

THE LIBERAL STATE AND EDUCATION IN PORTUGAL: SOCIAL INTEGRATION, FREEDOM OF TEACHING AND SECULARIZATION (1840–1880)

Estado liberal y educación en Portugal: integración social, libertad de enseñanza y secularización (1840–1880)

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INTRODUCTION. This article intends to analyze, for the Portuguese case, different dimensions of the State construction as State Educator. We will focus on the second half of the nineteenth century, a decisive period in the construction of educational modernity. We will seek to draw the main trends of a process marked by a set of important dilemmas and ambiguities. **METHOD.** This is a historical research by means of documental analysis. We use an approach that situates itself at an intersection zone between Educational History and Cultural History. The study sources thereby assume a central role. We sought to confront different sources whose content we have analyzed. **RESULTS.** The liberal educational rhetoric gives education a central role in social transformation. The study clarifies some of the main actions of the liberal State aimed at the construction and control of the educational system. This project is based on the Enlightenment's axiological and civic inheritance. The school arises as a privileged place for socialization of the Portuguese. Strategies regarding social integration and behavioral normalization are emphasized, having as their reference the ideal citizen figure. **DISCUSSION.** Above all we sought to discuss the ambivalences and dilemmas underlying the process being analyzed. How were the State's teaching fortification system and the affirmation of teaching freedom made compatible? How were the State's voluntarism and the communities' resistance to schooling combined? How were the control logic of liberal education and communities' resistance to schooling articulated? How did it seek to integrate permanencies (like civility) with innovations (like civics)? How could the secularization movement and the preservation of Catholicism's integrating role be reconciled in the educational field?

Key words: *Liberalism, State, Social integration, Freedom of teaching, Secularization.*

Introduction

In this text, we will aim to analyse the process of construction of the State as Educator, within the Portuguese context. The starting point is the second half of the 18th century, carrying on into the following centuries. It was a complex and multidimensional process, which we can portray in some of its dimensions. The reforms brought about by the Marquis of Pombal (1759 and 1772) made the State recognise Education as one of its areas of intervention. Measures are taken to attain control of the selection, hiring and nomination of teachers. Also, a curricular plan is drafted, a first attempt on a school network is made, there is a new tax contributing specifically towards teachers' salaries, and inspection mechanisms are planned (Nóvoa, 1987). However, all these initiatives of the State as Educator met a considerable degree of resistance and difficulty, namely the protest of the communities not included in the network (and nevertheless subject to the tax) or the difficulty in filling in some of the placements created for regal teachers.

The Portuguese liberalism, instituted in the first half of the 19th century, following the 1820 Revolution, and definitely consolidated from the fifties of that century, is a decisive stage in the process of affirmation of the State's power, namely in education, which did not seem to contradict the principle of freedom, in its several dimensions. Nevertheless, the process was marked by a few important dilemmas and paradoxes that we aim to portrait throughout this text. We shall pay special attention to the period set around the mid-nineteenth century and subsequent decades, and we will take as axes of our analysis the integrative vocation of liberal education, the debate around the theme "freedom of teaching" and the problems set by the secularization process. Several sources will be used, such as civic catechisms, civility textbooks, reports of the Superior Council of Public Instruction, press articles and other publications of the fields of education and teaching.

Liberal state and social integration

The beginning of Liberalism in Portugal brought about new concerns for the Education sector, with regards to the purposes of elementary school. The new principles deriving from the pedagogic inheritance of the Enlightenment and the French Revolution were then introduced in Portugal and led to the understanding of Education as a citizen's right. It was the State's duty to ensure this right was fulfilled. The horizon in sight, more rhetoric than real, showed a universal education, which unsurprisingly resulted in themes such as free compulsory schooling, together with the freedom of education, becoming paradigms of liberal education. Even though these principles undoubtedly met a few difficulties, it is unquestionable that they offered a new way of seeing Education, still valid in our days.

Vesting education with a major role to play in social transformation is one of the main references of the liberal speech (and then, the republican speech) about education. The idea that Portugal is a decaying ill country is repeated over and over especially throughout the second half of the 19th century. Antero de Quental even carried out a diagnosis of the causes of decadence among the peninsular peoples in a text with the same title. The novels by Eça de Queirós aimed to portrait some of the symptoms of what seemed to be the moral decay of the country. For republicans, gaining popularity towards the end of the 1800's, the monarchy is to blame for this situation. The solution, as presented by several different sectors, is unanimous: only education can save Portugal. It is mainly the elementary school, considered to be the people's school, that receives this transcendent mission: to regenerate a decaying country; to lead this country towards progress and civilization.

Illiteracy, whose gravity becomes patent in the last decades of the nineteenth century with the first population census, arises as one of the

main manifestations of the national illness. The speeches then promoted, by several liberal and republican sectors, exaggerated this problem to the limit, assuming a markedly negative perception of the illiterate citizen, placed in the antechamber of “civilization” to which a kind of civic inferiority was attributed. “The ignorant citizen is a clairvoyant, not a man”, ensures D. António da Costa; only schooling “elevates man through personal dignity” (Ferreira, 1975: 211). Illiterate citizens, due to their inability to gain access to written culture, would not be fit to be the citizen-voter, aware and participative, as yearned by the reformers.

Among others, the project of liberal schooling was based on civic and political purposes. The school, in search for generalisation, saw its role strengthened as a privileged place for the social learning of children and youths that attended it. According to Justino Magalhães: “The State legitimized its action by legal, administrative and economic elements, but its statement before the Nation resulted from the standardized and popularized culture by the school. Education has fulfilled functions of prevention, projection, specialization and normalization” (Magalhães, 2010: 15). In other words, it sought to prevent social illness and frame potentially dangerous populations, normalize behaviours according to values and rules considered legitimate, lead each person to its professional (and social) destination and, at last, built an imagined community based on new liberal values. In addition, the spread of education is seen as a decisive element in terms of making this change an institutional one, not only wanted by the people but also irreversible. We have to bear in mind that this is a recently instituted regime, aiming to become consensual amongst the Portuguese citizens. The citizen that is being formed must be a free being and, therefore, aware of its rights and duties, so as to be able to participate in social life, mainly through the right to vote; in a nutshell: the “voting citizen” essential to the preservation, consolidation and progress of liberal society.

The author of one of the political primers published in the early days of liberalism accounts for this political wish:

“[elections] are so important that those who do not wish to vote cannot be good citizens, because the vote is the first principle of dignity and the legitimate exercise of peoples’ sovereignty. [...] No citizen, and even less so the heads of families, should avoid the ballots” (Nogueira, 1845: 51-52).

In this context, D. António da Costa asked: “How can ignorant people perform the sacred mission of voting?” (Ferreira, 1975: 213). The aim is, therefore, to enable the Portuguese citizens to perform the voting act, to make them aware of how important this civic act is. Despite the suffragist rhetoric, not all Portuguese people were able to become citizens, due to legal imperatives or practical limitations. The permanent refusal of the universal suffrage, the important limitations to the right of voting existing throughout the entire liberal period, usually excluding women, illiterate people and those with reduced income, are there to show the dramatic separation between the ideals and the achievements that were characteristic of this time.

It was also liberalism that, deepening the reforms by Marquis of Pombal, led to the strengthening of the state school system and to the generalization of the schooling model, offering a gradual, even though slow, expansion of the school culture to sectors of the population until then not included in it. Throughout the 19th century, the formalization, within public education, of a school curriculum, made the integrating purpose already vested in school even more explicit and decisive. In this context, we can understand the importance given to the components related to the citizens’ formation. We can also explain the close connection between literacy and civic education. Learning skills such as Reading, Writing and Counting came in parallel with concerns relating to the absorption of the new

liberal values by the future citizens. Beyond the awareness of their rights and corresponding duties, the citizens being formed should be equally an example of morality, which meant the development of a project aiming to fight the so-called social “evils” and “vices”.

In a curious argument between continuity and breaking, the school curriculum of the 1800's added several areas in which the main purpose is to form citizens. On the one hand, the traditional themes of Christian moral and religion and of civility remained; on the other hand, a new curricular space is created, whose denomination, rights and duties of the citizen, notions of constitution and others vary with the following reforms, until the move into the 20th century, when it settles on the modern notion of civic education, soon after consecrated by the Republic.

A new tool, even though not specifically meant for schools, is then given some promotion: the political or constitutional catechisms. The choice for the question-answer method, rather popular at the time, points to a background of morality and to the markedly didactic character of these editions. As expressively written in one of the catechisms: “We have adopted the question and answer method because we consider this to be the easiest and most appropriate way to memorise” (Midosi, 1860: 6). The link between the sacred and the profane, that the designation itself implies, relates to the intention of making the new order legitimate, by presenting it as sacred. The most common political or constitutional catechisms are the ones that, in a descriptive register, merely summarise and point out the essential principles of the constitutions then in place, aiming at the political education of the future citizens. The appeal to heartstrings and emotions is not very marked. As we have seen, the emphasis is on the efficiency of repetition and, subsequently, in the memorization of constitutional knowledge, aiming at an ideal of civic participation.

In any case, the political and constitutional catechisms must be considered an important channel for the political culture of liberalism. They communicate and spread the main values and themes assumed as an integral part of the axiological and civic heritage of liberalism. The political catechisms distributed in the early decades of the liberal regime feature a good explanation of the doctrine they intended to promote. The most valued principles are those already present in the constitutional texts: freedom, whose limits are always highlighted; equality, in the sense of equality before the law; personal safety; property; law. Naturally, there are also references to the division of powers and their respective functions; the administrative organisation; taxes and their compulsory payment, which was considered a duty of all citizens; the army and the need to defend the motherland, arms in hand, to the point of sacrificing one's life for it; Catholicism and the fact that this is the State's religion (Pintassilgo, 2002a).

The school syllabuses of civility, widely promoted in the second half of the 20th century, expressed other dimensions of the liberal project for education. One of the most used works throughout this period, as shown by the inspection reports, the *Manual Enciclopédico* of E. A. Monteverde, significantly dedicates one of its chapters to civility teaching, that is defined in the following way:

“What is civility? — It is the practice of attention towards our similar in society, thus avoiding in words and in actions all that may offend or dissatisfy them. Civility is the distinctive sign of an upright education and right away features others in our favour” (Monteverde, 1874: 210).

Therefore, civility arises as some kind of social life regulator code, being part of a set of formulas that seek to regulate the way people relate between themselves, particularly regarding the exteriority of those relations. Specifically, the

emphasis is on civility at the table, in conversation, walks, visits, ways of treatment, correspondence, clothing, hygiene, among other social relation contexts privileged by the nineteenth century society. In the first place, civility had a civilizing vocation, in other words, it aspired to integrate in the “civilizational process” a whole set of children from lower classes. The aim was to elevate primitive and uncultured people, as they were seen by the cultured elites, to the category of civilised and groomed people, a condition necessary to social progress. In the second place, civility had a normalizing function. The aim was to model the body and soul of the young generations in the light of the behaviour norms considered to be legitimate, promoting a plan of “habitus” shared by all and eliminating from the public space all the behaviours considered inconvenient or barbarian. Bodily expressions are highly regulated, rationalized, subjected to “technologies of the self” capable of preventing its spontaneous and disordered demonstrations. Simultaneously, it is intended to control the bodies and discipline the minds.

Finally, civility contained in itself a “character of distinction”. At the same time as it integrated, it became distinct. The reinforcement, in new ways, of social unity seemed to imply the preservation of the respect for the social hierarchy, despite the constitutional definition of everyone’s equality before the law. Notions such as order, respect and obedience continued to be considered essential, in parallel with decency, moderation, modesty, and cleanliness, amongst others, aiming at the desired social conformity (Pintassilgo, 2002b).

Continuing to teach catholic moral and religion, which was constitutionally considered the official religion of the State, throughout the constitutional monarchy, equally, revealed the presence of the integrating dimension. The 1850 primary schools’ regulation accounts for the impregnation of its own school daily life by gestures and rituals from Catholicism, such as the opening and closing of classes

with prayers. Teachers are held accountable for religious education of their students and must accompany them to Sunday Mass and use Saturday afternoons for specific religious teachings (Government Diary, 1850).

Actually, despite the secularizing process and the anticlerical speeches, Catholicism maintains its former social functionality, that is, it keeps playing a social integration role. An excerpt from one catechism of that period, from the author Joaquina Lobo, in this case simultaneously religious, moral and political, is quite significant to this matter: “Fear of God is the most effective and strong brake to restrain men of all classes of society” (Lobo, 1822: 6-7). Catholicism is, therefore, recognized as an important factor of society moralization. By making some balance, we can say that the moral and spiritual unity intended by liberal elites results from the combination of liberal principles and Catholicism’s traditional values, two inheritances that are not seen as antagonistic, quite the opposite. To understand this apparent paradox one should consider the distinction between semantic fields associated with secularization and laicization. As noted by F. Catroga (2004), in the liberal period it was not yet the laicization of society that was at stake but instead its secularization (in several ways). Republicanism, and specially the Republic, represents to this regard another paradigm.

Between the “freedom of teaching” and the affirmation of the liberal State

The central place occupied, in this context, by the theme of the “freedom of education” is, in its different dimensions, unquestionable, especially the ones featured in the formulas “freedom to teach” and “freedom to learn” (Pintassilgo, 2011). The main meaning of “freedom to teach”, as it was historically built, points to every citizen’s right to open a school. Already present in the 1822 Constitution, this

right is then re-stated in the education reforms that take place throughout the 19th century. At the end of this century, Manuel Ferreira Deusdado defines the right as: “we believe that every citizen is entitled to open a school, teach what they in private consider to be true, to appeal to the parents to trust their children upon them” (Ferreira Deusdado, 1886: 13). In a traditional sense, the “freedom to learn” refers to the right families have to choose a school. In addition, we can also refer to the freedom present in the pedagogic options of teachers or the experience of an atmosphere of freedom in the schools.

Throughout the mentioned period, we can find a permanently conflicting relationship between the idea of “freedom to teach” and the centralizing and unifying project of the liberal State. In reality, the Portuguese liberalism extends and deepens a trend stemming from the reforms of the Marquis of Pombal, in the sense of strengthening the State’s power through the power of the Church. The modern State tries to intervene gradually in areas that were until then outside of its scope, assuming namely the figure of “State as Educator”. The debate has some expression in the pedagogic field. In the 1853-54 Report by the Superior Council for Public Education it is said:

“Instructing the people is, in our days, a duty of the State that cannot wait for individuals to fulfil its duties. It is good for this private initiative to exist, and the Council is interested in reviving, facilitating all it can [...] and recognising it as a very powerful tool in the general education. But we cannot disregard that private education, being a private industry, uncertain and precarious, cannot ensure stability and future for the general education of the country, which can only be attained through public schools” (Gomes, 1985: 172).

In the previous text we find an important idea with regards to this debate — the assumption that the people’s education is a duty of the State, and

private schools are a complement. Here we witness the reaffirmation of the importance of “state schools” in terms of the realization of the liberal project. The opposite position can be shown, for example, through a new text by the already mentioned catholic educator Ferreira Deusdado, a strong supporter of private education:

“We want competition, but without monopolies, without privileges, openly established before equal laws [...] the intervention of the State in education must have the purpose of supporting the free actions of individuals [...]

All monopolies are despicable, but the worst one of all is the education monopoly [...]

The modern spirit is moving in the social organisation towards the *État gendarme*, leaving the old dream of Providence State as a shameful utopia” (Ferreira Deusdado, 1886: 11-13).

In this author’s opinion, it is the “individuals’ free action” that must be primary, in a framework of “competition”, where the “State’s intervention” emerges as a complementary and, in particular, regulatory. This notion is shown in the figure of the “*État gendarme*”. The “teaching monopoly” by the State, which Ferreira Deusdado curiously associates with the figure of the “Providence State”, must be fought in the name of the “modern spirit”.

If we exclude some more dated notions, the modernity of the words in the debate between supporters of public and private teaching is quite surprising. In reality, some of the great topics underlying to the debate are explained and reworked throughout the second half of the 19th century. The same happens with relation to some of its main dilemmas, one of them being what points to the relationship between the will to control, shown by the States, and the reality of a constant permissiveness.

To teach in private education, teachers had to hold the respective “title of capacity”, which

could generally be obtained, through an exam and by showing documents proving good moral, civil and religious conduct, as well as a medical statement. However, the Reports of the Superior Council for Public Education account for the difficulty faced by the liberal State in applying the law in this area. This is shown in examples of two Reports from 1849-50 and 1857-58:

“Despite the continuing effort of the Council and its representation to Your Highness’ government on this subject, it has not been possible to guarantee that all private secondary school teachers are trained as per the laws; not even that the few qualified ones account for the number and learning’s of their students [...]

While we do not possess the maps of students attending private schools, which number is undoubtedly far superior to the ones attending public schools, we lack necessary data to base the actual and comparative statistics relative to this sector of education” (Gomes, 1985: 109).

“With regards to private schools, the Superior Council must point out to Your Highness the great discontent caused by constant and repeated negligence shown by the administrative authorities, allowing everywhere the clear disrespect for the law. It is rare to find a private teacher that is correctly qualified. Whoever finds himself worthy proposes to teaching and opens a school, without taking the law or authority into account, which must ensure its compliance.

However, the just freedom to teach, to those that can and know how to, is different from the absolute permission that encourages charlatans, ignorant and immoral people” (Gomes, 1985: 264).

These excerpts account for some interesting aspects. In the first place, the actual insufficiency of the school network, since the writer considers that, in this phase, private school students are more abundant than those attending public schools. Secondly, the resistance shown

by teachers in giving the necessary information to carry out national statistics, an essential instrument for public governing, reducing their credibility. Thirdly, the admission of the fact that many teachers develop their activities without the necessary legal qualifications and this in face of the impotence, actual tolerance, of the authorities to invert such a situation. Finally, the “freedom to teach”, considered different from the reigning “permission”, implied knowing the profession and legal qualification.

D. António da Costa makes very interesting remarks in terms of the relationship between the State and private initiative. The author, besides being a confessed supporter of the freedom of teaching, as he shows in several of his texts, was an influential politician, with governing responsibilities in this area. Similarly to some of the sectors of the Portuguese liberalism, he did not present the affirmation of the Liberal State as contradictory to the incentive of private initiative in education. Explaining the purpose of one of his last works, it is the author himself who guarantees the following:

“This book intends to be propaganda in favour of private initiative.

The past transmitted centralization. The future belongs to freedom, to the decentralizing action of citizens and their local corporations. Given the financial impotence of the State, claimed by its own voice and shown by its own facts, it is necessary and urgent to use all the intelligence, all the wills and the widest offers of citizens for the civilizational transformation of people [...]. The target is the same; only the path is different. Unlike in the State’s case, the cooperation of private institutions cannot be uniform, it has wider means, it scraps horizons wider in novelty, it applies the methods in which they think there is greater progress, it pays more to their work force and, instead of following the routine path that by Nature belongs to the State, it is, on the contrary, an exciting motivation” (Costa, 1885: 434-436).

It is quite clear that D. António da Costa supports the liberalism, whose Portuguese roots can be found in Henriques Nogueira and Alexandre Herculano, that favours the decentralization, which constitutes an incentive to the local forces (both public and private) and is suspicious of the centralizing temptations of the State. For the liberalism, the concept of freedom is central in its doctrine, the same happening with its forms of expression in the educational field, the freedom of teaching, on the one hand, and the decentralization of teaching, on the other hand. Regarding this last point, the tendency, during the liberal Portuguese period, was mainly towards centralization, with some exceptions, where the fleeting period of existence of the Public Education Ministry (1870), precisely with D. António da Costa, can be counted and particularly the period comprehended between the beginning of the reform of Rodrigues Sampaio (Law of 1878 and Regulation of 1881), that transferred some primary teaching management aspects to municipalities, and its return to the State's supervision in 1892 (Adão & Gonçalves, 2007). However, one should take into account "the singularity of the educational dynamic of Lisbon's municipality" (Silva, 2008: 313) that indulged the framework provided by decentralizing legislation, allowing the development of an important, yet ephemeral, set of experiences, among which can be emphasised the creation of graduate schools (the so-called central schools), the Froebel's kindergarten, the Pedagogical Municipal Museum of Lisbon or the Higher Primary School of Rodrigues Sampaio, starring, in the latter two initiatives, F. Adolfo Coelho, one of the key figures of the time (Pintassilgo & Fernandes, 2009). Mythologized in later times, the decentralizing experience of the 80's in the pedagogical field was not consensual, being challenged namely by the professional press. Soon in 1890, in his speech to the House of Representatives, another distinguished educator of the time, Teófilo Ferreira, former councillor of Lisbon's municipality and director of the Normal School of Lisbon, gave a disenchanting account of his own experience:

"Decentralization is, therefore, surprising, magnificent.

I have already confessed how many charms it has earned me.

I was even one of its most convinced apostles, as can be understood from several writings; but today I have changed my opinion, for the teachers themselves request and crave the reverse system advent.

This is the truth.

And why?

Because of the arbitrariness and inequities made by the administrative corporations against primary teachers [...]

Well, I am convinced that centralizing the education is worth more than centralizing the administration or, rather, I believe that both are good and acceptable things for now" (Ferreira, 1890: 18-19).

Finally, we cannot help to notice the advocated stands regarding the theme of "freedom of teaching", by one of the main politicians and educators of the transition period from the nineteenth to the twentieth century, the then monarchic but future republican leader, Bernardino Machado. The text to which we refer is also this time one of a speech given, in 1884, in the House of Representatives and that later was published in a collection. The author begins with an analysis of the expression "freedom of teaching", which he considers vague, relating it with the "freedom of doctrine", the freedom of choice of school and teacher by the students, and the "freedom of industry", that is, the possibility to found private schools. Expressing himself in favour of these various meanings, Bernardino Machado devotes more attention to the last of these points, particularly to account for his opposition to an "absolute, unlimited freedom of teaching" (Machado, 1898: 128). One of the reasons of that refusal is related with the need of private schools' directors and teachers to obtain pedagogical skills, either by the possession of a normal school diploma or by passing the still existing exam.

But the main reason for the refusal of the “radical principle of freedom of teaching” by the educator brings us to the part he assigned the State, concerning the organization of the public educational system. In his opinion, the State should not “give up, abandon education to private initiative”, because it is “a great organism”, the “largest national association”, hence it should “respond to society’s weaknesses” (Machado, 1898: 127). As noted by Rogério Fernandes, Bernardino Machado was, in Portugal, one of the driving forces of the “teaching State” design (Fernandes, 1985: 43). Let us then see what the main conclusion of the educator was: “We do not need, therefore, the freedom of teaching. We already have too much of it. What we need is, without fail, to organize, create national education. Unfortunately, we do not have it yet” (Machado, 1898: 137). Besides defending the public dimension of education, a clear conscience of the school role can be found in Bernardino Machado, as well as in other educators of the final decades of the nineteenth century, regarding the construction of an identity based on the Nation’s symbolism and memory, and not just by the rules of common social and political interaction and the same religious belief. To conclude with Justino Magalhães:

“The school was normalized by the States and instituted the Nations. The participation of the school culture in Modernity ideation extended itself to the Portuguese school, nationalizing the liberal revolution; organizing and technologizing society’s transformation; republicanizing the national fate through the coherent integration between history, country and construction of the Portuguese culture” (Magalhães, 2010: 11).

“Freedom of teaching” and the process of secularization (The issue of the “Charity Sisters”)

The Portuguese liberal State was marked by a great ambivalence with regards to its relationship

with Catholicism and with the Catholic Church. On one side, Catholicism was kept during the whole Constitutional Monarchy, as we have already noted, as the State’s official religion and was, as such, included in the primary school syllabus. On the other hand, from 1832-34 we witnessed the development of a wide project of secularization that, despite going backwards and forwards, led to the expropriation of the religious congregations and their expulsion from Portugal, though not completely, since in several occasions, we witnessed their gradual come back. The ambiguity of the liberal policy with regards to the religious matters led to the several remarkable confrontations between the clerical and the anti-clerical factions, such as the “miracle of Ourique”, which took place following the publication of the History of Portugal, by Alexandre Herculano (1846-57). An episode that accounts the state of the affairs, at the time, of the debate about the relation between public education and private education, in its articulation with the matter of teaching secularization, it is the one concerning the waged controversy, between 1858 and 1862, about whether the French “Sisters of Charity” should or should not be in Portugal (Matos, 2003; Pintassilgo, 2011).

Upon their arrival in Portugal, the “Sisters of Charity” begun to engage themselves in tasks related to assistance and teaching. The most radical liberal press developed, then, a vigorous campaign against the congregation. More than once, the debate reached the chambers of parliament. There were three main arguments against the presence of the French religious women: the obedience to a foreign authority; the fact they did not hold “title of capacity” and the danger posed by the congregational education. The centrality of this last argument is well expressed in the “Manifest”, to the “Portuguese Liberal Party”, written by Alexandre Herculano in 1858 where we can find the following text:

“The reaction tends to take hold of the education that can give and receive the woman, introducing in Portugal the French Charity

Sisters. In the homes of the first childhood, the teacher replaces the mother; in schools for girls, education is given to those that will be mothers. Give this home and this school to the influence of the strongly built congregations, and today organised to fight liberalism, and imagine how in twenty years the new generations will think and what will have happened, in another twenty years, to the political freedom and true Christianity” (Herculano, 1858: 38-39).

The great fear is, therefore, the potential devastating influence that the education given by the religious congregations would have over the conscience of the Portuguese children and youths. What is at stake, according to the anti-clerical sectors, is the very own preservation of the liberal regime. The supporters of the French “Charity Sisters” in Portugal, in general the most moderated wing of liberalism (with the support of legitimists), highlight the educational repercussions of their activity, and also use the defence’s argument of “freedom of teaching”. Their opponents consider that this could only happen if in Portugal there was the “freedom of the literates”, which did not occur due to the privileges of the Catholicism.

Gradually, the campaign becomes more radical and the legislation becomes more restrictive, until the final decision, in 1862, implying once again the expropriation of the religious congregations and their expulsion from Portugal. The French “Sisters of Charity” leave Lisbon in June that same year. Despite their apparent radicalism and the obvious confrontation between the two sectors (anti-clerical and clerical) that is underlying, this episode does not question the Catholicism of the liberal elite, or the preservation of the integrative functionality traditionally given to the Catholic religion. Besides, the measure was not against the presence of the secular clergy in teaching, as they were allowed to continue. The 1848-49 Report by the Superior Council of Public Education already claimed this was a good solution:

“And, in reality, who better than the priests could, in the rural parishes, be responsible for primary education; they, who are responsible for the religious education of the people would find this to be one of the closest occupations to their sacred education, as a complement to the teaching of the first letters” (Gomes, 1985: 86).

In reality this will be one of the great ambiguities of the Portuguese liberalism: the combination between an anti-clergy speech, marked by some radicalism, and the traditional integrating vocation of Catholicism, tacitly accepted. Bernardino Machado was one of the educators that, in the final decades of the nineteenth century, sought to break with this framework, in line with what the rising republicanism will do, which will claim the deepening of secularization towards laicization, both of society and school. In the previously mentioned text that precedes his support to republicanism, Bernardino Machado criticizes the privilege held by the “Roman Apostolic Catholic Church” and claims “the freedom of cults”, the necessity to “separate Church and State in all domains” and to suppress the “study of religion from primary school’s programme” (Machado, 1898: 139), a path that would only be trodden after the implementation of the Republic in 1910.

Final considerations

The previous path allowed us to identify some contributions of the liberal period, having as reference the 40’s to 80’s of the nineteenth century, for the creation of the Portuguese State as Educator State. Let us remind you the three axes around which we have organized this reflexion: the integrative vocation of the liberal State; the dilemmatic relationship between freedom of teaching and strengthening of the State’s power; the ambivalence of the secularization process of education.

Firstly, it is important to underline the part played by the school, particularly primary school,

regarding the project to build a symbolic community and a citizenship, even a limited one. School came to be considered as a privileged place to educate citizens conscious of their rights and duties and capable of participating in public life, namely through the vote. This meant the acquisition of reading and writing skills, considered essential to ascend to citizenship by the interiorization of a common axiological heritage and by learning the attitudes and norms of behaviour considered typical of a “civilized” society. It also meant the identification of a common religion, which is onslaught of a social functionality and held as a mandatory presence in the school space, element that became increasingly problematic towards the end of the nineteenth century. It included, as well, the project to build a national identity that, firstly with the Romanticism influx and then with Republicanism, had become a central element in the political, civic and pedagogical speeches broadcasted during the last decades of the nineteenth century. It is the school that strengthens the State and builds the Nation, it is then assumed. Besides, there was also the belief that a society based on the voting-citizen’s figure, and recognizing its individuality, needed boosting elements of cultural aggregation and social consensus. Public school assumed, in this regard, a key role. Its affirmation occurs, however, in permanent tension with the principle of freedom of teaching and with the admission, thereunder, of private initiatives’ legitimacy in educational field. This is an area that

will not only give an important contribution to the Portuguese’s education, but also where we can find some pedagogic pioneering. An embryonary reflection about the convenience of a State regulation of this sector is then produced by some of the most enlightened educators of the time. On the other hand, it is the previously mentioned social integration project that allows the explanation of the ambivalence that has coated the secularization process in a liberal context. The balance was only broken since the affirmation of an alternative world view, embodied in the extreme nationalism and in Republicanism’s radical laicism, yet imbued of a strong civic religiousness.

Finally, this historic journey allowed us to find the presence, in the debates here summoned, of one of the great dilemmas of modern times. In the pedagogic, civic and liberal speeches (and then republican) there were two purposes, apparently contradictory. One accounted for a desire for integration and social regulation, implying the creation of institutional tools of ideological legitimation and social control. Another referred to the desire for freedom, for the emancipation of humans, leading to the formation of citizens that would be free, autonomous, aware, critical and participative (Nóvoa, 1991). The investment made by the liberals in schooling was full of this ambivalence: the co-existence of the pillars of regulation and emancipation, that Boaventura de Sousa Santos (1995) mentions.

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Resumen

Estado liberal y educación en Portugal: Integración social, libertad de enseñanza y secularización (1840-1880)

INTRODUCCIÓN. Este artículo pretende analizar, para el caso portugués, diversas dimensiones del proceso de construcción del Estado como Estado Educador. Nos centraremos en la segunda mitad del siglo XIX; un período decisivo para la construcción de la educación moderna. Vamos a tratar de trazar las principales tendencias en un proceso marcado por un importante conjunto de dilemas y ambigüedades. **MÉTODO.** Se trata un estudio de carácter histórico a través del análisis documental. Utilizamos un enfoque que está en una zona de intersección entre la Historia de la Educación y la Historia Cultural. Vamos a poner en diálogo diversas fuentes cuyo contenido vamos a analizar. **RESULTADOS.** La retórica liberal asigna a la educación un papel central en la transformación social. El estudio analiza algunas de las principales acciones del Estado liberal a la luz de la construcción y control del sistema educativo. Este proyecto se basa en el patrimonio axiológico y cívico de la Ilustración. La escuela aparece como un lugar privilegiado para la socialización de los portugueses. Se valoran las estrategias que tenían como objetivo la integración social y la normalización de la conducta en relación con la figura del ciudadano ideal. **DISCUSIÓN.** Se pretende, sobre todo, analizar las ambigüedades y dilemas que subyacen en el proceso aquí estudiado. ¿Cómo se combinaron el fortalecimiento del sistema estatal de la educación y la afirmación de la libertad de educación? ¿Cómo se combinaron el voluntarismo estatal y la resistencia de las comunidades a la escuela? ¿Cómo es que la educación liberal articula una lógica de control y regulación social y, al mismo tiempo, ambiciona liberar a los ciudadanos a través de la educación? ¿Cómo se combinaron continuidades con innovaciones? ¿Cómo puede coexistir, en el campo de la educación, la profundización de la secularización y la permanencia de la función integradora del catolicismo?

Palabras clave: *Liberalismo, Estado, Integración social, Libertad de educación, Secularización.*

Résumé

État libéral et éducation au Portugal : Intégration sociale, liberté d'enseignement et sécularisation (1840-1880)

INTRODUCTION. Cet article cherche à analyser, dans le cas portugais, les différentes dimensions du processus de la construction de l'État en tant que État Éducateur. Nous allons nous concentrer sur la seconde moitié du XIXe siècle, une période décisive en ce qui concerne la construction de l'éducation moderne. Nous allons essayer de retracer les principales tendances dans un processus marqué par une importante série de dilemmes et d'ambiguïtés. **MÉTHODE.** Il s'agit d'une investigation historique en utilisant l'analyse documentaire. Nous utilisons une approche qui se situe dans une zone d'intersection entre l'histoire de l'éducation et l'histoire culturelle. Les sources d'études jouent donc un rôle central. On a essayé de mettre en dialogue des différentes sources dont nous avons analysé le contenu. **RÉSULTATS.** La rhétorique libérale accorde à l'éducation un rôle central dans le changement social. Ainsi, cette étude rend compte de certaines des principales actions de l'État libéral pour la construction et le contrôle du système éducatif. Ce projet se fonde sur les bases de l'héritage axiologique et civique de l'illuminisme. L'école apparaît comme un lieu privilégié de la socialisation des Portugais. Les stratégies qui visaient à l'intégration sociale et à la normalisation

du comportement sont évaluées ayant comme référence la figure du citoyen idéal. **DISCUSSION.** Nous recherchons, particulièrement, de discuter les ambiguïtés et les dilemmes qui sous-tendent le processus en cours d'analyse. Comment a été l'articulation entre le renforcement du système éducatif de l'État et l'affirmation de la liberté de l'enseignement? Comment le volontarisme de l'État et la résistance de la communauté à l'école ce sont-ils articulés? Comment est-ce que l'éducation libérale a lié une logique de contrôle et de régulation sociale avec l'ambition de libérer les citoyens par l'éducation? Comment a-t-elle essayé de combiner des continuités (comme la civilité) et des innovations (comme l'éducation civique)? Comment sont-ils parvenus à coexister, dans le domaine de l'éducation, l'approfondissement de la sécularisation et la préservation du rôle intégrateur du catholicisme?

Mots clés: *Libéralisme, État, Intégration sociale, Liberté d'enseignement, sécularisation.*

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