trazos rápidos que prácticamente esbozan el traje de chaqueta y la parte inferior de la corbata.

## 2.6. *Antonio Peñalver*

El siguiente retrato que vamos a ver es el primero escultórico, aunque no el único como ya iremos viendo. Se trata de la monumental efigie de 200 por 300 cm. del atleta Antonio Peñalver (Figura 6).

Realizado en resina por Juan Martínez Lax, supone el retrato más grande de toda la colección. El autor, que se había formado en Murcia, pasó algunos años en Francia donde dirigió su escultura hacia la cerámica, consiguiendo gran reconocimiento; a su vuelta a Murcia, logró la plaza de profesor de cerámica en la Escuela de artes y oficios.

Antonio Peñalver, que ya participó en los Juegos Olímpicos de Seúl, pasó en 1992 a la historia de la Región de Murcia al conseguir una medalla olímpica de plata en la disciplina de *decatlon*, siendo el primer medallista español en la misma.



Figura 6 - Juan Martínez Lax, *Antonio Peñalver*, 1998. CARM.

Para el retrato de Antonio Peñalver, Martínez Lax, no usó barro, como siempre acostumbró, sino que se atrevió a componer su obra investigando en el campo de nuevos materiales como es el caso de la resina. El autor representa al deportista en pleno ejercicio. Como si del *Discóbolo* de Mirón se tratase, detiene en un instante la tensión de la prueba y del deportista. El momento elegido por el artista es el de la prueba de salto con pértiga y, concretamente, el momento en el que el deportista clava la pértiga en el suelo e inicia un vuelo de más de cinco metros de altura buscando superar la barrera. De forma idealizada Peñalver es representado sin ropa como en los retratos griegos de las primeras olimpiadas y, al igual que en los retratos helenos, el rostro del atleta apenas representa la tensión y el esfuerzo que el momento requiere.

### 2.7. *Francisco García Navarro*

Bajo el título *El universo de Paco García* se presentaba en el taller el retrato dedicado a Francisco García Navarro (Figura 7). La obra es un óleo sobre lienzo que mide 116 por 89 cm. El encargado de realizarla fue el pintor Fernando Castillo, quien habiéndose formado en París

como pintor, ya había afrontado el reto de pintar ilustres personajes de Murcia en la obra que hizo para el Café del Arco de Santo Domingo en la capital.

El protagonista, Paco García, era natural de Fuente Álamo en Murcia y durante años fue un reconocido periodista que dirigió Radio Nacional de España en su centro territorial de Murcia. Además, en la emisión local de Televisión Española en Murcia condujo su propio programa titulado *Gente de aquí*.



Figura 7 - Fernando Castillo, *El universo de Paco García*, 1998. CARM.

El retrato se forma gracias al reflejo del protagonista en el cristal que insonoriza los estudios de grabación de la radio. Castillo compone un retrato en negativo del protagonista, a la vez que consigue verse a sí mismo para completar la obra con un autorretrato. Sentado y apoyando un brazo sobre la mesa, García aparece en una posición muy

natural. Viste traje de chaqueta azul marino, camisa blanca y corbata roja. Su rostro refleja un gran realismo, prueba de que el autor es buen dominador de la técnica del dibujo. El protagonista peina cabello blanco y un bigote grisáceo que llega a cubrir su labio superior. Las grandes gafas no ocultan, sin embargo, sus ojos claros y su mirada serena. En segundo plano, podemos observar el autorretrato de Fernando Castillo que aparece en plena acción de pintar, con la paleta y el pincel en la mano, trabajando junto al lienzo, inmerso en el proceso creativo. La composición se completa con un paisaje de huerta en el que vemos limoneros y palmeras ofreciendo un perfecto marco vegetal bajo un cielo crepuscular de tonos cálidos.

### 2.8. *Pepín Jiménez*

Otro de los que fueron representados en una escultura fue Pepín Jiménez (Figura 8). El torero lorquino fue inmortalizado en un busto de resina que midió 69 por 55 cm. La artista encargada de su efigie fue Lola Arcas.

Ella se inició en el mundo del arte desde pequeña gracias a sus padres, aunque se formó junto a Dionisio Page en Murcia. Su escultura siempre ha sido figurativa y muy mediterránea buscando siempre rotundos volúmenes.

José Jiménez Alcázar, más conocido como Pepín, fue un torero de excelente corte, gusto y sensibilidad. Su gran reconocimiento en el mundo de la tauromaquia se lo ganó gracias a sus triunfos en Las Ventas donde fue un fijo en la feria de San Isidro. Además, al final de su carrera, alternó los toros con las aulas gracias a que acabó con éxito la carrera de Magisterio.



Figura 8 - Lola Arcas, *Pepín Jiménez*, 1998. CARM.

El diestro lorquino es representado en un busto, siendo la frontalidad una de las características más fuertes del retrato, que a pesar de bulto redondo, está tratado para ser visto exclusivamente de frente. Vestido con traje de luces, muy elegante, el torero porta chaquetilla, chaleco, camisa y corbatín. Los detalles del traje son una auténtica labor realista, plasmando con sumo cuidado, los florones que adornan el traje y los bordados, reproducidos con leves incisiones.

## 2.9. *Ginés García Millán*

El primer retrato que vamos a analizar y que está inmerso en las técnicas fotográficas es el del actor Ginés García Millán (Figura 9). Su retrato es una obra enorme de 300 por 182 cm. que mezcla la técnica mixta con el papel fotográfico, no en vano contiene también óleo y bolígrafo.

El artista responsable de esta obra fue Manuel Granados quien, aunque nació en Murcia, se instaló en Barcelona donde se ha especializado en dos campos de la fotografía: el de la moda y el del retrato. El protagonista del retrato es el lumbrenense García Millán, actor que se mueve dentro del campo del cine, el teatro y la televisión siendo éste último donde mayores éxitos ha cosechado.

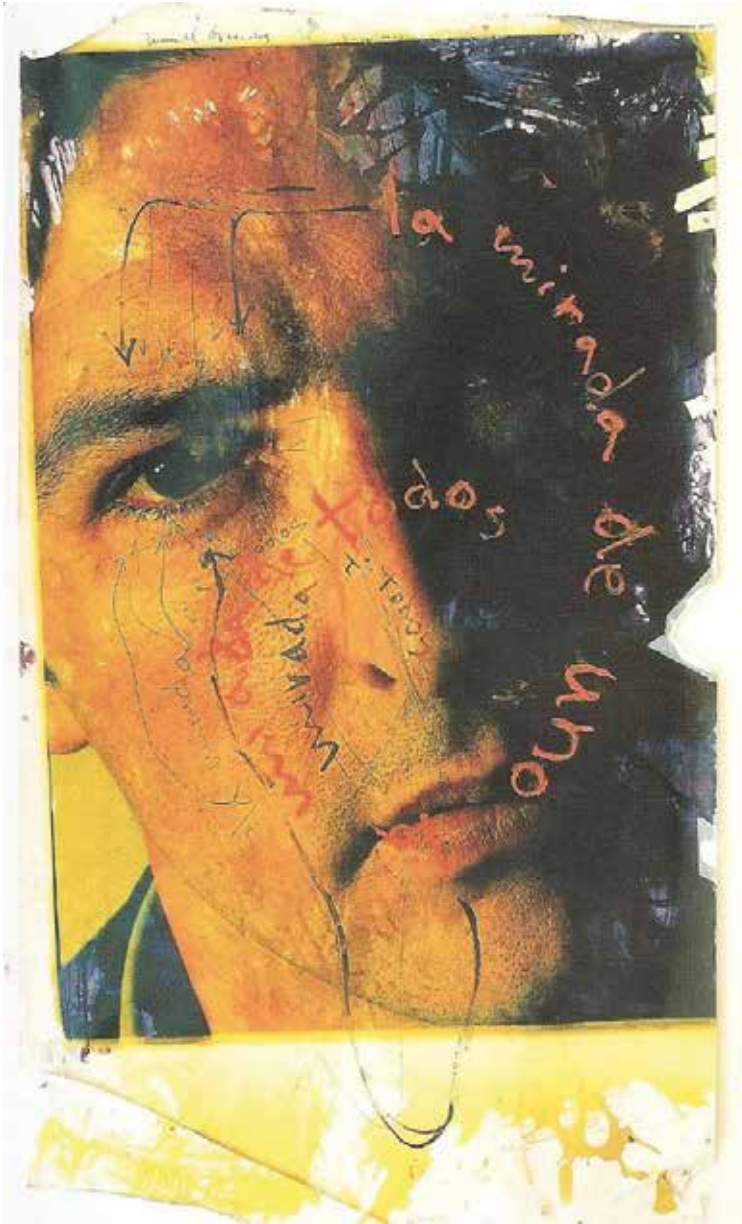


Figura 9 - Manuel Granados, *Ginés García Millán*, 1998. CARM.

Las enormes dimensiones del retrato hacen que el primerísimo plano usado –centrado en el rostro y la mirada- se transforme en una mirada hacia el interior del protagonista, más que en un estudio físico para perpetuar su imagen. Usando una técnica mixta, el autor consigue que predomine en la imagen un tono amarillento que dota la mirada del actor de cercanía y serenidad.

Pese a esto, oscurece con tonos azules la mitad izquierda del rostro del actor, dotando a la obra de un cierto sentido de misterio. Esta doble apariencia sea tal vez una metáfora acerca de la profesión del protagonista quien, como actor, presenta siempre dos caras: la suya y la del personaje al que representa.

### 2.10. *Ana María Escarabajal*

Otro de esos retratos con aire de oficialidad y distancia es el de Ana María Escarabajal (Figura 10) que pinta Miguel Valverde Cánovas.

Un óleo que mide 116 por 89 cm. El artista de Monteagudo se había formado en Murcia y Madrid donde conoció el éxito en la galería Toisón, pese a lo cual terminó volviendo a Murcia para pintar dentro de los géneros tradicionales.

Ana Escarabajal ha vivido toda la vida entre libros. Con tan solo cuatro años ya frecuentaba la librería Escarabajal en la Calle Mayor de Cartagena, puesto que era el negocio de su abuelo. Fundada en 1888, la librería tiene ya 122 años a sus espaldas y desde época de la transición tiene en Ana Escarabajal a su gerente.

El retrato que hizo Miguel Valverde desde luego recoge a través de las pinceladas la fisonomía de Ana Escarabajal. Representada casi de cuerpo entero, en posición frontal y sentada sobre una silla azul, de la que no vemos el punto de apoyo, la librera cartagenera parece levitar en el aire, mientras con ambas manos sostiene un libro que se convierte, así, en el símbolo que mejor representa el recorrido de su vida.





Figura 10 - Miguel Valverde Cánovas, *Ana María Escarabajal*, 1998. CARM.

La chaquetilla negra que cubre su vestido verde se le cae de los hombros, mientras ella, como en una fotografía, hace un alto en el camino para dirigirse al retratista y que así pueda perpetuarla en un magnífico retrato. La pincelada del fondo es rápida, inquieta, brusca y muy imaginativa.

### 2.11. *Ángel Pérez 'El pichota'*

El artista ceheginero Nicolás de Maya también participó en este taller sobre el retrato con una obra de tamaño natural -175 por 100 cm.- en la que representó a Ángel Pérez 'El pichota' (Figura 11). El óleo pintado sobre tabla en la Iglesia de Verónicas inmortalizó a uno de los vecinos más famosos de la zona, ya que Ángel 'El pichota' regenta una de las carnicerías con más solera en la plaza de abastos de Verónicas. Nicolás de Maya es un artista plástico todoterreno que se atreve tanto con la pintura como con la escultura o la ilustración de libros. Su estilo, sin dejar de ser realista, nos muestra una narración descriptiva del objeto una vez que ha pasado por el filtro de las emociones del artista.

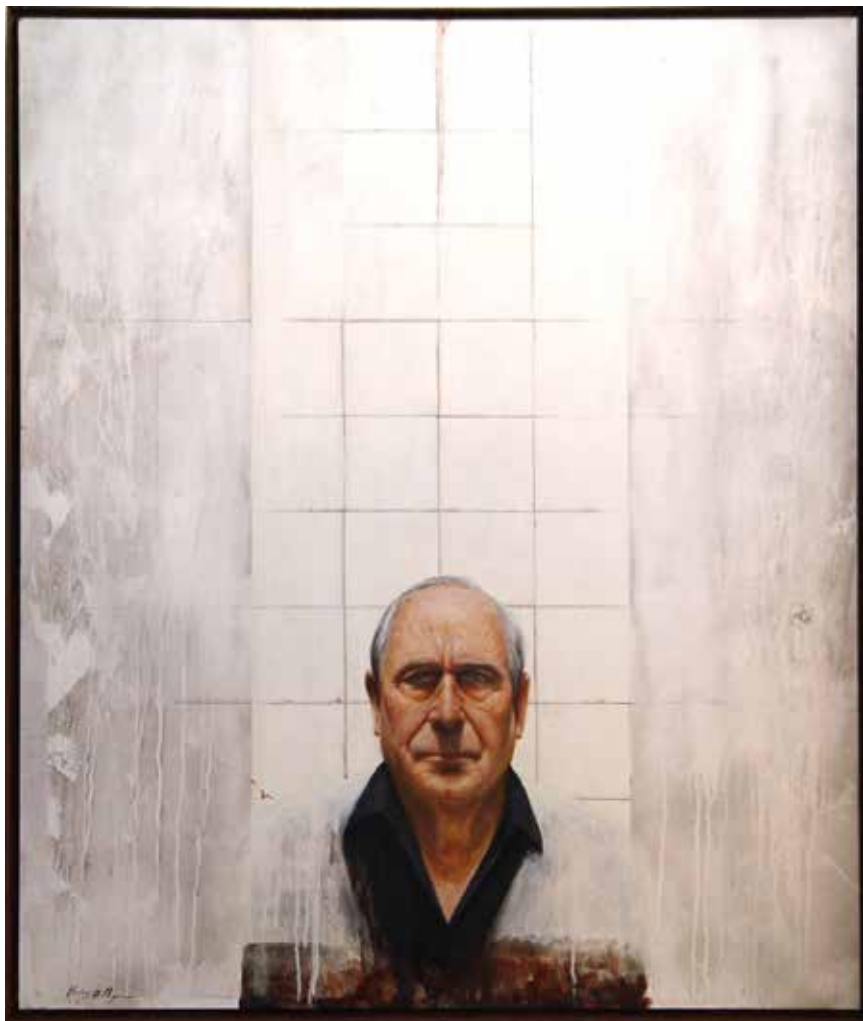


Figura 11 - Nicolás de Maya, *Ángel 'El pichota'*, 1998. CARM.

Lejos de lo que pudiera ser habitual en un retrato, el rostro de Ángel Pérez aparece situado en la mitad inferior de la obra, ocupando apenas un tercio de la pintura. Esta extraña composición, sin duda, responde al hecho de que Ángel comparte protagonismo en la obra con su establecimiento, que tanta fama le ha otorgado. La composición, además, está

dividida en tres calles verticales. Las dos laterales muestran una especie de cristal semiopaco que permite el paso de la luz, pero que no deja ver con nitidez el interior de la carnicería que apenas se intuye. En la calle central, la más ancha, aparece la pared blanca de la tienda y el retrato de Ángel Pérez, de un hiperrealismo extraordinario. De busto, vestido con camisa azul y bata blanca encima de la misma, la imagen de Ángel es completamente frontal. En la zona inferior del cuerpo de Ángel, y en los cristales laterales, Nicolás de Maya se permite alejarse del estricto trazo del retrato para dotar a su pintura de una velocidad inusual. El *dripping* se convierte en el auténtico protagonista, dotando a la imagen de una cierta magia que nos transporta hacia el mundo de la ensoñación.

### 2.12. José María Párraga

Otro personaje que fue objeto de un retrato en escultura fue el artista José María Párraga (Figura 12) que fue el único que no pudo participar en el taller ya que murió en 1997. Paco Bernal fue el artista encargado de realizar su busto de 59 por 42 cm. hecho en barro refractario.

El artista aunque no ha seguido una trayectoria uniforme a lo largo de su carrera siempre ha buscado representar la esencia del ser humano, el pensamiento, la vida y la naturaleza.

El protagonista, Párraga, fue uno de los artistas más importantes del siglo XX murciano. Formado junto a Mariano Ballester fue uno de los encargados de traer la modernidad de las nuevas vanguardias al arte de la Región. Su estética reduccionista, basada en la geometría y la deformación hicieron de su pintura algo único y original.



Figura 12 - Paco Bernal, *Párraga*, 1998. CARM.

El retrato representa a Párraga con una leve sonrisa en la cara y ya con la frente llena de arrugas y grandes gafas. Su gesto es amable. Aunque lo más interesante de la obra son los juegos de texturas que busca el artista. En ningún momento alisa el barro y lo iguala, lo cual dota a la obra de un sentido inacabado que el artista busca adrede. En las mejillas y la barbilla la textura es la del barro cuarteado, mientras que en la frente las incisiones en el barro dotan al rostro de hondas arrugas. En el cabello se alternan zonas más rugosas y zonas más

lisas. Estos juegos de texturas crean grandes tensiones entre la luz y la sombra que recorren y dibujan los detalles del retrato de José María Párraga. La fuerza de estos contrastes lumínicos aporta gran efectismo y expresividad al cercano rostro del pintor.

### 2.13. *Manolo Avellaneda*

Otro artista que fue representado en la colección fue Manolo Avellaneda (Figura 13). El óleo sobre lienzo de 46 por 55 cm. que le representa fue realizado por el pintor Pedro Serna, pintor de carácter autodidacta que siempre se movió mejor dentro del campo del paisaje, recordando con su obra el estilo de otros murcianos como Gaya o Bonafé.

Su medio de expresión más común ha sido siempre la acuarela, que permite a su trazo suelto un matiz de color al que imprime una veladura que suaviza las formas. Por su parte el protagonista del retrato, Manolo Avellaneda, fue otro prolífico pintor paisajista ciezano. Él se había formado en Murcia y en Madrid donde conoció de cerca la revitalización del paisaje castellano que realizó la Escuela de Vallecas, haciendo él lo propio con paisajes murcianos.



Figura 13 - Pedro Serna, *Manolo Avellaneda*, 1998. CARM.

La claridad y los colores suaves inundan un retrato en el que la luz blanca y brillante es la auténtica protagonista. Con una pintura muy suelta, el autor va conformando la figura de Manolo Avellaneda al que vemos de pecho para arriba, apoyando la cabeza sobre la mano izquierda en gesto de reflexión.

Con la mano tapa su boca y parte de la cara, mientras que unas grandes gafas con cristal blanquecino reflejan la luz y no nos permiten ver sus ojos. Una fuerte melena castaña cubre su cabeza cerrando, así, el retrato.

Los matices y las veladuras consiguen unos tonos claros y cálidos que, unidos a la suavidad del trazo, otorgan a la obra un acabado parecido al de la acuarela.

### 2.14. José García Martínez

Una de las pinturas de mayores dimensiones en el taller de Verónicas fue la que realizó Rosa Martínez Artero del periodista José García Martínez (Figura 14).

Se trata de un óleo pintado sobre lino y que mide 195 por 114 cm. Martínez Artero se formó en Valencia y es allí donde trabaja realizando investigaciones que indagan en la plástica moderna y en el retrato.

El representado, García Martínez, es un periodista de dilatada experiencia en los medios de comunicación regionales. En la actualidad escribe en el *Diario La Verdad* y mantiene la mecha encendida de la situación sociopolítica regional gracias a sus entrevistas en Punto Radio.

El retrato de García Martínez es de cuerpo entero, apareciendo él con los brazos cruzados y con un gesto serio situado en un rincón ante unas paredes blancas y amarillentas.

Pantalones grises, zapatos y cinturón negro, camisa azul cielo, grandes gafas y chaleco blanco visten al periodista que con paciencia permanece estático frente a la pintora. La iluminación invade la escena y la sombra de García se refleja en las dos paredes que le arrinconan.

La autora se enmarca dentro de un realismo muy naturalista en el que no sólo representa fielmente las características físicas del personaje sino que también busca a través de ligeros *sfumati* recrear el ambiente que le rodea.



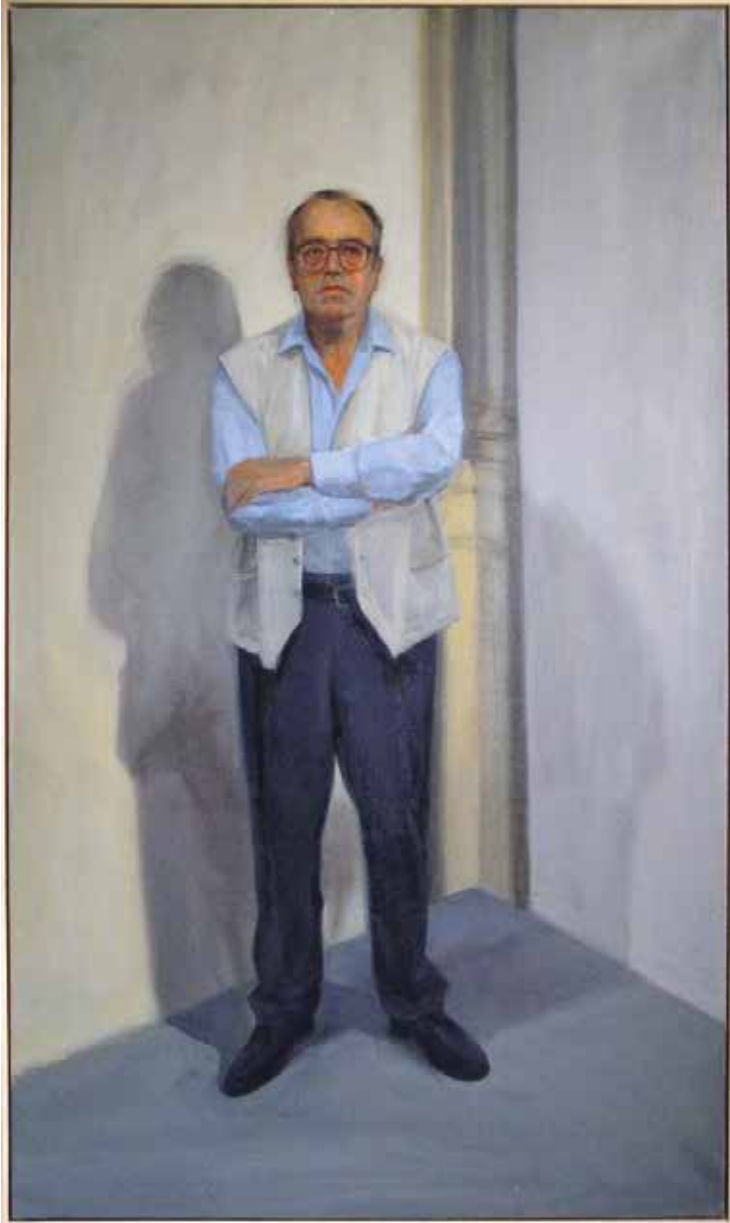


Figura 14 - Rosa Martínez Artero, *García Martínez*, 1998. CARM.

### 2.15. *Los Marañoses*

Que los ejemplos de retratos en el campo de la fotografía en este conjunto son minoría es evidente, aunque Paco Salinas dio buena cuenta de su cámara gracias al retrato del grupo de rock Los Marañoses (Figura 15). En total son ocho fotografías que representan doblemente a los cuatro componentes de la banda. Cada imagen mide 41 por 41 cm. El artista que se inició en Madrid alterna su obra personal con la fotografía de moda, teatro o cine. Aunque ha colaborado con multitud de periódicos, en la actualidad se encarga de la organización de exposiciones con la plataforma *Mestizo* y también del ciclo *Fotoencuentros* que organiza la Fundación Cajamurcia. Los protagonistas de la obra son los miembros del grupo murciano Los Marañoses. La banda que nace en 1986, y que sigue tocando en la actualidad, ha ido ganándose el respeto y la admiración de muchos amantes del rock and roll que en una banda de gran calidad. En 1998 la formación del grupo que posa para *Nuestros retratos* es la siguiente: Miguel Bañón, guitarra y voz; Joaquín Talismán, guitarra; Román García, bajo y Pedrín Sánchez a la batería.



Figura 15 - Paco Salinas, *Los Marañoses*, 1998. CARM.

Salinas hace una obra en la que cada miembro es el protagonista de dos fotografías independientes tomadas de perfil. El artista concede a cada miembro la misma importancia dentro del retrato. Las fotografías

están tomadas en blanco y negro y se apoyan en un fondo neutro. La composición se estructura en dos filas de cuatro fotografías cada una. En la de arriba aparecen Joaquín y Miguel en su perfil derecho y Román y Pedrín con el izquierdo. En la fila de abajo se invierten las posiciones. Especialmente expresiva es la fila superior donde las fotografías se enfrentan, simulando que los personajes mantienen una relación visual entre ellos.

### 2.16. *Isabel Gil Gambín*

Sin movernos del género fotográfico existen otras dos obras que utilizan esta técnica del conjunto *Nuestros Retratos*. El primero es el que realiza el artista Ángel Fernández Saura y que tituló *Maja*, aunque en realidad es el retrato de Isabel Gil Gambín (Figura 16). El artista lleva dedicado al mundo de la fotografía y el diseño gráfico desde mediados de los años setenta, aunque fue durante la década siguiente cuando consiguió abrirse hueco en la fotografía española. A finales de los ochenta le influyó fuertemente una estancia en Nueva York, a partir de la cual comenzó a desarrollar un estilo versátil preocupado por la fotografía en sí misma y con una intencionalidad fuertemente expresiva. La protagonista, Isabel Gil Gambín saltó a la fama en 1997 cuando fue nombrada segunda Dama de Honor en el concurso de Miss España, habiendo sido nombrada Miss Murcia el año anterior.



Figura 16 - Ángel Fernández Saura, *Maja*, 1998. CARM.

El retrato es una obra de lo más expresiva en la que la modelo posa de la misma manera en la que Goya representara sus *majas*, obras que Fernández Saura homenajea en esta ocasión. Nuestro retrato es un positivado en plotter que mide 85 por 200 cm. La *Miss* aparece recostada sobre un fondo de tela azul que conforma amplios pliegues que dotan a la obra de movimiento y un expresivo juego de claroscuros. En un ángulo contrapicado la protagonista viste un elegante traje de tirantes en colores rosa pastel que acaba con encajes por encima de las rodillas. Sobre su mano izquierda reposa la cabeza en la que destaca su profunda mirada que se dirige directamente al espectador.

### 2.17. Pepe 'El correas'

El último retrato fotográfico que veremos en el conjunto es otra obra de grupo, en este caso una familia completa: la Familia de Pepe El Correas (Figura 17). En este caso una obra llevada a cabo por el cartagenero Juan Manuel Díaz Burgos. Este autor que se inició como fotógrafo a los veinticuatro años ha tenido gran relación con América Latina en sus fotografías, ya que ha recorrido varios países buscando representar la fuerza de las gentes gracias a un gran realismo.



Figura 17 - Juan Manuel Díaz Burgos, *Familia de Pepe 'El correas'*, 1998. CARM.

Este retrato de grupo está formado por 12 fotografías individuales que muestran a cada uno de los miembros de la familia. En la composición distinguimos retratos de distintos tamaños: uno de 58 por

49 cm, dos de 58 por 24 cm., otros dos de 38 por 28 cm., otra pareja de 33 por 24 cm., cuatro obras de 28 por 28 cm. y uno de 24 por 34 cm. La colocación de los mismos tiene como eje el más grande que representa a Pepe El Correas, mientras que el resto de obras giran en torno a este retrato. Díaz Burgos hace uso de las imágenes en blanco y negro para aumentar la expresividad de los rostros de esta familia de etnia gitana, representada en fotografías cercanas donde predomina la importancia de la mirada.

### 2.18. *El ángel caído*

La última obra que analizaremos es la que se titula *El ángel caído* (Figura 18) que realizó el artista canario Pedro Rómulo Celdrán y que representa al famoso demonio encadenado de la procesión del Domingo de Resurrección de Murcia en un óleo sobre tabla de 211 por 112 cm. El artista natural de Las Palmas de Gran Canarias estuvo activo en el ciudad de Murcia entre 1997 y 2002 exponiendo de forma continuada. Cercano al arte hiperrealista y corrientes pop ha desarrollado un estilo en el que da vida a objetos cotidianos que aumentan de tamaño, conformando una nueva realidad producto del paso del objeto por el filtro emocional del artista. Aunque es en la escultura donde mayor éxito ha conocido, en sus inicios se dedicó sobre todo a la pintura haciendo unas obras de gran realismo, en las que predominaron unas naturalezas muertas que parecían detenerse estáticas en una dimensión mágica e irreal.



Figura 18 - Pedro Rómulo, *El ángel caído*, 1998. CARM.

Aunque apenas se dedicó al retrato, en *El ángel caído* nos acerca a ese estilo suyo tan hiperrealista pero, a la vez, cargado de un cierto misticismo producido por su visión tan peculiar de la realidad. El protagonista es quien fuera el demonio encadenado de la procesión del resucitado durante tantos años. Este personaje popular, que asusta con su lengua roja a los niños, representa el triunfo del bien sobre el mal. Sin embargo, en nuestra obra la persona encargada de darle vida aparece vestido completamente de negro y encadenado, como en la procesión, pero sin la peluca y la cara sin pintar. La efigie no ocupa toda la tabla y su rostro es de una gran expresividad. Aunque cargado de arrugas, su cara mantiene un gesto amable y cercano lejano al papel que representa el domingo de Resurrección.

### 3. Conclusiones

El grupo de retratos que ha sido analizado en este artículo pertenece a la iconoteca de la colección de arte de la Región de Murcia titulada *Nuestros retratos* que, realizada en 1998 como un taller artístico experimental reflejó en forma de grupo de obras a los personajes más relevantes de la sociedad murciana del momento.

El concepto de iconoteca surgió dentro de las culturas de la Antigüedad, cuando se componían conjuntos de retratos de los principales líderes políticos y militares; sin embargo, el estudio de esta tipología como conjunto de retratos no es todavía muy habitual en las obras sobre el género del retrato.

Sin embargo, y aunque las iconotecas estén formadas por retratos individuales, estos solo cobran total sentido cuando son analizados dentro de su conjunto, ya que existe en todos ellos un nexo común que los dota de una función determinada.

En el caso que se ha analizado hemos podido observar cómo encontrábamos retratos donde los artistas no descuidaban el parecido físico del protagonista, pero donde tenían al mismo tiempo libertad total para experimentar con la técnica, los materiales o la forma (National Portrait Gallery, 2016: 96). Así, se ha podido analizar cómo algunos autores tenían muy en cuenta la profesión del protagonista (Encarnación Fernández o Antonio Peñalver), otros que se decantaban por una deconstrucción de la imagen (Andrés Salom), algunos que preferían jugar con la mezcla de los materiales o los soportes (el retrato



de García Millán) y otro grupo de artistas que buscaban un retrato más clásico y tradicional (Antonio Pérez Crespo o Ana M<sup>a</sup>. Escarabajal).

En definitiva, el retrato de finales de siglo XX se caracteriza por una libertad formal muy amplia como se ha podido observar en esta colección y, además, también por una representación basada en la fama, el intelecto o la genialidad artística o deportiva (West, 2004: 87) como motivo de representación de la sociedad.

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## Parte terza

I problemi del presente:  
letture e interpretazioni socio-pedagogiche



Andrea Rácz<sup>1</sup>

*Is the State a Good Parent? - Challenges of education and care in the Hungarian child protection system*

ABSTRACT

The research is called *Is the State a Good Parent?* since it studies the principles and professional conceptions determining practical work in the field of corporate parenting. The state can be a good parent if it is able to assume responsibility for the children in care, to satisfy their individual needs, and to make every effort so that they have good results in school and in other fields of life, as any responsible parents would wish for their own children. Successful school graduation is needed to promote children's social inclusion and to improve their position in the labour-market, which cannot be achieved without support. Based on the results of the qualitative elements of my research, I will reflect on issues that point to necessary changes within the child protection system to ensure professionalism in the long term.

KEYWORDS: Hungarian child protection, educational support carrier, corporate parenting

*Introduction*

The mainstream child protection includes corporate parental involvement as an opportunity, as well as an obligation, to provide good future for children and young adults in care, compared to their counterparts in families. The state will be considered a good parent if it is able to take responsibility for the children in care, to meet their individual needs, and if it strives to promote them so that they achieve equally good results at school and in other areas of life, as any responsible parents would wish for their own children. Good parenting for young adults means the preparation for an independent, own life by providing the appropriate level of educational participation and labour market integration. The same expectations

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apply (Scottish Government, 2008; Corporate parenting strategy for Clackmannanshire, 2009-2012; Parent & child fostering scheme procedures, 2010-2013) to the foster parents as members of the public child care in providing home.

The following analysis describes the most important results of the qualitative phase of the research *Is the state a good parent?*<sup>2</sup>, which relate to satisfying children's needs and to the dynamics and character of planning. The research includes four individual interviews and three focus group interviews. The groups are organized according to three criteria, i.e. maintainers (government, church, civil maintenance), exploration of possible differences concerning the dominant treatment type for a deeper understanding of the characteristics of each model (foster care, children's homes dominance), and problem focuses. A child welfare professional was invited into the maintainers' focus group to explore coordination in cooperation. There was one group in Budapest and two in Debrecen, addressing professionals of Hajdú-Bihar County. In addition, with the permission of the Hungarian Association of FICE, the delegates of the XV Children's Parliament were asked whether the state was a good parent. Therefore, we will present the views of professionals and child parliamentarians, and discuss the importance of career education support in terms of social integration. The system-wide development of child protection is conceptually bound to the theory of change.

### *Some trends of specialized care*

As for the trends of child protection, apparently, the number of minors decreased between 2000-2008, while the number of adolescents grew. The number of minors showed a rise again from 2011 and exceeded 18 thousand. According to the data of the Central Statistical Office (2014), in 2013, 18,674 underage persons (children and

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<sup>2</sup>The University of Debrecen, Sociology and Social Policy Department of the University financed the research between June 30 and 1 July 2013. The survey (registration number: RH/885/2013) was built on quantitative and qualitative methods, designed generally to explore the principles and professional concepts defining the practical work relevant to corporate parenthood care and responsibility-taking. The quantitative research phase included an online questionnaire sent to the maintainers, which typically asked for attitude issues and to define child protection concepts and terminology.

youths) grew up in the care system. 63.8% of them lived with foster parents (11,918 people).

The role of the two main care forms changed, so that between 1997-2000 the institutional care was dominant, and between 2001-2003 minors were placed 50-50% in institutional and foster care. The shift towards foster care began in 2004, yet, a significant increase can be detected from 2010. In that year, the number of places in children's homes was 9241, almost 30% of this was in general children's homes, and the same proportion in residential care homes (30.5%), whereas the ratio was 5.7% in special children's homes and residential home. The ratio of places in special children's homes and residential homes was 21% (CSO, 2014). Both foster care and institutional care are the most extensive in Budapest and Pest County, Borsod-Abaúj-Zemplén and Szabolcs-Szatmár-Bereg Counties. 26.5% of the foster care networks exists in the Northern Great Plain (Alföld), and 17% in the capital. Also significant is the Southern Great Plain region, where 16.4% of networks operate (CSO, 2014).

### *Examination of need-satisfaction functions of the state's child protection*

Interviewees believe that the practical application of child protection principles and available decision-making mechanisms by regulations do not happen often in real life situations as systematic procedures, but only as ad hoc procedures, subordinated to the prevailing conditions and supplemented by possible intervention according to the actual knowledge and attitudes of the professional, who uses a system-wide process.

Many interviewees identify anomalies in the cooperation between primary and specialized cares as system problems, which can be traced back to the shortcomings in communication and linking procedure-order of the two-part system. The full realization of the professional principles is barred by the non-existent elaborated protocols, and the non-incorporated existent protocols.

«The collaboration between primary care and specialized care varies. It greatly depends on the institutions obliged to cooperate, on institutional culture, the personality of experts, their professional preparedness. [...] Today we can say that they see

each other's activities, but there is still such a belief in the specialized care that child welfare only appears when a review takes place. At the same time I often meet this kind of blaming opinion in specialized care. A sense of distrust exists in child welfare and specialized care. As if they felt at times unsure whether specialized care will be a good place for children, wherein certain stereotypes and prejudices obviously play a role, because specialized care was so completely different before 1997 than it is now»<sup>3</sup>.

Even the core concept, 'vulnerability', to remove a child from the family, is not a professionally well-defined system element, which inhibits professional and reliable process management. The fulfillment of the undertaken tasks of specialized care requires the future development of primary care. After removing a child from family, evidently, the blood family almost completely disappears from the sight of the child welfare. The extraordinary workload does not allow that, in addition to the cases in the concrete and direct threat, they also get resource to assist the reunification of broken families, that is, to create the necessary conditions for successful home care.

In relation to child care or institutional placement, child protection professionals have also drawn attention to more theoretical and practical dilemmas. Approaching from the removal and placement procedures, the first highlighted neuralgic point is the temporal indeterminacy of placement and generally removal, that is uncertainty, which causes a problem in connection with the permanency of the changed life situation for both the removed child and the host medium (mainly in foster care placement). The removal is temporary according to both legal will and child protection principles. This leads to an irresolvable contradiction in the case of foster care placement for the best reception, whether the guiding principle is to decide for development and strengthening of the personal ties, or, conversely, for the preparation to quickly reinstate the child to home care, when abstaining from forming deeper ties is appropriate. As concerns this dilemma, the possibility to reinstate to home care has a much broader scale in daily operation, and at the same time it can be better forecast than in the theoretical approach.

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<sup>3</sup> Source: expert of child protection, individual interview. Own translation.

«[...] this situation is full of failure, because I cannot imagine a situation when someone is added into my family, and I have to work on not to love him/her, that s/he should not love me, or I have to work on that s/he should love me. [...] I think it is quite evident when a person is placed in specialized child care, whether there is a real chance to get back into the blood family. [...] So, I think the profession should be much more responsible in this matter. [...] Quite differently could the natural parent adapt to this situation as well as the foster parents, let alone the children themselves, if the situation was clear»<sup>4</sup>.

Examining foster care and institutional care, all the professionals interviewed take the most important starting point in that the two sub-systems should not be contrasted with each other even when comparing, assessing their operational characteristics or their efficiency, they have to be interpreted as complementary care forms, as substitute services for a family. They consider it a specifically false conception that either form of care should have over-dominance, and they agree that the application of certain guidelines and setting priorities (for example, the guiding principle for foster placement of the youngest age group) are necessary, but in their practical application, the actual real-life situations should be reflected more than in the current practice. They believe that the profession should be more clearly and precisely able to formulate the benefits and drawbacks resulting from the characteristics of these two care forms and the profession should be able to treat those as a means. While the form of institutional care has institutional, alienating nature providing a less familiar environment, nevertheless it is true and equally important that the availability of support in this form of professional care has a much higher quality. It is also important that, due to the basic situation of the integrational context of a real family, the success of foster care is much more dependent on the participants, that is, the personal relations of the foster parent, the child and other members of the foster family, which facilitates not only a more homely upbringing environment, but requires more criteria to be considered in the placement and adjustment.

«Since the foster parents allow the children into their lives, they should have the choice to say no. They are people, not machines. Consequently, there will be a lot of kids, whom none of the

<sup>4</sup> Source: expert of child protection, individual interview. Own translation.



foster parents would want to take, and this must be absolutely respected and maintainable. It is pointless that foster parents take a child because the maintainers in the network say that, if they do not, they cannot continue as foster parents. We already know what constraints exist for foster parents to want to stay at any price. [...] Where a tremendous scale of unemployment reigns, there foster parenting is actually a job opportunity»<sup>5</sup>.

It is important to see that the function and system requirements of foster parent care and child home care cannot be the same. The institutional form of care is appropriate for those children who may be reinstated into their own family soon, as well as for those 14-17 year olds whose professional support aims primarily to gain the knowledge necessary for social inclusion, to acquire skills for independent living, or for those children who have neurotic, psychotic, dissociative symptoms and deviant behavior, whose development and treatment are only possible in an institutional framework. Institutional care is able to take care for those who have moderate and severe disabilities, or are acute patients in need of care and treatment. Unfortunately in the practice there aren't extended special tools, methods and programs for these target groups. Also do the siblings, when 4-5-6-7 siblings are placed in the care system at the same time (Joshua, 2005; Vidra Szabó, 2000).

During the placement procedure, according to experts interviewed, when the most appropriate place for children's needs in the care system is determined, typically the available places determine the committee of experts' proposal, rather than the children's real needs. Apparently, financially motivated decisions override the child's real interests in the selection of a placement with appropriate content capacity, as well as in the case of choosing between foster care or institutional care forms, when the experts in the decision-making process treat the fundamental fact that foster care is significantly cheaper as a high priority argument.

Experts point out that unfortunately, today's operation of the child protection system is typically an ad-hoc decision-making process clearly determined by underfunding in the background. The 1997 conversion, that is, the replacement of large institutions as the turning point in the re-organization of the system, was a process in which no or insufficient financial resources were available (Vidra Szabó, 2000).

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<sup>5</sup> Source: professional in child protection, leader of an apartment home, focus-group Hajdu-Bihar county. Own translation.

The apartment home structure brought system-wide risks into the structure, which mostly manifests in its extremely resource-intensive operation. Compared to the mass placement, the apartment home that typically works in small settlements with few persons poses new types of challenges for children and professionals. Therefore, the professionals are not able to provide appropriate support for the children in their trust, as there is a lack of targeted training for suitable skills to manage the new situation.

«The children tell us that they simply run away from the apartment home because they cannot handle freedom and few people. They were used to a large institution where they would certainly find links and cannot cope with the need to find a position among 8-10-12 children. All children have indicated that they feel lonely. [...] they cannot cope with the situation wherein they should find a place in a 500-person village from one day to the next. Thus, neither child, nor adult has been prepared, and adults express the same»<sup>6</sup>.

Interviewed experts believe that the development of foster networks against the apartment home structure is not an appropriate response to the problem in its current form. The measure, the intensity of development is clearly exaggerated in the light of short time for conversion, and secondly, as past experience has shown, the apartment home care model may not be suitable in all respects to replace the former institutional structure. Thus, the development of a dominant foster parents network cannot be a good decision. The most recent initiative in which a foster care network operates in line with a children's home can be a start for a very positive formation. This type of cooperation has been implemented in the civil and ecclesiastical operations, and its development would be highly desirable throughout the system.

### *Support for Educational Participation*

Supporting educational achievement is not easy in long-term child protection care. Children's motivation towards school is very poor. It

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<sup>6</sup> Source: professional in child protection, educator in a children home, focus-group Hajdu-Bihar county. Own translation.

is more typical when a child has lived in his/her multiple disadvantaged family for a long time. The lack of motivation is closely related to the low educational level of adults and social disadvantages. Even the children's parents do not consider learning important and school attainment as the possible way of social elevation. In order to promote their social inclusion and improve their position in the labour market, they need finishing school successfully and acquiring professions, and it cannot be achieved without increasing support. In long-term child protection care relating to caring-rearing activities, a continuous knowledge transmission is accompanied by communication and development of the children's verbal skills. Conscious attention should be paid to it. Talking amply to children who enter long-term care is vital, in accordance with their age. Tale-telling, poetry activities, singing together, puppetry and role-playing should become a part of small children's everyday lives, while youngsters appreciate drama pedagogy techniques (RÁCZ, 2015; Farkas *et al.*, 2015).

According to the OSAP (national statistical data collection programme) data for the year 2011, we can conclude that a larger proportion of children between 15-17 living in foster care, engage in secondary education: 86% of them study, differently from the children who live in children's home, where it is only 61,1%. There is a significant difference between the two forms of care regarding the engagement in education that ends with leaving certificate (secondary school or vocational secondary school), which later becomes determinant in terms of positioning in labour market and social integration. 54,3% of this age group living in children's home study in secondary vocational school or vocational school, and only 10,3% of them continue their studies in school that ends with maturation certificate. In foster care, 31,7% of the children study at a school that ends with a leaving certificate and 50,9% in vocational training school (Papházi 2014: 187). However, it is important to mention that the number of children participating in education that provides maturation certification has been increasing slowly, from 22% in 2002 to 25% in 2011 (KSH 2012: 10). Educational level is an indicator for social integration of those who are adult age and leave the system. Every second young adult aged 18-25 leaving the system, finishes elementary school. In 2011, in the case of young adults who left the system, it was nearly 40%. In 2011, 56,3%

of those who left the system had secondary and 3,2% of them had higher education qualification (KSH 2012: 12).

Table 1 – *Educational carrier in after care provision in 2014*<sup>7</sup>

Type of school	Those who are in after care provision (N)
Not finished elementary school	98
Finished elementary school	1,886
Finished secondary school	932
From this: finished high school ( <i>gimnázium</i> )	226
From this: finished vocational secondary school ( <i>Szakközépiskola</i> )	265
From this: finished vocational training school ( <i>Szakiskola</i> )	441
From this: finished special vocational training school ( <i>Speciális szakiskola</i> )	118
Finished higher education	36
From this: MA	7
From this: BA	15
From this: other higher education	14

Overcoming disadvantages at school requires complex, special skills, starting from scratch, and an assumed good educator-child relationship. Therefore, it is important to structure the preparation properly, to fulfil objective and subjective conditions of learning (suitable environment, preparation of learning tools, clarifying motivation and problems). During planning learning, individual characteristics should be taken into account. Developing individual learning techniques, learning self-check gradually, increasing self-confidence should be the objectives. Developing children's individual skills, recognising and facilitating their talents contribute to the development of their personality. It should be a customized achievement in this organised framework. Conscious talent support, personal skill development have positive effect on the individual's personality development as a whole. Further education plans and realistic opportunities should be talked

<sup>7</sup> Hungarian Central Statistical Office, unpublished data, by the Ministry of Human Resources.

over with the child in the last years of elementary school and with the engagement of parents if possible (RÁCZ, 2015; Farkas *et al.*, 2015).

### *Youths' Opinion on the State undertaking parenthood*

The XV Child Parliament had 35 delegates, all responded by writing whether the state was a good parent and they justified their response as well. 14 from 35 young people feel that the state is not considered a good parent, 11 people feel it partly good and partly bad, 8 of them consider the state a clearly good parent, and two youths are not able to judge it.

According to the positive beliefs, the state's parental involvement satisfies those in care, their needs, providing clothes, accommodation, social security, schooling, talent development and remedial programs, and plays a family substitute role. «The state tries everything so that we, disadvantaged young people should not suffer shortage of anything»<sup>8</sup>.

The negative opinions refer to a number of system shortcomings. The majority of young people believes that the system is not adapted to the individual needs and that it ignores individual wants, desires, and plans for the future. Children and young people often receive unjust treatment, for example, they are not reared with their siblings. They believe that the system is not fair, it distinguishes between those in care, and what they can achieve in the upbringing of the child protection system depends on the individual professionals. There are great differences in the financial possibilities of the institutions and foster parents, for example, in support for study or in the organization of free time (RÁCZ, 2012; RÁCZ-Korintus, 2013).

Young people claim that the system cannot fully compensate for the disadvantages, the rules in many cases are unpredictable. Young people highlight that the system is impersonal, that professionals do not seek to learn about the characteristics, capabilities, capacity of those in care, and to adapt these expectations to the system (RÁCZ, 2012). The most negative perception of the state is that it separates the parents from the children in care and is not able to give love to children. «[...] the state is not interested in the fate of people in state care»<sup>9</sup>.

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<sup>8</sup> Source: youth in Child parliament.

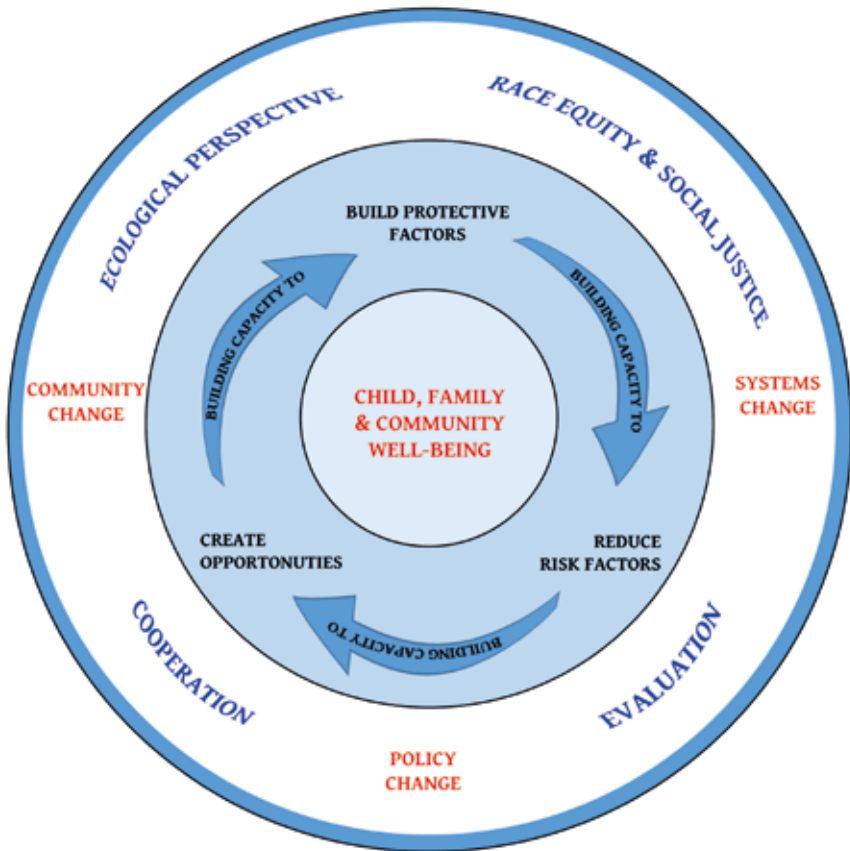
<sup>9</sup> Source: youth in Child parliament.

*Summary*

According to the results of the qualitative research and the child parliamentary delegates, a major problem in the child protection is that professional, substantive changes are mostly due to individual initiatives. There is no quality assurance, efficiency or effectiveness measurement in the current system of specialized care (Herczog, 2001; Szikulai, 2006; Rácz, 2012). Children's needs meet no full satisfaction, capacity planning is arbitrary, service capacity shows significant regional differences, so it is possible that regionally different problems become child protection issues. The system cannot meet the children's special and singular needs, especially in the context of foster care (Rubeus Association, 2013). The professional rules would also be vitally important because they determine what experts need to know, and simultaneously provide what the particular institution / care offer for the children and their blood families. The professional rules in meeting the needs may combine all the conditions, methods, standards and knowledge that child protection professionals are expected to possess (Domszky, 2004). Without these, however, on an emotional basis, some enthusiastic or less self-sacrificing people will determine the practical functioning, and this leads to clear system anomalies, dysfunctional operation, and, instead of protecting, to damaging children's rights. The state can only substitute the role of the family, and interviewed experts and young people claim that the state cannot be a good parent, unless it makes the professionals perform parental duties as good parents, that is, unless it enables them to concentrate on their professional work, to be satisfied with their own situation, and to proactively carry out their tasks.

As for the necessary system changes, the interviewed experts mention as a key target that real system-oriented reforms are to be carried out, along with complex interventions including the correlations of the sub-areas, rather than in the framework of separate, isolated, project-based developments, investments, in a kind of tinkering. An important conceptual foundation in line with the prior mission of child protection has been formulated: supporting families should be in focus for a global approach by channelling community resources, and only under its auspices should child protection and child welfare subsystems be considered individually (Trocmé, 1999). Strengthening families may come along with enhancing five interrelated protection

factors by informal and formal support systems in coordination with families with children, such as 1) parental resilience support, which means a positive attitude to children and parenthood, care and appropriate parental reactions in problematic life situations, and stress management; 2) encouraging social relationships that can mobilize the informal help of local resources; 3) parental knowledge about child development and education, adequate, tailored child-rearing and need-satisfaction, to ensure the child's physical, mental, spiritual and moral development, and to compensate for any delays; 4) support in times of crisis, so that they are actively seeking and accepting help for the child and the parent's own interest; 5) the development of the children's social and emotional competencies, positive communication, interactivity, which takes place in a warm family atmosphere (Center for the Study of Social Policy, 2005). Support for all these is not only the task of the actors in child welfare and child protection, but also that of the representatives of related professions, such as public education, health, social protection, culture, etc. The ecclesiastical and non-governmental organizations or voluntary associations can have a particular role, but the media should widely display parenthood and children as individuals with rights as social value in the context of educational activities (Bogács *et al.*, 2015).

Figure 1 - *The theory of change in order to support families*

(Source: Browne, 2014: 5th)

The theory of change (Figure 1) directs attention to that. Child's, family's and community's well-being involves not only engineering protective factors, but it simultaneously means a reduction of risk factors, as well as creating opportunities for families with children to enable realizing their potential (on individual and family level) to satisfy their needs. All this requires a system-level change, which may be achieved in a stable political, economic and cultural environment,



wherein co-operation, social justice and equality, as well as analyzing the impacts, are core values (Brown, 2014).

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Ewa Sowa-Behtane<sup>1</sup>

## *Binational marriages in Europe*

### ABSTRACT:

Today, in the era of post-modernity, the ethnically, racially, religiously, culturally or nationally mixed marriages are more and more frequent phenomenon, contributing to the emergence of new types of cultural identity. Nationally mixed marriages (binational) define a new cultural quality when they do not concern only individuals, but when they become a phenomenon which is statistically frequent, and even dominant in a broader social context.

Statistics of the German federal office showed that every ninth marriage in 2014 was binational with an upward trend. Half of all marriages celebrated in Switzerland are binational. In 2005, 43,266 French-foreign marriages were concluded. The number of marriage migrants in Sweden increased substantially in the period 1990 - 2004, and the spatial pattern of the origins of marriage migrants is highly gendered. Mixed marriages represented 1.78% (3,367) of the total number of marriages contracted in Poland. This statistic shows that binational marriages in today's Europe have a tendency to increase.

KEYWORDS: Binational marriages, marriage, family, multiculturalism, Europe

### *Introduction*

Partner choice is generally seen as being determined by preferences, social norms and opportunities (Kalmijn, 1998). From sociological studies, partners have been found to be similar in terms, for instance, of social status, age, geographical origin and cultural resources (Kalmijn, 1991, 1994, 1998). Social and cultural control by parents, family or others from the direct surroundings and the sanctions that might be imposed when partners are chosen from outside the group influence the process of partner choice as well. Also, marriage market opportunities describe the availability of potential partners with desired characteristics.

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Marriage market restrictions substantially influence who marries whom, and these restrictions have decreased very quickly over the last century, particularly in the last decades.

In an age of sweeping globalization and transnational mobility; in an age of blurred borders, the phenomenon of mixed marriages is remarkably increasing worldwide and more people marry across national and cultural boundaries. Mixed marriage is, thus, a by-product of globalization and migration of people. Binational marriage is a marriage between two people from different countries. A variety of special issues arise in marriages between people from different countries, including those related to citizenship and culture, which add complexity and challenges to these kinds of relationships. When two culturally distinct individuals marry, they bring their cultural backgrounds under the same roof, which is the contact zone where these backgrounds either co-exist and cross-pollinate for the benefit of the couple, or grapple and jostle against each other to the detriment of the marital bond.

According to Tadeusz Paleczny,

«one of the elements of Americanization, universalization of the identity of the members of monocentric groups, such as Korean, Japanese or Mexican ones, is the phenomenon of amalgamation. The Europeanization of Poles and Germans will also be fully realized only when there is a new, dominant type of double or polyvalent, multiple identity beyond the ethnic and national boundaries, formed through culturally mixed marriages». (Paleczny, 2007: 55, translation by mgr Bożena Traciewicz)

As a result of the amalgamation, that is a merger of cultural groups following a marriage and the creation of hybrid forms of kinship, a new cultural order emerges.

A successful mixed marriage is one where each member accepts the right of the other to be different, which most marriage advisors see as the nub of the problem. However, many other scientists argue that mixed marriage carries within itself the factors of its failure, irrespective of how long it resists.

*Binational marriage - in European research*

The term 'binational marriage' means a registered relationship entered into by the citizens of two different countries. Marriages between foreigners are a kind of an indicator of openness of a society to contacts with other countries. They also indirectly indicate the scale of long-term emigration or immigration, which may lead to the possibility of a permanent, intimate bond between citizens of the two states (Szukalski, 2013).

One of the very basic issues of family social sciences is the question of how do the partners experience love (Collet, 2012). In our deliberations we are also interested in motives of a binational marriage. Beate Collet (2012) lists a number of reasons, which, of course, are not exhaustive or exclusive: feeling alone, need for help or assistance and/or founding a family. For people living in a foreign country the motives might be more complex than these. Due to their legally or politically precarious position, they might be searching for a job and social integration, they might not speak the local language, they might feel different, discriminated against and/or even persecuted. She further states that, from the perspective of a local, an intimate relationship with a foreigner, hence a member of a minority group, is in some aspects 'special'. To love the person might be mistaken for caring for the person. The 'Romeo and Juliet complex' might also play an important role, because 'love is more intense' when your partner is discriminated or when the relationship is on unstable ground because it is legally difficult and socially rejected (Collet, 2012).

Initially, research into ethnically mixed marriages was conducted mainly in the United States and other classic countries of immigration. However, in 2006, two Dutch professors, Matthijs Kalmijn and Frank van Tubergen (2006), published the findings of their research on ethnic marriages among the citizens of Suriname and the Netherlands Antilles<sup>2</sup>, Turks and Moroccans in the Netherlands. For the authors, it was important to examine from the theoretical and empirical perspective whether the patterns observed earlier in the countries of traditional immigrants would be equally applied in the Dutch social context. In order to obtain a sufficiently large research sample, five representative

<sup>2</sup> The Netherlands Antilles was the Dutch autonomous territory in the Lesser Antilles (Central America) covering the 5 islands in the Caribbean Sea: Curacao, Bonaire, Saba, St. Eustatius and the southern part of St Maarten, existing in the years 1848-2010.

national groups were selected, among which research was conducted between 1988 and 2002.

Kalmijn and Tubergen (2006) distinguished three major sociological factors affecting the decision to enter into a mixed marriage: individual preferences concerning the features that a spouse candidate should possess, the number of opportunities to meet and the influence of third parties.

Sofia Gaspar (2010) argues that a binational marriage between two EU-partners is a different phenomenon than one between an EU-partner and a non-EU spouse. In an attempt to understand European intermarriages as a social phenomenon in its own right, she undertook a qualitative survey of 30 in-depth interviews with couples in Lisbon. She lists several advantages for couples with European nationality, such as the right of abode, geographical mobility, civil rights, legally guaranteed freedom from discrimination and easier access to employment in comparison to other immigrant groups. She further states that as an EU citizen, marrying someone from another EU country would not require the legal and security procedures that apply for non-EU spouses when pursuing to obtain citizenship and then having the freedom of movement within the EU. Without a detailed explanation she draws the conclusion that «European intra-marriage rather involves personal motives such as love and affection than legal and economic factors that might be hidden in other types of transnational unions» (Gaspar, 2010).

A weak point in Gaspar's (2010) study, which she admits at the end of her study, is the fact that she interviewed highly educated people only. Since any level of educational degree can be found amongst the population of binational marriages, the shortcoming of the foreign towards the native spouse should have been addressed in more detail, as this would probably highlight other yet hidden aspects. Interestingly Gaspar's (2010) distinction between non-EU spouses and EU spouses seems to fit the Polish conception as well. The 'bilateral negotiations' are the source for this harmonisation with inner European movement possibilities. It remains to be seen if 'mass-immigration initiative' and its aftermath will have a negative impact on the relatively facile immigration procedures for EU-spouses.

*Binational marriages - in European statistics*

In the era of globalization, meeting people from different cultural circles on one's way of life has become a common phenomenon. Statistics of the German federal office<sup>3</sup> showed that every ninth marriage in 2014 was binational with an upward trend. German women preferred partners from Turkey, Italy and the U.S. while German men tended to be married to women from Poland, Turkey and other east European and Asian countries. Of the marriages in 2014, 85.9% were between German couples and 14.1% between binational pairs. Divorce rates were higher in German-German marriages than in binational marriages with around 90.5% of divorces being between German couples and 11.4% of divorces between binational couples.

Half of all marriages celebrated in Switzerland are binational. Binational partnerships and families have become an important feature of Swiss society and will continue to grow in number as globalization increases. According to the Swiss Federal Statistical Office (BFS)<sup>4</sup>, in the year 2007, 49.7% of all marriages celebrated in Switzerland were binational. Swiss female marries non-Swiss male: 20.8%. Swiss male marries non-Swiss female: 22.4%. Non-Swiss female marries non-Swiss male: 6.5%. While 45% of Swiss women marry men from EU/EFTA member countries, 55% marry men from non-member countries. These Swiss women most frequently marry men from Italy, Germany, Serbia/Montenegro, North Africa, Turkey and France. Thirty-five percent (35%) of Swiss men marry women from EU/EFTA member countries, whereas 65% marry women from non-member countries. These Swiss men most often marry women from Germany, Brazil, Thailand, Italy, Serbia/Montenegro and North Africa. Comparing the number of Swiss divorces (11,642) to the number of Swiss marriages (20,406) yields a divorce rate of 57%. In contrast, comparing binational divorces (6,760) to binational marriages (14,910) yields a divorce rate of 45%. Swiss female-non-Swiss male couples are affected by divorce to about the same degree as are non Swiss male-Swiss female couples.

<sup>3</sup> The 2014 Migration Report, Date: 22 January 2016, <http://www.bamf.de/SharedDocs/Anlagen/EN/Publikationen/Migrationsberichte/migrationsbericht-2014.html?nn=2006704> (last access: 22.06.2016).

<sup>4</sup> Familie, households, <http://www.bfs.admin.ch/bfs/portal/en/index/themen/01/04.html> (last access: 22.06.2016).



To count French-foreign marriages, we have to look at the number of marriages concluded each year. Annual Report on Immigration and Foreign Presence in France in 2005 published by the Ministry of Labor, Social Cohesion, and Housing (Régnard, 2006) shows that, in 2005, 43,266 French-foreign marriages were concluded. They represented 15.3% of the 283,194 total number of marriages celebrated in France (i.e. 231,348 marriages between French citizens and 8,580 marriages between two foreigners of different nationalities). Mixed marriages are concluded somewhat more by French men (55.6%) than by French women (44.4%). The proportion of mixed marriages concluded every year remains high compared to the number of marriages between French citizens. Concerning the national origins of the foreign spouses of couples married in 2005, 56.9% had arrived from the African continent, mostly from North-Africa. 67% of foreign men married to French women came from Africa, whereas only 33% of foreign women married to French men did. The second most important group of foreigners married with French citizens in 2006 are Europeans: 24.8%. For this group, foreign women married to French men are more numerous than foreign men married to French women (57% vs. 43%).

Thomas Niedomysl and colleagues (2009) focused on marriage migrants, or those immigrants who moved to Sweden and got married to a native within a year of arrival in Sweden. They found that the number of marriage migrants increased substantially in the period 1990 - 2004, and that the spatial pattern of the origins of marriage migrants was highly gendered. Female marriage migrants mainly came from Southeast Asia and other parts of Asia, Eastern Europe and Russia, and South America, while male marriage migrants (making up 42% of all marriage migrants) were mainly from Western Europe, Africa and the Middle East, North America and Australia. John Östh and others (2009) found that men who married marriage migrants were higher educated. Regarding population density, a U-shaped effect was found, i.e. men and women in the most rural and the most urban areas had the highest odds to recruit a partner from abroad, with the effect being greatest for those recruiting a partner from a poor country.

Additionally, after joining the European Union, Poland has become a 'matrimonially' attractive country for non-EU citizens who may acquire Polish citizenship through marriage. The processes of entering

into intercultural relations in the territory of Poland will intensify. We could say that in Polish society a significant social change is taking place, a change from homogeneity to heterogeneity, from unity to diversity. Demographic yearbook of Poland prepared by Central Statistical Office (Szałtys & Stańczak, 2015), shows that, in 2014, 188,488 marriages were concluded. They represented 1.78% (3,367) of the total number of marriages contracted in Poland. Mixed marriages are concluded somewhat more by Polish women (2,599) than by Polish men (768). Exact figures are shown in [Table 1](#).

*Table 1 - Marriages contracted by foreigners by country of residence before marriage in 2014*

	Males	Females	Total
Albania	17	-	17
Algeria	16	-	16
Argentina	5	-	5
Armenia	11	7	18
Australia	22	5	27
Austria	27	-	27
Bangladesh	11	-	11
Belgium	40	-	40
Belarus	10	61	71
Brazil	11	8	19
Bulgaria	11	5	16
Canada	16	-	16
China	5	7	12
Colombia	6	-	6
Croatia	9	-	9
Czech Republic	35	10	45
Denmark	17	-	17
Egypt	20	-	20
Finland	7	-	7
France	108	7	115
Germany	368	34	402
Greece	12	-	12
Georgia	7	-	7
Hungary	29	-	29
India	34	-	34
Indonesia	-	5	5

Iran	5		5
Ireland	133	12	145
Italy	169	-	169
Kazakhstan	-	5	5
Latvia	-	10	10
Lithuania	9	21	30
Macedonia	12	-	12
Mexico	10	-	10
Morocco	17	-	17
Nepal	7	-	7
Netherlands	86	7	93
New Zealand	5	-	5
Nigeria	27	-	27
Norway	26	-	26
Pakistan	38	-	38
Peru	5	-	5
Philippines	-	7	7
Portugal	20	-	20
Romania	30	9	39
Russia	24	101	125
Serbia	14	-	14
Slovakia	32	10	42
South Africa	9	-	9
Spain	99	5	104
Sweden	24	-	24
Switzerland	33	-	33
Tunisia	19	-	19
Turkey	56	-	56
Ukraine	81	299	380
United Arab Emirates	5	-	5
United Kingdom	608	38	646
United States	42	7	49
Uzbekistan	-	5	5
Vietnam	6	-	6
Other countries	94	83	177
	2,599	768	3,367

Source: Based on data from the Demographic yearbook of Poland, Central Statistical Office, Warszawa 2015, pp. 233-237.

Polish women preferred partners from United Kingdom, Germany, Italy and France while Polish men tended to be married to women from

Ukraine, Russia and Belarus. In 2016 Ewa Sowa-Behtane (2016) published the findings of her research on binational marriages among the citizens of Poland and foreigners living on the entire territory of Poland. The research was concluded on a sample of 40 people (10 binational marriages and 10 Polish married couples). The research shows that decision-making processes of people entering into binational marriages are different from the decision-making processes of people entering into mononational marriages. In terms of socio-demographic characteristics, binational marriages are mostly homogeneous marriages. In binational marriages problems often arise due to cultural diversity of the spouses. Among the adaptation strategies aimed at dealing with cultural differences, the most commonly used by spouses are a strategy of compromise and a coexistence strategy. National origin will be a factor highly unfavourable for the implementation of the partnership model of marriage.

### *Completion and conclusions*

There is a large need for research on married binational couples. The justification for tackling the problems of binational marriages is that the results of the research will provide knowledge that will, in turn, contribute to the development of sociology discipline. On the other hand, based on the knowledge across the discipline, including the research on binational marriages, we can create a set of good practices or official documents of legislation. Research is also necessary in order to complement the theoretical knowledge with subsequent conclusions. It would be worthwhile to present an in-depth portrait of binational marriages, analyzing their values, ideologies, opinions and goals in life.

Research on binational marriages will give new arguments for the international discussion on the nature of the changes taking place in modern multicultural societies.

Binational couples have to overcome a number of social, cultural and financial obstacles. There is a need to form organizations which can assist such couples by:

- personal counseling;
- advice and support for further problems such as bringing up children or a falling out between partners, etc.;
- information and education pertinent to the legal/formal aspects

of a marriage, rights and duties of the partners according to the laws of their respective countries of origin, pointing to possible discrepancies concerning the partners' culture, religion, language or upbringing;

- helping a couple-to-be prior to marriage, or before starting life as an unmarried couple, to make this important decision in full awareness of the situation the couple may find itself in, and to help them openly discuss all aspects that may lead to serious misunderstandings;
- diagnosis of problems arising between partners having their possible origin in different cultural backgrounds, with the possibility of passing on those dealt by organisations specialised in family mediation, family counseling, family therapy, etc.;
- in cases of separation or divorce, providing information on pertinent foreign legal aspects with a special eye on guaranteeing the well-being and rights of the couple's children;
- networking/cooperation with additional counseling units/call centers for binational couples;
- setting up and maintaining a website in conjunction with additional organisations active in the field.

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Aneta Wojnarowska<sup>1</sup>

*Le famiglie miste italiano-polacche*

«Il bilinguismo e il biculturalismo possono essere un dono per la persona e per la società a cui appartiene solo nel caso in cui vengono vissuti e sviluppati coscientemente». (Jadwiga Cieszyńska, 2006: 173)<sup>2</sup>

ABSTRACT:

Le famiglie miste costituiscono uno dei tanti simboli dei cambiamenti dinamici del mondo contemporaneo e dei processi di globalizzazione. Le ricerche polacche relative alla problematica delle coppie e delle famiglie miste polacche formate attualmente costituiscono un campo ancora poco esplorato nell'ambito delle scienze sociali. La famiglia mista italiano-polacca dal punto di vista culturale e i figli cresciuti in essa rientra nell'ambito dei miei interessi di ricerca. L'obiettivo del presente articolo è di richiamare l'attenzione sulla necessità di attuare degli studi/ricerche che permettano di arricchire la teoria e la prassi pedagogica con la descrizione della quotidianità delle famiglie italo-polacche che abitano in Polonia (a Cracovia) e dei figli cresciuti in queste famiglie nel contesto dei processi di socializzazione e acculturazione familiare, nonché della strategia di costruzione dell'identità culturale dei singoli membri della famiglia. Ritengo sia necessario che non soltanto le persone impegnate professionalmente nell'istruzione e nella formazione siano rese consapevoli e al contempo sensibili al fenomeno della presenza dei bambini provenienti dalle coppie miste, che costituiscono un gruppo particolare dei cittadini polacchi.

KEYWORDS: matrimoni binazionali, famiglie miste, famiglie italo-polacche

ABSTRACT:

Mixed families are one of many symbols of the dynamic changes of the contemporary world and the processes of globalization. Research on modern Polish mixed relationships and families is rarely conducted in social sciences. Italian-Polish families and children brought up in those lie within my scientific interests. The purpose of this text is to stress the need to enrich research on pedagogical theory and practice by emphasizing the description of everyday life of the mixed families (including the Italian-Polish)

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who live in Poland (Cracow) and whose children are being raised here. This kind of research needs to include the context of socialization and family enculturation and the strategies of building cultural identity of family members. I am strongly convinced that there is a need to raise the awareness and sensitivity, not only of those who are involved in education and upbringing but also the general public, about the presence of children from mixed families, who constitute a special group within our society.

KEYWORDS: binational marriages, mixed families, Italian-Polish families

### *Introduzione*

Le famiglie miste costituiscono uno dei tanti simboli dei cambiamenti dinamici del mondo contemporaneo e dei processi di globalizzazione (Beck, Beck-Gernsheim, 2013). La famiglia mista dal punto di vista culturale e i figli cresciuti in essa rientrano nell'ambito dei miei interessi di ricerca. Ritengo sia necessario che non soltanto le persone impegnate professionalmente nell'istruzione e nella formazione siano rese consapevoli e al contempo sensibili al fenomeno della presenza dei bambini provenienti dalle unioni miste, che costituiscono un gruppo particolare dei cittadini polacchi.

Incuriosita dalle esperienze quotidiane e dai significati costruiti internamente, attribuiti a tali esperienze dalla gente, ho focalizzato l'attività di ricerca sul vivere quotidiano delle madri polacche che hanno dei figli con dei partner italiani e che vivono con le loro famiglie a Cracovia. Esse affrontano il compito difficile di crescere i propri figli in una situazione in cui le culture si incrociano, talvolta scontrandosi, sul confine dei contenuti e delle culture (Nikitorowicz, 1995) nell'ambiente più vicino, più intimo costituito dalla propria famiglia. Questo è un compito molto complicato e di responsabilità, che implica una costante ridefinizione e costruzione dell'identità (Bauman, 2006, 2011) della donna in diverse dimensioni della propria vita, fra l'altro come: madre, madre del figlio cresciuto in una famiglia mista, partner, partner di uno straniero.

### *Matrimoni italo - polacchi nelle statistiche ufficiali*

Le unioni binazionali moderne e le famiglie create da esse sono la conseguenza dei viaggi di lavoro dei nostri connazionali (prevalentemente

persone giovani) nei paesi dell'Unione Europea, avvenuti dopo l'adesione della Polonia, dei viaggi degli studenti (il programma Erasmus è presente alle università polacche già da oltre 20 anni) oppure dei viaggi turistici. Nel corso degli anni la Polonia è stata un paese di emigrazione, adesso va considerata come paese di emigrazione e immigrazione (Grzymała-Moszczyńska, Kwiatkowska, Roszak, 2010). Da qualche anno la Polonia è diventata il punto di arrivo per gli investitori stranieri e per le persone giovani che vengono dall'estero in cerca di un lavoro e di una sistemazione, il che costituisce una delle conseguenze della crisi mondiale del 2008 (Berardi, 2014).

Secondo le analisi pubblicate da Główny Urząd Statystyczny [il corrispettivo polacco dell'Istat] (Annuari Demografici, 2004-2014) i matrimoni misti contratti negli anni 2004-2014 rappresentano all'anno l'1,7% del numero complessivo dei matrimoni contratti in Polonia (tab.1). I matrimoni contratti dal momento dell'adesione della Polonia all'UE fino al 2011 costituiscono il 40% del numero complessivo dei matrimoni misti contratti in Polonia dai tempi della trasformazione del sistema politico del paese (1990) fino al censimento del 2011. Un numero ancora più elevato di matrimoni binazionali viene contratto dai nostri connazionali al di fuori dalla Polonia. Antoni Rajkiewicz (2009) stima che ogni anno all'estero viene contratto un numero 3 - 4 volte più elevato di matrimoni di questo tipo rispetto a quanto avviene in Polonia. Occorre ricordare che le statistiche summenzionate presentano soltanto i dati delle unioni formali e non comprendono le unioni di convivenza.

Come risulta dalle statistiche polacche, prevalgono le unioni delle polacche con gli stranieri che costituiscono circa i 3/4 dell'insieme delle unioni miste (Slany, Ślusarczyk, Krzyżowski, 2014). Le donne polacche scelgono prevalentemente partner provenienti dai paesi occidentali. Analizzando i dati del GUS si può notare che gli italiani occupano il terzo posto tra i partner stranieri scelti più frequentemente dalle polacche (anni 2007-2014). Anche le statistiche ufficiali italiane pubblicate dall'Istituto Nazionale di Statistica confermano il numero considerevole dei matrimoni italo-polacchi contratti in Italia (tab. 2). Nel decennio scorso essi hanno costituito circa il 6% del numero complessivo dei matrimoni contratti dagli italiani con le straniere, e le polacche sono fra le cinque prime mogli straniere scelte più spesso dagli italiani (Matrimoni, 2006-2014). Il confronto dei dati statistici

polacchi e italiani conferma la tesi di A. Rajkiewicz relativa alle stime del numero dei matrimoni polacchi misti contratti al di fuori dal nostro paese; nel caso dell'Italia, nel decennio scorso è stato contratto un numero di matrimoni di questo tipo superiore di 5 volte rispetto a quelli contratti nel nostro paese. Secondo le stime del GUS, negli anni 2004-2013 l'Italia era fra le prime cinque destinazioni di emigrazione dei polacchi (Kostrzewska, Szałtys, 2014).

Le numerose ricerche incentrate sulla questione delle migrazioni, nella sua accezione più ampia, condotte prevalentemente dai demografi e dai sociologi, puntano sul fenomeno della femminilizzazione della migrazione (Beck, Beck-Gernsheim, 2013), compresa anche la femminilizzazione della migrazione polacca (Kindler, Napierała, 2010; Slany, 2008; Slany, Ślusarczyk, Krzyżowski, 2014). I ricercatori sottolineano altresì la particolare posizione, il significato e lo status della donna nella cultura e nella società polacche (Boski, 2009; Dyczewski, 2003). P. Boski (2009) caratterizza la cultura polacca come prettamente femminile e presenta la tesi sulla femminilità culturale polacca. I risultati delle analisi comparative (Boski, Chojnowska, Koziej, 2007) svolte in Polonia, Germania e Italia indicano una maggiore presenza delle donne nello spazio sociale del nostro paese rispetto alla Germania o all'Italia. Secondo uno dei ricercatori, su questa situazione può influire la doppia attività delle donne polacche che operano nell'ambito sia domestico che professionale. P. Boski ritiene anche che le polacche, essendo donne attraenti, «sono ricercate come partner per i matrimoni internazionali e loro stesse cercano tali unioni molto di più rispetto agli uomini polacchi» (Boski, 2009: 458).

### *Relazioni italo-polacche*

I numerosi contatti italo-polacchi nell'ambito socio-culturale e politico-economico si possono trovare, guardando la storia remota e contemporanea di entrambe le nazioni a partire dai viaggi degli intellettuali polacchi nelle università italiane, attraverso la famosa unione del re Sigismondo il Vecchio con la principessa Bona Sforza e la partecipazione dei soldati del Secondo Corpo Polacco del generale Władysław Anders nella battaglia di Monte Cassino, per finire con la figura di Giovanni Paolo II (vedi Bernini, 2010; Golemo, 2010; Golemo, Kaczorowski, Stefanowicz, 2014).

L'Italia costituisce uno degli ambiti di interesse per la ricerca degli accademici polacchi; tra le ricerche condotte figurano anche quelle rilevanti per la mia attività di ricerca teoretica e analitica (Golemo, Kowalska, Pittau, Ricci 2006; Golemo, 2010; Golemo, Kaczorowski, Stefanowicz, 2014). Secondo Stefania Bernini (2010), sia in Italia che in Polonia la famiglia occupa un ruolo centrale nella mentalità di entrambi i popoli e nella politica sociale di entrambi gli stati essa acquisisce un significato chiave nella prospettiva delle ricerche da me svolte.

*Rassegna delle ricerche polacche relative alla problematica delle unioni e delle famiglie miste*

Dall'analisi del contenuto di due rapporti interessanti (Slany, Ślusarczyk, Krzyżowski, 2014; Brzozowska, 2015) dedicati al fenomeno della migrazione polacca e della scelta del coniuge nelle unioni miste, pubblicati dal Comitato di Ricerca sulle Migrazioni PAN (Accademia Polacca delle Scienze) nel 2014 e dal Centro di Ricerca sulle Migrazioni dell'Università di Varsavia nel 2015, risulta che i matrimoni polacchi binazionali e le famiglie miste esistenti in Europa e nell'UE costituiscono un campo di ricerca delle scienze sociali relativamente poco esplorato.

Le analisi e le ricerche polacche relative alla problematica delle unioni e delle famiglie miste in prevalenza riguardano le zone di confine e le unioni create dai nostri cittadini con gli immigranti provenienti dall'Est<sup>3</sup>. In primo luogo si concentrano sul processo della costruzione della propria identità nelle zone di confine fra le culture e sulla problematica dei comportamenti relativi all'identità dei membri delle famiglie miste. In secondo luogo, si focalizzano sull'essenza delle relazioni fra i partner e, in particolare, sulla scelta del coniuge, sulla durabilità e sulla dinamicità dell'andamento dell'unione, sulla situazione sociale e sulla situazione sul mercato del lavoro dei partner stranieri. Poche ricerche trattano invece la problematica dell'educazione del figlio nella famiglia mista, il suo bilinguismo e il suo biculturalismo, nonché la questione dei dilemmi di identità dei figli adulti provenienti da unioni miste.

Le pubblicazioni polacche che presentano le ricerche relative alla vita

<sup>3</sup> Le analisi polacche relative al multiculturalismo sono svolte da tre centri di ricerca: l'équipe di ricercatori del professor Jerzy Nikitorowicz dall'Università di Białystok, l'équipe di ricercatori del professor Tadeusz Lewowicki dall'Università della Slesia (sede di Cieszyn) e l'équipe di ricercatori del professor Zenon Jasiński dall'Università di Opole.

coniugale e familiare delle coppie miste e ai loro figli, da me reperite e ritenute di particolare interesse, possono essere divise in tre ambiti tematici: stabilità dell'unione, situazione del figlio nella famiglia e quadro della famiglia.

Dalle ricerche svolte da Monika Walczak (2001), relative alle previsioni di durabilità delle coppie biculturali che vivono in Polonia, risulta che i coniugi sottoposti all'analisi hanno valutato la qualità e la durabilità delle loro unioni e la loro felicità in modo simile a quello delle coppie polacche. Małgorzata Jodłowska (2001), analizzando gli studi sui matrimoni misti, ha distinto un gruppo di fattori che influiscono di più su base, andamento ed effetto dei conflitti in queste unioni. Dalle sue analisi emerge che il livello di soddisfazione dei coniugi rispetto alla loro vita comune influisce sul modo e sulle loro capacità di risolvere le discordie. Nelle unioni 'riuscite', i conflitti svolgono un ruolo integrativo, invece per quelle con scarso successo aumentano il sentimento di scontentezza e malcontento.

Le unioni miste, che costituiscono un costante 'scontro di culture' sono, come afferma M. Jodłowska, «difficili, richiedono un costante compromesso, tolleranza reciproca, apprendimento e compressione» (Jodłowska, 2001: 227). Nella perizia del Comitato di Ricerche sulle Migrazioni PAN leggiamo che «numerosi studi internazionali dimostrano tutta una serie di conflitti coniugali e familiari, una disintegrazione risultante dalla diversità culturale, sociale, religiosa e economica dei partner» (Slany, Ślusarczyk, Krzyżowski, 2014: 16). Joanna Grzymała-Moszczyńska ribadisce invece che «nonostante i numerosi problemi riscontrati, le unioni interculturali hanno la possibilità di creare relazioni durevoli e felici» (Grzymała-Moszczyńska, 2001: 91). Edwarda Rosset fa presente il fatto che «l'endogamia in sé non libera il matrimonio dalla non conformità delle opinioni, invece l'esogamia apre ai coniugi la prospettiva di integrazione di diversi costumi e tradizioni, il che può rendere la vita più interessante e più ricca dal punto di vista emozionale» (in Walczak, 2001: 23). Le suddette riflessioni dei ricercatori indicano che il mantenimento della stabilità delle unioni binazionali richiede ai partner un grande coinvolgimento. È difficile, ma al contempo eccitante, costituisce una sfida che non è a priori condannata all'insuccesso.

Gli autori dell'analisi succitata dedicano molta attenzione alle unioni e alle famiglie binazionali, focalizzandosi in gran parte sulle conseguenze formali della situazione dei figli nei casi di divorzio o

rottore del matrimonio dei genitori. Illustrano gli eventuali modi di comportarsi in tali situazioni, elencano documenti importanti e presentano esempi mediatici relativi ad alcuni casi clamorosi. Fra le raccomandazioni di carattere generale contenute nelle pubblicazioni, vi è la necessità di fornire la tutela legale e psicologica delle famiglie e delle unioni miste interessate da dissidi, in particolare nelle cause per l'affidamento dei figli. Nelle conclusioni generali, gli autori delle pubblicazioni sottolineano anche che, alla luce delle trasformazioni delle famiglie polacche e delle modifiche nei legami sociali risultanti da una mobilità e da migrazioni sempre maggiori e più frequenti dei cittadini polacchi, il sistema di formazione deve affrontare diverse nuove sfide significative legate al funzionamento delle famiglie multiculturali e delle famiglie nel contesto del multiculturalismo.

Ewa Nowicka (2003, 2005, 2006) ha svolto un'analisi molto interessante relativa ai modi in cui i figli dei matrimoni misti costruiscono la propria identità nazionale. Basandosi sulle libere interviste individuali e approfondite svolte, l'autrice ha creato una tipologia delle strategie relative all'identità dei figli delle unioni miste e ha definito il gruppo dei fattori che condizionano la scelta della strategia giusta da parte del bambino. Le considerazioni generali relative all'educazione del bambino in una famiglia multiculturale sono contenute nella pubblicazione di Marzena Pawlus e Halina Grzymała-Moszczyńska (2011). Le autrici sottolineano che la famiglia mista offre al bambino la possibilità di acquisire delle competenze uniche, la possibilità di conoscere in pratica le culture diverse e di imparare almeno due lingue. Sono però consapevoli delle difficoltà che incontra in tale ambiente un bambino. In base alle interviste fatte con le polacche che hanno una relazione con gli stranieri, hanno stabilito che le madri sottoposte all'analisi tengono al fatto che i loro figli siano coscienti della doppia provenienza e che abbiano contatto con le culture di entrambi i Paesi. Sono anche giunte alla conclusione che l'influsso definitivo sull'educazione dei figli nei casi analizzati è derivato proprio dalle madri.

Vale la pena menzionare anche due articoli di Maria Rólkowska (2010, 2011) che presenta in modo interessante il quadro della famiglia italo-polacca in base all'analisi della stampa polacca e della stampa degli emigrati polacchi. Nelle sue considerazioni, l'autrice auspica che l'argomento dei matrimoni binazionali, e la problematica ad essi correlata della comunicazione interculturale, venga sempre più spesso

e sempre più profondamente presentato nei media e che interessi la società polacca. Come sottolinea M. Rólkowska la famiglia di questo tipo «è l'unico indice della nuova realtà multiculturale del XXI secolo» (Rólkowska, 2010: 226).

*Ricerche italiane dedicate alla problematica delle immigranti polacche e delle unioni e famiglie italo-polacche*

La problematica dell'immigrazione polacca (Anastasi; Pelliccia, 2011) e delle unioni e famiglie italo-polacche (Baldoni, 2008) ispira anche i ricercatori italiani e le istituzioni coinvolte nelle analisi sui processi migratori. Le analisi sono tuttavia scarse in numero.

Andrea Pelliccia (2011) ha scelto come oggetto delle sue ricerche approfondite le esperienze delle immigranti polacche altamente qualificate che abitano a Roma e dintorni. Le analisi presentate hanno costituito una parte del vasto progetto di ricerca intitolato *Indagine sull'inserimento lavorativo delle immigrazioni qualificate provenienti dai paesi dell'Est europeo* (Brandi, 2012; Busola, Pelliccia, 2012; Pelliccia, 2010, 2011). Le donne partecipanti all'analisi erano in gran parte laureate in materie umanistiche e in due terzi erano sposate con italiani. L'approccio biografico usato per la ricerca ha consentito al ricercatore di tracciare i percorsi professionali delle donne che hanno partecipato all'inchiesta. Settantacinque storie di vita raccontate dalle donne polacche di età compresa fra 26 e 72 anni hanno costituito un ricco materiale di analisi. Le donne intervistate si sono recate in Italia in diversi periodi storici e, pertanto, si possono elencare diverse cause e motivi della loro emigrazione. Fra le intervistate vi sono anche le discendenti dei soldati del Secondo Corpo Polacco del generale Władysław Anders. Le cause dell'emigrazione nominate più frequentemente dalle donne intervistate sono i fattori economici, familiari, sentimentali oppure relativi all'istruzione. La generazione più giovane dell'immigrazione polacca è costituita da persone affascinate dalla cultura italiana che viaggiano in diversi paesi europei e che studiano nelle università italiane.

Dalle storie delle donne intervistate emergono tre scenari dei loro percorsi professionali. Il primo e il più frequente riguarda le donne che subito dopo esser giunte in Italia hanno lavorato (illegally) nel settore dei

servizi casalinghi come badanti, babysitter o colf. Con il passare del tempo, l'acquisizione della capacità linguistiche e di altre qualifiche, nonché con l'integrazione nel nuovo ambiente e l'intensificarsi delle interazioni sociali sia con gli italiani che con i polacchi, sono riuscite a trovare il lavoro che corrispondeva alle loro aspettative, aspirazioni e qualifiche professionali. La maggior parte, dopo essersi laureate in Polonia e ancora prima di andare in Italia, ha intrapreso un primo lavoro corrispondente alla propria formazione. Attualmente lavorano in Italia più frequentemente nel settore dei servizi pubblici, sociali o commerciali. Si sentono persone felici e realizzate, non abbandonano però l'idea di un eventuale ritorno in patria nel futuro. Il secondo gruppo è costituito dalle donne che nel primo periodo di immigrazione non sono state costrette a svolgere lavori inferiori alle proprie qualifiche. Si tratta di libere professioniste che lavorano come giornaliste, medici, avvocati, produttori cinematografici, attrici o imprenditrici. L'ultimo gruppo è costituito da donne che non sono riuscite a uscire dalla situazione di lavoro inferiore alle proprie qualifiche professionali. Pertanto, è per loro più difficile entrare in relazione con i membri della propria e cultura e quella altrui. Si sentono sospese ed escluse, non si identificano con nessuna delle due culture. Nel loro caso possiamo osservare il fenomeno largamente descritto nella letteratura relativa allo spreco di cervelli (*brain waste*).

Un'analisi interessante delle strategie di identità delle mogli polacche e rumene degli italiani è stata presentata da Emiliana Baldoni (2008). La ricercatrice ha svolto delle interviste biografiche individuali con donne polacche e rumene e con i loro coniugi italiani (16 coppie / 32 interviste). Durante l'analisi del materiale ottenuto, E. Baldoni si è focalizzata sulle strategie di identità adottate dalle donne polacche e rumene, basate sul modello degli approcci di acculturazione di John Berry e sui motivi delle loro scelte del coniuge. Ha analizzato anche l'identità europea dei loro coniugi italiani. Le donne polacche prese in esame sono state presentate come donne che si identificano fortemente con la loro cultura nazionale e che al contempo entrano attivamente in contatto con la cultura italiana. Sono donne che crescono i propri figli nel rispetto e nella conoscenza delle radici della madre; i figli conoscono la lingua polacca, però a casa comunicano prevalentemente in italiano. La strategia di integrazione intrapresa dalle polacche era in opposizione alla strategia di assimilazione con la cultura italiana adottata dalle rumene.



*Rilevanza dall'argomento di ricerca trattato per la teoria e la prassi della formazione*

L'obiettivo delle ricerche da me svolte consiste nel provare a descrivere e comprendere le esperienze delle madri polacche che crescono i figli con i partner italiani. Il principale problema di ricerca è stato definito nella domanda: «Quali sono le esperienze delle madri polacche legate all'educazione dei figli nati dalle unioni con i partner italiani?».

Per raccogliere i dati si è adoperata la tecnica dell'intervista individuale che Steinar Kvale (2010) descrive come un'intervista parzialmente strutturata orientata all'ambiente di vita. Tale intervista costituisce una via di mezzo fra una conversazione quotidiana e l'intervista indirizzata. Il suo obiettivo è quello di, citando il ricercatore, «ottenere le descrizioni della vita degli intervistati, considerando l'interpretazione del significato dei fenomeni descritti» (Kvale, 2010: 42). La scelta del campionamento statistico scaturisce dai presupposti metodologici di ricerca qualitativa da me adottati. Il gruppo bersaglio della ricerca è pertanto quello composto dalle madri polacche che crescono i figli con i partner italiani, i cui figli frequentano gli asili di Cracovia.

L'argomento di ricerca da me analizzato ha lo scopo arricchire la teoria e la prassi pedagogica con la descrizione della quotidianità delle famiglie italo-polacche che abitano in Polonia (a Cracovia) e dei figli cresciuti in queste famiglie nel contesto dei processi di socializzazione e acculturazione familiare, nonché della strategia di costruzione dell'identità culturale dei singoli membri della famiglia. Il sapere ottenuto può costituire un'eventuale base per definire le indicazioni per le persone coinvolte nell'educazione dei figli nati dalle unioni miste, al fine di creare condizioni ottimali per sostenere lo sviluppo e la costruzione della propria identità e della visione positiva di se stessi in seno alla famiglia e alle istituzioni dell'educazione primaria.

Tabella 1 - *Matrimoni contratti in Polonia negli anni 2002-2014 in base a diversi criteri*

Anno	Numero complessivo dei matrimoni contratti	Numero complessivo dei matrimoni contratti dai cittadini polacchi con gli stranieri	Matrimoni contratti dalle polacche con gli stranieri	Matrimoni contratti dalle polacche con gli italiani
2014	188.488	3.367	2.599	169
2013	180.396	3.357	2.547	172
2012	203.850	3.399	2.596	170
2011	206.471	3.318	2.627	159
2010	228.337	3.732	2.804	196
2009	250.794	4.120	3.076	172
2008	257.744	3.957	2.967	209
2007	248.702	3.850	2.658	162
2006	226.181	3.547	2.363	128
2005	206.916	3.483	2.260	120
2004	191.824	4.080	2.402	128
2003	195.446	3.967	2.258	103
2002	191.935	3.552	2.119	111

Fonte: Elaborazione propria in base ai dati GUS (ISTAT polacco),  
Annuari Demografici 2002-2014.

Tabella 2 - *Matrimoni contratti in Italia negli anni 2006-2014 in base a diversi criteri*

Anno	Numero complessivo dei matrimoni contratti	Matrimoni misti in cui uno dei coniugi è straniero	Matrimoni degli italiani con le straniere	Matrimoni degli italiani con le polacche
2014	189.765	24.230	13.661	702
2013	194.057	26.080	14.384	778
2012	207.138	30.724	16.340	864
2011	204.830	26.617	14.799	947
2010	217.700	25.082	14.215	1034
2009	230.613	32.059	16.559	1190
2008	246.613	36.918	18.240	1216
2007	250.360	34.559	17.663	1157
2006	245.992	34.396	19.026	1193

Fonte: elaborazione propria in base ai dati ISTAT, Matrimoni 2006-2014.

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