

TE
ARA/CON
vol.1

HELENA COSTA ARAÚJO

THE CONSTRUCTION OF PRIMARY TEACHING AS WOMEN'S WORK
IN PORTUGAL (1870-1933)

Volume I

Thesis submitted for Degree of PhD
in Sociology of Education

The Open University

Date of submission: July 1993

T₂ / 187-0

UNIVERSIDADE DO PORTO
Faculdade de Psicologia
e de Ciências da Educação

N.º de Entrada 5468

Data 93/11/23

Abstract

This thesis presents a historical and sociological analysis of the construction of primary teaching as *women's work* in Portugal during the period 1870-1933.

Firstly, it examines State policies on the relationship between the expansion of mass schooling (which as this thesis demonstrates was an uneven process) and the entry of women into primary teaching in the specific social and political conditions of Portugal as a semiperipheral country. Secondly, it explores ideologies regarding women's position and role in society. Finally, it collates the life histories of women teachers who experienced changes in the profession due to changes of political regime.

Two main historical periods are identified: 1870-1910 and 1910-1933, framed by important political events, namely the onset of the First Portuguese Republic of 1910 and the launching of the main institutions of the authoritarian State, the 'Estado Novo'. In the first period, 1870-1910, the thesis reveals that the State produced policies which attracted women into primary teaching in growing numbers. The ideology of 'maternalism' presented the teaching of primary children as requiring maternal qualities, thus legitimating women's entry in greater numbers. At the same time, the emergence of a 'new orthodoxy' on women's work facilitated their acceptance in the public sphere.

In the second period, primary teaching had already gained some autonomy from State policies. Women teachers continued to enter primary teaching in increasing numbers, despite attempts by the State to restrict them. When the 'Estado Novo' was established, women teachers already represented two-thirds of the teaching force. Thus, the attribution of a functional link between the 'feminisation' of teaching and the conservative policies of the 'Estado Novo' is questioned. Furthermore, lively political debates on women's situation, including co-education, will be shown to have a particular significance for the conduct of women teachers' lives. The fact that women teachers actively participated in these debates challenges assumptions of women's 'natural' passivity.

Within the framework of Sociology of Education, the thesis has drawn on Political Sociology, with regard to theories of the State. Moreover, the contribution of Women's History has proved vital in understanding the life histories of women teachers and raising women's visibility in Social Sciences.

ACKNOWLEDGEMENTS

It is quite common to say that PhD research is an isolating experience. This is even more true in Portugal where PhDs in Sociology of Education are rare. However, in my case, I was lucky to have colleagues and friends with whom I could discuss parts of this thesis. I wish to acknowledge their support and good will.

At this point, I would like to thank explicitly my supervisors. This thesis started under the supervision of Dr. Roger Dale and Dr. Stephen Stoer. When Roger Dale went to New Zealand, Dr. Jenny Ozga agreed to take over, even after accepting her headship at Bristol School of Education. They were all of great help to me and I benefitted from the quality of their supervision. Jenny Ozga has proved to be a rigorous and challenging supervisor. In particular Stephen Stoer, as both a supervisor and a friend, has provided stimulating comments throughout the duration of this thesis. Moreover, working with Stephen at the University of Oporto, has proved to be invaluable in giving academic recognition to Sociology of Education in Portugal.

My friend and colleague, Celia Jenkins, besides patiently proof-reading my English, has been a solidary and provocative "compagne de route", debating with me many of my arguments and confronting my doubts. She was also one of the persons who helped me most to maintain confidence in my research. A special thanks to her.

Several other colleagues have contributed to this research. António Nóvoa was of great help in giving me information about specific primary sources and making useful comments on some chapters. As an authority on Portuguese History of Education, I clarified many uncertainties with him. António Candeias debated with me many of the republican conditions and dilemmas. Luiza Cortesão, among other contributions, impelled me to make more clear my 'implicational heuristic' through the life histories. Virginia Ferreira made important remarks on the first chapters dealing with the State and questions of gender inequality. Fernando Catroga explained to me his view on Republicanism. Cristina Rocha has debated with me many issues on girls' education and gave suggestions which proved useful to this thesis. Manuela Ferreira and Maria José Magalhães encouraged me to pursue this research through reading and comments. Margarida Louro, Carlinda Leite, Natércia Pacheco and Amélia Lopes have helped me in different ways. Thanks to all my colleagues in CIIE (Centre for Research and Intervention in Education) who came to meetings where this research was presented, also to my students in the Education courses who contributed with their questions and

comments to clarify some of my formulations. My thanks also to Rosa Lima and Amália G. Andrade who, as good friends, although too busy, were able to translate some life histories. Dr. Zélia Martins translated another. Maria José Casa Nova searched specific articles for me in educational journals with great care. Angela Silva has helped me very much with the transcription of life histories and a special thanks to her. The librarians of the Library of Oporto (Biblioteca Municipal do Porto) and Lisbon (Biblioteca Nacional) have been helpful.

A special thanks to my family, specially to António who gave me his love and support in completing this research. My Mother and Aunt were important emotional supports as well as the rest of the family. My friends (a very special mention to Graça Moura) merit recognition at this moment for accepting my frequent excuses to stay home and work on this thesis.

Statement of Previous Publications

Extracts from the joint paper I wrote with Stephen Stoer, entitled "A Contribuição da Educação para a Formação do Estado Novo: continuidades e rupturas, 1926-1933" (published in *O Estado Novo: das origens ao fim da autarcia 1926-1959*, Lisbon: Fragmentos, 1987) have been used in this thesis, in chapters 6 and 7. I have transcribed only the parts I wrote.

Chapter 4 has been previously published under the same title in *Gender and Education* 1992, 4 (1/2), 7-24.

Brief extracts from chapter 9 appeared in *Consulta Psicológica* (6), 33-40, 1991, under the title of "Procurando as Lutas Escondidas Através das Histórias de Vida".

Table of Contents

Abstract
Acknowledgements

GENERAL INTRODUCTION

(i) introducing the thesis.....	1
(ii) background to the thesis.....	6
(iii) substantive and theoretical issues and main lines of the research.....	11
(iv) organisation of the thesis.....	18

PART I (1870-1910)

Chapter 1 - Women Teachers, Mass Schooling and the State - a theoretical discussion

1. The field of 'women's history'.....	24
2. Theories of the State and of its involvement in the construction of mass schooling.....	27
2.1 how to understand the State's role in the construction of mass schooling?.....	27
2.1.1 what is the 'nature' of the State?.....	28
2.1.1.1 pluralist theories of the State.....	29
2.1.1.2 marxist theories of the State.....	32
2.1.1.3. feminist theories of the State.....	40
2.1.1.4 the 'nature' of the State as both capitalist and patriarchal.....	45
2.2. what is the role of the State in the construction of mass schooling?.....	45
2.2.1. education and the labour market.....	46
2.2.2. education and 'social control'.....	49
2.2.3. education and conflicting group competition.....	51
2.2.4. education and 'hegemony'.....	57
2.2.5. education and feminist explanations.....	63
2.2.6. education, the construction of citizenship and the world system.....	68
2.2.7. some points for further analysis.....	73
3. State systems and the 'feminisation' of teaching.....	76
3.1 'feminisation' conventionally understood as 'cheapness' and submission.....	77
3.2 the posited interrelationship between 'feminisation' and proletarianisation.....	78
3.3 explanations which do not take the State as a central concern and assume that education systems reflect social constructions.....	82
3.3 State's activity considered in its relation to the 'feminisation' of teaching.....	86
3.4. the 'feminisation' of teaching and the 'core' problems theory of the capitalist State.....	90
4. The specific semiperipheral situation of the Portuguese State.....	92
Conclusion.....	98

Chapter 2 Women's Re-Incorporation into the State

Introduction.....	100
"A possibly unique golden era of liberal capitalism in Portugal".....	101
'Precocity' and rhetoric in the construction of Portuguese mass schooling.....	105
The 1878 Education Reform Act.....	112

Source and scope of the 1878 Education Reform Act.....	118
The actual implementation of the 1878 Reform Act.....	126
Legitimation problems concerning the State and Education during the period 1870-1910.....	130
Feminisation in the Semiperiphery.....	135
(i) State policies on girls' education and on the changing definition of a woman teacher's job.....	141
(ii) equal pay for women teachers.....	148
(iii) State policies on the expansion of Women's Teacher Training Colleges.....	154
Conclusion.....	161

Chapter 3 **Governesses in the Domestic Sphere - Women Teaching within the Home**

Introduction.....	164
Private and Public Spheres - reviewing the concepts.....	166
Women Educators in the Private Sphere.....	171
Conclusion.....	185

Chapter 4 **The Emergence of a 'New Orthodoxy' Public Debates on Women's Capacities and Education in Portugal**

Introduction.....	187
The Emergence of the 'New Orthodoxy': divisions in the public debates.....	190
Women's 'nature'.....	191
The Aims of Women's Education.....	196
(i) 'Women's domestic confinement' view.....	197
(ii) 'Women's conditional work' view.....	200
(iii) The 'egalitarian' approach.....	205
The Emergence of the 'New Orthodoxy': commonalities.....	208
Conclusion.....	212

PART II (1910-1926/1926-1933)

Chapter 5 **The Socio-Political Context and the Position of Women in the Republican and Dictatorial Years**

Introduction.....	199
The Republican Years: explanations for the collapse of the Republic.....	206
The Years of the Military Dictatorship.....	217
Women's Situation in the Republic and Military Dictatorship.....	225

Chapter 6 **A Fair Balance of Sexes in Primary Teaching in Republican Educational Policies (1910-1926)?**

Introduction.....	255
The State and Education - from the Emphasis on the Value of Education in itself in the 'Strong Republic' to Vocationalism in the 'Weak Republic'.....	257
. the primary school.....	266
. 'higher primary' schooling.....	267
. the technical schools.....	271
The Construction of Mass Schooling during the Republican Years.....	274

. the neutrality of schooling.....	274
. decentralisation of the school system.....	275
. co-education.....	278
Educational Policies and the 'Feminisation' of Teaching.....	288
Conclusion.....	297

Chapter 7 Back to Strict Gender Lines' in Primary Teaching - Pragmatic Realism and Compartmentalisation in the Educational Policies of the Dictatorship (1926-1933)

Introduction.....	302
Contradictory Measures and Ideological Consolidation in Education.....	303
. political fluctuations in education - the period 1926-1930.....	307
. the ideological consolidation of education -.....	314
The Construction of Mass Schooling 1926-1933.....	319
The 'Feminisation' of Teaching 1926-1933.....	326
A Brief Summary on the Development of Mass Schooling and the 'Feminisation' of Teaching.....	335
Conclusion.....	338

Chapter 8 Women, the Best Partners for Men' - perspectives on women's role and forms of education in republican and dictatorial years

Introduction.....	341
I - Perspectives on The Role of Women in Republican and Dictatorial Times.....	347
. Positivist/Republican Views on Women.....	350
. anarchist and socialist views on women's role.....	363
. feminist views on women's role.....	370
. Catholic and other traditional views on women's role.....	383
II - Girls' education: single-sex or co-educational schools?.....	395
. the 'battle' against co-education.....	399
. the support for co-education.....	407
. some points for further elaboration.....	412
III - Discourses on the role of women teachers and their situation within the profession.....	414
. 'Women's specificity' in teaching.....	416
. women teachers, politics and religion.....	425
. the issue of marriage for women teachers.....	429
. women teachers' protests against discrimination.....	433
Conclusion.....	436

Chapter 9 Pathways and Subjectivities of Women Teachers through their Life Histories

I - Introduction.....	442
II - Life Histories: further theoretical reflections.....	450
III - Some considerations of life histories of women teachers.....	459
IV - The Doing of Life Histories.....	461
V - Getting to know Teresa, Laura, Ana, Isaura and Luisa.....	466
VI - Career Pathways and Contexts of Professional and Family Lives.....	469
. the teachers' family and social origin.....	470
. formal education - profiting from republican innovations.....	475
. the 'choice' of teaching as a career.....	480
. "our lives were similar to those of the gypsies" - the first years of teaching as the most difficult and precarious.....	484
. interweaving domestic and professional activities in the lives of primary teachers.....	488
. daily school life and the inspector's visit.....	493
. development of professional life and retirement.....	497
VII - Women Teachers' Subjectivities.....	500
. work as providing autonomy for a woman.....	501
. surviving on the miserable teachers' salary.....	503
. the relationship between the woman teacher and the rural community.....	506
. the woman teacher, the pupils and the school.....	511
. attitudes towards the political regime.....	516
VIII - Conclusion.....	520

CONCLUSION

Introduction.....	523
State educational policies sponsoring women's entry into teaching (1870-1910).....	524
The emergence of a 'new orthodoxy' on women's work (1870-1910).....	529
State attempts to redress the balance between the sexes but primary teaching already is seen as <i>women's work</i> (1910-1926).....	531
The 'Estado Novo' was not the great promoter of 'feminisation'.....	532
The uneven development of mass schooling in Portugal (1870-1933).....	534
Debates on women's situation structured women teachers' lives (1910-1933).....	537
Stormy tensions for women primary teachers around co-education (1910-1933).....	540
Women teachers reacted, contrary to assumptions of women's passivity and political conservatism.....	541
Listening to the voices of women teachers: work as women's autonomy.....	543
Questions for Further Research.....	546
REFERENCES.....	550
APPENDICES.....	597

General Introduction

(i) introducing the thesis

"(...) The realities of modern social life are so fundamentally rooted in ongoing conflicts and changes in communities, regions, nations and the world as a whole, that sociologists have never stopped - and will never want to stop - fashioning fresh theories and interpretations that highlight the variety of social structures, the epochal constraints and alternative possibilities for change, the *intersections of structural contexts and group experiences, and the unfolding of events and actions over time*. (...) Broadly conceived historical analyses promise possibilities for understanding how past patterns and alternative trajectories might be relevant, or irrelevant, for present choices" (Skocpol 1984:5, my emphasis).

These words by Theda Skocpol have a special significance for this thesis on the historical construction of primary teaching as *women's work* in State schools in Portugal, with reference to the period 1870-1933. They call our attention to the importance of constructing historical and sociological analyses which bring together both the structural conditions which frame human lives as well as the unpredictable character of social activities concretised by social groups. With regard to an analysis of women's lives, the concern to accommodate both 'structure' and 'agency' is even more important for several reasons. Firstly, it is a crucial form of giving voice in the historical analysis to those who were constructed, during the period under study, as 'voiceless' in the public space of citizenship. Secondly, it is a way of challenging hidden assumptions

in commonsense views and the Social Sciences about women as malleable, passive and politically conservative beings.

The thesis will privilege this line of reasoning to understand the construction of primary teaching as *women's work*. It will examine the State, its activity towards mass schooling¹ and the association of teaching as a women's occupation. This means that I will be examining State educational policies between 1870-1933 in their close relationship to the development of mass schooling and the 'feminisation' of teaching in the specific social and political conditions of Portuguese society. A second step is to link this analysis of State education policies to ideologies of women's activity in society hoping to unravel the role that ideologies have played in the transition of women from the domestic sphere to the public space. Finally, it will disclose the views and pathways of women teachers both as professionals and

¹ This analysis does not consider the private school sector, boarding schools ("colégios") or convents, since the main aim of this thesis is to focus on State intervention and female involvement in mass schooling. However, in a country such as Portugal, where the Catholic Church has played such a central role, it might be argued that the religious boarding school until the end of the Monarchy (banned with the republican revolution of 5 October 1910 and only reinstated after the military coup of 28 May 1926) does not appear to hold a distinct identity from the domestic space, at least considering the relationship which women maintained to them. Both were visibly characterised by a strict closure, in the sense that they were spaces where women (at least, middle and upper-middle class women) should remain, dedicating their time to the domestic routine or to activities which conformed to traditional female roles. Their movements were hence quite restricted. The first boarding school for girls was created in 1782 and it is quite significant that it was set in a convent school ('Convento da Visitação', see Lopes 1989:97). This supports the view of the similitude and ambiguity existing between the convent and the boarding school. Moreover, it is worth underlining the proximity, and the correspondence, between the household and the convent, in Lopes' account, even though she writes about an earlier period, the latter part of the eighteenth-century: "In the views of that time, women were confined to two closed spaces: the household and the convent, corresponding to one another. In both spaces, the same roles were required: the unique dedication to a spouse (divine or human), to whom one's will was surrendered, to whom all expectations were dedicated, who, in the end, was glorified. In both spaces silence, austerity, work, dedication were required and only those attitudes would confer upon women their existential justification" (1989:37). In that way it is possible to argue for a similarity between the household, convent and boarding school. However, this statement does not deny the importance of a proper study about the relationship within and between these institutions.

women, stressing the relevance of their subjectivities for a more comprehensive sociological analysis.

Women's work generally refers to occupations in the 'public sphere' which have been defined, through a historically constructed process, as 'appropriate' to 'women's nature' or to 'women's social role'. It captures (at least, to some degree) women's aspirations for some kind of social autonomy and economic independence. *Women's work* is a useful concept to remind us that work performed in the 'public sphere' is defined in gender terms. Harriet Bradley (1989:1) stresses this clearly: "[the] 'sex-typing' of jobs has become so extensive and pervasive that the two sexes are rarely found doing exactly the same kind of work".

In fact, in the last eighty years, primary teaching in Portuguese State schools appears to have become *women's work*, both statistically and also in terms of being perceived as embodying 'feminine' attributes. It started as a male occupation within State institutions at the end of the eighteenth-century. Women teachers were incorporated later than their male counterparts and were restricted to teaching in girls' schools. After the 1870s, teaching began to attract more women. Following Women's History studies (cf. for instance Prentice & Theobald 1991), I refer to the process of the increasing entry of women into State primary teaching as the process of the 'feminisation' of teaching. During the Republic (1910-1926), despite the political rhetoric around the role of the primary teacher derived from masculine images of the teacher as the 'missionary' and 'community leader', the number of women teachers continued to grow. This trend continued during the Military Dictatorship (1926-1933).

Given that women teachers were increasingly entering State primary schools, the relationship between their entry into teaching and the construction of State mass schooling becomes an important issue in this thesis. It is important to examine whether State policies in education attracted women to fill teaching posts and mobilise their energies for the system's concretisation. The concept of mass schooling refers explicitly to the process of State intervention in education providing children of all social groups with certain levels of a free, compulsory and secular schooling. The fact that mass schooling was attended mainly by sectors of the working classes and of the lower middle classes in Portugal at the turn of the century and in the first decades of the twentieth century is a complex matter that in part leads us to question the perspectives and strategies of social groups towards schooling as well as the concretisation of State policies.

The thesis sets out to examine the construction of primary teaching as *women's work*, in Portugal, in two main historical periods. The first period considers the years 1870-1910, of the monarchist regime, when important State policies were produced with regard to mass schooling and to the teaching force. In the second period, comprising the years 1910-1933, the political conditions in Portugal changed from the Republic (1910-1926), termed by Schwartzman (1989) as "unstable democracy", to the Military Dictatorship (1926-1933) which was also characterised by uprisings and revolts. It gave way to the authoritarian State, the 'Estado Novo', a dictatorship ruled by the ideology of 'God, Fatherland and Family'.

It is the emergence of the Republic on 5 October 1910 with the ideals of 'Freedom, Equality and Fraternity' emphasised by

republican discourse and drawn from the French Revolution, which separates the period 1870-1910 from the years 1910-1933. The period 1926-1933, which was politically marked by the Military Dictatorship, is not considered as constituting, by itself, a third main period. It was much too short, in comparison with the other two, to acquire a similar status. Further, given political instability, it may be seen more as a period of transition to the 'Estado Novo' than as a period having its own significance. In this thesis, where the analysis focuses on the construction of primary teaching as *women's work*, the choice of historical periods framed by political events leads to the possibility of assessing the contribution of each political regime to changes in women's situation and of gender relations.

This kind of concern - how political regimes contribute to changing women's situation and gender relations - is relevant, for instance, with regard to the Republic. One of the most interesting contradictions, during the Republic, seems to be the repeated rhetoric of State officials about the importance of the teacher's role as 'missionary' and 'community leader', against 'vice, prejudice and ignorance' - which clearly evokes male images - despite the fact that the majority of teachers were women, especially in rural areas. Conversely, women teachers were most probably expected to confine their activities, within the school walls, to promoting a "maternal ambiance" (David 1980). Moreover, they seem to have had little prospect of influencing the community as they were denied the right to vote by the republican regime. Thus, the tensions and contradictions in educational policies on the question of who would fill the teaching posts, both at the end of the Republic and in the period of transition to the authoritarian 'Estado Novo', will be

central to this analysis. Also, the tensions and pressures which women teachers experienced, both in their professional and personal lives, will be documented here through their life histories which represent a particular concern of this thesis.

The contributions of Sociology of Education, Women's History and Political Sociology (with regard to theories of the State) make up the main areas in which this thesis establishes its theoretical terrain. Each of these areas has its own concerns, approaches and tensions which will be negotiated in bringing together a selection of the relevant issues they raise for the debate in this thesis of the problems mentioned above. Of the three disciplines, Women's History is certainly the least well known in Portugal, and as a result, has less legitimacy. Indeed, Women's Studies and Women's History are relatively new subjects in Portugal and this thesis hopes to contribute to increasing familiarity with these areas of knowledge.

(ii) background to the thesis

The direction that this thesis has gradually taken bears a close correspondence to my professional life. As a former secondary teacher, in State schools, and afterwards moving on to a lecturership in a State university, the whole question of understanding how and why women turned to State education as one of their main fields of work in the 'non-manual' sphere became a central issue for me. Also it led me to question why women as educators occupied the lowest grade jobs in education. In primary schools today, they constitute 92.4% of the total workforce. The picture hardly changes in 'preparatory' (junior) schools, where they represent 69.1% of the total numbers. In secondary schools (7th to

12th grade), women are 61.8%². In higher education, which enjoys greater status, they constitute 30% of all lecturers; and as full professors, they are only 8.2% (Sutherland 1990). Hence, although teaching can be seen as one of the 'non-manual' activities which attracts more women, they tend to be concentrated in the low status posts at all levels of the education system.

Initially, this research aimed to concentrate on an analysis of teachers' social class, their professional ideologies and political struggles supported and promoted by teachers' unions, and mainly on the relationship between the teaching profession and the State. In fact, the awareness of the central activity of the State in a semiperipheral country (in the European context) such as Portugal proved to be an important concern to develop in the thesis.

However, in core countries, where studies have addressed these questions, in the late 1970s and early 1980s, taking the teaching profession as a whole (for instance Grace 1978; Ozga & Lawn 1981; Harris 1982), women teachers were more or less absent or marginalised. In Portugal, studies on the teaching profession have also followed a similar pattern (for instance, Bento 1978; Nóvoa 1987). As several authors have stressed, most historical, philosophical and sociological theories have been developed in terms of 'men' as representing the whole human world. Okin (1980) stresses (as well as Janeira 1987) that with regard to philosophical studies:

While the use of supposedly generic terms like 'man' and 'mankind', and of the allegedly inclusive pronoun 'he', might lead one to think that philosophers have intended to refer to the human race as a whole, we do not need to look far into their writings to realize that such an assumption is unfounded. Rousseau, for example, tells his reader at the beginning of the

² Data from the Report 'Braga da Cruz' 1988:1198, for the year 1985/86.

Discourse on the Origins and Foundations of Inequality among Men that: "It is of man that I am to speak". It subsequently becomes very clear that it is only the inequality between males that is the subject of his investigation (Okin 1980: 5).

Sydie stresses, with regard to much sociological theorising, that its main concerns on issues such as class, status, etc. has lead to the 'invisibility' of women in the studies produced:

The sociological assumption that the social is defined in terms of the public sphere in which men interact and towards which the private sphere (at least ideally) reacts has had significant consequences for sociological theorizing. (...) Sociological theorizing focused on the dynamics of class, status, power, authority and social conflict - all generated by, controlled by and affecting men directly. As a result, social class has been linked to male occupational categories, and the fact of women's paid labour has either been ignored or explained as a special, separate problem; status has been examined in terms of men's interaction and the contribution of women has been acknowledged only in a peripheral sense of 'drawing-room' manipulations; power and authority have been seen to refer to the legitimate formal and informal exchanges among men in which, women as power-holders, can appear only as anomalies or as problem cases. The key point is that sociology has had a blinkered, and therefore partial, perspective on the nature of the social world, which has meant the de facto exclusion of women's realities from the accounts (Sydie 1987:10).

This theoretical awareness has contributed to a reformulation of later studies. In England, for instance, studies on teachers have started to take into consideration the fact that gender relations affect most areas of teachers' interventions (see Ozga & Lawn 1988, for instance). In Portugal, Benavente (1990), in her study, has also focused on women primary teachers in the 1980s. However articulate and elaborate these studies are, in some of them we still do not find a more complete theoretical reframing which the introduction of the category of 'women' implies. Studies on Women's History have already demonstrated that the *rewriting* of the social processes in which women as teachers have been involved is both desirable and possible.

It is particularly due to Women's History that it has been possible to see unknown and anonymous women emerge from obscurity, women who have contributed in different ways to changing women's position in society. Women's History has demonstrated that women have a history of their own, largely unseen until recently. With regard to teaching, these studies (such as Bilken 1990; Clifford 1987; Copelman 1985; 1986; Danylewicz & Prentice 1984a; 1984b; 1986; 1988; Gémie 1991; Louro 1989; Margadant 1990; Moch 1988; Nelson 1992; Oram 1987; Prentice & Theobald 1991; Preston 1982; Steedman 1985; Theobald 1990; Vaughn-Robertson 1984) have revealed women teachers' personal lives, professional careers and aspirations to independence. The task of writing women teachers' history from 'within' has been pursued taking into consideration their own views. Moreover, these studies, with a structural underpinning, also analyse the patriarchal structures and ideologies in which women were (and are) brought up and which have led to the construction of their world views and life conditions. As Joan Scott stresses:

Women's history, implying as it does a modification of "history", scrutinizes the way the meaning of that general term has been established. It questions the relative priority given to "his-story" as opposed to "her-story", exposing the hierarchy implicit in many historical accounts. And, more fundamentally, it challenges both the sufficiency of any history's claim to tell a whole story and the completeness and self-presence of history's subject - universal Man" (Scott 1991:51).

Therefore, it became apparent to me that, unless women teachers were the central theme in this thesis, my basic question of how and why women turn to education as one of their main activities outside the domestic sphere would be incomplete and unable to deal with the complex issues involved. Theobald and Prentice remind us that it was "feminism (that) taught us to

explore the history of teachers from the point of view of the women who taught school and to look for the structures that subordinated and exploited women in education" (Theobald and Prentice 1991:4). It is important to examine how women made sense of the conditions in which they lived and how they confronted them, as a means of escape from placing women's history in a "male-defined conceptual world". As Gerda Lerner stresses: "treating women as victims of oppression once again places them in a male-defined conceptual framework: oppressed, victimised by standards and values established by men. The true history of women is the history of their ongoing functioning in the male-defined world, on their own terms" (Lerner 1975:6, emphasis in the text).

In accord with this line of reasoning, besides a concern with structural questions - focusing State policies with regard to mass schooling and women's entry into primary education as well as ideologies on women's role in the period set above - the thesis listens to the *voices* of women teachers involved in the process of the construction of primary teaching as women's work. Throwing some light on the *experience* of women teachers became an important issue as a way of bringing the concern for agency into the problem under study. Life histories of women who started to teach in the final years of the Republic and during the Military Dictatorship are presented in order that their way of knowing and making sense of the conditions in which they taught and lived become comprehensible in their own terms.

(iii) substantive and theoretical issues and main lines of the research

This thesis is structured around three main areas: education policies, ideologies and finally the emergence of the subject. Each one will be dealt with in some detail below.

The first issue which runs throughout this thesis is the identification of specific State policies which relate to women's increasing participation in the teaching force. This requires investigation of the kind of relationships that can be established between 'feminisation' and mass schooling and whether there were specific State initiatives to attract women into primary teaching.

To explain these policies means to clarify the rationale behind them: why were women entering teaching? Were they responding to a 'functional need' of the State for their alleged 'expressive' attributes and "maternal ambience" (David 1980) towards the children of the 'poor'? Were they incorporated into mass schooling as more easily proletarianised within capitalism? How powerful were the economic constraints, within the context of the expansion of mass schooling? Did such constraints, in conjunction with ideologies about 'women's proper job' and women's specific 'inherent qualities', oblige us to raise questions on the 'feminisation' of teaching in State schools?

To understand the relationship between mass schooling and 'feminisation', a necessary step is to question the 'nature' of the State in their construction. Theories of the State, the construction of mass schooling and the 'feminisation' of teaching are analysed and debated. Hence, the State appears as confronted by capitalist and patriarchal relations, which influenced the formulation of education policies. In each of the political regimes,

in the period 1870-1933 (the monarchist, the republican and the military dictatorship regimes), both kinds of relationships are perceived to impact upon the activity of the State towards the construction of mass schooling and women's entry to teaching. It is important to understand the State's involvement in both processes as contradictory at times, and incoherent and precarious at others (Dale 1989; Ball 1990; Santos 1990a; 1990b). Patriarchal relations are an additional pressure on the State, resisting the emergence of new relations of production or even influencing new forms emerging from State intervention (Walby 1990). Additionally, in the Portuguese case, and given its location in a system of world relations, its semiperipheral status (in the European context) will need to be examined³.

In order to pursue this line of research, the analysis of the historical context, identifying the main stages of the development of mass schooling in Portugal becomes important. Compulsory school attendance laws (1835,1836) were only introduced more or less sixty years after the first intervention of the State in primary schooling (1772). They were produced within Liberalism as a political regime. After the 1820 Liberal Revolution, Portuguese society witnessed a period of continuing upheaval and conflict between opposing interests. These were closely related to class fractions and groups struggling to establish their supremacy or, at least, to make alliances within the political and social spectrum. After 1851, during the period called 'Regeneração' (Regeneration) and in the next decades, two main parties secured (in alternation)

³ Several authors stress, following Wallerstein's theory, that educational policies in Portugal were (and still are) strongly influenced by those produced in core countries (Dale 1984; Stoer 1986; Stoer & Araújo 1992; Stoer & Dale 1987; Stoer & Stoleroff 1988; Stoer, Stoleroff & Correia 1990).

the government and the Parliament. The *1878 Education Reform Act* constitutes a landmark with regard to mass schooling and women's increasing entry into primary teaching. Later, in the Republic (1910-1926), other Reform Acts introduced further changes to mass schooling. Innovative measures were foreseen in the republican legislation and were sometimes implemented.

However, at the end of the period 1870-1910, and although the Portuguese State had been advanced ('precocious') in launching mass schooling in comparison to 'core countries', the publication of several Reform Acts re-affirming State interest in mass schooling (as well as rates of illiteracy which remained as high as 80%) demonstrated that the development of mass schooling in Portugal was still to be concretised. The 'nature' of the Portuguese State, its involvement in mass schooling and its contribution to the 'feminisation' of teaching need to be understood within its specificity as a semiperipheral State with regard to the complex relations of the world system (Wallerstein 1984; Santos 1990a; 1990b).

The second main area is related to ideologies. After the lively theoretical debate of the 1980s, the concept of ideology is less dominant in sociological analyses. In part, this is due to the limitations of a marxist concept of ideology, pointing mainly to "mystification serving class interests", as Barrett stresses (1991:167). It is not the place here to debate the concept, which I have discussed elsewhere, echoing the debate mentioned above (Araújo 1982; 1985). Although Michèle Barrett remains sceptical of the use of the concept, she stresses, in the Preface of her book, that "one could not explain the oppression of women without taking

very seriously indeed the role of ideology and culture in the creation, as well as reproduction, of that inequality" (1991:vi). Hence I will limit my use of the concept to refer to specific processes which are important to understand the position of women in a changing society. The usefulness of Barrett's definition becomes evident here. Ideologies can thus be understood as: "discursive mechanisms that may occlude, legitimate, naturalise or universalise in a variety of different ways but can all be said to mystify (...) not tied to any particular content, nor to any particular agent or interest" (1991:167).

Therefore one of the lines of research in this thesis is an attempt to understand the "discursive mechanisms" related to women's emergence in the 'public' sphere and mainly in the 'workplace'. *Maternalism* as an ideology is used in this sense here: it appears to have legitimated and naturalised the view of women as having inherently the best qualities for teaching due to their biological conditions. As a discursive process it was not class determined, although it was produced during the period in which the entry of middle and lower middle class women to the 'workplace' was debated furiously.

Later in the republican period, and its aftermath, it is useful to explore the 'perspectives' and 'views' of political groups which had a stake in the political and social changes taking place in the years 1910-1933. Changes in gender terms are usually a very sensitive area and it can be quite revealing to see whether political groups accepted progressive reforms for women as well as more open and non-traditional forms in gender relations. Gender politics cuts across traditional political divisions and it is not unusual to see left parties involved in traditional rhetoric on those topics.

Furthermore, to explore the 'perspectives' of these political groups is also a means of analysing how republicanism, feminism and anarchism have contributed to changing a traditional consensus on 'women's role' in society.

Thus the "discursive mechanisms" mentioned above can clarify the ideological ambiance in which educative policies towards the 'feminisation' of teaching and mass schooling took place. Further, they also reveal the changes which were taking place with regard to women, in particular concerning their access to the 'citizenplace' and the 'workplace'.

It is with regard to "discursive mechanisms" towards women's activity that Women's History makes a remarkable contribution. Gerda Lerner (1975) advises those contributors to Women's History that, when analysing the writings on women and women's images, there is a danger of confusing "prescriptive literature with actual behaviour". That is, many of the sources used in this kind of analysis provide information, not on what women really used to do, but on "what men thought women should do" (Lerner 1975:7). Lerner thinks that this is a "'contribution' history", but not yet Women's History. In the approach adopted here, such confusion will be avoided, since the intention is to depict the constraints which operated on women, whilst attempting to understand the way women have actively constructed their lives, often resisting such constraints. Furthermore, researching women teachers' life histories will facilitate the shift that Lerner proposes "from male-oriented to female-oriented consciousness" (Lerner 1975:10; see also Louro 1992).

The lines of research just mentioned are crucial in the third main area of this thesis, which is related to the emergence of the subject. As already stressed, the views and experiences, in sum, the *subjectivities* of women teachers are important when focusing on the construction of primary teaching as *women's work*.

The concept of *subjectivity* needs to be clarified. Michèle Barrett's definition (1991) is useful for an understanding of the lives of these women teachers. Subjectivity, in her view, "allows us to speak of the private sense that individuals make of their experience and how this varies from content to context. (...) It can also encompass the vast unspoken territory of emotionality and affect" (Barrett 1991:91). Chris Weedon (1987) similarly stresses that "subjectivity is used to refer to the conscious and unconscious thoughts and emotions of the individual, her sense of herself and her ways of understanding her relation to the world" (1987:32). It is only recently that the Social Sciences have begun to address subjectivities, in particular, those of women.

Women teachers' experience should be known for several reasons. Firstly, as already stressed, agency (as well as structure) is a central pole of sociological analysis. Without agency, sociology remains dehumanised (Ferrarotti 1983; Plummer 1983; Archer 1991). Secondly, sociological analyses are increasingly aware of the heterogeneity of the subject (Barrett 1991), due to its simultaneous interpellation by several discourses and practices. Diversity is also a quest for sociology and the quest for individual pathways and subjectivities is an important task for sociology. Thirdly, it is through the subjectivities of women and what they have to tell us, that we can witness a different history of women, quite different from the images produced about them, for instance

in the political or educational domains. The telling of the life histories of five women teachers, who started to teach in the period of political transition from the Republic to the Military Dictatorship, will clarify the active role of women teachers in the development of mass schooling and their own profession. In fact, the life history provides "an ideal vehicle for the social scientist to sway to and fro between life's specifics and theory's generalities", as Plummer stresses (1983:75).

Before concluding this part, it is necessary here to stress that the historian of women will be clearly confronted with a dilemma: to capture the specificity of women's history in its own terms, as Burstyn stresses, means that she/he will be more concerned with the narrative of their lives than with the theoretical issues. She argues that "women's lives are often discursive, in that women create links and are concerned about the continuity of relationships rather than the categorisation of experience" (1990:4). At the same time, it is necessary to clarify that there are constraints on women's lives: "to write women's history from inside the social construction of reality of the participants themselves can weaken the restrictive force of the argument that women make their own history but not in circumstances of their own choosing" (Burstyn 1990:4, quoting Patricia Grimshaw, emphasis in the text).

This dilemma is confronted in this thesis by assuming that women are active agents, constructing their lives with often scarce means and resources. They often sense constraints upon their lives and attempt to find strategies to deal with them. With the concepts of 'resistance' and 'strategies' the intention is to overcome notions of structure and agency as simply juxtaposed

concerns. Several proposals are advanced for understanding the relation between them⁴. In this thesis, the concepts of 'resistance' and 'strategies', adopted in studies in the Sociology of Education to express the relationship between 'structure' and 'agency' by Willis (1977; 1990) and McRobbie (1990; and subsequently, Stoer & Araújo 1992) attempt to express the way active beings confront the conditions which structure their lives.

(iv) organisation of the thesis

The thesis is organised in two main parts.

Part I will focus on the period 1870-1910 to examine State education policies with regard to the increasing presence of women teachers in mass schooling as well as ways of explaining State intervention in this area.

Chapter 1 will draw upon a theoretical framework developed around the nature of the State, mass schooling and the 'feminisation' of teaching. 'Pluralist', marxist and feminist theories are analysed in terms of the contribution of the State to the construction of primary teaching as *women's work*. A theory of the State is required which encompasses the possibility of understanding the relationships between the State, the social, economic and political system as well as the specific conditions in which women live. It is necessary to find a perspective on the State which identifies both its capacity for domination and struggles,

⁴ For instance, Ferrarotti (and Sartre, from whom he derives some of his theoretical propositions) selects concepts such as 'totalising praxis' and 'dialectical reason' (Ferrarotti 1983) as will be seen in the last chapter.

resistances and strategies of gendered human beings, especially women.

I will discuss theories of mass schooling due to the latter's importance in understanding the 'feminisation' of teaching, especially in the period 1870-1910. Several theories about mass schooling are reviewed to explain the State's intervention in providing universal formal education. The semiperipheral situation of Portugal throws light on the specificity of Portuguese mass schooling as both 'precocious' (advanced) and slow-moving in its concretisation. The aim is to theorise this complex articulation to understand women's entry into mass schooling in vast numbers in the last quarter of the nineteenth-century, during a period in which mass schooling was growing more rapidly.

Chapter 2 is an attempt to explore, in a systematic way, the articulation of the process of expansion of mass schooling with the 'feminisation' of teaching looking at the educative policies produced by the State in the period mentioned above. Educators' and politicians' writings on the topics related with mass schooling are reviewed as well as official documents such as the Educational Reform Acts to clarify Portuguese State policies towards women teachers.

The next two chapters attempt to call attention to material "discursive mechanisms" influencing the State's activity and in which it was embedded. Chapter 3 focuses on the sexual division of labour which existed in the 'private' sphere and which might have influenced the State to attract women into primary teaching. In fact, women as salaried employees, worked as governesses in middle and upper-middle class households. Given the lack of other sources, the chapter draws its analysis from novels

by male and female writers, to identify the social conditions in which they worked and their status.

In chapter 4, the aim is to analyse discourses on women's physiological and psychological capacities and the conditions which were produced during the period 1870-1910. These will be related to the transition of women (at least, middle class women) from the 'private' to the 'public' domain. The emergence of new 'positivist' sciences, such as craniometry, biology, physiology, categorised human beings according to determinist categories. Such discourses generated debate between these perspectives and those advocating a development of human capacities in new forms of social being, such as the socialist, anarchist and feminist movements.

Part II of this thesis concentrates on the period 1910-1933 which encompasses two political regimes: the Republic (1910-1926) and the Military Dictatorship (1926-1933).

This period cannot be understood without outlining the conditions and main events in which social forces and movements struggled within the Republic, both in social and educative terms. Chapter 5 focuses on the wider social, political and gender contexts. The 'nature' of the Republican State and the forms it took during the period of transition to institutionalised dictatorship (1926-1933) are significant for this analysis.

Chapter 6 aims to unravel the contradictory nature of education policies in the Republic, clarifying the tensions between different *mandates* for education and throwing some light on the specific policies of mass schooling and the feminisation of teaching. Central questions will evaluate the role of the State in the definition and concretisation of mass schooling and the recruitment of women teachers to the profession.

Chapter 7 concentrates on the changes in educational policies after the military coup of 1926, to highlight the role of gender relations in primary teaching and schooling. The State was subject to different pressures, particularly in terms of guaranteeing a rigid, firm and secure context for capitalist accumulation. Also changing attitudes towards the position of women in society constituted additional pressures upon the State. The end of the regime of co-education soon after the military coup of 1926 may be related to these pressures.

Chapter 8 analyses different perspectives on women's role in society and, especially, on the role of women teachers. Republican, anarchist, feminist and catholic perspectives will be reviewed, to assess the situation of women in Portuguese society. Co-education and the regime of the separation of the sexes will be discussed through the views of educators and politicians.

Chapter 9 will listen to the *voices* of women teachers who began to teach either during the last years of the Republic or at the beginning of the Military Dictatorship. Their *voices* describe their experience as both women and professionals, some living part of their lives in remote villages, where they were the only women with a salary paid by the State. These women as single women, or married women with children, constructed their own lives in complex situations which need to be related to the existing social and patriarchal relations of the period.

This thesis weaves a passage through a period of history and also of my life. It represents for me many hours of patient work, many doubts and anxieties and my own deep implication in the research which is now presented. I hope that readers will enjoy it, as much as I have.

PART I

Part I consists of an analysis of the period 1870-1910. The aim is to develop an understanding of the State's activity with regard to the 'feminisation' of teaching at the primary school level. This is set within the context of the expansion of mass schooling in Portugal as a semiperipheral country. It charts the emergence of a 'new orthodoxy' of what counted as *women's work*. The ideology of *maternalism*, voiced by several educators and politicians, is also examined to explain the presentation of teaching as *women's work*.

Women Teachers, Mass Schooling and the State
- a theoretical discussion

The problem discussed in this thesis is certainly complex. Different areas of sociological study have been brought into the analysis to contribute to a better understanding of the construction of primary teaching as *women's work*. Besides the Sociology of Education, two main areas of study - Women's History and theories of the State, quite often developing as separate and confined fields - constitute the framework of this research.

The chapter starts by identifying both areas of study, and the relevant questions they bring to the analysis of the problem. An attempt is made to engage directly with a selection of theories about the 'nature' of the State, the process of the expansion of mass schooling and the 'feminisation' of teaching. Finally the semiperipheral situation of Portugal at the end of the nineteenth and at the beginning of the twentieth century is examined. These theories are debated while keeping in mind the problem of the construction of primary teaching as *women's work* and its relationship with the development of mass schooling.

1. *the field of 'women's history'*

In this section, I want to address Women's History and its contribution to the problem under study. Some of the questions formulated to understand the shift in Portuguese State schools from a largely male to a predominantly female teaching force owe their origin to the contributions of Women's History: why were women replacing male teachers in a specific historical period? why were they entering teaching and not other occupations to the same extent?

I wonder also if Portuguese women's social movements and organisations played a special role in pushing women into specific areas of the labour market, such as teaching. Ideologies about women's supposed 'nurturance' and maternal qualities, which gradually evolved to underpin primary teaching as *women's work*, are also of interest. They seem to have emerged when the conditions for women's entry to teaching were being created. Very much related to this question is another about whether women teachers' aspirations matched the expectations impinged upon them by educational politicians and reformers as the 'best educators of children'. The fact that teaching has developed as a hierarchical occupation raises questions about the position of women within the occupation. These and other points provide guidelines for this research in its attempt to understand the entry of women as a social group, with a specific gender identity, into teaching.

Women's History has inspired many ideas and perspectives. As a consequence, in part, the thesis will be guided by two main concerns: firstly, in a *structural* attempt to convey how patriarchal relations are related to the process of construction and expansion

of mass schooling by the State; secondly, to accentuate women teachers' *experience* and the way their personal and professional lives become intertwined in their daily activities and careers

In this way it aims to contribute to an understanding of how primary teaching became *women's work* in Portugal. In fact, the development of the very notion of *women's work* means that certain areas of the labour market in specific historical periods were perceived as particularly suitable for women and became feminised in different degrees.

Another concept equally central to this research is the concept of 'patriarchy' and also the related notion of 'patriarchal relations'. Undoubtedly the concept of patriarchy obliges us to raise several questions, as many authors have already pointed out. A first problem is that the concept may presuppose biological determinism as an ultimate explanation for the domination of men over women. Another set of questions raises the issue of the existence of patriarchy in its relationship to capitalism: are we identifying two autonomous modes of human relations or should we consider the specific articulation between the two? Veronica Beechey (1987) and Michèle Barrett (1980; 1988) provide systematic discussions of the issues involved. Beechey, in particular, illuminates some of the possible ways of utilising the concept. It is not relevant to provide here a review of the different positions in the debate. 'Patriarchy' will be used here to mean the structural subordination of women in relation to men. It could be said that 'patriarchy' is too much of an 'umbrella' concept: different forms of subordination among women (middle class vs. working class women; black vs. white women) in relation to men are often not specified. For instance, the transition of women from the

domestic to the public sphere appears to have been the object of much concern in the case of middle class women, while working class women who worked outside their domestic settings were considered differently (see chapter 4). The possibility of 'patriarchy' remaining a useful concept, despite the problems it presents, appears to depend upon how much the differences between women are emphasised; or instead, if the commonalities which unite them in relation to men are taken as the basis of the analysis. I would agree with Walby who stresses that "there are sufficient common features and sufficient routinised interconnections that it does make sense to talk of patriarchy in the West in the last 150 years at least" (1990:16). The distinction that Walby (1990) advances between "private forms of patriarchy" (meaning the exclusion of women from the public arena, and their seclusion under the power of a male head of the household) and "public forms of patriarchy" (where women are not barred from the public arena, but remain subordinated within it) may be useful in this research to specify the change in women's situation which developed in particular at the turn of the nineteenth-century. The incorporation of women into State structures, through their entry into mass schooling as pupils and as teachers, can be acknowledged as changes in the *form* of patriarchal relations.

In the review of theories of the State and the expansion of mass schooling which follows, questions about women and gender relations are again posited when discussing feminist perspectives. Therefore, new insights will be offered to understand the complexity of gender and State relations in capitalist social formations.

Theories of the State and of its involvement in the construction of mass schooling is the third area of study which frames this thesis.

In order to understand the relationship between the 'feminisation' of teaching and the process of mass schooling, beyond the merely descriptive, it is necessary to understand the development of State mass schooling since its inception in Portugal and also to relate this development to theories of the State and of the construction of mass schooling.

2.1 how to understand the State's role in the construction of mass schooling?

One of the questions of central interest here is to understand the State's role in the construction of mass schooling. Was the State providing education equally for the various social groups? What kind of relations can be identified between State intervention, the process of accumulation and the construction of mass schooling? Was State activity in the field of mass schooling oriented by the specific intentionality of its own agents, or was it simply an instrument of powerful groups, either in terms of economic, political or social criteria? Which interests were included at specific stages of the development of this process, and which were excluded? Bearing in mind the specific conditions of the development of mass schooling in Portugal, it may also be necessary to ask why the expansion of Portuguese mass schooling was slow-moving and precarious - this is true especially if one remembers that the Portuguese State was already quite advanced ('precocious') in promoting primary school education (as well as

other levels of the education system) at the end of the eighteenth-century. What were the conditions (political, economic, ideological) which contributed to this delay? What aims guided State intervention in specific periods?

2.1.1 what is the 'nature' of the State?

Taking the State as a central issue, it may be useful to clarify the 'nature' of the State before analysing its involvement in mass schooling. Debates over the 'nature' of the State are rendered even more complex when questions relating to its 'nature' extend beyond its relationship towards class relations and the process of accumulation to consider gender (and ethnic) relations. Is the State both capitalist and patriarchal (and racist)? Most perspectives on the 'nature' of the State have hardly inquired, in any depth, into the way gender relations intersect with State activity and the process of accumulation. Contributions to women's studies have been addressing these issues and some of the more recent will be reviewed here.

There is a vast literature on the 'nature' of the State involving complex explanations which turns a critical review into a difficult and lengthy task. In this thesis, my interest in State theory is more specific. It involves an attempt to concentrate on the 'nature' of the State as it has been theorised by 'pluralist', 'marxist' (both 'orthodox' and 'neo-marxist') and 'feminist' traditions, addressing in particular two main questions (always keeping in mind the Portuguese case): (i) how is the relationship between the State and the various social groups envisaged, both in terms of class and gender (race relations and the State are not directly pursued here, due to questions of scope and space, although

the policies of the Portuguese State, as of other European States, excluded black people from incorporation into the State as citizens at the turn of the century) - the metaphor of the State as a 'social arbiter' among social groups is used in this review; (ii) under what terms can we refer to the autonomy of the State in the three traditions (i.e. what social forces and conditions set limits to the State's activity).

2.1.1.1 *'pluralist' theories of the State*

It is 'pluralism' which offers "probably the dominant conception of the State in political sociology" (Dale 1989:26). 'Pluralist' theories present the State as a neutral arbiter among the different 'partners' participating in the policy-making process. They aim, according to McLennan (1984) to describe with accuracy the processes which characterise western democracies, by privileging the role of the political as an essential ingredient in such processes. In fact, the State is identified mainly with the formal political system, i.e. with the electoral system, the constitution of parliaments, the pressures put on government by the electorate.

It is the assumption of 'pluralist' theories that in modern democracies power is widely distributed among different groups competing for the distribution of resources. In some versions of pluralism, according to McPherson and Raab (1988), it is believed that the power which interest groups exert at the political level (i.e. upon the State) has no direct relationship (once exerted) to the social groups in which it originated. Such interest groups have the possibility of influencing policy outcomes by means of bargaining and negotiation. It is a common assumption in all versions of

pluralism that "there is no social group that cannot achieve significant political power, if not by itself then in coalition with other groups" (McPherson and Raab 1988:6). Robert Dahl has described American society as a "polyarchy" to express such widely distributed power (Dahl 1971).

The State needs to balance the different group pressures in order to maintain social equilibrium. McLennan compares its role, in this perspective, to a "kind of switchboard which separate interests plug into, are connected together and whose message is received" (1984:83). Further, the State is perceived as pursuing the 'national' interest which is interpreted and concretised into policies and practices by State officials.

Carnoy and Levin (1985:28) have called this approach, ironically, as the "'common good' theory" to express precisely the idea that the State is presented as non-identified with specific interests either in class, professional, gender or racial terms and is only guided by the so-called 'common good'.

Further criticisms advanced in relation to 'pluralist' perspectives point out that these perspectives appear to advance a justification of western democracies, rather than pursuing an analysis of State activity in these political contexts (McLennan 1988; Dale & Ozga 1991). Also their view of social groups competing on quite similar terms overlooks power relations (regarding social class, gender, ethnic and other divisions) and the way they are related to State activity. Gewirtz and Ozga stress that: "Although [interest] groups *may* be reflections of more enduring class or occupational or other groupings, pluralists maintain that political power and civil society do not interpenetrate, and that no social group is excluded from power."

(Gewirtz & Ozga 1990:38). At the same time, as the State ³¹ is presented as responsive to pressure, the coercive aspects of the State are obliterated as McLennan underlines: "One gets in pluralism little sense of the active, coercive, non-democratic aspects of state power over and above the everyday channels of access" (McLennan 1984:84).

The State appears to be restricted to the role of a neutral institution where negotiation between these groups takes place. It is for this reason that Dale (1989:17) stresses that in this perspective "the state is certainly granted no autonomy, no power of its own" or, at most, it is restricted to "a sort of umpire or referee role" (*ibidem*), guaranteeing the application of the negotiated rules between the competing groups.

More recent 'pluralist' theories have attempted to deal with these criticisms ("pluralism II", as Lindblom 1977 calls it, or "sociological pluralism", in McLennan's (1984) words). They acknowledge the existence of power relations and even confirm that class hegemony has been neglected in former 'pluralist' perspectives. Charles Lindblom (1977), for instance, attempts to incorporate the existence of power relations in a new 'pluralist' formulation. He acknowledges that businesses may put great pressures upon the State and it may prove to be difficult for the State not to support and enhance their activities in order to maintain social stability. In his view, crucial issues are restricted only to be handled by "government officials" and "businessmen". Only less vital issues are disclosed to sectors with less power in society. In 'pluralism II', thus, there appears to have occurred a recognition of, at least, some aspects of other political theories, such as the marxist, with regard to the importance of power

relations. Thus the State apparently is no longer depicted as simply a neutral arbiter among competing groups. However, this affinity does not extend very far since these same theorists believe that the political system provides open channels for non powerful groups to check the bias and distortions which "business" may bring to State activities (McLennan 1984).

2.1. 1. 2 *'marxist' theories of the State*

The summary of marxist theories presents a considerable challenge as comprising an extensive and diverse literature. 'Orthodox' marxist views on the State have tended to present it not as a neutral arbiter between the various social groups but as an instrument of the dominant class, the bourgeoisie, who owns the means of production and therefore has appropriated the State, to achieve its own interests. Since the State is conceived as part of the superstructure, it reflects the needs and direction of the economic base as well as the interests of capitalists who have the power to determine the State's activity. Therefore the State does not represent the 'common good' or the 'general will'. In order to enforce the interests of the minority the State uses coercion, including physical force, and is perceived as repressive. The theory in the terms outlined here constitutes a 'crude', simplified version of marxism.

One of the criticisms of this version, which is of considerable interest to my argument, points out that, as much as it has emphasised power relations, it has neglected the ways in which States develop their activities in forms not accountable to the dominant class. Other criticisms also compelled this version of

marxism to rework its formulations. 'Neo-marxist' theories, in their reworking of economic determinacy in more complex and subtle terms, have questioned the relationship between State activity and the capitalist mode of production. State activity is considered to enjoy an autonomy (a relative autonomy) from economic conditions and is influenced by other relations than those dictated by class. This means that there are State activities which are not accountable to the process of accumulation.

As a matter of fact, the (relative) autonomy of the State is already theorised in the writings of Marx and it is these views that 'neo-marxism' attempts to develop. In the first place, in Marx's view, relative autonomy results from the fact that those who occupy State institutions cannot be considered as part of the dominant class, and should be perceived as independent, although acting as executors of its policies. Further, Marx also analysed, in *The Eighteenth Brumaire*, the 'exceptional' conditions under which the State was able to rule on its own: this occurs when the dominant class, in specific historical circumstances, has not enough power to rule and as a consequence allows the State and its agents to take direction of events.

Two recent contributions to this perspective provide us with central insights for this research. Claus Offe is referred to here for his particular concern with providing a more concrete specification of the autonomy of the State.

Offe is concerned with a notion of the State which distances itself from the narrowly defined alternatives of the controversy around Marxist theories of the State:

I have attempted to think of the modern state as a highly complex agency that performs a variety of different, historically and systematically interrelated functions which

can neither be reduced to a mere reflection of the matrix of social power nor considered as part of an unlimited multitude of potential state functions (Offe 1985:4).

In Offe's theory, it is assumed that the State is deeply involved in the process of accumulation. State institutions or bureaucracies are supported by the revenue brought in by the process of accumulation. However, this cannot be interpreted as if the State acts solely in the interests of the dominant class. State institutions are sites much too complex to simply reproduce the needs and interests of this class. According to this line of argument, Offe has stressed that:

The capitalist state can no longer be characterized as an *instrument* of 'the' interest of capital (an interest which is neither homogeneous nor 'generally understood'); rather, this state is characterized by constitutional and organizational structures whose specific selectivity is designed to reconcile and harmonize the 'privately regulated' capitalist economy with the processes of socialization this economy triggers (Offe 1984:51).

The State, in Offe's theory, in order to support the process of capitalist accumulation, needs to follow four conditions for guaranteeing its own reproduction (Offe 1984). Firstly, the State cannot intervene openly in the organisation of production since "according to its own 'political' criteria, property, whether in labour power or capital, is private" (Offe 1984:120). Secondly, it depends on the taxation it can collect from the process of accumulation. This means that those who are State agents "are powerless unless the volume of the accumulation process allows them to derive (through taxation) the material resources necessary to promote *any* political ends" (Offe 1984:120). Thirdly, and for the reason just mentioned, State agents are involved in contributing to "a 'healthy' accumulation process" (*ibidem*). With regard to this point, the State has the mandate to create the conditions for the

accumulation process, avoiding any events which are perceived as presenting any threat to this process. Fourthly, it is through a process of "democratic legitimation" that political forces win control of the State whenever they are able to get sufficient electoral support. This constitutes only one of the forms of political determination of the State, that is, the "institutional form of the State", since the other one, the "material content of the State" (Offe 1984:121) is conditioned, as stressed before, by the process of accumulation.

In Offe's theory, the State is in the midst of strong contradictions and attempts to balance them through different forms. One of its features is its "structural selectivity". As Jessop underlines (1982), it is structurally organised in such a way that it needs to be able to respond to the interests of capital in general, and not to the interests of particular capitals, which are often contradictory among themselves. In the same way, the State needs to be able to reject the forces and processes that represent anti-capitalist interests and aims. Moreover, State institutions have also to respond to pressures upon themselves by other social groups such as the workers. The State is, in Offe's theory, "a crisis manager" (Carnoy 1984:131).

Furthermore, while representing the interests of capital, the State needs to appear as neutral between capital and labour, as well as among the different fractions of capital. Its class bias has to be concealed if the State is to be perceived as acting in the general interest. It must legitimate its activity in relation to these groups. This implies that it appear as a 'mediator' between opposing social groups and as such is constantly attempting to legitimate its activity.

Carnoy stresses that, in Offe's theory, "the bureaucracy becomes the 'independent' mediator of the class struggle inherent in the capitalist *accumulation* process" (Carnoy 1984:130, emphasis in the original). The 'independent' State cannot be only understood in ideological terms, i.e. in the sense of the general interest it claims to represent. The basic contradiction between commodification and decommodification processes which confronts the process of policy-making is crucial to understand this. The process of capitalist accumulation implies that labour power be transformed into a commodity. However, at the same time, the continuation of the commodity form increasingly depends, in contemporary societies, on the existence of State institutions whose activities do not assume the form of a commodity. As Offe stresses, a system based on exchange relations and the capitalist market cannot function unless it is supported by "flanking systems" such as the family and the legal system: "even in a purely competitive-capitalist social system, individuals must be socialized in normative structures, while the established rules of social intercourse must be sanctioned by sovereign power" (Offe 1984:38).

In his view, State policy is to be seen as an attempt at obtaining 'compatibility' between contradictory pressures and strategies to which the legal and administrative political system are submitted: "social policy (...) consists of answers to what can be called the internal problem of the state apparatus, namely, how it can react *consistently* to the two poles of the 'needs' of labour and capital - in other words, how to make them mutually compatible" (Offe 1984:104). "Administrative rationalisation" as well as the "authoritative participation of experts in the

development and evaluation of political programmes" constitute attempts by State institutions and bureaucracies to confront conflicting demands (Offe 1984:104-114).

Roger Dale (1981, 1989, 1991) has reworked Offe's theory in what is known as the 'core problems of the capitalist State' approach. The State is also analysed as a non-neutral arbiter in the process of accumulation and at the same time as non instrumental to this process: the State deploys various forms of activity not bound by economic needs which are often contradictory in their relation to each other. In Dale's view, the State responds to different (and quite often opposing) political, ideological and economic pressures or problems. These problems are referred to as: (a) supporting the process of accumulation (an economic problem); (b) guaranteeing an amenable context for its expansion (a political problem); (c) the legitimation of State activity and continuation of the process of accumulation (an ideological problem). Several important points are added to understand more explicitly the 'nature' of the State: (i) there are activities in which the State is involved which are not accountable to the process of accumulation; (ii) the State is not necessarily designed to tackle all problems it confronts in an effective way since its various institutions may be adjusted to different priorities; (iii) many of the chosen solutions may prove to be unacceptable or ineffective due to their cost; (iv) even when a solution is accepted, this does not mean that it will be implemented: each model of State organisation ('bureaucratic, 'purposive-rational', 'participating' models) presents its internal contradictions, and can be an obstacle to its implementation (v) solutions do not prove to be complementary to each other, rather

they are contradictory; when developments are pursued around one area or problem, these entail changes in other areas which are not compatible, for instance, with regard to levels of State expenditure; (vi) the implementation of solutions generally activates opposition and conflict, hence more problems (Dale 1989, Dale & Ozga 1991). Therefore, it is argued in this approach that "the education system is expected to contribute to meeting the economic, political or legitimatory needs of the State, and the simultaneous meeting of these demands is frequently impossible. Furthermore, the conflict between the solutions constitutes a dynamic force in the education system" (Dale & Ozga 1991:11).

This approach is in fact able to offer a non-deterministic view of the State and State policy. The demands put on the State by the economy are, in Dale's theory, filtered through the conflicts *within* the State as well as through the conflicts *between* the State and the various social (such as occupational) groups. They are specially focused providing an understanding of the complex ways in which State policy is formulated and implemented. The State is presented as being under different and contradictory pressures. As Apple underlines, concerning the 'core problems of the capitalist State' approach: "Dale restores history and contingency to the analysis of State policy" (1989:15). But the State is also analysed in the way it provides moral and educative leadership particularly by its recognition and acceptance of responsibility for mass schooling since the nineteenth-century. The ideological debates and political struggles between those located in State educational institutions and those situated in the various organisations of civil society end up producing negotiation and forms of winning consent of those for whom policies are intended.

A further point developed by Dale is to consider the effect of the forms of State institutions on the formulation and implementation of educational policy. He underlines that the forms that the educational State apparatus takes are not determined by the capitalist mode of production and thus identifies an interesting area for researching their similarities and differences in various social formations and in different historical periods. One of the more revealing points of Dale's analysis concerns the levels of selectiveness of State institutions regarding policy implementation. Although their selectiveness "may be seen broadly guided by the 'needs' of the capitalist mode of production" (1989:34), it is the particular histories of each State apparatus that can explain why particular sets of questions are raised in policy formulation and implementation while others are avoided.

All of these considerations are relevant in relation to the Portuguese State, in particular when one is confronted with other explanations. Some studies have emphasised the failure of the Portuguese bourgeoisie to develop, through the State, an effective hegemony for uniting the 'working classes' in a broad project of capitalist 'progress' (see, for instance, Magalhães Godinho 1971). The underdevelopment of the State education system in both the last and the present centuries is sometimes explained in these terms. To explain the slower development of Portuguese society through the 'defects' of the Portuguese bourgeoisie - hence as less 'able' than the bourgeoisies of other countries - does not seem to be a very convincing explanation¹. The 'core problems of the

¹ More precisely, a 'weak' bourgeoisie should be seen in the context of other more powerful factors, such as the context of world relations which may condition policy formulation and implementation in Nation-States. See also the discussion of this perspective in Reis 1984.

capitalist State' appear to offer a better theoretical framework for understanding the formulation and implementation of State policy in education. However some caution is necessary when using this theory to explain State involvement in mass schooling in Portugal at the turn of the nineteenth-century and in the following decades. Dale's theory is more related to later forms of capitalism whereas the specific conditions in which Portuguese capitalism developed need to occupy centre stage. During the period under study in this thesis, which constituted an early phase of capitalist development in Portugal, the State attempted visibly to create the conditions for capitalist growth, at least in specific sectors. For instance, its effort to rationalise the network of communications and transportation in the country in the last quarter of the nineteenth-century is a clear and important example of such activities. Further, it also developed activities to capture fractions of peasants, although in an uneven way as will be seen later, for absorption into exchange relations. But all these efforts were made when the capitalist system was in fact in an early phase. Hence, the legal and administrative State sectors were less developed as compared with a later phase. In this line of reasoning, it may be said that the Portuguese State was obliged to confront different problems (although contradictory among themselves) from those affecting the State in more industrial societies.

2.1.1.3. *'feminist' theories of the State*

As the main issue confronted in this thesis is gendered - the construction of primary teaching as *women's work* - it is crucial also to inquire into the 'nature' of the State in relation to gender. Two recent contributions have been selected, as they

provide a review of feminist theories on the State and offer their own interpretation.

Catherine MacKinnon (1989) posits a number of questions which are central to this task. Although she does not use the concept of patriarchy, she refers to a gender hierarchy and women's subordination to men through her understanding of "gender as a form of power and power in its gendered forms" (1989:xi). Some of the questions raised by MacKinnon are as follows:

Is the state to some degree autonomous of the interests of men or an integral expression of them? Does the state embody and serve male interests in its form, dynamics, relation to society, and specific policies? Is the state constructed upon the subordination of women? If so, how does male power become state power? Can such a state be made to serve the interests of those upon whose powerlessness its power is erected? (1989:161).

She underlines that feminism needs a theory of the State. Up to now feminist practice has tended to look at the State as appropriating either 'pluralist' or 'marxist' (orthodox) perspectives. In the first case, the State is perceived as a neutral arbiter, regulating conflicts of interest between men and women and framed by laws that may attribute equality of treatment for women. "Women implicitly become an interest group within pluralism, with specific problems of mobilization and representation, exit and voice, sustaining incremental gains and losses" (1989:160). In 'marxist' theories, the State is perceived as an instrument of domination and repression, "the law legitimating ideology, use of legal system a form of utopian idealism or gradualist reform, each apparent gain deceptive or cooptive, and each loss inevitable" (ibidem). Therefore, the possibility of intervention by women at the level of the State may be perceived as hopeless. It is due to the flaws of both perspectives that she

underlines that feminism needs a theory of the State: "a theory of the State became possible as the State was seen to participate in the sexual politics of male dominance by enforcing its epistemology through law" (1989:xi). Although MacKinnon appears to support theories that in relation to the capitalist process of accumulation recognise the autonomy (relative) of the State, with regard to male dominance, State autonomy (even relative) is non-existent. MacKinnon sees male epistemology as pervading all aspects of gendered life in a very powerful way.

However autonomous of class the liberal state may appear, it is not autonomous of sex. Male power is systemic. Coercive, legitimated, and epistemic, it *is* the regime (1989:170).

In the theory developed by Walby, the State is also perceived as acting in men's interests, but she moves beyond this assertion stressing that the State is both capitalist and patriarchal (1990:160). She reviews 'liberal', 'marxist feminism', 'radical feminism' and 'dual-systems theory' in her analysis of gender and the State. It does become clear that 'liberal' and 'radical feminist' approaches did not develop a theory of the State. The former reveals its concerns about the representation of women in State institutions via the notion that its increase would be positive for women. MacKinnon's critical comments with regard to 'pluralist' views on the State and gender, seen above, are relevant here. Regarding 'radical feminism', it has been so preoccupied with revealing the fact that personal relations and the 'private' domain are just as 'political' as other sites that it has not concentrated on the State as its primary concern.

Walby analyses a 'marxist feminist' theory of the State formulated by Mary McIntosh (1978). The State is connected both

with the capitalist mode of production and the oppression of women. It provides support for the accumulation process while, at the same time, it contributes to the maintenance of family forms which are oppressive for women. The aim of these State policies is to keep the family fit to be able to reproduce the labour force necessary for capitalism. As much as McIntosh establishes a functional tie between capitalism and the family, she also underlines the tensions that exist between both processes. In spite of her analyses of tensions and contradictions between capitalism and the family, Walby stresses that the theory has not lost its strong functionalist framework with relation to the family. She also thinks that McIntosh does not pay enough attention to the subordination of women within capitalism.

'Dual-systems theory' represents a different attempt to bring together both capitalist and patriarchal processes, giving them equal explanatory force. Walby provides a review of some of the contributions to the field, adding her own critical points. One of them includes Zillah Eisenstein's contribution (1979;1984) with her analysis of the way capitalism and patriarchy became integrated and came to constitute one system. In her appraisal of Eisenstein's theory, Walby states that it remains 'too economic' and that it places "insufficient emphasis on the political level and upon gender relations" (1990:159).

For Walby, who improves on the framework of 'dual systems theory', a theory of the State as both capitalist and patriarchal is crucial. And she adds:

(...) the actions of the state should not simply be read off from the interests or logic of the system; rather, there is a degree of autonomy of the political struggle from the material base of patriarchy and of capitalism. This political struggle is important in determining the state's actions (1990:159).

She wants to emphasise the impact of political struggles such as 'first wave' feminism in its attempt to win the vote, education and access to more work opportunities. This movement contradicted patriarchal relations which attempted to keep women inside the house, without access to political and wider social rights. Economic changes within capitalism and its need for a labour force, for instance in the service sector, in combination with feminist struggles, made possible the transition of women from 'private' to 'public forms of patriarchy'. Given that 'first wave' feminism was able to achieve a victory principally at the political level of the State, it has contributed to broadening women's work opportunities and protected them from some of the worst forms of exploitation.

Walby's theory clearly takes a different perspective to MacKinnon's. For the first author, the State is perceived as the opposite of a monolithic organisation, and State policies concerning gender relations are seen as the outcome of political pressures and struggles, within a changing context of capitalist relations. Contrasting with this position, MacKinnon assumes the State as pervaded and unified by a powerful masculine epistemology. Although in her view the State is both capitalist and patriarchal, MacKinnon seems to assume that patriarchy is the basic division and also a more powerful division than capitalism. The message appears to be that there is not much hope in struggling for a change in gender policies since the State is patriarchal and all its activities concerning gender will be pursued according to a male epistemology and culture. The (relative) autonomy of the State perceived by Walby emphasises the

importance of political struggles with respect to State activity and the production of policies in gender and social relations - and in this sense it opens up the possibility for understanding the State as an arena of domination *as well as* an arena where contradictions and tensions may provide space for human intervention and change in gender as well as in capitalist relations.

2.1.1.4 the 'nature' of the State as both capitalist and patriarchal

It is possible to find areas of consensus between Walby's and Dale's theories, in terms of the 'nature' of the State as 'capitalist' and also of its (relative) autonomy from the process of capital accumulation. Further, both agree that not all State activity is explained in terms of the process of accumulation. In this way, there is room to understand that there exist State activities oriented solely by patriarchal relations and there are other activities which are not related to patriarchy at all. What are the implications for the development of mass schooling of intervention by a State which is seen as both capitalist and patriarchal?

2.2. what is the role of the State in the construction of mass schooling?

Few theories on the development of mass schooling consider the 'nature' of the State as being both capitalist and patriarchal. It is also rare that such theories clarify their own hidden assumptions about the State and its activity. To question the role of the State regarding mass schooling and to ask how and why this is explained by the various theories may well be a rewarding step for understanding the development of mass schooling and the feminisation of teaching in Portugal. Recent contributions have compared the process of mass schooling in

different countries in an attempt to identify the common social factors underlying the development of mass schooling and to identify the specificities of each national development in education. It is believed that these approaches "can help to explain the historical causes of the different patterns of education that have emerged in different countries" (Green 1990:IX).

In what follows, I will firstly review the theories that emphasise the development of mass schooling on the basis of the needs of the labour market; secondly, I will confront one 'social control' theory with regard to this development - Bowles & Gintis's historical view of the development of mass schooling in the United States; thirdly, I will present Margaret Archer's theory of the construction of education systems through the interaction of opposing groups; fourthly, Andy Green's recent work on *Education and State Formation* will be reviewed, giving particular emphasis to Gramsci's influence on his perspective; fifthly, 'feminist' explanations of mass schooling for both boys and girls as well as their basic question about why girls' schooling developed in different and unequal terms are presented; finally, recent theories about the 'construction of the national polity' through mass schooling are discussed while the influence of the interstate system in promoting such schooling is considered.

2.2.1. education and the labour market

Authors in the functionalist tradition conceive education as a means of providing 'social integration' for the young members of society. Education is perceived as a means of integrating individuals in society, providing them with values, beliefs and moral perspectives. The State's role in the expansion of mass

schooling contributes to maintaining this 'social unity' through the transmission of culture. This was the emphasis Durkheim brought to the field of education. At the same time, these theories attach an equal importance to schooling for the acquisition of skills and of values required by the labour market. In particular, the American functionalist tradition, represented by Talcott Parsons and also by Kingsley Davis & Wilbert Moore, keenly underline this function. Schooling socialises the future workforce with the orientations necessary to insert it into the various levels of a stratified and hierarchical society, according to the abilities of each of its members. It is possible to argue, in line with Green (1990), that the State, in the American version of functionalism, is not concerned with providing and consecrating the 'social unity' in the same terms as Durkheim:

Modern functionalism has lost much of what was useful in Durkheim's work without in any way mitigating its deficiencies. In particular it has forgotten the degree to which Durkheim developed his ideas against the grain of nineteenth-century individualism. (...) In the United States, the archetypal home of individualism, (...) his ideas have become the textual reference for conservative educational theories. In so doing they have lost much of their historical dimension and relevance (1990:38).

In this perspective, the role of the State in the expansion of mass schooling is seen as being mostly concerned with State schools developing a more effective response to the needs of the labour market.

The assumptions of this perspective have already been criticised in relation to both contemporary and nineteenth-century schooling. Regarding the State's role in the maintenance of contemporary schooling, several authors have underlined that the State's inability to accomplish this task is notorious mainly due to

the rapid changes of the labour market. Randall Collins (1981) has also stressed that job skills are learned mainly in the workplace, which undermines the functionalist emphasis on the importance of State schooling for teaching the appropriate skills.

Further, changes in education systems are not attributed to the pressures of the labour market to the extent assumed by functionalist theories. The development and expansion of State schooling is explained by other factors as demonstrated by the historical evidence from England and other early industrial economies. In the first stage of the 'industrial revolution', the skills required in machine production were not learned in schools but were brought to the workplace by craftsmen whose skills were appropriated by the newly emerging industrial world. And the skills needed for the crowd of unskilled women and children, who also worked there, were rudimentary. It was only in later phases of industrial development, when industrial techniques became more complex, that new requirements were placed on the education system. But, again, as already pointed out, this does not mean that schools in England were adapting quickly to these pressures. There were complaints about the low level of technical knowledge acquired, for example, in early education even among those who attended courses in Mechanics Institutes (Green 1990). More historical evidence can be brought from countries that were not yet involved in industrial development and yet were advanced in promoting their education systems, and in expanding mass schooling. As Green states (1990), this was the case of Prussia, for instance, where the development of mass schooling developed well in advance of industrial 'take-off'. Mónica's (1977) analysis of educational expansion in Japan is another example of planned

educational development prior to industrial expansion. This historical evidence not only questions whether mass schooling was developed in accordance with economic needs; but also underlines the fact that the expansion of mass schooling cannot be connected directly with the process of industrial development. Therefore, it is difficult to support the view that the State's role in the expansion of mass schooling was guided, in the first place, by the economic needs of an expanding industrial order.

2.2.2. education and 'social control'

'Marxist' theories about mass schooling give different answers to the question of the State's role in mass schooling development. For writers such as Bowles and Gintis in their *Schooling in Capitalist America* (1976), the State's role in the expansion of mass schooling was pursued due to the expansion of capitalist relations of production. Educational reform is associated with the development of capitalism: as capitalism changed its forms of production, education also changed to meet the needs of capitalism. In their theory, mass schooling has in fact emerged to confront the new social conditions brought about in American cities by the development of capitalism. The growth of the urban proletariat, as well as of a 'reserve army' of the unemployed from diverse ethnic origins gathering in rapidly growing urban areas, was one of the main concerns for capitalists and social reformers:

[The process of capitalist accumulation] had inexorably generated a condition which challenged the continued domination [of the capitalist class]. With increasing urgency, economic leaders sought a mechanism to insure political stability and the continued profitability of their enterprises. (p.159)(...)
Capitalist economy and bicycle riding have this in common: stability requires forward motion. Yet the accumulation of capital and the widening of capitalist control over production

It was to solve this contradiction that State mass schooling was introduced. Schooling would not exactly provide workers with the skills needed by industry, but would teach obedience and submission to those whose destiny would be the lower ranks of the occupational hierarchy. Those who were to occupy the higher grade posts should be taught leadership, determination and self-direction.

In the last pages of their study, however, Bowles & Gintis appear to change their theory. They state:

The development of mass education (...) was, in many respects, a genuinely progressive development. (...) This massive expansion of schooling (...) was not simply an imposition on the working-class, though workers and their children did sometimes resist attendance. Less still was it a victory for the working class, though the benefits of literacy, access to more advanced learning, custodial care and the like are real enough. Rather, the spread of mass education can best be seen as *an outcome of class conflict, not class domination* (emphasis added). The impetus for educational reform and expansion was provided by the growing class consciousness and political militancy of working people (ibidem:239-40).

Therefore, they start their study offering an implicitly instrumentalist view of the State regarding mass schooling and class relations and move afterwards to present the State as an arena of conflict and struggle. It is this ambiguity in their work that has been emphasised by several authors (for instance, Dale 1981; 1989; Demaine 1981; Cole 1988; Gintis & Bowles 1982). In fact, the last part of their study contradicts their main analysis, which has the effect of reducing the role of State involvement in mass schooling to something quite mechanical. It is for this reason that R. Dale (1981;1989) has pointed out that what is missing in *Schooling in Capitalist America* is, indeed, the State. Additionally,

authors such as Katznelson & Weir (1985) have commented that the working class is also more or less absent in *Schooling in Capitalist America*. They express their view as follows:

(...) the working class appears automatically as merely the object of history and public policy, an epiphenomenon of capitalist desires and activities. By contrast, we think it is impossible to develop accounts of the relationship of schooling and capitalism without treating schools and school systems as institutions actually or potentially contested by members of the working class... we must look at moments of indeterminacy, conflict, and change in the character of the public schools. Such examinations demand that we look not only at capitalists but at workers as well (1985:19).

What is relevant for the project of my thesis is that Bowles and Gintis have implicitly drawn attention to the 'nature' of the State as capitalist and to the relationship between the process of mass schooling and the accumulation process. However, their study falls manifestly short of understanding the (relative) autonomy of the State, and the State as an arena of political conflict. Moreover, the specific conditions of a social formation such as the Portuguese cannot be incorporated easily into their perspective: although the State was itself enmeshed in the process of accumulation, while at the same time involved in the construction of mass schooling, it did not confront either the rapid and intense forms of urbanisation and industrialisation or the growth of an urban proletariat on the same terms as the United States.

2.2.3. *education and conflicting group competition*

Another approach to the State's role in the development of mass schooling is Margaret Archer's study (1979, 1984 university edition), which is framed in a broader 'pluralist' theory regarding

State activity (Dale 1981). It examines why and how the State (in France, a centralised State, and in England, a decentralised system) became involved in this process. It is the interaction between groups with different interests and perspectives about education which is both central and the main explanatory force.

In explaining the emergence of education systems, Archer identifies, in the nineteenth-century, two types of groups: 'dominant' groups (constituted in particular by the churches) and 'assertive' groups (emerging groups struggling for forms of education in tune with their perceived educational needs) who clashed for the control of education. As Archer states: "to understand the nature of education at any time we need to know not only who won the struggle for control, but also how; not merely who lost, but also how badly they lost out" (1984:2). According to the different social conditions in which these groups struggled, they adopted either 'restriction' or 'substitution' strategies. With regard to the first strategy, 'assertive' groups aimed to destroy the control dominant groups had secured, and to use the State machinery to implement their own educative views. They were able to pursue this strategy given the particular conditions and resources they enjoyed, securing a special political influence on State processes. Using the 'substitution' strategy, 'assertive' groups offered alternative institutions for the provision of education. It was in particular their notorious wealth which provided them with the possibility of choosing 'substitution'. Archer details the conditions which influenced the choice of these two strategies pointing out that, in the French case, the 'assertive groups' came generally from the professional and commercial bourgeoisie and, although they had not much wealth, they were able

to influence the State, gain access to, and even control its services. The English "assertive" groups were drawn in particular from the industrial bourgeoisie who had at its disposal enough financial resources to offer alternative educational institutions. The conditions that were at the disposal of each of these groups and the strategies they followed contributed to the shaping of centralised and decentralised systems.

It is not our aim here to discuss and illustrate Archer's complex and extensive theory about the developments of each system in specific historical periods. However, regarding the centralised systems, her analysis offers interesting insights when applied to the emergence and expansion of Portuguese State intervention in schooling. In the last part of the eighteenth century, social groups, interested in the introduction of new forms of production (related to manufacturing) and social life, put pressure upon the dominant groups, such as the aristocracy and the clergy. The prime minister Pombal, dominant within the institutions of the absolutist State (under the rule of King José I), attempted to implement this project of social life, which implied the emergence of a new group of civil servants. Pombal clashed with the Jesuits (who until then had controlled most of education in Catholic countries) over the ends of education and, after their expulsion (as happened in Austria in 1774), launched the first schools of writing, reading and counting, in 1772. However, in contrast with Prussia, where State intervention at primary school level was launched at a similar time (1763 Frederick II's compulsory schooling laws, see Green 1990), compulsory attendance was not introduced. The Portuguese legal document, while creating the first 'schools of 'reading, writing and counting',

under the control of the State, stressed that those schools would not be attended by "peasant or working class' *sons*' (emphasis added) 'for whom the priests' instruction would be sufficient"². The State was also empowered with several measures concerning the regulation of teachers' activities: regulations concerning the national examination to which future teachers would submit to be qualified and also concerning the annual report teachers had to write at the end of the academic year. Men teachers came to be considered as part of the civil service since the Pombal Reforms (1772). This meant that they would be surveyed by central agencies or their delegates not only about their competence, but also about their moral 'adequacy' and political loyalty towards State policies (as many historical periods of its history can document). The 1772 law (as well as the previous 1759 law on secondary and higher education) clearly demonstrated State assertion, direction and management of education:

(...) more than ever, teachers, either laymen or priests, are seen as 'state functionaries'. In Portugal, in the second half of the eighteenth century, the secularisation of teaching is synonymous with state intervention in education initiatives. Secularisation and state intervention are part of the same social and educative project, as the 1772 law came to prove (Nóvoa 1987:169).

The political elite and the bourgeoisie, in this period, can be considered as the assertive groups and were 'coterminous' in the sense given by Archer (1984:62). Even if the assertive groups lacked resources, they disposed of "the central machinery to organize public educational financing rather than having to provide such facilities [themselves]" (Archer 1984:62). The modality the Portuguese assertive groups employed, much in the same way as

² Law 6 November 1772 in *Collecção das Leys*..

55

the French, was "to increase the fiscal burden on the public" (ibidem), by launching a direct tax that made towns and villages pay for educational services (cf. Nóvoa 1987³).

Regarding the later development of education systems, Archer emphasises that it is through negotiation that the process developed, although this negotiation followed different processes in centralised and decentralised systems. Archer's analysis of the development of the French education system, for instance, at the end of the nineteenth-century during the Third Republic, stresses that it was mainly through political manipulation that change was introduced into the system (and not "internal initiation" nor "external transaction") given the lack of autonomy of the diverse groups either working in the State or not:

Political manipulation is by far the most important form of negotiation in centralized systems. Because education as a whole has so little autonomy from the government and because groups seeking change have few alternative means of obtaining it, most pressures converge on the political centre. (...) The parties seeking new services (...) must go outside the system in order to influence it, by pursuing a national political organization or external pressure group (Archer 1984:114).

Regarding the State's role in the emergence of mass schooling, Archer stresses its support for both "restrictive" and "substitution" strategies which allowed "assertive" groups to implement their own views on education. Therefore, in this phase, the role of the State regarding mass schooling was instrumental to the aims and struggles of "assertive groups". Education systems only gained some autonomy in later developments:

(...) [it is only] when the resources used by education are no longer owned and monopolized by one party (...) [that] a significant amount of educational autonomy develops for the

³ Cf. also the critical review by S. Stoer and H. Araújo on Nóvoa 1987, in *Revista Crítica de Ciências Sociais*, 1990 (29).

first time. (...) This net consequence of multiple integration for education is a potential increase in autonomy, defined as the capacity for internal determination of its operation. This may not be extensive in certain cases, but its existence to some degree in every state system is in complete contrast with the total lack of autonomy which characterized education under private ownership (Archer 1984:90,91).

There are indeed many insights in Archer's theory that can be pursued regarding the development of mass schooling in a centralised system such as Portugal's. For instance, with regard to the question of teacher autonomy, according to her perspective, teachers are seen as having a lower degree of professional autonomy in comparison with teachers in decentralised systems. Moreover, her analysis of education systems at the level of institutional and organisational forms demonstrates that the analysis is about different forms of State. And this undoubtedly has consequences for the processes adopted to implement change as well as for the specific degree of autonomy education systems are able to achieve.

However, for our specific problem of understanding the process of expansion of mass schooling, the attempt to explain this process through the interaction between groups with different interests, whilst throwing some light on Pombal's launching of State intervention in education, in the second part of the eighteenth century, appears as less convincing regarding the (slow) development of mass schooling during the nineteenth-century. Further it does not offer a way of understanding the 'nature' of the Portuguese State in the specific period addressed in this thesis. As other authors have stressed (Dale 1981, Green 1990), in Archer's theory, it is not clear why the State intervenes nor what direction it takes in specific periods in education systems. "The emphasis is on the machinery rather than (...) on what powers it" (Dale 1981:27).

2.2.4. education and 'hegemony'

The recent work by Andy Green (1990) *Education and State Formation* compares the process of mass schooling in different countries to determine the common social factors underlying the development of mass schooling and to identify the specificities of each national development in education. Green offers his own perspective, drawing on Gramsci's concept of hegemony, to explain this emergence in countries such as Prussia and Austria (both characterised by the 'absolutist State'), France (the centralised State), England and the United States (both decentralised systems).

Green's analysis is premised

(...) on the notion that the development of public education systems can be understood only in relation to the process of state formation, where this is understood in a non-reductive way which gives due weight to both political forms and their economic and social conditions of existence (1990:77).

He stresses that in Gramsci's theory there is a central belief in the 'educative' and moral role of the State (1990:91) and this provides a clue to understanding its involvement in mass schooling. In Green's attempt to move beyond the instrumental role of the State and the economic determinations of prior marxist formulations, the State is perceived as an arena (but not the only one) where the ruling class exerts its power by coercion, and at the same time, also attempts to win consent from the subordinate social groups. State schooling is, in Gramsci's view, a form of attempting to win consent from the people. But schools are also important sites to build up a counter-hegemony, in the way they provide access for working class children to 'elements of the curriculum' they need to master: "[Gramsci] thus appears broadly

sympathetic with the universalizing principles of a schooling designed to transform popular culture through an uncompromising struggle against folklore" (1990:97)⁴. Since schools are sites of conflict and struggle, State involvement in mass schooling is neither perceived, in Gramsci's terms, as instrumental to class rule as in some marxist formulations nor seen as mediating among different social groups as a 'social arbiter'.

It is Green's attention, in particular, on 'statism' and education in continental Europe that is relevant to this research. In his clarification of the State's role in the development of mass schooling, Green points out the way Marx theorised the State in a centralised society, such as French society. Marx saw the centralised nature of the French State as inherited from the absolutist monarchy but appropriated by the revolutionary movement; later

(...) it became an indispensable tool of the bourgeoisie, not only for the maintenance of its political hegemony but also for forcing the development of civil society. Through its concentrated and directed power, it could compensate for the relative stagnation and underdevelopment of the economic forces (Green 1990:102).

This same role for the State could be seen in the German autocratic Junker State in the post-Napoleonic period and in general in other countries where the State played a role in modernisation and in "bourgeois rationalisation" (ibidem). In its effort to follow in the wake of the first industrialising country - England - the State in continental Europe was "a directive force to prime the pump of industrial development in a concerted attempt to catch up with the leading industrial nation" (Green 1990:102).

⁴ Cf. also Mardle (1977) and Stoer (1982) for an appraisal of Gramsci's contribution to understanding the role of education to changing social relations.



The same view on the State's role is also supported by Gramsci. But Gramsci was also concerned about the role the State played in cultural transformation, consolidating bourgeois rule in continental Europe. According to Green's view on Gramsci, this could be seen in particular in countries where "an acute social and ideological polarisation had occurred as in France, or a very deliberate effort of national reconstruction from above, as in Prussia" (Green 1990:109). In this process of cultural transformation, the schools undoubtedly played an important part: the developments these States undertook during the nineteenth-century in developing and consolidating education systems were in tune with the process of State formation and bourgeois 'hegemony'.

However, when Green engages in a more detailed analysis of the State and construction of education systems, as for instance in the French case, his analysis seems to slide into a 'social control' view of mass schooling, instead of throwing light on the way education systems expand both by conflict and by winning the consent of the people. In his view, State mass schooling, which expanded late in the nineteenth-century, attempted to

(...) impart a limited version of the national culture that would encourage political loyalty and civic obedience amongst the working class and impart a modicum of useful, appropriate skills without encouraging excessive ambition or the desire for social advancement. (...) They sought to inculcate a pious and receptive attitude and to instill the Christian virtues, but avoided exciting any worldly ambitions. (...) At primary level education was thus essentially an instrument of social conformity. Its effect on the class structure was regulatory and consolidative, specifically designed to foil excessive ambition and to limit social mobility (ibidem:162-3).

Some questions about Green's theory do not find an easy answer: was the State successful in transmitting a "limited

version of the national culture" to the working classes? what conflicts and resistances did the extension of mass schooling cause in France? Green in his theoretical discussion emphasises the specific role of the State in cultural transformation - is this understood as the State acting solely as an instrument of bourgeois rule? or does the State's role in cultural transformation also mean that some of its activities in this field cannot be easily related to bourgeois rule?

From Green's analysis of the French and Italian States and societies, one can extract points for further analysis concerning the expansion of Portuguese mass schooling and the role the State played in it. The Portuguese State appears similar to the French State with a centralised administrative organisation inherited from the prior absolutist State and appropriated by the Liberal Revolution of 1820. This appropriation could have provided the Portuguese State with the means of attempting to forge a 'hegemony' in relation to social groups and institutions. However, similar to the Italian case, the Portuguese State appears to have been 'unable' to consolidate its own hegemony in a prolonged and systematic way. This was not because of regional divisions as in the Italian case (Italian national unification was only attained in 1870) - Portugal acquired its present frontiers as far back as the middle of the thirteenth century; later it lost its independence to the Castilla kingdom (Spain) at the end of the sixteenth century (1580) but was able to recover it sixty years later (1640), due to the specific context of world relations (see Cabral 1979). Regarding national unity, after the 1820 Liberal Revolution, (and until the middle of the century) a civil war, peasant uprisings and an extended governmental instability clearly constituted an

61

obstacle to the consolidation of hegemonic power by the Portuguese State. However in the second part of the nineteenth-century, this situation changed and apart from some periods of governmental instability, national unity prevailed. Portuguese capitalism was in expansion (Cabral 1976). Truly it was in the period ruled by 'Regenerators' (1851-1890) that State mass schooling grew: the number of schools more than trebled, albeit still with low figures. And the difference between private and State school provision became visible as the number of State schools grew to four times the number of private ones (Nóvoa 1987: 345-9). But the rate of illiteracy still remained around 80% at the turn of the century: between 1878 and 1900, the rate diminished from 82.4% to 78.6% (Nóvoa 1987:351). Although Portugal was indeed experiencing capitalist development and an expansion of mass schooling, this was pursued at a considerably slower pace of expansion than the same processes in core countries. What are the specificities that should be taken into consideration in the Portuguese case for the expansion of mass schooling? Gramsci's emphasis and Green's study of the State's role in economic and cultural transformation is crucial to understanding the State's activity in Portugal as a strong and interventionist State, although conditioned by a process of slow accumulation. Further, it is possible to ask whether the 'educative' and 'cultural transformation' role of the State that Gramsci was talking about had other effects than channelling popular consent to bourgeois rule. Why were sectors of the labour movement defending access to State mass schooling? Was their belief in the positive aspects of mass schooling a mere illusion? What were the effects of the pressures put by republican and (utopian) socialist

politicians and educators upon State education? They were pressing for better schooling and for a wider curriculum in primary schools to overcome the 'mechanical learning of reading, writing and counting' in primary schools (Coelho 1892).

Mass schooling developed as a conflictual process in Portugal. Although there are no studies in Portugal about the views of the various social groups on popular education at the end of the nineteenth-century, we know these views in the first decades of the twentieth-century. Poor peasants were represented in novels as stating that formal education was a destiny for high status groups, but not appropriate for their children (Mónica 1977). Fractions of landowners opposed the development of mass schooling which they saw as a threat to their power in villages and likely to destabilise rural life. In industrial cities, where school rolls were growing rapidly, there were at least two different 'strategies' towards mass schooling: in the emerging Republican ranks, instruction (seen through the metaphor of the light that illuminates the enslaved mind) would improve the lives of working people. It should be through 'statism' (Baron *et al.* 1981) as a strategy that mass schooling would develop (Mónica 1977). Other fractions of the labour movement, in particular those influenced by the anarchist movement, were creating their own forms of education. A. Candeias (1981, 1987, 1992; see also Stoer 1986) has analysed their forms of educational organisation which included a redefinition of contents and changing pedagogical methods. This can be seen as a strategy of 'substitution' (Baron *et al.* 1981) where the popular movements offered alternative forms of education to the working classes. Therefore, it appears that the Portuguese State, in its process of gaining hegemony through the expansion of

mass schooling, found opposition from landowners and resistance from peasants, as well as from certain sections of the urban working classes, who were organising 'substitutive' strategies (albeit limited in their extension) of mass schooling.

2.2.5. education and 'feminist' explanations

There are few studies from a 'feminist' perspective which focus on why the process of mass schooling for both boys and girls developed at all. Feminist scholars argue generally that explanations about the development of State mass schooling do not take into consideration the fact that this was a process affecting both boys *and girls* (see among others Miller 1989).

A somewhat different, but equally important question, is to understand why mass schooling historically was constructed differently and on unequal terms regarding gender relations. Girls' mass schooling developed later than boys' mass schooling and on precarious terms, as can be seen in the Portuguese case. When the State created primary schools at the end of the eighteenth-century, they were declared as exclusively for boys. Further, in the first legal document issued by the State in 1836 girls' mass schooling was not mentioned. The *1844 Education Act* referred to girls' schools as 'specialised', as something that was to be added to the earlier provisions, but it constituted an isolated chapter. It is only in the *1878 Education Reform Act* that mass schooling was said in a clear way to be applied to both boys and girls (see chapter 2). Throughout the nineteenth and greater part of the twentieth-century, girls' schools, as well as girls' school enrolments were therefore fewer than boys'.

Some historians and sociologists have debated the origins of mass schooling in England for both boys and girls. Anna Davin stresses (1979) that neither political explanations underlining the relationships between the expansion of mass schooling and the 1867 Franchise Act nor the needs of the 'expansion of empire and commerce as well as industry' are relevant to the development of mass schooling for girls: women were still excluded from suffrage in the 1870 Education Act; and were generally not employed in jobs in industry, commerce or even offices. In Davin's view, mass schooling developed to inculcate morals and discipline in the 'deficient' working class family and to instil in the working class a new model of family functions and responsibilities:

Education was to form a new generation of parents (and especially of mothers) whose children would not be wild, but dependent and amenable, accepting not only the obvious disciplines of school and work but also the less visible constraints of life at the bottom of the heap. Education was to establish (or as they believed to re-establish) the family as a stabilizing force (Davin 1979:90).

And this family model, finding its origin in the bourgeois ideal, was constituted by a "male breadwinner with a dependent housekeeper wife and dependent children" (ibidem).

Dyhouse shares this theory about the development of mass schooling (1981), although she concentrates more on the position of women than on the family. She frames the expansion of mass schooling within the concerns of reformers and educational politicians preoccupied with 'civilizing the poor' and "[bringing] the structure and organisation of working-class family life into line with middle-class values and canons of 'respectability'" (1981:79). Dyhouse stresses the specific context in which this impetus arose: infant mortality was still high and the birth rate, low. Also there

was a continuing obsession with the 'physical deterioration' of the British people at the same time that there existed anxieties about the future of the British empire and 'national efficiency'. In all these public anxieties, women were seen as potential instruments of a "rationalised and civilised society". Arnot emphasises that in this perspective, "women were now being seen as a 'national asset' and their education was judged to be necessary for the future of the country" (Arnot 1982:25). Working-class girls were taught domestic skills such as needlework, cookery and laundry work since, as future mothers and wives,

(...) [they were seen] as responsible for working-class living standards. (...) Poverty, it was repeatedly urged, could be cured through thrift and careful housekeeping. (...) If so much depended on women's domestic skills, and if working-class women were generally perceived to be so ill-equipped as wives, mothers and housekeepers, it followed in the minds of contemporaries that schooling might supply a remedy (Dyhouse 1981:81).

Deem (1978) emphasises 'the interests of capitalism' in the expansion of mass schooling for girls as well as for boys, albeit girls' education was addressed in different terms: girls needed to be educated in order to become "competent housewives, thrifty homemakers and careful mothers" (1978:19). In that way a labour force for capitalism would be reproduced with minimal costs.

Turning to the second question - why mass schooling developed differently and on unequal terms for girls - part of the answer is already given by these same historians and sociologists. The specific role attributed to women in English nineteenth-century society, i. e. becoming attentive wives and mothers, conditioned the process of mass schooling, with implications for specialised subjects introduced in girls schools' curriculum, in

particular 'needlework'. There was "an explicit ideology of gender differentiation" (Arnot 1982:23) and an ideology of "women's domesticity" (ibidem:26; Purvis 1991). Further, mass schooling aimed to maintain a sexual division of labour in the sense that boys would be prepared to perceive the public sphere of work and life as their domain; and girls were required to channel their energies mainly into the home, and to become 'home based'. Undoubtedly this process of gender differentiation coincided with a general devaluation of girls in relation to boys - albeit nineteenth-century discourses on women attempted to present them as central to the development of society, in particular of the moral order.

The 'feminist' contributions concerning how gender divisions have intersected with the process of mass schooling are important to the problem that concerns us here. As Arnot emphasises (1982:26) "the development of schooling (...) was of key importance as one of the major agencies through which the division between public and private spheres was reinforced and associated with the male and the female". In fact, feminisation of teaching is related in specific ways to the division of public and private as well as to the process of educating boys and girls. For these reasons, the intersection of gender divisions with the process of expansion of mass schooling needs to be addressed.

With regard to the problems discussed in this thesis, the theories of Davin and Dyhouse are an interesting contribution to understanding the aims and intentions of politicians and moral reformers in the formulation of educational policies regarding the development of mass schooling. They underline that the family was perceived, by these politicians and social reformers, as a way of controlling the masses. However, like other explanations of 'social

control', they appear to develop their arguments within a ⁶⁷ functionalist framework, where the policies implemented are perceived as directly produced by effective and powerful politicians. For this reason, there is apparently no attempt to examine how these policies were received and restructured nor a consideration of their effects: were they in tune with the proposed aims of their authors? With regard to Deem's theory, some criticisms can be made of the way it gives centre stage to economic factors in the reproduction of the capitalist mode of production and leaves little room for political factors in the construction of mass schooling.

These perspectives appear, in one way or another, to be critical of the mainly functionalist explanation that mass schooling developed in response to the needs of the labour market. Their departure point is to demonstrate that this could not be the case for explaining mass schooling for girls. However, while debating the aims of State policies in relation to girls' education, they also appear to fall into the functionalist trap by overemphasising the way in which education for girls serves social control functions. Therefore, any sense of contradiction, resistance or conflict is lost. Undoubtedly, an important point to make here regards the kind of attitude one should take towards functionalist explanations. Barrett's (1988) acute remarks thus appear extremely relevant:

(...) we should not let a general hostility to 'functionalist' forms of explanation blind us to the fact that some institutions of capitalism are the product of explicit State policy and that therefore any account of them must inevitably be a 'functionalist' one (Barrett 1988:120).

But then what is missing in these accounts of the development of mass schooling for both boys and girls is, paraphrasing Barrett (who quotes R. Johnson 1976), an analysis of the unintended effects of State policies. In response to Johnson's question "why does state policy on education have effects which were not those intended?", Barrett replies: "Undoubtedly the answer will be framed in terms of struggle, the 'obstinacy' of the working-class and inefficiency or failure of the State in securing its ends" (Barrett 1988:121). Although this reply is not totally satisfactory (the State appears far too monolithic in this account), it does emphasise that the unintended outcomes of State policy may draw our attention to the active role of social actors in resisting/interpreting educational policies.

Furthermore, another kind of question may be put which avoids the functionalist framework. It stresses the conflicts around mass schooling for girls: where did the pressures for girls' schooling come from and how were they accommodated? This question takes on additional importance in the Portuguese case where innovative views with regard to this matter had to confront the most traditional of perspectives on women and on education at the end of the nineteenth and during most of the twentieth centuries.

2.2.6. education , the construction of citizenship and the world system

Recent studies attempt to bring together a world system perspective to understand how the expansion of mass schooling processes occurred in different world locations at the end of the eighteenth and during the nineteenth centuries. They focus mainly on "transnational similarities" (Ramirez & Boli 1987:2) with regard

to the ideological and organisational responses of States to forge a "national polity".

Theories from a world system perspective argue that states do not have unlimited discretion in affecting the structure and organization of formal education; in other words, their internal power and authority is tempered by normative prescriptions within an integrated worldwide system (Benavot 1983:73).

Several studies within this perspective have been published in the United States in the last ten years (Ramirez & Boli-Benetti 1982, Boli, Ramirez & Meyer 1985, Boli & Ramirez 1986, Ramirez & Boli 1987, Benavot & Riddle 1988, Soysal & Strang 1989, Boli 1989). Here, attention will focus on Ramirez and Boli (1987). They ground their perspective in the structural situation of each Nation-State within the world system and its relationship to the expansion of mass schooling. This expansion was pursued in different historical periods by each Nation-State and was dependent upon whether the Nation-State was a dominant power, like England or France, or had less power and influence in the interstate system, such as Prussia, Austria, Sweden, Denmark or Italy. Those less influential countries were the first to make use of mass schooling, during periods of social, economic and political crisis. Historical factors - such as "military defeats" or the "failure to keep in pace with industrial development in rival countries" or the challenge to rise to a more prominent world position - have obliged the State to carry out the expansion of mass schooling in different ways.

European States made increasingly feasible the construction of the *nation*, according to a model of what was more and more considered as the "national polity".

the interstate system evolved from a loose collection of centralizing monarchies that espoused divine-right ideologies to a highly interdependent set of national states, that invoked 'the nation' as the overriding justification for state action (...). Transforming the masses into national citizens became a standardized feature of the state-orchestrated nation-building process; utilising state-sponsored mass schooling to achieve this political end became a routinely accepted *modus operandi* (Ramirez & Boli 1987:13).

According to these authors, the 'construction of the polity' through the contribution of mass schooling was therefore, the result of a model of a national society increasingly implemented throughout the European nations. Such a model was neither the product of "imitative behaviour" nor was it adopted due to the "actual effects of compulsory mass schooling on Nation-State structures". Instead its adoption could be explained by its "perceived institutional character" (1987:3) and by the influence and even imposition of the interstate system: "the nation-building process [was] imposed on them by the larger environment within which they competed" (ibidem:9). The origins of this model (the so-called "five institutionalised legitimating myths" - the individual, the nation as a society made up of individuals, progress, childhood socialisation as the key to adult character, the State as guardian of the nation and guarantor of progress) are also analysed by Ramirez & Boli as well as the social transformations that shaped this European model, such as the cultural movements of the Reformation, the rise of the national States and of the interstate system, and the expansion of the exchange economy.

Clearly the theory presented here was inherited in particular from the contributions of Durkheim⁵, who analysed the

⁵ In Durkheim's writings, the State's role is perceived as taking an active and 'normative' part. It is up to society to forge "moral unity" among its members, and not to the State. "Organic solidarity" keeps industrial societies together, on the basis of the mutual dependence among their members. Nevertheless, the State must intervene, not to create this "social

State's role in taking an active and 'normative' part in the forging of 'moral unity'. This contribution is associated with a 'world system perspective' where power relations between States are emphasised in order to provide an explanation of their differential processes of mass schooling expansion. However, and in contrast with Wallerstein's theory, Ramirez & Boli do not appear to consider these States as capitalist, but simply as 'industrial States'.

Although Ramirez and Boli's theory (1987) on "'Nation-States' compelling interests in mass education" (ibidem:2) is a useful way of understanding the power relations between different States, these authors do not provide us with ways of understanding what made Nation-States fail to implement (or delay the implementation of) these aims. This is more the concern of Soysal and Strang's contribution (1989) which refers to the discrepancy between State laws and the low expansion of school rolls in Southern European countries. They describe the State's intervention in countries such as Portugal, Spain, Greece and Italy in the nineteenth-century, as a "*rhetorical construction of education* ": "(...) States were quick to formulate compulsory schooling, but unable to pursue it in actual schooling". They also identify other forms of State intervention as the "statist construction of education" ("the State created educational services quite early, both formally and organically") and as "societal construction of

unity" but "to consecrate it, maintain it and [make] individuals aware of it" (Durkheim in *Education and Sociology*). In this perspective, education is a means of integrating individuals in society, providing them with values, beliefs, ways of seeing, and the State's role in the expansion of mass schooling is contributing to maintain this "social unity" through the transmission of culture. Although Durkheim provides a functional answer in what concerns the relations between education and society - and also analyses social class conflicts as 'anomic' processes - he appears to grant to the State in mass schooling expansion some degree of autonomy, even an intentionality, as the chosen words appear to suggest: in moments when 'social unity' weakens, the State plays an active role; and in the process of mass schooling development, the State also reinforces the value of the common cultural heritage.

education" ("schooling expanded considerably ahead of the State's involvement in education") both of which characterised the State's intervention in other countries (Soysal & Strang 1989:285).

These perspectives can contribute to this research project in offering an explanation for the fact that Portugal, like other less powerful European States, was advanced in launching mass schooling. Mónica (1977) and Stoer (1986) have called attention to the 'precocious' character of State intervention in mass schooling in Portugal. It may actually be said that the process of mass schooling, under the specific conditions in which it has developed since the 1830s, is one of Portugal's specificities that most needs to be explained.

The perspectives outlined above shed light on the insistence by the Portuguese State to reaffirm its laws of compulsory schooling (1835, 1836, 1844 and 1878). Such insistence occurred during critical periods, as an apparent attempt to strengthen national identity and/or to overcome national crisis (such as during the period after the Civil War between supporters of the Ancient Regime and the Liberals-1832/1834). Also, the analysis carried out of Southern European State intervention as a "rhetorical construction of education" indicates the advantages of analysing not only the State's declared intention to launch mass schooling but also its actual implementation.

However, there are still some points that need to be cleared up with regard to these perspectives. The specific articulation through which national States have operationalised "normative prescriptions" (to use Benavot's expression cited above) has not been dealt with. Further, and in particular with regard to Ramirez & Boli (1987), we are not provided with an understanding

73

of why Nation-States developed different powers among themselves. These authors fail to confront the emergence of the interstate system in the nineteenth-century within a framework of developing capitalism: the world system, rather, is described simply as constituted by individual Nation-States with different powers. Finally, and above all, none of these approaches even so much as attempts to explain the separate emergence and development of girls' schooling.

2.2.7. some points for further analysis

After having reviewed some of the explanations offered for the expansion of mass schooling, we are now left with a complex picture. And we must consider how a research project that aims to understand the construction of primary teaching as women's work and the expansion of mass schooling in Portugal at the turn of the nineteenth and the first decades of the twentieth centuries may profit from these perspectives.

On the basis of this review, I would like to highlight three main points which may provide guidelines and orientations for this project. Firstly, in most of the theories, the State is seen as instrumental either to class rule, to conflicting groups or to labour market needs. Even in the 'world system' perspective, there is apparently little room for the effects of the specific articulation of national States upon the ideological and organisational processes that find their origin in the interstate system. Thus, it is the (relative) autonomy of the State in mass schooling expansion that needs to be explored. Secondly, although there may be some reference to this process as a conflictual one (in particular in Green's work), this fact does not emerge clearly from the analyses

provided. Thirdly, what is striking is that almost of these theories (with the exception of the feminist explanations of mass schooling) omit the question of how gender (and race) intersect with the expansion of State mass schooling. They generally assume a view of the child as non-gender (and race) specific, while, in fact, what they have in mind is the image of the male (and white) pupil.

Hence, if we return to the question posed at the end of the last section about what the implications for the expansion of mass schooling were when pursued by a State whose activity is located within capitalist and patriarchal relations, the logical step would be to stress that class and gender inequalities were not only maintained but also reconstructed through such activity. In primary schools, boys and girls from the working and lower middle classes were taught a "limited version of the national culture that would encourage political loyalty and civic obedience" (using Green's expression cited above). They were also socialised into a sexual division of labour based on two separate spheres: boys were expected to direct their future lives towards the 'public sphere' and girls learned that their first duties were to the household and childcare, and perceived that their role was one of subordination to men. Here we are confronted with State activity in the expansion of mass schooling that promoted specific relations for the process of capitalist accumulation: the working classes were taught restricted versions of the national culture and there was also the intent to teach submission. Above all, it is important to emphasise that girls' schooling was made to fit into the existing patterns and assumptions of boys' schooling.

But from this analysis it also becomes clear that not all of the State's activity in mass schooling was related to the capitalist accumulation process. Patriarchal relations were also present in this process, although not appearing to be functionally articulated with it. For instance, the incorporation of women into State mass schooling as teachers has been justified within a functionalist perspective stressing that the economic system was in need of a labour force with specific characteristics. However, this omits the fact that their employment introduced further tensions into the development of mass schooling. As teachers, they were the educators of the new generation of children in the State sector. Yet, the same State neither recognised them as citizens nor granted them the right to vote for many years to come. Further, the new definition of women teachers' roles in relation to girls and boys, produced by the *1878 Education Reform Act* (to be examined in chapter 2), is another example of the changes related to patriarchal relations. Women teachers, from being restricted within State schooling (at the beginning of the nineteenth-century) to educating girls only, began to be considered as suitable educators of both girls and boys and were able to teach mixed classes, but not boys' classes with boys aged over twelve. There did not take place a similar extension for men teachers who were not allowed to teach girls. Was this a change in patriarchal relations? There are grounds to stress that this was so, since women's activities as educators were extended to include boys when previously women teachers had been perceived as threatening their 'maleness'. It also reveals that, at the symbolic level, within the context of nineteenth-century rhetoric about women's role for the regeneration of the family and their intrinsic 'purity' (see

chapter 4), only women were granted the power of integrating both sexes in school without fears of 'corrupting' children's bodies and minds. These changes in gender relations were not accepted passively: there are indications that this was strongly resented by male teachers who perceived women as favoured within schools (see chapters 2 and 8).

Hence it is argued here that the 'feminisation' of teaching in the context of the expansion of mass schooling is related to the State's activity, an activity that cannot be properly understood except within a context of changing patriarchal and capitalist relations. Within the process of the expansion of mass schooling, gender and class inequalities were changing, sometimes reinforcing each other, at other times evolving in contradictory ways. This can be partially explained by the fact that the State is both an arena of domination and of conflict.

3. State systems and the 'feminisation' of teaching

The concern in this section is with the incorporation of women as teachers into the State. The process of their gradual entry into mass schooling needs to be analysed at the level of policy formulation. This means investigating the specific measures that were taken by the State to facilitate their entry and the contradictory pressures (including political struggles sustained by women's campaigns concerning the right for women to work in the public sphere) which were put upon the State. Other theories have suggested instead that the feminisation of teaching should be explained either by a sexual division of labour pre-existing industrial developments or via ideological constructions concerning women's work and 'mothering'. What follows is a

selective and critical review of some of the theories explaining feminisation of teaching in State schools. Firstly, conventional explanations which present the feminisation of teaching in terms of 'cheapness' and 'submissiveness' will be reviewed. Secondly, the proletarianisation thesis will be examined in its attempt to establish a necessary relationship between proletarianised labour and female activity. Thirdly, explanations which do not take the State as a central concern and assume that education systems reflect social constructions will also be considered and evaluated in their contributions to this study. Fourthly, the analysis concentrates on theories which integrate the action of the State with ideological and cultural production on gender identities and roles. Finally, there is an attempt to rethink the 'feminisation' of teaching in the light of Dale's theory on State 'core' problems.

3.1 'feminisation' conventionally understood as 'cheapness' and submission

Past and present educators and teacher unionists seem to agree that the Portuguese State's trend towards low expenditure in education was, and is, closely related to the entry of growing numbers of women into the education system. This perspective argues that the entry of women meant that teaching lost status. Studies produced, for instance, in England, such as the one by Bergen (1988), clearly point in this direction. As will become clear in this research, this is not the perspective adopted here. Certainly feminisation and loss of status became very much entangled, but to claim a cause and effect relation between women's gradual entry into teaching and its subsequent low status would be simplistic.

Another popular explanation stresses that feminisation took place as a response to the 'needs' either of the State or of

capitalism, employing a female labour force that was perceived as 'cheap' and also 'submissive'. It is a view that was clearly developed within a functionalist framework, where ideological and economic conditions came together, providing the 'system' (whatever it is understood as) with the answer it required, without exploring either tensions or contradictions.

Both views lose sight of the more complex articulation between State intervention and the problems confronting it, and the cultural and ideological conditions in which feminisation took place, including ideas on femininity and on 'proper work for women', as well as social and ideological constraints upon women's work outside the home. They also omit the tensions and resistances that the process of feminisation engendered. Additionally, the changing conditions in which teaching took place at the turn of the last century and, in particular, the conditions under which women teachers worked and what they were expected to do, in comparison with men, are ignored. Finally, these theories also do not appear to pay enough attention to the way in which teaching for women might constitute one of the few opportunities for obtaining independence and autonomy within the ranks of the labour aristocracy and the middle class.

3.2 the posited interrelationship between feminisation and proletarianisation

The 'proletarianisation thesis' is here reviewed as it has recently been applied to the feminisation of teaching, mainly in the work of Apple (1987, 1988) and Ozga & Lawn (1988); its application to the Brazilian situation is pursued by Louro (1989). It is an attempt to link Braverman's argument on social and technical deskilling in the workplace, within capitalist development, to

changes in teachers' work and the increasing number of women teachers. The feminisation of teaching occurred at the same time as deskilling, increased supervision and the exercise of tighter control:

In every occupational category, *women* are more apt to be proletarianized than men. This could be because of sexist practices of recruitment and promotion, the general tendency to care less about the conditions under which women labor, the way capital has historically colonized patriarchal relations, and so on. Whatever the reason, it is clear that a given position may be more or less proletarianized depending on its relationship to the sexual division of labour (Apple 1988:100).

The proponents of this thesis do not consider that the entry of women into teaching was the cause of its proletarianisation. They distance themselves from this view, claiming that the relationship between feminisation and proletarianisation owes its development to the context of patriarchal relations. The proletarianisation of teaching is traced back to capitalist processes: deskilling is presented (in particular in Apple 1988) as an inevitable feature of the development of capitalism. Lawn & Ozga (1981) stress that deskilling is a feature of contemporary teaching. More than just a technical term, deskilling is a social process. It implies "a relationship to the process of conception *and* execution. (...) Today, even skilled work, whatever the length of the training period, is confined to execution and excludes conception" (1981:54).

Two main points need to be made about this perspective. The first concerns recent criticisms which suggest that historical accounts of teaching do not support deskilling tightening of controls and so on as inescapable processes. In their critical review of the proletarianisation thesis, Ozga & Lawn (1988) argue that:

The idea of proletarianisation as inexorable, moving teachers into a particular class relation, has to be deconstructed and recognised as not just an economic but a political question, and as not inevitable but contested. There are deep contradictions in teaching, not just between teachers and employers, but between teachers themselves (...) While teachers' work currently has many of the features of deskilled work, teachers' accounts of their work in the early decades of this century are also about severe and detailed controls. Lack of an historical perspective produces a tendency towards thinking of current, perhaps temporary, trends as signifying inevitability or dominance (1988:334).

Ozga & Lawn in this paper, while reviewing critically the theory, attempt to rearticulate it, asking questions and indicating directions for further research in such a way that the changing nature of teachers' work ("the impact of increased controls, the proliferation of supervisory roles, the erosion of class-based teaching", *ibidem*:333) can also be understood in gender terms, within the context of patriarchal relations. Further, as they argue, proletarianisation takes place on a contested terrain, where human agency confronts changes within the labour process in terms of gender. However it is not entirely clear how the thesis of proletarianisation can be maintained in relation to teachers given that, as the authors point out, the tightening of controls upon them is not only a contemporary process but one that had already begun at the beginning of the century.

The second problem relates to Apple's notion of the relationship between patriarchal relations and capitalism and how the relationship between them should be understood. Taking as an example what happens in technologically equipped offices, where patriarchal control (meaning the dominance of the male boss) has been partially substituted by 'technical control', patriarchal relations are presented as non-functional to capital's needs. If the forms of patriarchal control have changed in the workplace, this is

because "capital has found more efficient modes of control than through patriarchal authority" (1988:102). Are they two separate systems each working with its own logic? What can we infer from this last quotation? Patriarchal authority was functional to prior forms of capitalism, whereas in contemporary times and places the use of high technology leads to the restructuring of gender relations. Therefore, are gender relations more egalitarian in high-tech sites? Apple does not assume this clearly, but he gives us a hint of his position in the above-stated assertion. Further, he states that:

(...) patriarchal relations of power organized around the male principal's relations to a largely female teaching staff, will not necessarily be progressive for capital or the state. (...) gender relations must be partly subverted to create a more efficient institution (ibidem).

Apple seems to assume that patriarchal relations are overridden due to "capitalism's 'needs'" and, by this token, they do not have a specific logic of their own. Apple is supporting the view that capitalism is the basic division and that patriarchal relations are articulated within it in specific ways (expanding or contracting), depending on whether they are functional or dysfunctional to it.

With reference to the feminisation of teaching in Portugal, another set of questions can be posited. These questions are related to capitalism and its development in Portugal at the turn of the nineteenth and during the first decades of the twentieth centuries. Firstly, it is necessary to underline that when women teachers began to enter teaching, in the first decades of the nineteenth-century (1815), teachers' status was very low and people in general were used to making fun of them. Nóvoa (1987)

gives many indications of this low status. Could this be paired with high levels of autonomy in the classroom, in the process of decision-making, about what should be taught and how by the male teacher? Again, Nóvoa argues that one of the features of the Portuguese State, in its intervention in education in 1772, was to establish strict controls upon teachers: not only were there clear indications about the contents to be taught, school materials (books, etc.) and pedagogical processes to be adopted, but also teachers were officially scrutinised (Nóvoa 1987:145). The inspectorate corps was introduced and clearly the various reforms during the nineteenth-century demonstrate that there was a growing concern among State politicians to specify more complete systems of rules to which schools and teachers should conform. It is in the (historical) light of a traditionally centralised State in Portugal, that the thesis of proletarianisation appears as problematical in its application to this case. Further, at the turn of the nineteenth-century, the Portuguese education system, despite growing at relatively impressive rates, was not experiencing the same processes as the English or Canadian education systems, such as the rise of large schools and the creation of administrative and supervisory tasks on a large scale, identified by Lawn and Ozga (1981), and Danylewicz and Prentice (1984a). Nevertheless we need more detailed studies to compare the daily work of teachers in this and later periods to be able to debate these issues systematically.

3.3 explanations which do not take the State as a central concern and assume that education systems reflect social constructions

Other perspectives which are important to review here look at feminisation as the result of major social constructions

reflected in education. One perspective emphasises the sexual division of labour prior to the emergence of education systems, which influenced its subsequent shape, combined with the availability of jobs in terms of gender divisions. The pre-industrial sexual division of labour partly explained women's tendency to perform activities related to the domestic sphere. Marta Danylewicz and Alison Prentice analysed women teachers in Quebec and Ontario, Canada in the nineteenth-century (1984a; 1984b; 1986) to unravel the specific conditions of each society. Quebec and Ontario presented "contrasting cases" of the relationship between men and women in teaching. In Quebec, the existence of better paid jobs for men implied a feminisation of teaching almost from the beginning of mass schooling. This was combined with a tradition of women as educators in the domestic sphere and convents. Catholic nuns in Quebec were closely involved in the education of girls (Danylewicz 1987). In contrast, in Ontario, the proportion of male immigrants in search of teaching jobs was greater than in Quebec, which meant that the feminisation of teaching occurred much later. It is this emphasis on a prior sexual division of labour in association with a fluctuating labour market for a male workforce which both authors emphasise in their views on the feminisation of teaching, while they also examine the changes occurring in teachers' work in the same period. Although they are concerned with the way the process of feminisation developed within the State education system, they do not focus on the State's relationship to feminisation as their principal concern. Nevertheless their emphasis on a prior sexual division of labour is a useful reminder of the potent effects of a prior sexual division of

labour on the feminisation of teaching to which I will return in chapter 3 of this thesis.

Another perspective emphasises the ideological relations and cultural context of nineteenth-century Western societies in which teaching was represented as a suitable mission and a special 'calling' for women given its continuities with the functions of the mother. Teaching should be modelled upon 'motherly' attitudes (Preston 1982; Grumet 1981; Steedman 1985). Carolyn Steedman clarifies the meaning of these 'maternal' attitudes. Within the context of pedagogical production, developing with the emergence and expansion of the State education systems, it was assumed that women teachers should model their activities on the good mother. According to Froebel, the ideal teacher for children was the 'mother made conscious'. What mothers did naturally, women teachers would do consciously, imitating mothers, and creating an empathy with their pupils. Teaching as a kind of mothering also had its origins in the educational activities of middle-class mothers teaching their children at home. When the State entered the field of and initiated mass schooling, women were able to transfer those skills, which they had internalised, to the world of work. Later, in State schools, the English system adopted an 'official ideology' of the ideal teacher based on the relationship between mother and children. It has been reproduced through mass schooling, handbooks, textbooks, and teachers initial and in-service training. The emphasis on the ideological elements of the teaching function, presenting women teachers as mother substitutes, echoes Parsons.

In fact, Talcott Parsons (1959) claimed that women teachers represented within schools a continuity with the role of the mother in the home. As women, teachers shared with mothers

an expressive role, functional to their professional activity in schools. As (semi)professionals, given this 'expressive' role, they introduce children to the 'universalistic' meanings conveyed by the school: they are able to mediate between the family and the school, providing an emotional basis for the child's transition from the 'particularistic' values of its own family to the more 'universalistic' perspectives of the school. Women teachers are functionally necessary since the pre-oedipian child will identify with her, seeing in her the continuation of the role of the mother. In her turn, the woman teacher will assume motherly attitudes, which will soften the selection operated by the school.

Undoubtedly, there is a marked difference between Steedman's and Parsons' perspectives. In the first case, women teachers' 'motherly attitudes' are considered as ideological constructions, historically based, and therefore the theory distances itself from deterministic and normative assumptions about human nature and socialisation. In the case of Parsons, the division between expressive and instrumental roles, in terms of gender identity, i.e. the former connected with feminine and the latter with masculine characteristics, appears to support such deterministic and normative assumptions.

Steedman's analysis of the ideological construction of teaching as *women's work* is an important contribution to the research project of this thesis. It emphasises that ideologies play a central part in understanding the development of feminisation of teaching. However, State involvement in mass schooling and its relationship to the feminisation of teaching needs to be extended to grasp their complex articulation.

3.3 State's activity considered in its relation to the feminisation of teaching

The 'State-family' perspective, developed by Miriam David (1980), takes as its central concern the State and its relationship to the family. As she underlines in the first pages:

[the study] focuses upon the way the State, through educational politics, has regulated both parental (or rather paternal and maternal) relations with children in school and familial relations within school, that is, the role of the teacher *in loco parentis* and the way the curriculum teaches about parenting in adulthood (1980:vii).

Emphasising the lack of studies which examine this relationship, she develops an historical analysis of State policies for mass schooling which promote familial ambiance, in terms of teachers' duties and curricula for boys and girls, covering an extended period from the nineteenth-century until the 1970s. In a context where the economy set limits to the production of a workforce for the educational labour market, such as at the end of the nineteenth-century, the ideology of *maternalism* presented teaching as appropriate and as an important job for women. The mother's attitudes towards her children were taken as a model for women teachers to follow with their pupils in the classroom. School and family would be, according to this perspective, acting like a "couple": through the State, the family environment would be re-created at school by women teachers, adopting motherly attitudes towards the children. Further, the social organisation of knowledge established by school would teach girls to carry out household tasks as part of their future destiny. Also the curriculum within schools would also teach specific and restricted views of parenting.

The appropriation of Althusser's ISAs by feminist studies has already been analysed as problematic in some of its

assumptions (cf., for instance, Barrett 1980, 1988), in particular with regard to problems resulting from a functionalist perspective and with regard to the concept of the State. Several references in this chapter have already been made with regard to the first problem. There are also indications about the ways the functionalist perspective can be avoided or at least combined with other views to balance its non-conflictual framework. Therefore it is more appropriate to concentrate attention on the problems with David's concept of the State: does her concept of the State share the same meaning as it does in Althusser's ISAs essay? Althusser's concept, argues David, has become too general given the fact that it includes the church, family and unions as ideological State apparatuses. This has contributed to the concept losing its analytical potential. David adds, in a footnote in the introduction to her study, that she holds "a narrower, more specific view of the State" (1980:2). She then clarifies her perspective stressing that the State is seen as central government and that she intends to investigate "the ideological assumptions with which it operates in relation to education and the family" (ibidem:3). Nevertheless, she often refers to the ISAs essay concept of the 'family-education couple', which appears to reintroduce the question of the ideological State apparatus. It might be said that without a discussion by David of the problems that she has identified in Althusser's essay about the nature of the State, it is difficult to see how far she has, in fact, distanced herself from an Althusserian perspective on the State.

Another question concerns her statement that "the family and the education system are used in concert to sustain and reproduce the social and economic *status quo*" (p.1). Basically, it is

the terrain of reproduction which is the main focus of her analysis. Even if at other points David attempts to overcome this emphasis, stressing that there are contradictions and conflicting principles articulated in State policy, which may contribute to change, this is not explored. Therefore the (relative) autonomy of the State is not developed in her analysis and the State appears to be determined by the social and sexual divisions of labour.

Turning to the feminisation of teaching in Portugal at the turn of the century, I would like to emphasise that David's concept of *maternalism* is important to express the ideological construction of teaching as *women's work*, and therefore, can explain partially when and why teaching appeared increasingly as appropriate for women's activity outside the home. This will be explored further in chapter 4 of this thesis, offering a framework to explain many of the interventions of politicians and educators, at the end of the nineteenth-century, in favour of women in primary teaching as the 'adequate educators' for the 'children of the poor'.

A final approach considers the economic and ideological problems confronting State intervention in education in the United States. Richardson and Hatcher (1983) relate the growing feminisation of teaching to the creation of a system of mass schooling by the State between 1870 and 1920. They argue that from the time that schooling became compulsory, the State had to face increasing costs to expand its provision at the primary level to attain a universal basis, while at the same time it was establishing or sustaining a secondary and a higher education sector - which meant strong economic constraints. One way of reducing costs was to find a labour force which could be employed

for lower wages. The trend was not to increase finance for education, but to appeal to a female workforce with few job opportunities, which could be expected to constitute a compliant workforce. The authors also identify "the persistence of cultural constraints on women's work participation, whose roots are in the structure and the pattern of preindustrial households" (1983:82) as primary determinants of the feminisation of teaching. But the authors also stress that the entry of women to teaching has been resisted by "Protestant denominations", who have feared women's economic independence might divert them from marriage and the family and that women teachers would have an unhealthy effect on boys' identities.

The major contribution of this perspective to this research is the emphasis it puts on the relationship that historically has been established between the construction of the State school system ("formalization", *ibidem*:82) and the feminisation of teaching. The centrality they attach to this relationship to explain why women came into teaching in increasing numbers is stimulating. However, Richardson and Hatcher's theory appears to return to explanations of the feminisation of teaching as 'cheapness'. But, in fact, it is more complex than this. Truly, according to this theory, women constitute a cheap labour force in this period, and the theory lacks an explanation for the reasons why this was so. However it is an attempt to go further than other theories, combining an economic explanation with the existence of a sexual division of labour, which originated in pre-industrial times. It is also an attempt to perceive the formulation and implementation of State policies as conflicting processes giving rise to resistances and protests. Their

theory echoes some of the questions raised by Roger Dale's theory on the 'core problems of the capitalist State' that will be explored in the next section.

3.4. *The feminisation of teaching and the 'core' problems theory of the capitalist State*

The principal contribution of the 'core problems' of the capitalist State approach to explaining the feminisation of teaching in Portugal lies in its emphasis on the tensions between the various problems confronting the State. The growing entry of women into teaching can be seen as related to the problem of accumulation: during the expansion of mass schooling, State revenues, from which teachers were to be paid, needed to be greatly expanded. This is therefore one of the problems that the State confronts when expanding mass schooling: finding the necessary public funding and resources. One solution to this problem would be to employ a cheaper workforce. Thus the question may have been put in terms of who would constitute a cheaper workforce (as well as having minimum qualifications for teaching). The employment of women would reduce necessary State spending, for reasons that will be analysed below.

However, employing women as teachers would also give rise to problems of legitimation: women were not considered as *citizens*, they had neither the right to vote nor other basic rights, but at the same time they were increasingly put in charge of the education of boys and girls. They were expected to contribute to the construction of the citizenship of boys, mainly - but also of girls, as future 'regenerators' of the nation. Furthermore, there were sectors of the population who perceived women as inadequate

as teachers, lacking the work qualities intrinsic to *true* ⁹¹ (male) workers and employees (see chapter 4).

But at the same time the Portuguese State, like other States, was under greater pressure to provide education for the masses. And Portugal revealed, at least via the public statements of its politicians and educators, a particular concern with the state of 'backwardness' of its education system. These pressures could also provide a favourable terrain for the acceptance of a feminine workforce. The dissemination of views such as *maternalism* could be seen as partly filling out this terrain, legitimating women's entry in great numbers into teaching as well as presenting teaching as *women's work*.

It is also possible to identify in the process of feminisation, problems that the State confronted in providing an adequate context for the continuation of the accumulation process. Through images of the family and of teachers as mothers, an attempt was possibly made to frame, in a regulated form, the working classes and their children within the Nation-State.

Moreover, relevant to this question is the existence of patriarchal relations conditioning and structuring women's lives. In their entry to the labour market, women were perceived as cheaper, and unskilled, workers due to a sexual division of labour in which they performed the unpaid services of the household and childcare. Therefore, they were at their point of entry to the labour market seen as without adequate training for the job, or, at least, with skills that were devalued in a male world. It was also assumed that women would be dependent for their reproduction on the earnings of a male member of their families, husband, father, brother, etc., and therefore, that they were not in need of the same level of pay

as men. All these processes help to explain women's subordination to men in patriarchal relations.

Undoubtedly, capitalism and patriarchal processes became articulated and enmeshed in specific ways in this emergence of women as teachers within a capitalist and patriarchal State. But it is necessary to underline again that this does not mean that the two interacting systems became functionally articulated: the entry of women teachers into mass schooling produced tensions and conflicting views. And if these tensions and views were not more crude and visible this is due to the way teaching was, at the same time, symbolically constructed as embodying feminine qualities.

4. *the specific semiperipheral situation of the Portuguese State*

The concern in this thesis is to analyse the problem of the construction of teaching as *women's work* and its relationship to the expansion of mass schooling in the specific context of the Portuguese State and social formation at the turn of the nineteenth and during the first decades of the twentieth centuries. Main questions remain about the specific terms and conditions in which it is possible to identify a capitalist and patriarchal State in Portugal. Its semiperipheral status (in the European context) must here be acknowledged given the fact that educational policies were (and still are) very much influenced by those produced in core countries. Portugal has been characterised by its situation of semiperiphery within the world system according to Immanuel Wallerstein's theory:

during the long colonial period, and mainly from the 18th century onwards, Portugal was a core country regarding its colonies and a peripheral one concerning the capitalist center of accumulation. Between the former and the latter it

performed the role of 'transmission belt', one of the typical roles of the countries in the semiperiphery (Santos 1985a: 870, referring Wallerstein's theory).

Schwartzman (1989) provides a review of the definition of the concept of semiperiphery and suggests that Wallerstein's concept is rather more precise than other authors:

Wallerstein writes that there have always been a series of countries that concretely fall between high-profit, high-technology, high-wage, diversified production and low-profit, low-technology, low-wage, less-diversified production. They act in part as core countries for some peripheral areas (Schwartzman 1989:194).

The question of the autonomy of the semiperipheral State is dealt with by Wallerstein (1979) who stresses that, because of "a mix of economic activities", the State enjoys a considerable degree of autonomy in affecting economic activity: "the semiperipheral State is precisely the arena, where, because of a mix of economic activities, conscious State activity may do most to affect the future patterning of economic activity" (Wallerstein 1979:274). But in Wallerstein's theory this looks like an autonomy restricted to economic relations.

In fact, the concept needs more precise definition and Sousa Santos states that the concept lacks theoretical consistency, reducing the social, political, economic and cultural conditions, which characterised Portuguese society in its specific aspects regarding core and peripheral countries, to a descriptive account (Santos 1985a: 872). It is not the aim here to try to discuss, in depth, the 'social materiality' of the concept of semiperiphery as applied to Portugal, in the context of world relations at the turn of the century and in the first decades of this century. But, according to Sousa Santos, one of its specificities is

the existence of a strong State in the sense that the State plays a central role in the regulation of the economy (Santos 1985a;1990b). As Portuguese economic development was then characterised by a slow process of accumulation, the State, despite playing a central role in the regulation of the economy, was weak in economic terms. At the same time, it lacked in legitimation and sought to legitimate its action by referring to processes characterised by core countries as those leading to 'progress':

(...) the semiperipheral states are, in general, rather autonomous in their definition of policies (although not necessarily in subsequent political actions) and they tend to be internally strong. However the strength of the state is not easily transformed into the legitimation of the state (as happens in core countries). And this occurs independently of the legitimacy of the democratic regime that is in place at any given moment, a regime always based on an unstable equilibrium (Santos 1985a, reprinted in 1990b:110).

In a more recent paper, Sousa Santos explains why the State in semiperipheral countries such as Portugal has played (and continues to play) a central role. The various structural places he identifies - the 'householdplace', the 'workplace', the 'citizenplace', the 'worldplace', each consisting of a unit of social practice⁶, an institutional form⁷, a mechanism of power⁸, a form of law⁹, and a mode of rationality¹⁰ (Santos 1985b) - are characterised as four basic forms of the production of power. These structural places are heterogeneous *among* themselves as well as *within* themselves in

⁶ Sousa Santos points out that the units of social practice are constituted respectively by the family, class, the individual, and the nation.

⁷ These institutional forms are respectively: marriage/kinship, the factory, the state, international agencies, bilateral and multilateral agreements.

⁸ They are: patriarchy, exploitation, domination and unequal exchange, respectively.

⁹ Domestic law, production law, territorial law and systemic law.

¹⁰ Santos identifies: 'affection maximising', 'profit maximising', 'loyalty maximising' and 'effectivity maximising'.

semiperipheral countries. In core countries, however, the strength of the workplace can be acknowledged in the way it has changed the householdplace and the citizenplace:

(...) the autonomy of civil society in core countries signifies basically that the workplace has shaped the citizenplace, and therefore, the state, according to its needs and interests. This becomes clear by the fact that the process of industrialisation preceded the dominant regime, parliamentarism; and that this, in its constitution and in its activity, has acted in accordance with the general interests of capitalist expansion. Moreover, the vigour of the workplace has also revealed itself in the way it has changed the householdplace, and therefore, the family, in conformity with the demands of the reproduction of the workforce (Santos 1990a:660).

In semiperipheral countries, Sousa Santos emphasises that the relationships within and between these structural spaces developed in quite different ways from the core countries:

On the one hand, the modernisation of the citizenplace preceded the modernisation of the workplace (for instance, parliamentarism, even restrict and restrictive, preceded the great expansion of industrialisation) and maintained in relation to it a great autonomy (...). On the other hand, the workplace maintained always a great internal heterogeneity clearly represented by the heterogeneity of productive activities, by the disarticulation or weak complementarity among sectors, by the great disequilibrium of intersectorial and intrasectorial productivity, and finally by the coexistence of the capitalist mode of production with other modes of production. The same heterogeneity occurred in the household, which provided a logic of social reproduction relatively autonomous, either to the workplace, or to the citizenplace. This heterogeneity was conditioned, and in some ways, augmented by the situation of dependency of the semiperipheral society in the worldplace.

The great internal heterogeneity among the various structural spaces (...) has produced a deficit of hegemony or, in other words, a deficit of national aims. This was compensated for by an 'excess' of state authoritarianism. In Portugal, this 'immoderation' has assumed, either democratic, or dictatorial forms. (...) The internal heterogeneity of the householdplace and the workplace and the non-correspondence with regard to their own reproduction demands generate relative autonomies in each of these structural spaces of Portuguese society. As a consequence, they subvert, transform, take over, in short, block state activity (Santos 1990a:660-1).

This contribution of Sousa Santos aiming to clarify State activity in a semiperipheral country such as Portugal, despite its

focus on recent periods of Portuguese social history, offers an interesting way of understanding the Portuguese State at the turn of the nineteenth-century. As a capitalist State constructing its own influence and power and expanding some of its activities, such as in education, it was forced to confront the great heterogeneity of the other structural places identified by Sousa Santos. In addition to playing a central role, the State also found its activity located in a web of structures and ties inherited from the Ancient Regime which maintained considerable vigour. This meant that it had to combine its activity with other internal powers controlling specific areas of Portuguese society. For example, many practices of 'social patronage' remained, certainly in rural areas where the Catholic Church and the landed proprietors maintained a strong stake in local politics. Further, local needs were interpreted, manipulated and negotiated at the moment of either national or local elections by those who retained power in these villages ('política de campanário'): local votes became a source of trade between local oligarchies and State agencies (Dias 1897; Matos 1907; Quaresma 1988). Mass schooling (as well as the provision of other State services or initiatives) became entangled in this manipulation/ negotiation at local level politics. This fact throws some light, as part of its explanation, on the irregularity and unevenness of mass schooling expansion.

Equally complex is the task of confronting the relationships between the State and the 'householdplace' in the semiperipheral situation of Portugal. Although some recent (and others not so) contributions have brought to front stage the polemical question that not patriarchal but rather matriarchal

structures were still alive in the North of Portugal¹¹, women's subordination appears as a common trait of their situation. In the period under study, women certainly had fewer opportunities, in terms of education, than their male counterparts within each social group; with almost no opportunities in work and training; no franchise at all until 1931 (where only those with university diplomas were considered potential voters) and no other basic rights (such as being considered able to educate their children, the right to inherit, etc). Citizenship for women was still a distant reality, although during this period some incipient changes were occurring. Patriarchy clearly defined and involved their lives - it was, echoing MacKinnon, *the* regime. It will be interesting to analyse the tensions and conflicts between the activity of a 'modernising' State at the turn of the century, where, for instance, some of its representatives struggled to extend State instruction to women, and the patriarchal household, a place where women were considered as men's property and inadequate in terms of educability (see chapters 3, 4, 8 and 9).

Although it is not possible to go into a more detailed discussion here about the heterogeneity among the various structural places at the turn of the century, and in the later period of the 1920s-1930s, it may be assumed that this was even more characteristic of the Portuguese social formation at that time than it is today. The deficit of hegemony that it produced, according to Sousa Santos's words, was compensated for, in part, by greater State intervention.

¹¹ Anthropologists, in particular, are reviving this debate, underlining the matrilinear inheritance of goods and family names (Pina-Cabral 1986; Descamps 1935) and also women's greater intervention in productive agricultural activities and in household management (more in the North than in the South of the country, cf. Descamps 1935).

Conclusion

Many contributions from this long excursus can provide a better understanding of the activity of the semiperipheral State in relation to mass schooling and the 'feminisation' of primary teaching.

The great heterogeneity evident among the various structural places can explain, partially, the slow development of mass schooling, in Portugal, even though the State insisted on producing, at various moments, new legislation in order to reinstate mass schooling. The State was engaged in making its imprint on Portuguese society, in the construction of its hegemony throughout civil society, but its cultural and educative role appears to have been often blocked by the heterogeneity of the other structural places. And some indications remain that the expansion of mass schooling was indeed a conflictual process. In short, it was the relatively high degree of the State's own relative autonomy, along with the important relative autonomies of the 'workplace' and the 'householdplace', which conditioned the expansion of mass schooling in Portugal.

Concerning the 'feminisation' of teaching, there are suggestions of a clear intervention by the State in favour of primary teaching as appropriate for women, at the turn of the nineteenth-century. As previously noted, 'feminisation' developed later in Portugal than in core countries. This does not imply that 'feminisation' would inevitably happen in Portuguese society, even if some decades later. There is no clear basis obliging us to see it as an historically determined process. Rather, it seems that the State, assuming an educative and cultural role, and stating its

99

intention to 'modernise' Portugal, took charge of implementing and stimulating the 'feminisation' of primary teaching (see chapter 2).

Having stressed that specific measures were taken by the State to attract women into primary teaching, it should be added that parallel pressures and aspirations by the women's movement (possibly more effective and organised in core countries than in Portugal) at the turn of the century had some success in the defence and promotion of women's right (in particular for middle class women) to work outside the domestic sphere. Although the influence of the women's movement is not analysed in detail in this part of the thesis, this is not due to any subestimation of its possible importance but rather due to the fact that the intention is to focus on the State's activity in mass schooling and on women's entry into primary teaching.

Having completed this review, I will turn my attention, in the next chapter, to an analysis of State educational policies which are related to the construction of mass schooling and women's entry into teaching. In that way I hope to be able to unravel the main orientation of State policies providing some explanation for these questions and for the specificity of Portuguese educational development. This chapter will be followed by a further two chapters where the focus will be centered on the existence of ideologies which may have influenced educational policy-making.

Chapter 2

Women's Re-Incorporation into the State as Teachers in Mass Schooling (1870-1910)

Introduction

The articulation of the process of expansion of mass schooling with the 'feminisation' of teaching, particularly with the emergence and expansion of teacher training colleges for women, equal pay and the new definition of the woman teacher's job in the second half of the nineteenth-century, is the focus of this chapter. State policies concerning the 'feminisation' of teaching and the construction of mass schooling will be reviewed here, offering an explanation of the conditions which led the State to attract a female labour force into teaching. My analysis of the development of mass schooling in Portugal gives emphasis to the specific structural semiperipheral situation of Portuguese society and the basic features and stages of this development, while trying at the same time not to lose sight of how gender crucially intersects with State involvement in schooling. The whole area of women's *experience* is left open, since the concern in this chapter is with structural issues.

Besides reviewing the writings of the main educators and politicians who discussed the questions of mass schooling, I will base my analysis mainly on the official documents produced by the government as well as on the debates which echoed in Parliament when the *1878 Education Reform Act* was discussed (*Diários da Câmara dos Senhores Deputados*). As will be seen below, this

Reform may be seen as an important landmark in education policy-making with regard to mass schooling and the 'feminisation' of teaching.

After examining the rate of feminisation between 1850 and 1910, one focuses on three main areas in which State intervention established and supported gender divisions in Portuguese mass schooling with the *1878 Education Reform Act*. These areas are as follows: (i) State policies on girls' education, which, after having legitimated the entry of women into the State sector in 1815, to teach girls exclusively, put women teachers in charge of mixed and even 'elementary' boys' classes; (ii) an analysis of women teachers' equal pay with their male colleagues; (iii) finally, State policies on the expansion of women's teacher training colleges.

**"A possibly unique golden era
of liberal capitalism in Portugal"?**

The State confronted conflicting demands in the expansion of mass schooling in Portugal during the period 1870-1910. Economic, political and ideological problems pressured it in specific ways. The 'core problems' of the capitalist State, an approach developed by Dale (1981, 1989, 1991) and also by Dale & Ozga (1991), have been outlined in the first chapter. Hence, what follows is an attempt to analyse State intervention towards mass schooling and the 'feminisation' of teaching using this approach. In particular, the *1878 Education Reform Act* will be examined, after presenting the wider context in which it was elaborated. Education policy-making is better understood if related to the social conditions in which it arises, as Dale and Ozga (1991) stress:

Education policy is not limited to the formal relationships between central and local government, schools and teachers, or to legislation affecting those relationships. It encompasses the political, social and economic contexts which shape education policy and which therefore require study if this policy is to be understood fully. Prevailing ideologies also have to be considered and these are discussed and linked to particular perspectives (Dale & Ozga 1991:5).

Therefore, although briefly, some of the features of Portuguese capitalism, which during this period was attempting to expand its structures and institutions with considerable vigour, are presented as well as some of the basic contradictions which confronted it.

In the period 1851-1890¹, the State was increasingly involved in supporting the accumulation process. It has been argued that Portuguese capitalism was "flourishing" and, indeed, more stable conditions for capitalist development existed. In the words of Vilaverde Cabral, it was a "possibly unique golden era of liberal capitalism in Portugal" (Cabral 1976:31). The political and economic project which the main political party, the 'Regenerators' ('Regeneradores'), adopted was the modernisation of Portugal taking as its model this process in 'core' countries such as England and France. In order to carry out this project, its leaders were convinced that it was necessary to attract foreign capital. Foreign capital, mainly British, was attracted to the more profit-making sectors of the Portuguese economy, thus also making it possible for such capital to escape the more difficult and unsafe situation it faced in its own country. Even so, the Portuguese State systematically borrowed money through international banks to

¹ During the first half of the 19th century, Portugal was in a state of political turmoil and social unrest. The fragile Liberal State faced many problems resulting from the forces of the Ancient Regime after the 1820 Liberal Revolution: military coups, the civil war, popular uprisings and deep political divisions within liberal ranks (see Serrão 1990, for further analysis). These were very difficult conditions for the State to win support for the expansion of public education in what was an almost rural society.

pursue its policy of massive investments in unproductive sectors, which were not likely to appeal to foreign capital (Quaresma 1988: 38).

State support for the process of accumulation can be seen through several initiatives, some of which will be summarised here. Firstly, the construction of extended networks of roads and railways, financed from loans from foreign and national banks: more than 10.000 km in the first case, and more than 2.000 km in the second, between 1878 and 1890 (see Cabral 1976:334). Improved transport networks were essential to the expansion of capitalism, since they played an intrinsic role in the construction and expansion of a national market (Cabral 1979; Quaresma 1988). Secondly, the introduction of taxes on basic products helped to solve the economic problems (such as those brought about by the world crisis of 1868). Later, due to the popular revolt against these taxes, in January 1870, the State attempted to secure a more stable context by abolishing them (Cabral 1976). Thirdly, as a consequence of large amounts of 'mobile capital', to which the State contributed largely, there was a 'capitalist fever', considered excessive, which was an important cause of the crisis of 1876. As a result, the State attempted to 'cool' speculation and investments in industries. As Cabral suggests, this intense capitalist activity did not coincide with similar levels of productivity (1979:28). Fourthly, the State's involvement in the expansion of the accumulation process became highly visible when it abolished import duties, such as on wheat. This benefited the non-agrarian class fractions who were connected with import-export trade, the finance sector and the emerging big industries.

The "first genuine capitalist crisis which the country

experienced" (Medeiros 1978:6-7) was the great depression around the 1890s whose effects could still be perceived thirty years later. From then onwards, living conditions became more difficult, with a drastic reduction of State expenditure and an increase in taxes. In particular, between the years 1902 and 1909, strikes occurred in the main industrial centres (see Cabral 1979). The State attempted to deal with industrial unrest through a period of dictatorship (1907-08) led by João Franco. But at same time the government (within the context of a State campaign to convince those who owned factories and businesses in general of the importance of the 'social question' regarding workers' living conditions) conceded a 'day off' for workers; it also liberalised the process of trade-union formation which from then onwards could be launched without governmental approval. Cabral advances his own view on this matter:

I tend to perceive João Franco's policies in the light of a very clear perception of the 'social question', attempting to give the state the means to channel the factory workers' pressures into more peaceful solutions in order that their claims might be 'more pliable' to advanced industrial capital (1977:53).

Therefore, it can be said that in the period which followed the crisis of the 1890s, characterised by difficult economic conditions and by a strengthening of both the workers' and republican movements, the State attempted different ways of securing a suitable *context* for the continuation of the accumulation process. Social and industrial unrest would also be dealt with by non-repressive means.

Other pressures on the State included also the large-scale expenditure committed to maintaining an extensive colonial empire that was under threat in a world situation where several European powers had eyes on the colonisation of Africa and Asia. The British

Ultimatum of 11 January 1890, compelling Portugal to leave the territories between Angola and Mozambique (see Serrão 1990: 159-174, for more detailed evidence of other European powers' claims upon Portuguese colonies) made this painfully clear. Besides the costly colonial administration, the expenses incurred by the royal family, and all the services connected with it, were considered substantial and were the subject of much polemical debate in Parliament and in the press. The economic difficulties of the Portuguese State were reflected in its declaration of bankruptcy in 1892, caused by its inability to cover "recurring heavy budget deficits with temporary borrowings" from international companies and banks (Schwartzman 1990:32).

Although one cannot neatly separate out the process of accumulation from its context, it may be analytically useful to ask questions such as: what were the consequences for educational policy, firstly in a period when the main concern was with the *process* of accumulation (1870-1890)? And in the later period (1902-1909), when State activity was engaged in securing a more suitable *context* for accumulation? Additionally, it may be useful to ask if the State was attempting during the whole period 1870-1910 to win wider support through the education system?

'Precocity' and rhetoric in the construction of Portuguese mass schooling

As already stressed in the first chapter, the Portuguese State was 'precocious' in launching mass schooling, which means that the State declared, earlier than in most 'core' countries, its interest in mass schooling.

In 1835 and 1836 there appeared the first official documents demonstrating such interest. The days on which the

school year should begin and end, and also what academic subjects should be taught to pupils were clearly stated. However, other crucial items remained vague or were simply not stipulated, such as the age of pupils starting primary schooling. Clearly the law was essentially rhetorical and, as a consequence, the rates of school attendance remained very low. In the following decade, the *1844 Education Reform Act* reinstated the principle of compulsory education for children, underlining that all children between 7 and 15 should attend State schools². During the political stability obtained after 1851, other Education Acts were produced. After the short-lived *1870 Education Reform Act*, and after unsuccessful attempts in Parliament to produce a new Reform Act (all such attempts were characterised by the same principles) - still another Reform, the *1878 Education Reform Act*, was produced which constitutes a landmark with regard to mass schooling and the 'feminisation' of primary teaching. It also launched a period of decentralisation in education which came to its end in 1892. Yet another Reform Act was published in 1894 establishing State regulations for mass schooling and laying the foundations for most of the basic official definitions which continued to remain in force until recently.

At the end of the period under study, one may have a picture of the Portuguese State as advanced ('precocious') as a

² The law accepted that children could be exempted from attending State schools in specific circumstances: children whom it could be demonstrated already possessed the required knowledge; children having access to other similar or better educational institutions; children whose excessive poverty would make difficult their attendance; children whose families would not survive without their sons' working hours (and daughters?). The *1844 Education Reform Act* included penalties for those who did not send their children to compulsory schooling: they were threatened with early conscription in the army and were unable to exert political rights; parents who failed to send their children to school would lose their political rights for five years. And the Law also reasserted that the State would prefer to employ in State departments people who were literate. The following *1878 Educational Reform Act* applied pecuniary penalties equivalent to a day's salary to those parents failing to send their children to school.

result of its launching mass schooling early in comparison to 'core countries'. However the production of several Reform Acts reaffirming State interest in mass schooling, without managing to concretise it, as high rates of illiteracy demonstrate, show that the development of mass schooling was precarious.

Educators at the turn of the century claimed that compulsory school attendance laws only came into being with the *1878 Education Reform Act*³. This apparent lack of historical memory may be partially explained by the absence of positive effects of the former legislation⁴. Another reason may lie in the fact that, in 1878, compulsory schooling was, for the first time, extended to include girls. Further, the *1878 Education Reform Act* was considerably more developed and addressed issues related to increasing State intervention. These issues ranged from compulsory school attendance, enrolments, curriculum and school organisation to community commissions to promote compulsory schooling, teachers' regulations, examinations, teacher colleges, school financing, and so on. It also contained innovative measures, such as the decentralisation of primary schools - a demand made by the emerging republican movement - equal pay for women teachers and the expansion of training colleges for women teachers. The law clearly stated that children of both sexes should attend schools between 6 and 12 years of age. Finally, free schooling was reasserted.

The 'precocity' of the Portuguese State with regard to mass schooling was thus not concretised as its announcement predicted. Portugal, as other Southern European countries, was in

³ See Lima 1892 and articles of the educational journal *Educação Social*.

⁴ Rui Ramos in an interesting study (1988) refers to the complaints of nineteenth-century educators of the lack of a positive answer from rural populations to mass schooling, particularly from those living in the South of the country.

fact slow in its implementation. This was described in the first chapter as "a rhetorical construction of education" by Soysal & Strang (1989). A look at the growth of pupils, teachers and schools in Portugal since 1850 substantiates even further this 'rhetorical' character of State intervention in education.

The first figures regard the number of primary schools between 1854 and 1899:

table 1
Number of Primary Schools
1854-1899⁵

Years	Boys Sch	Girls Sch	Mixed Schools	Total N Schools
1854	1146	53	-	1199
1868	1997	362	-	2359
1881	2423	836	19	3278
1899	2825	1345	325	4495

Legend:

Boys Sch = Boys' Schools; Girls Sch = Girls' Schools; Total N Schools = Total Number of Schools

These figures document, in part, the expansion of Portuguese mass schooling in this period. The clearest inference that can be made from them is that mass schooling consisted of a limited number of schools. The second inference regards the difference between the number of boys' and girls' schools. This difference demonstrates clearly that State education, throughout the nineteenth-century, was defined mainly as male education. Nevertheless, the number of girls' schools, insignificant in the 1850s, did increase⁶.

⁵ The data of table 1 has been gathered in *Anuário Estatístico*, 1899/1900 and also in Nóvoa 1987: 345;1991:82.

⁶ Looking at the average annual growth rate through the periods mentioned above, the uneven

It is also useful to remember that, between 1852-1869, more than four hundred official documents were issued creating a great number of primary schools. From them, a picture of the development of mass schooling can be gained. António Nóvoa (1987) stresses that between 1860 and 1900, the number of schools more than trebled; specifically, in the case of girls' schools their number increased more than twentyfold. From these figures, it is possible to work out the increase in percentages in school numbers:

table 2
Percentages in School Numbers Increase

years	% Boys Sch	% Girls Sch.	% Total N. Sch.
1854-1868	74.2	583.	96.7
1868-1881	21.3	130.	38.9
1881-1899	16.6	60.9	37.1

Legend:

Boys Sch = Boys Schools; Girls Sch = Girls Schools; Total N Schools = Total Number of Schools

Looking at the increase of percentages in school numbers, they reveal that it was in particular the period 1854-1868 which witnessed the most impressive increase. This is in accordance with the number of official documents creating schools. Mass schooling was finally developing at an impressive pace, despite continuing high levels of illiteracy in the population (around 80%). In the following periods the percentages visibly decreased. What is

character of the development of the education system emerges.

table 1a
annual growth rate of Portuguese primary schools 1854-1899

	Boys Sch.	Girls Sch	Total Sch.
1854-1868	4 %	14.7%	5.0%
1868-1881	1.5%	6.7%	2.6%
1881-1899	0.9%	2.7%	1.8%

From this, it emerges that in the period 1854-1868 the annual growth rate was higher than in the following periods: 5% as annual growth rate in the total number of schools vs. 2.6% between 1868-1881 and 1.8 between 1881-1899. Particularly, regarding girls' schools, the annual growth rate is quite impressive - 14.7%; but this rate is better understood when one takes into account that girls' schools were incipient.

also very clear from these numbers is that the higher percentages concerned girls' schools.

It is also useful to look at the number of school enrolments during the period 1870-1900. It has proved difficult to find data for the years 1850-1870, nevertheless the following table reveals interesting trends for the period 1870-1900:

table 3
Number of School Enrolments
in Primary Schools
1870/1900⁷

Years	Boys' rolls	Girls' rolls	% Girls' rolls
1872	96.800	27.846	22.3
1883	123.928	53.757	30.2
1892	126.469	55.589	30.5
1899	115.900	63.740	35.5

It is clear that there was a sustained expansion of mass schooling during this period, with regard to the numbers of pupils enrolling in schools. The most interesting finding from this table is the increase of the proportion of girls as a total of the primary school population: from 1/5 in 1872 to just over a 1/3 in 1899.

The growth of mass schooling can also be shown through the increase in the number of teachers:

⁷ The data of table 3 has been gathered in *Anuário Estatístico*, 1872, 83-84, 1892 and 1899/1900.

table 4
Numbers of Women and Men Teachers
1854-1910

Years	Men Teachers	Women Teachers	Total Number of Teachers
1854	1146	53	1199
1868	-	362	-
1881	2364	914	3278
1899	2825	1670	4495
1910	2777	3031	5808

Between 1854 and 1881, the number of male teachers doubled. Their rate of increase slowed down after that, and it is clear that at the end of the century it began to decline. After the mid nineteenth-century, it also became clear that women were increasingly coming into the teaching profession in such a way that, after the turn of the century, they would constitute the majority in the profession.

In summary, although the Portuguese State was advanced in its proclamation of mass schooling, school enrolments demonstrate that its concretisation was slow and inefficient, especially when compared with core countries: in 1867, only 17% of all children between 7 and 15 were in school in Portugal, while in core countries such as France and the United States, the percentages were over 70%⁸. It does become clear that, in the Portuguese case, as in other semiperipheral States, such as Spain and Greece there existed a 'discontinuity' between State laws

⁸ Data for Portugal for the year 1867, in *1870 Education Reform Act*, Decree 16 Aug 1870, in *Colecção Oficial da Legislação Portuguesa*, p. 458, *Diário do Governo*, 194, 31 Aug. 1870. Data for France and the United States in 1870, in Soysal & Strang 1989:278, for children aged 5 to 14. Soysal & Strang show Portugal's primary school enrolment rate for the same year as 13%. There is not much reliable information available about school attendance at the end of the Monarchy (1910). The statistical data point out that, in 1911, at the beginning of the republican period, this percentage appears to have increased - 43.5% of all children would be in State schools. However, this data is not reliable for, as Sampaio shows (1975:44), in the censuses of 1916-17 and of 1918-19 only 30.5% and 25.7% of all children between 7 and 14, respectively, were in fact in school.

enforcing compulsory schooling and the expansion of school rolls (Soysal & Strang 1989).

It may be useful to pursue at this point an analysis of the *1878 Education Reform Act* which played a pivotal role in education policy-making, at the end of the nineteenth-century. It will be reviewed here in detail as it is crucial for understanding the relationship between the construction of mass schooling and the 'feminisation' of teaching in Portugal. In doing so, there will be an attempt to interpret it in the light of the "core problems" of the capitalist State approach developed by Dale and Dale & Ozga (1991).

The 1878 Education Reform Act

In the *1878 Education Reform Act*, where the decentralisation of education played a central role, mass schooling was reaffirmed as compulsory. Other innovative measures were also proclaimed with regard to the preeminence of the female teacher in primary schools. It changed the specifications of a woman teacher's job; introduced equal pay; established an equal number of teacher colleges for women, and enforced an academic-professional curriculum, although it still maintained gender specific subjects.

This Reform Act suffered the influence of the *1870 Education Reform Act*, which did not last long, since the government did not survive more than three months. With the *1870 Education Reform Act*, a Minister for 'Instruction' (António da Costa) was appointed for the first time. Mass schooling was made compulsory once again and the innovative measures, pointed to above, were proclaimed. Although these educative measures were not then implemented, the influence of the *1870 Education Reform*

Act maintained itself throughout the 1870s in the formulation of other education proposals. Its importance was acknowledged in three other unsuccessful projects, presented to Parliament (Câmara dos Deputados) in subsequent years⁹. All of them maintained the general framework of the *1870 Education Reform Act*. In 1875, Rodrigues Sampaio, 'Minister for the Kingdom' (including 'Instruction') presented his Project for the Reform of Primary Education for the second time, reproducing the main lines of the *1870 Education Reform Act*. It was only discussed in the following year, having been approved. However, its publication was only possible when Rodrigues Sampaio returned to the government in 1878. Further, it was only finally implemented in 1881, when Rodrigues Sampaio returned, for the last time before his death, to the government.

Besides the preeminence given to women teachers, the *1878 Reform Education Act* marked also a clear shift regarding the relationship between the central and the local State, and forms of taxation. For the first time, the strong centralised State 'offered' local authorities the power of managing schools and teachers, and collecting the revenues from local people needed to support education. It was the first time that decentralisation was going to be implemented in the country. A close look at the specific social and political context in which the Reform took place may clarify many of the points which will be the object of further analysis.

At a general level, the formulation of the *1878 Education Reform Act* was simultaneous with the enlargement of the

⁹ One project of Reform was presented by the Prime Minister, Marquis d'Ávila e Bolama, on 11 March 1871. Another followed in 13 March 1871, by Mariano de Carvalho. In the presentation of these proposals, the *1870 Education Reform Act* was acknowledged for the importance of its concerns and measures. The third project was presented in 20 January 1872, also by Mariano de Carvalho but its author was already Rodrigues de Sampaio, as Minister.

definition of political (male) suffrage which can be seen as an attempt towards a wider incorporation of male individuals as citizens. Further, according to Boli (1987), it can be seen as a strategy to

(...) hasten the shift of individual loyalty from traditional groups (family, region, occupational class) to the state as the new source of collective identity. (...) Political rights lead to both the protection of individuals from traditional forms of political control and their subjection to new controls exercised by the state (Boli 1987:136).

In 1878, the government extended franchise to all male voters who were heads of households, even illiterate. Decentralisation of primary education and wider (male) enfranchisement were going hand in hand with the assumption that because many more (male) citizens were incorporated into the State, therefore they would be able to intervene in local politics and education.

In a context of popular political mobilisation in Portugal ('Janeirinha'), against the launching of a 'consumption tax' - and in the wake of the Paris Commune movement, the proclamation of the Republic in Spain (1873), the cultural and political impact of the *Conferences of Casino* and of the *Geração de 70*¹⁰ - the State promoted new political measures which represented an attempt to

¹⁰ The movement called *Geração de 70* (1870 Generation) was produced by a group of Portuguese intellectuals, very much influenced by the new social, economical and political ideas which characterised the new and revolutionary European context, with the aim of contributing to the reform of the country. They criticised the projects developed by the governmental parties. The *Conferências do Casino* ('Casino Conferences'), organised by them in 1871, attempted to constitute a broad project for Portuguese society. After the first conferences had been given, the government forbade them. The 'civic action' which they wanted to carry out was characterised in the following terms by Silva (1987:8/9): "it was intended to be a global intervention - it intended to be cultural agitation, by publicly denouncing the gap between our school system, newspapers, public reflection, the arts and French or English societies, and also by contributing to scientific and artistic modernisation; their aim was also political agitation, struggling against the status quo produced by the 'Regeneration' and participating actively in radical movements. They were already guided by the political principles of justice and solidarity, sustained by secure beliefs in fatal historical evolution towards progress, equality, science (...)".

bring a new vitality to political, social and cultural life in Portugal. Quaresma underlines that "the regime knew how to transform the radical side of social discontent into positions of compromise" (Quaresma 1988:130). Mónica also suggests that there was a relationship between fears expressed by the government towards popular agitation and support for the extension of enfranchisement as a way of channelling popular discontent into State institutions (Mónica 1984:76).

In European terms, the law was exceptionally open. Formally, Portugal became one of the most democratic countries (...). (...) The law not only penetrated the terrain of the opposition, it also channelled popular agitation into the political system (Mónica 1986:16-17)

At the same time, the *1878 Education Reform Act* also signaled an enlargement of the incorporation of women into the State, but not through suffrage. As Ramirez (1987) stresses, by 1870,

(...) not a single country had extended the franchise to women, although in some countries, universal male suffrage had been attained. By 1930, women acquired the franchise in nearly half of the countries for which we have information on this variable (1987:274).

Women's incorporation into the State was reinforced clearly with this Reform Act, in two ways. Firstly - and for the first time - it underlined the equality of access for girls to mass schooling. Secondly, it integrated literate women more widely into specific State structures, the schools, as teachers, under the claim that women were the true educational workers. As Ramirez and Weiss stress (1979), women as peripheral groups have been incorporated into the State through the franchise, mass schooling and the labour market. In the Portuguese case, at this period, they were incorporated by the expansion of girls' schooling and the increase of women's job opportunities as teachers in the State

sector. That some educators were taking notice of this movement is clear in the words of one of them, who some years later, still felt the need to accentuate that women should already be considered as "citizens":

(...) primary education should contribute by itself to the basis of the education of all citizens, *including women*, and making them able to live in Portuguese society (emphasis added) (Matos 1907:316).

Regarding decentralisation, it may be useful to reveal some of the assumptions which guided its formulation. Liberal politicians believed that to decentralise was the best process to bring the Portuguese (male) to participate in political life by voting. At least, this was stressed several times in the debates in Parliament, when this Reform Act was discussed¹¹. Rodrigues Sampaio declared his views on decentralisation:

It generates local life. It establishes the government of the people by the people. It makes possible for people to manage their own interests. It educates and prepares citizens for the general administration of the State. It alleviates central government from superintending interests whose financing should be hand over with more benefit to local bodies, born from the popular vote (Rodrigues Sampaio, quoted in Soares 1982)

Sampaio argued that, in his view, it was necessary to decentralise first in order to expand 'instruction', and not the contrary, which was one of the arguments used against the reform he was advocating: "I do not adopt the view that it is necessary to instruct in order to decentralise.(...). I prefer to decentralise in order to 'instruct'"¹². Moreover, the government was also prepared to present a reform of general public administration, which would

¹¹ See *Diários da Câmara dos Senhores Deputados*, 20 march 1875, 24, 26 and 29 January, 7 and 8 February 1876.

¹² In *Diários da Câmara dos Senhores Deputados*, 26 January 1876, p. 174. See also MP Ilídio do Vale, in *Diários da Câmara dos Senhores Deputados*, 20 March 1875, p.924.

imply a decentralisation of local administration (see Serra 1988 for an overview of this process). An MP of the governmental party ('Regeneradores') stressed that decentralisation was in fact a process able to counteract the lack of initiative and indifference towards local politics, about which many politicians had complained¹³.

The debates which followed in Parliament demonstrated that decentralisation was in fact the most polemical question of this Reform. Although there was support for decentralisation from the parties of the political opposition, some MPs disagreed that local authorities should be charged with collecting the sums needed to expand mass schooling¹⁴. The debates made clear that the government expected to alleviate the central State of the burden of launching taxes to expand primary education, in a period when the State's main efforts were directed towards the construction of extended networks of roads and railways. In the forecast of the budget for education, presented with the Reform, local authorities were expected to provide a sum greater than the one intended by the central State for primary education¹⁵. The money was to come from the "friends of popular education" (legacies, inheritances, donations, etc), the selling of communal land ('baldios'), and through direct and indirect taxes¹⁶. Rodrigues Sampaio advocated that people would contribute more easily "to those things that they can see by themselves. We should not assume that people pay more easily to the central State than to local authorities"¹⁷.

¹³ MP Ilídio do Vale, *Diários da Câmara dos Senhores Deputados*, 8 February 1876, p.301.

¹⁴ See, for instance, the discourse of MP José Luciano de Castro, *Diários da Câmara dos Senhores Deputados*, 20 March 1875, p.924. Also MP Melo e Simas, *Diários da Câmara dos Senhores Deputados*, 29 January 1876, p. 211.

¹⁵ *Diários da Câmara dos Senhores Deputados*, 20 March 1875, p. 916.

¹⁶ MP Ilídio do Vale, *Diários da Câmara dos Senhores Deputados*, 8 February 1876, p. 293.

¹⁷ *Diários da Câmara dos Senhores Deputados*, 29 January 1876, p. 217.

**Source and scope of
the 1878 Education Reform Act**

The *1878 Education Reform Act* does not appear to have originated either in 'civil society' or in the 'economy'. Its *source*, to use Dale & Ozga's (1991) concept, appears to have been the State. In addition to the fact that the State was, as many authors have argued, the central 'actor' in the expansion of formal education, there were no references, in Parliamentary debates nor in educational literature of the time, to any other forces, either from 'civil society' or from the 'economy', pressing for the expansion of mass schooling. As argued in the initial chapter of this thesis, the semiperipheral Portuguese State is a centralised State. Further, it is a "strong" State (to use Sousa Santos's words), in the sense that it plays a central role in the definition of many policies, including educational and economic policies.

The government attempted to articulate the pressures which confronted the State, within a basic framework which characterised its policies. At the time of the *1878 Education Reform Act*, the Minister in charge of 'Instruction' was the 'radical' liberal Rodrigues Sampaio. Years before he had been president of the "Centre for the Improvement of the Working Classes" (*Centro Promotor das Classes Laboriosas*), where republicans, socialists, freemasons and radical liberals would assemble to debate the important cultural and political issues of the time (Mónica 1984). Apparently, the political forces of the government and, in particular, the presence of Rodrigues Sampaio played a specific role in the framing of this Reform with its concern for the equal access of girls to State schooling and for making more effective mass schooling on a universal basis.

What dominant perspectives framed the Reform with regard to what the education system should pursue? I.e. what was its *scope* (Dale & Ozga 1991)? Dale & Ozga identify three main *mandates* for education. By mandate they mean "the views of what is desirable and legitimate for the education system to seek to bring about" (1991:16). Although several different sets of views may coexist, there is a tendency for only those which are produced within powerful institutions to prevail. These *mandates* derive from the three core problems of State education, and they are the following:

- "(i) the provision of an appropriately skilled, qualified and stratified workforce, making education occupationally relevant;
- (ii) the inculcation of discipline, preferably *self*-discipline, to anticipate the need for social order and control;
- (iii) the encouragement of personal fulfilment through education, education for its own sake" (Dale & Ozga 1991:16 emphasis in the text).

The *1878 Education Reform Act* did not clarify its basic assumptions on what mass schooling was for. However, from the debates in Parliament and educators' writings, we can get a sense of the concerns which influenced most the production of this Reform.

The expansion of primary education was justified during the debates as "bringing to all social classes the benefit of instruction" and contributing to "good social organisation" (Rodrigues Sampaio)¹⁸. The governmental party, through its deputy leader in Parliament, claimed that instruction was necessary

(...) to prepare conveniently the path to a social organisation that may be supported by popular reason (Ilídio do Vale¹⁹);

(...) instruction is the first guarantee of order, the most powerful lever of progress, the most fruitful source of wealth,

¹⁸ *Diários da Câmara dos Senhores Deputados*, 20 March 1875, p.914.

¹⁹ *Ibidem*.

the main basis of freedom and the most solid support of modern institutions (Ilídio do Vale²⁰).

One encounters an amalgamation of several concerns of what education was for in these statements. It is difficult to identify which concern was the dominant. However, a concern for social control, or at least, for its internalisation through 'instruction', that is, through self-discipline, was expressed, as well as an expectation that 'instruction' would contribute to "progress", presumably a word that aimed to refer to the role of 'instruction' in economic development.

The concern for social control can be related to the development of a State education system which intended to contribute to the secularisation of Portuguese society, substituting the Catholic Church in its teaching and social control functions. Morality would also be in the hands of a growing secularised State, aiming to expand its services. It was probably expected that, using Raymond Williams' words, instruction would teach "habits of regularity, self discipline, obedience and trained effort" (1962:162). This was also expressed, for instance, in an official Report in 1885, when the Reform was being implemented. There it was stressed that the expansion of primary education would contribute:

(...) to the security of the individual and property; special protection would not be so necessary; ethical and political interests could develop; justice would be less difficult to apply; and more rational support for administration would be achieved (...) the maximum of education will result in the minimum of government²¹.

A leading education politician, who powerfully influenced this Reform, António da Costa, articulated this concern for

²⁰ *Diários da Câmara dos Senhores Deputados*, 24 January 1876, p.120.

²¹ In *Relatório do Conselho Superior de Instrução Pública*, 1885, p. 34.

education in terms of *intelligence, morality and labour* :

There is no freedom in the nation without popular instruction. Each school launched will represent many souls brought to the light, many families rescued from famine. Each school is a capital of intelligence, morality and labour(Costa 1870:232).

The second concern, revealed during the debates in Parliament, expressed the attempt to make 'instruction' and education contribute to "progress", i.e. to respond to the needs of a capitalist economy in expansion. The debates echoed the concerns expressed by 'development oriented' politicians and educators that State education should prepare children for their future role in the labour market, for the expansion of the industrial order and the national well-being. In fact, some of the policies elaborated after 1852 demonstrate that this concern was already present in Portugal. Technical schools for sectors of the labour aristocracy were started in this year. Indeed, the technical school sector expanded considerably in the period between 1882-1884. It was argued that popular instruction needed to be more aware of crucial and recent scientific and industrial developments on which national well-being depended. Some of the new intellectual elites, an influential group of politicians in charge of key positions in the State apparatus (Andrade Corvo, Fradesso da Silveira) as well as 'development oriented' university professors and high ranking State officials (Ferreira Lapa, Morais Soares, Rebelo da Silva, António da Costa), emphasised the need to 'educate the people' for a more industrialised, politically liberal society. They added to the aim of a more liberal society, the concern for the "economic functionality" of education (Silva 1987:93).

Neither of the two afore-mentioned concerns - a concern for social control and a concern for education as contributing the

expansion of the economy - appears to have achieved the status of *mandate* for education within the period of the *1878 Education Reform Act*. At the same time, the orientation of a pragmatic economic development of Portuguese society by the government of 'Regenerators' during this period may well explain why the concern for individual self-development through 'instruction', characteristic of a Liberal philosophy, was not mentioned explicitly in the debates. In fact, this was a concern that could be more easily articulated within the discourse on decentralisation as a way of stimulating local participation. Some educators returned later to this concern, in the 1890s, when stressing that primary education should be concerned with the learning of a wider knowledge than simply "the mechanical learning of writing, reading and counting" which contributed to "the development and integration of psychic faculties" (Ferreira 1890:12). "It is the school which is the element of intellectual, moral and social progress; (...) [it transforms] slaves into citizens" (Dias 1897:34 & 44). They related this concern to another where primary education was expected to increase (male) participation in the Parliamentary regime.

Several reasons may explain the impossibility of being able to identify a clear *mandate* for primary education in the *1878 Education Reform Act*. Firstly, Portuguese capitalism was less developed in comparison with 'core' countries. Secondly, the debates in education policy-making remained at a general level, with many unexplicit assumptions and intentions. Thirdly, the degree of the restricted expansion of State education in Portuguese society may bear some relation to the lack of clarification of the issues involved in the debate.

That the State was confronted by contradictory pressures thus becomes evident. Firstly, there was the intense involvement of the State in contributing to the expansion of capitalist accumulation, in particular to the provision of infrastructures, such as roads and railways, considered crucial for economic growth. In the Parliamentary sessions on the Reform, references were made to the budget for the construction of railroads where fabulous sums were involved especially when compared with the sums provided for primary education (including Teacher Colleges).

Secondly, there were different and, sometimes, opposite pressures from social groups regarding mass schooling. Among the intellectual élites there were those who pressed for its expansion, emphasising social control while others were more concerned with the contribution of education to economic development. In their turn, the emerging workers' associations and 'public educators' (to use Williams' category, 1962) supported 'instruction for the people' and pressed for better public education as well as for alternative schools originating in working class organisations. They were also concerned with national well-being, adding their own belief in the qualities of 'instruction' for the improvement of workers' lives and the advance of democracy.²² The State had also to confront opposition to the expansion of primary education from sectors involved in pre-capitalist relations. Apparently, 'instruction' for peasants was more feared than supported by the local power elites. They feared that it could cause insubordination and revolt. Hence,

²² If many of them were not confronting the problems of cultural domination and social control through mass schooling, others, such as the socialist Custódio J. Vieira, were advising that the right of every human being to be educated to its full potential would not be achieved in the liberal political regime: "of the three principles on which a new education system should be based - liberty, equality, fraternity - only the first, liberty, has been accomplished" (quoted in Silva 1987:101). In Vieira's view, only social revolution would be able to realise a truly working-class education.

they generally did not reveal concerns about 'educating the people' and mass schooling was often used as a way of bargaining in the local power struggle and local dominant groups retained considerable power in their dealings with the centralised State.

Thirdly, external social and political conditions - both the Commune in France and the Republic in Spain were recent events - as well as specific internal conditions (see previous references to 'Janeirinha') put additional pressures upon the State.

Given that this was a period of "flourishing capitalism", we might have expected a central role for the *process* of accumulation in education policy-making. Considering the education system as a whole, the expansion of technical schools, whose destiny was to receive sectors of the (male) working classes - suggesting that lyceum education was to continue to be for the (male) middle and upper middle classes - indicates the existence and support for an élitist system of education "devoted to the early recognition and fostering of 'ability' and its processing through a largely 'instrumental' curriculum" (Dale 1989:31).

However, if we focus our attention on the changes that the *1878 Reform Act* implemented, what we find is a concern to provide a *context* more suitable for the same process. Both the assumptions and measures taken, for example, in securing equality of access for girls as well as a universal basis for mass schooling have more to do with social control and legitimation concerns than with a direct economic contribution by education.

A final remark needs to be stressed here with regard to girls' education, since the perspectives on their education were specific. It was expected that girls - although having equal access to schooling - would behave according to a very strict code of

morality, where their duties as subordinates to the male world were emphasised. Even among liberal educators, girls' education was defined in an instrumental way, since it was mainly thought in terms of its contribution to the regeneration of the family (see chapter 4). Nothing was said about their rights for an autonomous future life. Their transformation "from slaves to citizens" - to use a former expression - had yet to be considered.

To sum up this section on the *source* and *scope* of the 1878 *Education Reform Act* - which represents a breakthrough in the history of mass schooling and women's entry into primary teaching in Portugal - the shift to decentralisation and the attempt to feminise primary teaching probably can be related in part to economic problems in the financing of education. The State, in its turn, attempted to gain legitimation in its intervention in mass schooling through decentralisation which was a long-standing claim for most educators and the republican party in expansion. The central State was not trusted among these sectors since it was seen as promoting the interests of a ruling elite living in the capital city of the kingdom and was perceived as ignorant of the "real needs of the nation". This effort to win legitimation occurred at a time when formal education, and particularly mass schooling, continued to suffer from scarce resources. Simultaneously, the State was able to take more coherent steps towards the incorporation of women into the State, ("as the new source of collective identity", Boli 1987:136) through the expansion of mass schooling for girls (Ramirez & Weiss 1979) and, more conclusively, by attracting an increasing number of women into the teaching ranks.

I will examine in more detail the problems of legitimation which the State confronted throughout the period 1870-1910 further below.

The actual implementation of the 1878 Reform

The Reform of 1878 started to be implemented in 1881. A large number of official documents were issued from central education authorities to local State agencies, between 1881 and 1882, to explain the proceedings and to make the most recalcitrant local agencies conform. In many of these documents, one finds reference to local disapproval of central State practices. Local authorities resisted being burdened with the increasing costs of mass schooling and having to extract more money, through direct and indirect taxation, from local people for whom formal education meant very little. It is argued by local authorities in some of the documents that "primary instruction is a general service provided by the (central) State and not a municipal service; and because the people are already burdened with taxes (...), municipalities should not be put under more strain"²³. Others argued that their own local finances were in disarray²⁴ and therefore they were unable to pay for schooling. Many others asked, in these documents, for loans from the government to be able to pay teachers' salaries. All of these were turned down, local authorities being advised to pay teachers' salaries from their own local revenues²⁵.

By the sheer number of documents issued by central government it is possible to gain a sense of the confusion and

²³ In *Diário do Governo*, 192, 29 Aug 1881 (8 Aug 1881); also in *Diário do Governo*, 193, 30 Aug 1881, 25 Aug 1881.

²⁴ In *Diário do Governo*, 193, 30 Aug 1881, 27 Aug 1881; also 10 Nov 1880, 24 Oct 1881.

²⁵ See for example *Diário do Governo*, 192, 29 Aug 1881; 25 July 1881; 26 Jul 1881.

uncertainty which existed in localities with regard to these changes in educational policy. That central authorities were aware of the difficulty and complexity of the tasks required of local authorities is clear from the documents²⁶: governmental representatives at local level ('governadores civis'), as well as the inspectorate, received detailed information about the complex and bureaucratic proceedings which they should follow. In particular, the inspectorate was advised to use the utmost tact and care with the various local bodies in charge of schooling:

It is essential that you do your best to maintain good relations with these authorities and municipal corporations, giving to them all the help and advice they need; avoiding any conflicts of competence; inciting fervour and patriotism in each one in favour of the same common end, popular instruction. (...) It is also important to extend the same fervour to all those interested in the expansion of popular instruction and for the betterment of schools. Private initiatives are strong levers to remove specific obstacles in villages. It is necessary to take advantage of these initiatives and reward the generosity and dedication of those who merit public recognition by these acts²⁷.

It is clear from these and other documents that governmental officials were quite well-informed of the needs, in terms of buildings and school materials, at the time²⁸. They were able to give advice to local authorities about the necessary steps to be followed when a school was launched: firstly, the acquisition of the school building, and the teacher's house; secondly, the acquisition of essential school material; finally, the need to save money in order to gradually buy the books needed for the school library²⁹. Inspectors were advised to closely examine material

²⁶ See *Diário do Governo*, 6 Dec 1880; 86, 20 Apr 1881; 240, 23 Oct 1882, 21 Oct 1882; 186, 10 Aug 1884 & 14 Aug 1884.

²⁷ In *Diário do Governo*, 199, 6 Sept 1881, 1 Sept 1881, in *Colecção Oficial da Legislação Portuguesa*, p. 305-306.

²⁸ See *Memoire sur l'Instruction Primare au Portugal*, 1878 (presented at the Exposition Universelle de Paris 1878).

²⁹ See *Memoire sur l'Instruction Primare au Portugal*, 1878 (presented at the Exposition

deficiencies. It was their duty, when noticing school and teachers' deficiencies, to investigate the causes and to attempt to remedy those problems by talking to the most affluent people in the localities³⁰. Inspectors were also particularly advised to take care of the situation of teachers in small communities, given their frequent exposure to "ingratitude", "injustices", and "disappointments" which could affect their courage and strength. Nevertheless, inspectors needed also to bear in mind that nothing should affect the "dignity, (...) order and discipline, so necessary to the progress of instruction". Teachers also needed to be maintained under strict supervision since "the main cause of the poor state of our schooling is precisely the lack of appropriate teacher training"³¹. Inspectors should reward the most dutiful teachers with prizes and praise and reprimand and discipline less zealous ones³².

It is quite interesting to note that although inspectors' reports from the period before the *1878 Education Reform Act* (Ghira 1866) emphasise the state of misery and chaos of most rural (and even urban) school buildings, official documents issued by the central government generally highlight teachers' performance and the need to keep them under control. Does this attitude indicate that the schoolteacher was already considered a threat as a result of participation in the new social movements emerging on the political scene in Portugal? That the primary school teacher was perceived as someone who needed to be

Universelle de Paris 1878).

³⁰ *Diário do Governo*, 244, 22 Sept 1882, 20 Sept 1882, in *Colecção Oficial da Legislação Portuguesa*, p. 408.

³¹ In *Diário do Governo*, 199, 6 Sept 1881, 1 Sept 1881, in *Colecção Oficial da Legislação Portuguesa*, p. 305-306.

³² In *Diário do Governo*, 294, 22 Sept 1882, 20 Sept 1881, in *Colecção Oficial da Legislação Portuguesa*, p. 407.

politically and socially controlled became more apparent later in the 1901 *Education Reform Act*, and regulations attached to it, where teachers were threatened with disciplinary procedures: if she/he "teaches any doctrines opposite to the State religion, morals and good habits" (*Regulamento* 1902).

In 1892, new legislation put an end to the experience of decentralisation. Some time before, decentralisation had come under heavy attack. Official reports and educators expressed their concern particularly regarding teachers' salaries. Claims were repeated that local authorities did not pay teachers' salaries, either because the financial costs were too much of a burden on them³³; or because the lack of basic rules in local political struggle allowed for the possibility of local authorities using teachers' salaries as a way of putting pressure upon teachers to win their votes in local elections (Ferreira 1890:19). Undoubtedly, there were also accusations of social patronage in the allocation of resources, and in the employment of teachers³⁴. The 1892 government, which ended the decentralisation experience, also accused local authorities - some had pursued innovative experiences, such as the Lisbon Town Hall - of overspending and overstaffing³⁵. Guerreiro has presented a severe picture of the local politician, as ignorant and ambitious, who used his power in local education to win influence and money (1898:22-23). Many voices were heard saying that, after ten years of decentralisation the situation of education in the country had not improved: "half of the parishes in the country have no school and 4/5 of the population still remain illiterate" (Dias 1897:23).

³³ See for instance the *Relatórios do Conselho Superior de Instrução Pública* (Reports from the Higher Council of Public Instruction) 1886:10; 1887:17; 1888:24.

³⁴ *Relatório do Conselho Superior de Instrução Pública* 1886:11; see also Ferreira 1890:18.

³⁵ Decree 6 May 1892, *Diário do Governo*, 103, 9 May 1892.

**Legitimation problems concerning the State and Education
during the period 1870-1910**

The educators and politicians, who wanted greater State intervention in education, claimed that the budget for the education sector was manifestly insufficient to cover the cost of expansion of mass schooling. This budget was judged critically by many of them at the turn of the century (Costa 1870, Dias 1897, Coelho 1902, Matos 1907). Dias stressed that only a fifth of the total expenditure on primary instruction was paid by the central State; 4/5 were paid by local authorities, which meant that, besides finance from central government, local authorities had to attract money from legacies, inheritances, gifts and charitable donations in favour of "popular education" (Dias 1897:76-79) and from direct and indirect taxation. The sums collected through the "friends of popular instruction" appear, according to Dias (1897) to have been much less than the expected.

In 1904-1905, Trindade Coelho traced a similar picture: what was spent on "popular instruction" did not increase significantly and its proportion of State expenditure remained more or less the same (quoted in Matos 1907:294). To legitimate their intervention in favour of more State spending on "popular instruction", educators and politicians compared the Portuguese education budget with other countries' budgets. Even in countries smaller in size than Portugal (for instance, Belgium, Switzerland and Holland), the State was spending with primary education seven to ninefold more than in the Portuguese case (Matos 1907:294; Costa 1870). 'Public educators' and 'development politicians' concluded that, with such an inadequate budget, the conditions for

the development of schooling were precarious. The educator Adolfo Coelho emphasised that "a comparison with most European countries and the United States shows that we are clearly behind them and very much at a distance" (1902:451).³⁶

Educators' descriptions of the state of school buildings and school materials are distressing. Years passed and there were still no improvements. School 'buildings' were compared to a "pig sty", in an official report³⁷ or a "cricket's cage" in the words of one educator (Matos 1907:277). Some primary teachers' descriptions of the 'school' sites where they were compelled to teach children make clear the appalling conditions in which they worked:

The school room had a very small window, without panes, giving a rarified light. It was intended for fifteen pupils but it was crowded with forty five. Children needed to carry out acrobatic exercises when they had to move. The walls were dirty and repulsive. And ventilation? If one closed the door we would be in danger of being asphyxiated and we would be in complete darkness. If one opened it, the sun transformed the temperature of the room into a kind of furnace! How could I have survived a summer there? I do not know! During the winter, the school room was transformed into a lake because of the (holes in the roof). Books were wet; the boys ran, jumping upon the tables, shouting. How did we spend a entire winter there? I cannot say! (Guerreiro 1898: 24-25).

At the same time, teachers protested vehemently about their pitiful salaries in such a way that it became a recurring topic of teachers' congresses and other professional meetings in the last part of the nineteenth-century. In these meetings, teachers presented themselves living in a state of economic misery, as beggars at the school gates, compelled either to support their

³⁶ The meagreness of resources for education was undoubtedly an issue long before the turn of the century. The Reports from the Higher Council of Public Instruction between 1844 and 1859 (*Relatórios do Conselho Superior de Instrução Pública*) indicate either that any educative measure which government officials wished to implement was always argued for in terms of its practicability within scarce resources; or in terms of not representing a burden on the education budget (see the *Reports* in Gomes 1985). From these arguments, there is clear evidence of the restrictions education policy-making faced and the negotiations it required.

³⁷ *Relatório do Conselho Superior de Instrução Pública*, 1887:16.

teaching activity with very different functions (such as working in the fields³⁸ or as clerks in local administrative jobs) or to accept gifts from their pupils in order to survive:

Portuguese primary teachers are already in a very difficult position given their miserable salaries and cannot bear any more sacrifices (...) Teachers have been modest intellectual workers whom the state treats badly and miserably, acting only to stop teachers from begging at the school gates³⁹.

Members of Parliament of the Portuguese Nation: the precarious situation in which men and women primary teachers live across this kingdom cannot be endured for much longer. Therefore, with one voice, the Portuguese primary teachers, tormented by their distressed condition, bring to the attention of Parliament the absolute impossibility of continuing to do their duties with dignity, as long as their salaries are not augmented to an adequate level.⁴⁰

We will show that the primary teacher is not so weak to be unable to go straight to the government and say in a dignified way: if you want us to work, if you want instruction to spread, pay us an honourable wage⁴¹.

Throughout this period of teachers' claims for a living wage, one can envisage the economic problems and the persistent pressure upon the State during the expansion of mass schooling. There were strong indications that the pressures put by 'development-oriented' politicians and 'public educators' as well as the support for a better State education from unionists did not provide a sufficient legitimation basis for resources to flow to

³⁸ In Ribeiro 1883 (pp.51-52) one finds some impressive stories about teachers working in the fields in order to survive. "A teacher told a Lisbon journalist: - If you came to the villages, you would see teachers with a hoe in their hands in order to be able to survive with their families. (...) A neighbour of mine, as soon as the class is finished, picks up his hoe and goes to work in his parents' fields; the other, who has got a numerous family, goes with peasant workers to cultivate the land; a third one carries wood. (...) From them, you can get a picture of the teaching profession to whom all decency and respectability is recommended... they are compelled to earn for their survival in their free time, instead of being at study.' Ghira (1866) also gives an impressive description of the situation of teachers in rural areas (p.253).

³⁹ The quotation is from a petition of teachers, published in *Boletim do Clero e do Professorado* (268), 13 July 1868 (quoted in Nóvoa 1987:485).

⁴⁰ A petition from primary teachers presented to Parliament in 1878, quoted in Ribeiro 1883:49.

⁴¹ A quotation from a teacher unionist, quoted in Nóvoa 1987:488.

assist the expansion of education. Among these sectors, there was a clear awareness of a problem of legitimation for education. There was no wider and extended recognition of its importance in supporting a Parliamentary regime; or for establishing 'the collective integrity of the people' (see Costa 1892; Dias 1897; Coelho 1902; Matos 1907). Most of these educators emphasised the low cost of education in comparison to other sectors of the Portuguese State. For example the expenditure on the police was four times greater:

We can see that in the eyes of the government the important issues are defence using guns against the enemies who threaten our territorial possessions as well the repression of crime; for the government those are sectors which must imply much bigger sacrifices from the national budget than the people's education (Coelho 1902:452).

Parliamentary debates during the 1870s have already demonstrated that education was not seen as a priority. Some MPs were implicitly accused of exclusively praising material benefits for Portuguese society, and consequently disregarding "moral improvements" brought about by State intervention, such as "instruction":

Is it not true that some time ago we haggled some pennies for primary teachers? and is it not true that we voted some days ago the sum of 17.000.000\$000 for the construction of railroads? Is it not true that we vote more easily and more liberally expenses for material improvements than those necessary to pay primary teachers, those missionaries of the light and truth?⁴²

At the same time, the State was also initiating and in some cases attempting to maintain its intervention in other levels of schooling: secondary schools ("liceus") from 1836; technical and vocational schools, mainly from 1852; and higher education

⁴² MP José Luciano de Castro, *Diários da Câmara dos Senhores Deputados*, 20 March 1875:926.

institutes, the Polytechnic Schools - created at Lisbon and Oporto in 1837, struggling to emerge against the old and powerful Coimbra University - Surgical-Medical Schools, Teacher Colleges and Arts Schools. The State was also building up a whole structure of educational bureaucracies, both at national and local levels to deal with inspection, finance, recruitment of personnel, and other matters related to its expansion (in the sense identified by Green 1990). It could be argued that a vast amount of public funding and resources were required to develop mass schooling and maintain the process of construction of an overall education system. Was the State able to guarantee the resources for this expansion and maintenance, and simultaneously gain wider support for policies in education which would necessitate cuts in other services such as the military, colonial or crown budgets? Clearly, it was not.⁴³

That the system was not improving very much is a view that can be substantiated by comparing State education expenditure in relation to the overall State budget in 1870 and in 1890. The percentage education spending represented in the national budget was small and tended to decrease between the two periods, 3.4% in 1870 and 2.7% in 1890 (see *Orçamento Geral do Estado*, State National Budget, 1870 and 1890). More evidence could be quoted to demonstrate the scarcity of resources for mass schooling and for education in general, but there is plenty in this chapter to show the economic constraints impinging upon the expansion of mass schooling, and consequently, the uncertainty

⁴³ The perspective of Reis (1988) explaining the slowness of Portuguese mass schooling and the high rates of illiteracy in the nineteenth-century by the lack of big social conflicts and national identity crisis may appear problematic. Reis does not provide any explanation for Portuguese 'precocity' in starting mass schooling earlier than 'core' countries. In what concerns the slowness of Portuguese mass schooling he may underestimate the conflicts and crisis which Portugal went throughout this period (in particular in the first part of the century).

which characterised this development. Improvements in working-class education certainly occurred but at an uneven pace and these were not guaranteed in the long term.

In this context, it could be argued that to attract a female labour force to teaching would ease some of these economic pressures, as the expectations at that time were that they would be a 'caring', 'compassionate' workforce, in other words, unlikely to complain about lower salaries. As already pointed out in chapter 1, there was also ideological resistance to employing women in the public sphere and accepting them as adequate educators in the 'non protected' areas of working-class education. Hence, these were problems which needed a new legitimisation. In chapter 4, a more complete picture of the expectations of women by (male) education politicians is presented, though not all these perceived attributes were equally clearly voiced. It is argued that a 'new orthodoxy' was gaining ground. One could say that such persistent appeals for a caring workforce in the context of that time could be perceived as the expectation of a non militant workforce.

'Feminisation' in the Semiperiphery

In 'core' countries, women were also recruited for the expansion of mass schooling. Hence, this process may be seen as a "transnational similarity" (using the concept of Ramirez and Boli 1987). At the end of the nineteenth-century in the United States, women teachers already comprised 63% of the profession, rising to 90% in the cities (Grumet 1981:467). Preston (1982), referring to New England, identifies the period between 1830 and 1880 as "the period during which schoolteaching became statistically and

ideologically women's work" (1982:173). In the European context, the English case also demonstrates a clear feminisation of primary teaching: in the middle of the century, women represented 46% of primary teachers (Bradley 1989:205, quoting Tropp 1957); by 1896, this proportion had risen to 70% and, in 1913, women teachers were 75% of the total (Bradley 1989:206; David 1980:129). In France, around 1900, women primary teachers outnumbered male teachers (Moch 1988:303). In Portugal, a majority of women teachers in primary schools was attained later than in core countries. As will be seen below, Portuguese women teachers were only 33% in primary schools at the turn of the century. Undoubtedly the percentages concerning different countries hide quite different social realities, requiring a cautious interpretation when comparing these figures. Nevertheless, there remain strong indications, in my view, that the late feminisation in Portugal is related to a slower and later expansion of mass schooling. The feminisation of teaching did not occur in Portugal at the same time and pace as 'core' countries, such as England and the United States. This reinforces the main argument in this thesis of a strong relationship between the increasing entry of women into primary teaching and the development of mass schooling.

In the middle of the nineteenth-century, there were little more than fifty women teachers in State schools since they were restricted to girls' schools. Until 1878, they entered teaching at the same pace as the creation of girls' schools. After 1878, as teachers of mixed classes, and even of boys' schools, their numbers rose more substantially. The following percentages point to the increase in women's presence in primary schools:

table 5
Rates of 'Feminisation' in Teaching

years	women teachers %
1854-1855	4.5
1868-1869	-
1881-1882	27.8
1899-1900	37.2
1909-1910	52.2

From these figures, it may be stressed that the percentage of women teachers in State schools, although very low in the middle of the century, increased substantially to attain, at the end of the century, more than one third of the teaching profession. In 1910, at the onset of the Republic, this percentage already represented more than half of the profession.

Focusing on attendance at Oporto Women Teachers' College - as an example of the increasing number of women students in these institutions - their percentage in the period 1882-1892 was already more than 58%:

table 6
Numbers and Percentage of Men and Women Trainees
at Oporto Teacher College
1882-1892⁴⁴

Total Number	Women	Men	% Women	% Men
779	455	324	58.4	41.6

These numbers kept growing (with small variations), as demonstrated by the following figures:

⁴⁴ The data of tables 5 and 6 have been gathered in the *Relatórios da Escola Normal do Sexo Feminino do Distrito do Porto* (Report) for the years 1882-3, 1883-4, 1884-5, 1886-7, 1887-8, 1888-9, 1889-90, 1890-1, 1891-2, 1892-3, 1893-4, 1894-5, 1895-6, 1903-4, 1904-5, 1905-6, 1906-7, 1909-10. And also in *Anuário das Escolas Normais do Porto*, 1909-1910, p.63

table 7
Numbers of Women Students
at Oporto Teacher College
1882 /1896 & 1903/1910

years	numbers
1882-83	32
1883-84	46
1884-85	46
1885-86	42
1886-87	43
1887-88	49
1888-89	54
1889-90	65
1890-91	59
1891-92	70
1892-93	79
1893-94	73
1894-95	70
1895-96	64
1896-97	68
1897-98	91
1898-99	87
1899-900	87
1900-01	108
1901-02	106
1902-03	102
1903-04	104
1904-05	151
1905-06	153
1906-07	121
1907-08	81
1908-09	100
1909-10	121

As far as the number of men students in the Oporto Teacher College are concerned, their figures were as follows:

table 8
Numbers of Men Students
at Oporto Teacher College
1882-1892⁴⁵

years	numbers
1882-83	35
1883-84	41
1884-85	34
1885-86	41
1886-87	33
1887-88	40
1888-89	47
1889-90	26
1890-91	35
1891-92	33
1892-93	43
1893-94	30
1894-95	30
1895-96	43
1896-97	48
1897-98	60
1898-99	59
1899-900	52
1900-01	63
1901-02	52
1902-03	33
1903-04	29
1904-05	35
1905-06	34
1906-07	37
1907-08	29
1908-09	33

Comparing both men and women student figures, it is noticeable that there was a majority of women in colleges at the time, which demonstrates the trend in State schools to identify teaching as increasingly *women's work*.

The average annual growth rate of women students between 1882-1895 was 5.5%; in the period 1896-1909 this growth was somewhat smaller: 4.5%. Regarding their male counterparts, this same rate was clearly slower, 1.6%, whilst in

⁴⁵ The data of tables 6 and 7 has been gathered in Resende (1902:155) and in *Anuário das Escolas Normais do Porto*, 1909-1910, p.64.

the period 1896-1908, the average annual growth rate was negative: - 3.1%.

As a consequence, more women teachers qualified at the Colleges:

table 9
Women and Men Teacher Colleges Certificates
1899-90⁴⁶

Total Number of T. Trainees	Women Trainees		Men Trainees	
	T	%	T	%
334	213	63.8	121	36.2

Inspectorate reports (such as the one which appeared in 1885) appear to be concerned with the low number of men students in Teacher Colleges, and with the number of grants (in Men's Colleges) which were not taken up. Their explanation pointed to the low value of these grants "insufficient to the most modest demands of the costs of living in Lisbon"⁴⁷. Not surprisingly, the reports which dealt with Colleges for women emphasised the increase in their student enrolments. They saw this as proof that teaching was considered as "a good future for women", but also that Women Teachers' Colleges "have gained the *bona fides* from fathers, who do not fear to trust their daughters to these colleges". They represented a model of decency and modesty⁴⁸.

As already stressed, these increases in the numbers of women teacher students are related to the changes introduced by the 1878 *Education Reform Act*. It is now time to analyse in detail the changes it introduced regarding women primary teachers. In the

⁴⁶ In Ministério dos Negócios do Reino, Direcção Geral de Instrução Pública *Estatística do Ensino Normal*, 1905:21.

⁴⁷ In *Relatório da Inspeção do ano de 1885*: 11.

⁴⁸ in 'Relatório da Escola Normal de Lisboa (sexo feminino)', 1903-1904, in *Relatórios dos Directores das Escolas de Lisboa, Porto*: 736.

first place, the State policies on girls' education and their relationship to women's entry into the public sector as teachers will be examined. It is suggested that the important changes which occurred in women teachers' job definition contribute to explain the increasing feminisation which followed in primary schools. Secondly, the implications of equal pay for women teachers achieved by the *1878 Education Reform Act* will be discussed. Finally, the expansion of Women Teachers' Colleges in equal number, by this Reform, following their introduction into a more academic curriculum - albeit maintaining strict gender divisions in specific areas - is reviewed.

**(i) State policies on girls' education and
on the changing definition of a woman teacher's job**

In the context of the State education system, women teachers were first employed when State primary schools for girls opened in 1815⁴⁹. This was originally proposed by Queen Maria I in 1790⁵⁰. The first schoolmistresses began to make their appearance in the State sector to teach the daughters of craftsmen and other qualified workers. They were required to teach "christian religion, reading, writing, basic arithmetic, spinning, knitting, sewing, embroidery and cutting garments". Only those women whose lives conformed to the strict rules governing ladylike behaviour, and who were recommended by local priests, had access to teaching⁵¹.

They saw the doors of the profession opening for them on the grounds that they were more suitable to teach girls. Why only women should teach girls was simply taken for granted at the time, apparently requiring no discussion or justification. These measures

⁴⁹ *Resolução Real*, 13 February 1815 in *Collecção de Legislação Portuguesa*, 1988:99.

⁵⁰ *Resolução Real*, 31 May 1790.

⁵¹ *Resolução Real*, 13 February 1815 in *Collecção de Legislação Portuguesa* (1988), p. 99.

were intrinsic to a clear cut, traditional, sex segregated education, and applied to the educative agents, pupils and schools. It may be assumed that underlying these measures was the fear of inappropriate and unacceptable attitudes developing in girls unless taught by women teachers. In particular, sexual promiscuity was feared. As girls should learn not only moral conventions but also domestic subjects appropriate to their sex, only women, who, by definition, controlled these areas of knowledge, could teach them.

The State launched its initiative for the education of girls asserting a rather instrumental aim for their education: "Girls' Education and Instruction [represent] great value for the general public"⁵² (in the *regeneration* of the Nation). This initiative, in 1815, promoted girls' access to mass schooling where two different systems of education were in place, sustained by an ideology of different "vocations" and "destinations" for girls and boys (see Mosconi 1989).

Thus schoolmistresses were introduced into State schools to teach girls exclusively. Both the 1836 and 1844 *Education Reform Acts* maintained these gender divisions in schooling. However, particularly in the latter Act, it became apparent that in the process of construction of mass schooling, girls' education was something 'added' on to existing provisions. It included a chapter apart (well insulated) on "girls' schools", described as "specialised". In fact, they were "specialised" in the sense that girls were deprived of the more academic subjects and taught what were seen as the most appropriate subjects for the construction of their female identity - needlework. Girls were excluded from the second level of primary schools.

⁵² See former footnote.

Only with the *1878 Education Reform Act*, were women teachers able to teach boys. They were able to teach boys not only in mixed classes but *also* in boys' schools. Clearly the Reform Act undermined the earlier definition of a woman teacher's job by stating that girls and mixed classes should be taught by women teachers exclusively. Male teachers were allowed to teach mixed classes when a female teacher could not be found, but only in very specific circumstances: on condition that they were married to a woman, or had a woman in their family, who could teach girls needlework and the appropriate female morality. In fact, the *1878 Education Reform Act* introduced, for the first time, the requirement that older girls should be taught the duties of daughters, wives and mothers in primary schools.

Furthermore, women teachers were able to teach in every type of primary school⁵³, except boys' 'complementary' primary schools, designed for boys over twelve years. Moreover, when mixed classes were taught by women teachers, boys of this age were not allowed to attend them. As expected within the ideological framework of the time, men teachers could not teach in girls' schools, even at an 'elementary' level.

The *1878 Education Reform Act* revealed an ideological climate of fears of sexual promiscuity or sexually deviant behaviour and formulated specific regulations to prevent them (as the specific regulations cited above appear to suggest - men

⁵³ With this Reform, primary schools were divided in two levels: 'elementary' (compulsory, to be attended by children between 6 and 12 years of age) and 'complementary'. In terms of gender organization, they could be single-sex or mixed. The curriculum for boys, in 'elementary' schools, consisted of 'reading', 'writing', 'four arithmetic operations', 'baisc knowledge of Portuguese grammar', 'basic notions of the metric system', 'drawing', 'christian morals and religion', 'gymnastics', 'singing', and 'basic knowledge of agriculture'. In the 'elementary' schools, girls should learn the same subjects, except agriculture to be substituted by 'needlework', "which is necessary to the practice of the poor" (*1878 Education Reform Act*, art. 2).

teaching in mixed classes would be married and boys over twelve years of age could not attend classes taught by women teachers⁵⁴). With regard to the relationship between women teachers and boys, the official document appears to express fears that women might 'soften' proper male behaviour, and that boys' attitudes might threaten a woman teacher's authority. Strober and Tyack (1980), writing about the American educational context at this time, state that there were concerns that women might not be able to discipline older boys. Men were perceived as the ultimate source of disciplinary authority. The fear of sexual promiscuity was expressed, even more clearly, in documents coming in the wake of the *1901 Education Reform Act*, when it was recommended that girls should be always in the company of a woman teacher or a woman employee, even when within the school walls⁵⁵.

This new definition of what counted as women and men teachers' jobs gave rise to some protests. The educator Simões Dias (1897) criticised regulations which forbade male teachers to teach girls. He saw this definition of a male teacher's job as predicated upon "restrictive morality" and "hypocritical modesty", since

(...) the law admits the promiscuity of the sexes under the supervision of a woman teacher, but condemns this promiscuity under the direction of a male teacher (1897:181)

To justify his protests he told the story of girls who had no access to local primary school, since the teacher was male. Again, his assertion makes clearly visible the fear of sexual promiscuity or of the blurring of gender definitions in nineteenth-century Portuguese society. However it also reveals that, at the

⁵⁴ This was later slightly changed: in the *1901 Education Reform Act*, women teachers were not able to teach boys over 14 years of age (*Decree* 14 Dec 1901).

⁵⁵ *Regulamento* 19 Sept 1902.

symbolic level, within the context of nineteenth-century rhetoric about women's role for the 'regeneration' of the family and their intrinsic 'purity' (see chapter 4), only women were granted the power of integrating both sexes in school without fear of 'corrupting' children's bodies and minds.

Some indications remain also about the climate of frustration among male teachers with regard to the way women were favoured in the primary school labour market. Women teachers are presented as "appalling competitors even in boys' schools", in the *Report of the Men Teachers' College* :

A great number of boys' schools is already provided with women teachers. Truly this is a stimulus to women, but a great discouragement for men. Teaching is not a popular profession. To this lack of stimulus is added the uncertainty of a job. Therefore many (male) teachers do not find work, living a life of difficulties, while women are being provided with jobs⁵⁶.

Surely these views serve as a confirmation, for many male teachers, of the intentions of the new legislation in changing teaching into *women's work*.

The change in the definition of a woman teacher's job was neither justified nor framed in ideological terms in the 1878 *Education Reform Act*. Even the debates of the Reform Act in Parliament paid little attention to this question. Rodrigues Sampaio mentioned it briefly, albeit his words were quite revealing of the ideological framework which inspired the Reform. He stressed that:

Women are not inferior to men, given their instincts and special ability. They even have some advantages for instructing and educating children in the primary school. The brilliant example of the United States, where the number of women teachers is five times the number of male teachers, and the

⁵⁶ In 'Relatório da Escola Normal de Lisboa' (sexo masculino)1903-1904, in *Relatórios dos Directores das Escolas de Lisboa, Porto...*, p.719.

advantages of the same experience in Milan and Stockholm justify the enlargement of their activities⁵⁷.

The same ideological justification can be found in the previous *1870 Education Reform Act*, which greatly influenced the *1878 Act*, and whose principal figure was António da Costa. In the introduction to the 1870 Reform, it was underlined that educated women were considered as the "essential basis for public morality, for noble sentiments and for the true progress of nations"⁵⁸. It was already stated that women should teach mixed classes since in this way "the estimable principle of men being educated by women"⁵⁹ would be put into practice.

On the whole, the changes implemented by both the *1870* and the *1878 Education Reform Acts* appeared as a result of the debates developing on gender roles at the time. The view of women as the best educators of boys and girls, given their inherent motherly attitudes - i.e. *maternalism* - was then constructed and publicly voiced⁶⁰. What is quite revealing is that, from then onwards, women students at Teacher Colleges were taught the

⁵⁷ Rodrigues Sampaio in his presentation of the Reform Act in Parliament, *Diários da Câmara dos Senhores Deputados*, 24 January 1876. Similar arguments can be found in the speech of the MP Mariano de Carvalho, in the presentation of another project of Reform, *Diários da Câmara dos Senhores Deputados*, 20 January 1872.

⁵⁸ In *Colecção Oficial de Legislação Portuguesa*: 442, 3 Aug 1870 (*Diário do Governo*, 181, 16 Aug 1870). Ghira (1866:259) also shared this view, signalling the new role for women in their involvement in the education of their children and providing the best impulse for their education in State schools.

⁵⁹ In *Colecção Oficial de Legislação Portuguesa*, p. 460, 16 Aug 1870 (*Diário do Governo*, 194, 31 Aug 1870). Women teachers from then onwards teach mixed classes due to the new rhetoric of women as the best educators of children. However, politicians were at the same time thinking about economic advantages when adopting mixed schools, since it was cheaper to have both boys and girls with the same teacher, when their number was reduced. See for instance, the discourse of the MP Mariano de Carvalho, *Diários da Câmara dos Senhores Deputados*, 13 March 1871, p.60.

⁶⁰ That *maternalism* was already in place may be seen also in kindergarten which were appearing at the end of nineteenth century. They should employ a woman director, two permanent women teachers, a woman caretaker and four nannies ('jardineiras'), among other personnel. One of these was the very successful Froebel kindergarten, run by the Lisbon Town Hall (see Freire 1892). Many other educators and politicians supported this view of *maternalism*. See for instance Leite 1892: 96-7.

"duties of the mother in the family", in contrast to the "duties of the citizen", assigned to male students.

Therefore it may be said that the *1878 Education Reform Act* defined teaching for women in new terms. Later documents (such as the *Report of Maria Pia School* for the academic year 1885-86) described this Reform as launching a new career for women. It became clear that, subsequently, teaching would be seen within this new definition as increasingly *women's work*. Until then, the schooling system had been divided along strict gender lines concerning the provision of spaces, curricula, teachers, pupils, vocations and careers in such a way that it could be said that two systems operated. With this Reform, mixed classes were introduced and women teachers were empowered to teach in all types of classes, except boys' classes of twelve years and older. Thus a breakthrough in strict gender divisions began to operate both in the education system and in Portuguese society of the time.

Subsequent documents (such as the *1901 Reform Education Act*, and the attached official documents, *1902 Statutory Rules*⁶¹) maintained these basic definitions, with slight changes or restrictions: women were able to teach only the first class, in urban 'central' schools for boys, while their job was neither restricted in urban or rural 'parish' schools⁶² for boys nor in any other type of school. In fact, some of the pressures from male teachers had already produced an effect - the schools with highest status should be kept in men's hands for a while.

⁶¹ *Decree* 24 Dec 1901 and *Regulamento* 19 Sept 1902.

⁶² 'Central' schools were different from 'parish' schools because they had several teachers and were located in central places in town. The 'parish' school had only one teacher.

(ii) equal pay for women teachers

From their introduction into the State system of education, women teachers received lower pay than their male counterparts. Under the *1844 Education Reform Act* they were paid two thirds of men's salaries. Further, whereas men teachers living in Lisbon and Oporto were paid better salaries than those living in small towns or villages, women teachers' salaries in both places were almost the same. Apparently, the female labour force was considered cheaper with the assumption that, even in the main towns, their living could be complemented by the male income within their families, either husbands or fathers, etc. This inequality of pay contrasts with the equality of grants that both male and female students in Teacher Colleges received from the State and local authorities: the law did not discriminate against women students in this respect.

The *1878 Education Reform Act* put an end to salary discrimination at the primary level, although significantly it did not offer any explicit explanation for the change of policy. Women teachers attained equal pay to men. Even during the debates of this Reform in Parliament, equal pay for women teachers was not discussed. But, significantly, it was this Reform which gave expression to equal pay. As recently as the session of 21 January 1875, Parliament had discussed teachers' salaries in which women teachers were to be paid less than their male peers⁶³. Nevertheless, from 1870 onwards, projects of new reforms contemplated equal pay, without being able to concretise it. Mariano de Carvalho, for instance, in the presentation of one of these projects, gave clear support to it: "the project law considers

⁶³ *Diários da Câmara dos Senhores Deputados*, 21 January 1875, p. 141.

women equal to men and pays equally the same services"⁶⁴. Presumably, some resistance to the introduction of equal pay for women teachers was encapsulated in these successive attempts, which only the *1878 Education Reform Act* was able to overcome.

According to the data collected so far, the introduction of equal pay for women teachers appears quite odd, insofar as it was an unusual procedure at the time both at national and world levels. Equal pay in teaching was only accepted in 1909 in France (Moch 1988:312), in 1919, in Denmark (Moeller 1987) and in England, women teachers only achieved equal pay in the 1960s, after long struggles, chiefly during the 1920s and the 1930s (Oram 1987:276-7).

In Great Britain, equal pay was a claim of the feminist movement and was adopted by sectors of the trade union movement, during the nineteenth-century. But this campaign was diluted into protective legislation prohibiting women from working at night or for long hours, as well as being kept away from specific types of work. Emma Paterson, of the Women's Protective and Provident League in 1874, was against protective legislation on the basis that such legislation restricted women's opportunities in the world of work, and consequently the development of women's rights. The first equal pay resolution was passed in 1888, supported by the Women's Trade Union League. In the United States much debate focused around these issues and the 1868 Conference of the National Labor Union gave its support to women's equal pay and the need for their unionisation (Banks 1986). In other countries the socialist movement, in its different approaches (including the Saint-Simonians and Fourier, in France, or Bebel in Germany, cf.

⁶⁴ *Diários da Câmara dos Senhores Deputados*, 20 January 1872, p.105.

Coole 1988) supported, in many of its resolutions and demands, the equality of women in the world of work, sometimes questioning society as an androgenous model.

Portuguese studies about labour relations and feminist issues suggest that equal pay was not such a crucial issue at the time. There is no evidence of strong demands for equal pay either in the State or private sectors. Nevertheless, it was sometimes mentioned and debated. Although there are practically no studies of labour relations concerning civil servants and working class sectors in Portugal having the question of equal pay as their focus, there are some indications that equal pay was sometimes advanced by specific sectors of the labour movement, in the nineteenth-century. Cabral (1976) states that in the tobacco factories in the South of the country, where the working class movement appeared more rebellious, equal pay was advanced as a claim of their movement, in the 1870s (1976:331). Mónica also reproduces the memorandum of the First Congress of Socialists Workers in Portugal in 1877, where the ship fitters section presented a claim for equal pay for women and men workers, to be adopted as a general principle within the labour movement (Mónica 1986:172).

As far as State institutions are concerned, there is very little data available on the introduction of equal pay as yet in Portugal. We do know however that, in 1870, the Central State Services for Telegraphists created a new post: *telegraphists' aides*, who could be either men or women and who were paid the same. Presumably, it was thought that for low-grade posts, with low salaries, only women would be attracted. A similar justification for the introduction of women as telegraphists was based on the successful experience of other countries ("France,

North Germany, Bavaria, Belgium, Denmark, Norway, Sweden, Baden, Switzerland and Russia") where

(...) women have demonstrated as telegraphists more ability in the manipulation of delicate instruments than men, and no less intelligence, whereas their work is cheaper⁶⁵.

Hence, it was said that women should not be considered inferior concerning their capacity to be employed in specific jobs. They were even thought to have attributes which were gender-specific and, in this case, more adequate to their job as telegraphists. It is noticeable that this rhetoric hid the fact that they were expected to fill places at the bottom of the job hierarchy. The directive here in question stressed at the same time that it was expected that the new employee should be someone of the family of the (male) telegraphist in charge. In this way, the head of the family was able to control the women of his family not only in the household but also in the workplace. It is possible that other areas of State services were introducing equal pay, but this is a question that only systematic research can answer

Equal pay for women teachers at the primary level was probably introduced to help attract women into the job. The fact that this occurred in a government where a 'radical' liberal was in charge of 'Instruction' and where a certain expansion of job opportunities for male workers was taking place is important. The State intended to gain new legitimation by adopting a quite 'radical' measure and by promoting a new direction in State education. It was an attempt to contribute to the extension of mass schooling on a more universal basis. As said earlier, among several

⁶⁵ Direcção dos Telegraphos e Pharoas do Reino, "Ordem Geral" nº 9, 11 August 1870, in *Ordens Gerais de Direcção dos Telephrafos do Reino*, 1869-70, Lisbon, 1-4. I would like to thank the interest and kindness of Virginia Ferreira who has provided me with this useful information.

educators and politicians there was a clear consciousness of the backwardness of the process of expansion of mass schooling. António da Costa, as a result of his views on *maternalism*, i.e. that women teachers should duplicate the work of mothers in primary schools, was already pleading, in 1870, for an advanced role for Portugal in the European context with the employment of women in teaching:

We, who are always quoting others, should we not be quoted at least once [by other countries as a model]? If in the European modern institutions we are usually the tail which is dragging, why should we not be, in this question of women's teaching, the head which is pushed forward? (1870:222).

He supported equal civil rights for women, but was quick to assure that this was a different matter from granting women political rights (Costa 1892:353). He stressed that:

(...) with the *1870 Education Reform Act* both sexes were considered as equal. Until then, one was the master and the other the slave. Afterwards, an equal number of schools was created and equal pay was introduced. In this way, one assures that many women, with the best ability, come into teaching (Costa 1892:355).

At this point, it is useful to stress that the salaries to be paid by local authorities (since the Reform pointed to a clear change in policy, transferring primary school management, inspection and financing to local authorities) were nearly the same as the salaries that had been paid for the past thirty years by the central State (see Nóvoa 1987:399n).

There are hints about the way teachers reacted towards the salaries included in the Reform. They complained bitterly against a policy of restriction in salaries which they saw as maintaining them in misery, there having been no improvement in their salaries, from the *1844 Education Reform Act* onwards:

(...) [thirty years ago] things necessary to life cost three to

four times less than they cost nowadays. (...) It is amazing how lightly the [government] pays our hard efforts, as the mentors of childhood. We are in charge of opening the doors of science to the children of the nation and at the same time of sacrificing our entire lives to the development of the intelligence of those who are its future⁶⁶.

Their claims for a salary to live decent lives was double the salary stipulated by the State. However the situation of lower salaries was maintained. After the 1890 'capitalist crisis', referred to above, State officials and politicians could answer bitterly to teachers' claims for a salary increase that "it was inconvenient to augment teachers' salaries (...) since this could result in more abuses than advantages"⁶⁷. It is worth quoting the famous answer by the prime minister João Franco in 1906 to a teachers' commission who met him for the same reasons:

Teachers' claims are incompatible with the state of the national budget. Many teachers are worthless in their work and they do not merit the salaries they receive. It is better that they begin to fulfill their duties, and the government, when financing conditions improve, will do what is in its reach. Meanwhile, teachers should look after their gardens and backyards, cultivating potatoes in their free time (quoted in Matos 1907:307).

Although women primary teachers were paid the same, it is pretty clear by some comments of Guerreiro (1898), himself a teacher in a local school and a strong defender of teachers' rights, that their salaries were low and that they suffered great hardship, living isolated from 'society', because they could not afford to dress up or go out.

⁶⁶ From petition by primary teachers, presented to Parliament in 1878, quoted in Ribeiro (1883:50). From 1871, during the debates concerning the *Education Reform Act* in Parliament, MPs mentioned several times the "miserable salaries" of primary teachers and the need to increase them. See, for instance, the speech of Marquis d'Ávila e Bolama, *Diários da Câmara dos Senhores Deputados*, 11 March 1871. In the same line of argument, the Reports from the Higher Council of Public Instruction mentioned often the poor salaries of primary teachers (see *Relatório do Conselho Superior de Instrução Pública*, 1887:17; 1888:24)

⁶⁷ *Despacho*, 26 Sept 1891, quoted in Matos 1907:87/88.

While women teachers were attaining equal pay with men at the primary level, they still experienced salary discrimination in Teacher Colleges. In a higher status situation, women were not perceived as having the same value as men: in Teacher Colleges, women teachers received 3/4 of men's salaries. Also, in this case no explanation was offered. Women teachers resented this treatment:

It is difficult to accept such an irregular and, for us women, vexing regulation, put into practice at a time when a law tolerating unequal salaries between men and women teachers at the primary level has been outlawed⁶⁸.

The inequality of women teachers' salaries in the Colleges was maintained for many years. The incorporation of women at a higher level in State institutions was seen as a concession rather a right. For a long time, the State considered it perfectly legitimate that women could be paid less while doing the same job, in the same institution. Male teachers were presented generally as the most competent, better trained and more cultivated,⁶⁹ and, therefore, as the most appropriate members of Teacher Colleges.

(iii) State policies on the expansion of Women's Teacher Training Colleges

Nineteenth-century accounts (such as Leite 1892; Ribeiro 1883) as well as recent reviews (Nóvoa 1987) of Teacher Colleges depict their development and regulation throughout the century. Although the first Teacher Colleges appeared in the 1830s (strongly related to the expansion of the monitorial school), it was only after 1862 that they were defined exclusively as teacher training institutions. The educational institutions devoted to

⁶⁸ *Relatório da Inspeção* 1884, "As Escolas Normais Primárias", Junta Geral do Distrito de Lisboa p. 9-11.

⁶⁹ *Ibidem*.

teacher training then appeared within an ideological framework stressing the greater importance of education over 'instruction' likening the teacher's role to that of a 'priesthood'. This emphasis provided them with opportunities to introduce new forms of pedagogic practices. They also attempted to instill in apprentices a "love of work and of the noble teaching profession, for the dignity and comradeship within its ranks" (Leite 1892:22). Teacher Colleges should instill in their apprentices a strong attachment to teaching, a "feeling for teaching" (Leite 1892:103). It was said that teachers carried with them the most "important social mission" since like "the temple and the priesthood" teaching had to be constructed (Leite 1892:7). Teacher Colleges for men were expected to attract a male (and white) clientele, coming from rural areas and thereby experiencing upward mobility as a result⁷⁰.

⁷⁰ At the end of the nineteenth-century, there are some references in official reports about the social recruitment to Teacher Training Colleges. It is stressed that male students came from social backgrounds in need of financial help. For this reason, they were not able to live in Lisbon - one of the most expensive cities in Europe, as it was stressed - or in Oporto, without State or local grants. The fact that the places in Teacher Colleges were not fully taken - only the places guaranteed with a grant were taken - was attributed to the lack of resources on the part of students (see *Relatório da Comissão Inspectoral das Escolas Normais do Porto*, 1888). Another report, in 1904, also underlined that the students in Colleges for Men came from the lower middle classes. Many of them were sons or relatives of primary teachers. For all of them it was difficult to study in a Teacher College, with all the expenses in housing, fees, books, etc. When the grants were abolished in this year, there were complaints. Those who drafted the reports stated that they would agree to this cut if it were restricted to women studying in Teacher Colleges. But to extend it to Men Teachers' Colleges, already characterised by the low numbers of applicants, seemed to them as unjustifiable (see *Relatório da Escola Normal do Sexo Masculino de Lisboa 1903-1904* :719). Regarding women, some studies have established that many women primary teachers came from the labour aristocracy and lower middle classes (Copelman 1985, 1986; Purvis 1989 and Widdowson 1983 emphasise as well as their working-class origin). In Portugal, there are no studies concerning women teachers' social origins but there are some indications that this trend applies to the Portuguese context too. When Teacher Colleges for Women were created, they were expected to recruit girls from orphanages. Certainly some changes occurred subsequently. Some novels (such as *Madame Renan* by Caiel) present girls coming from the labour aristocracy to be students at the Teacher College. Regarding (lower) middle class intake to the profession, some legal documents (such as *Relatório da Escola Maria Pia* 1884-85) stress that both *ladies* and *girls* were applying to Teacher Colleges to become primary teachers. The data from the attendance on Oporto Teacher College for Women shows that, between 1881-82 and 1909-1910, high proportions of their students came from rural areas. Only one third was from urban social groups. At least some would come from sectors of landowners since, as Ramos has noticed (1988:1086), there was a tradition among these social groups, in the North of the country, of sending their daughters into primary teaching.

The first Women Teachers' College opened its doors in 1866, in a convent school ('Recolhimento do Santíssimo Sacramento e Assunção ao Calvário'). Women students were to be taught under strict rules similar to convents, which were perceived to be "more appropriate" models for these Colleges (Ribeiro 1883:188). The relationship between the Catholic Church and the State may be of interest here since convents were defined as places for Women Teachers' Colleges by the *1844 Education Reform Act*. Religious orders were expelled in 1834, after the Liberal Revolution. They only started to return in the last quarter of the century (see Matias 1989). Hence, the State owned many buildings which previously belonged to religious orders. It may have appeared as a logical step to place Teacher Colleges there. Moreover, some of these buildings had been used as orphanages for working-class girls and they were

Students Origins in Oporto Women's Colleges

years	number students	from Oporto	family orig. unknown
1881-82	32	31%	9
1882-83	21	38%	3
1883-84	16	25%	3
1884-85	18	44%	3
1886-87	33	30%	10
1887-88	39	31%	7
1888-89	48	29%	8
1890-91	33	33%	4
1891-92	52	46%	6
1892-93	32	43%	2
1893-94	49	37%	6
1894-95	34	27%	1
1895-96	41	24%	1
1904-05	75	41%	4
1905-06	64	28%	6
1907-08	60	27%	6
1909-10	71	20%	5

sources: Relatórios da Escola Normal do Sexo Feminino do Distrito do Porto (Report) for the years 1882-3, 1883-4, 1884-5, 1886-7, 1887-8, 1888-9, 1889-90, 1890-1, 1891-2, 1892-3, 1893-4, 1894-5, 1895-6, 1903-4, 1904-5, 1905-6, 1906-7, 1909-10.

expected to provide teaching ranks with apprentices.

However, it was not only the availability of buildings which directed State decision. The symbolic order played an important part. Teacher Colleges for men were also following the model of the Catholic seminaries. A social control view encapsulated the emergence of both men and women Teacher Colleges.

Nonetheless, these concerns may also be interpreted according to the way (male) education politicians framed the entry of women to the public sphere as qualified teachers. They had to conform to the strict rules and morals of convents as a guarantee of their moral suitability for teaching in public schools in a context where expectations about their contribution to expanding the underdeveloped girls' school network were raised (Ghira 1865). Domestic economy and needlework as well as catholicism were the specific subjects - besides the more academic curriculum ("French translation, Portuguese grammar, arithmetic, geography, history, drawing²) as well as some concern with pedagogics - that were taught to them as the perceived expression of their inherent and essential qualities.

Both Women and Men Teachers' Colleges experienced problematic institutional lives, sometimes confronting obscure conflicts and criticisms of poor academic work. They were replaced later by new institutions. Other criticisms however pointed to the ambitious nature of Teacher Colleges:

The Teacher College does not produce good results because its aims are too broad on the one hand to train modest teachers who are going to teach in small villages; and on the other, it is insufficient to prepare teachers fully to work in Colleges. Therefore it is not enough for one, and it is too much for the other (Corvo 1866).

As a result of the *1878 Education Reform Act*, more Teacher Colleges emerged: four sex-segregated Colleges (two at Lisbon and two at Oporto, one for each sex) and ten mixed Colleges, one in each provincial capital. It is worth remarking that the inherited vision of a disciplinarian discourse, which accompanied Teacher Colleges from their birth, was maintained. Women teachers were expected to be concerned with strict moral behaviour:

The education of manners, usually not of very much concern in our school system, i.e rules of civility and cleanliness, decency, honesty and modesty, which are such strong moral police [meaning social control] for women, need to be enforced in the classes, everyday, and be largely exemplified by the teachers themselves⁷¹.

Actually some changes were introduced in the academic-professional subjects of both men and women Teacher Colleges (such as methodology). Specific subjects considered suitable for women remained. Hence, instead of having 'agriculture', women students learned 'gardening'; instead of the 'duties of the citizen', they were there to learn the 'duties of mothers in the family'; instead of 'rural, industrial and commercial economy', they switched to 'home economics'; finally, instead of learning 'commercial writing', they practised 'needlework and embroidery'⁷².

⁷¹ See *Relatório da Inspeção do ano de 1884 'As Escolas Normais Primárias'*, Junta Geral do Distrito de Lisboa, p. 12. Also *Relatório da Comissão Inspectoras das Escolas Normais do Porto*, 1888, p. 9.

⁷² *Regulamento* (Regulation) 27/7/1881 which settled the *1878 Education Reform Act*.



table 10
Specialised Women's and Men's Subjects
by the 1878 Reform Education Act

women's subjects	men's subjects
gardening	agriculture
duties of the mother in the family	duties & rights of the citizen
home economics	rural, industrial & commercial economy
needlework & embroidery	commercial writing
drawing applied to needlework	-

Academic subjects - such as arithmetic, geometry, geography, notions of physics, chemistry, and natural history, drawing, pedagogics and methodology - took up less time on women students' timetables in order to incorporate the rather heavy timetables for needlework, embroidery and drawing applied to both subjects (18h per week in the 3 course years).

table 11
Women's and Men's Academic/Professional Subjects
1878 Education Reform Act⁷³

academic subjects	n° hours Women Colleges	n°hours M. Colleges
arithmetic	8	11
geometry	6	9
geography	7	10
drawing	5	8
pedag/ methodology	7	10
physics/chemistry	7	10
needlework	18	-

There was a strong concern among fractions of (male) educators and politicians that women's education in Teacher Colleges should follow the gender models of the time. Several

⁷³ The figures represent the total number of hours in each subject per week, considering the 3 years the course lasted (Leite 1892: 49-50).

reports emphasised the need to relate the subjects more directly to the experience and needs of women's future lives. For instance, in the 1889 Inspectorate Report, it was said that there was not enough teaching of home economics and needlework, in the Lisbon Women Teachers' College, and it was added that these matters "need to occupy a more practical and positive place in women's education"⁷⁴. Some rhetoric was added stating the need to increase its status as a subject in the Women Teachers' College. Some years later, another report stressed again that "home economics was one of the most important subjects in the Teacher Colleges for women"⁷⁵. Nevertheless, it is also clear that some proposals were advanced, in an indirect way, to attempt to minimise the possibility of needlework losing its importance there: the entry examination would imply prior skills in needlework, and women students would salvage more time for other subjects⁷⁶.

Hence, women teachers to whom the State had granted the possibility of teaching in almost every type of school presumably experienced difficulties in their job, since they were not given any training in boys' subjects and yet were expected to teach them⁷⁷. Moreover, even in the more academic curriculum, they were expected to remain at lower levels of cognitive knowledge. The *1878 Education Reform Act* had not been able to offer a solution to the ideological tensions of allowing women to teach boys and at the same time living in a context of strict gender divisions of what was considered as appropriate knowledge for a male or a female culture and for future male or female occupations. Only some years

⁷⁴ See *Relatório da Inspeção do ano de 1889, Junta Geral do Distrito de Lisboa*, p 10.

⁷⁵ See 'Relatório da Escola Normal do Sexo Feminino dde Lisboa', 1903-1904, in *Relatórios dos Directores das Escolas de Lisboa, Porto...*p. 734.

⁷⁶ See *Relatório da Escola Normal do Sexo feminino do Porto*, 1891-1892, p.5.

⁷⁷ See footnote 53.

later, in the *1901 Education Reform Act* did women's and men's curricula in Teacher Colleges become more similar although needlework and embroidery were maintained as specialised women's subjects.

Conclusion

This chapter relates the 'feminisation' of primary teaching to the construction and expansion of mass schooling between 1870 and 1910. The recourse to a female workforce, in the expansion of the system, meant that the State was incorporating women in State institutions such as the schools. Specific State policies were adopted, which changed teaching in terms of gender relations. This period saw the changes in the definition of a woman teacher's job; the introduction of equal pay for women teachers; and the expansion of Teacher Colleges for women in equal numbers. These changes signalled that, increasingly, women were designated to swell the ranks of primary teaching, at the lower levels. They occurred at a time when teachers' salaries remained almost the same - for a period of more than thirty years they did not rise, despite the protests of teachers against their miserable conditions.

The chapter has outlined the 'feminisation' of teaching in the specific conditions of mass schooling in Portugal. Although Portuguese State intervention was advanced, compared with core countries, the expansion of mass schooling occurred later. This 'rhetorical construction of mass schooling', as it has been called, had implications for gender relations within the teaching ranks. The 'feminisation' of teaching, which can be considered as a

transnational process, at least regarding several countries, took place in Portugal later than in core countries. In comparison with countries such as England, where primary school teaching was already perceived as *women's work* in the last quarter of the nineteenth-century, a similar situation in Portugal was not reached until 1910. Indeed, in Portugal, mass schooling has been a slower and less efficient process. However, the number of women teachers was increasing: in 1878, they constituted one fifth of all teachers; by 1899, they represented one third.

These trends support the view that the problems faced by the Portuguese State impelled it to employ a female workforce in the construction of mass schooling. The State was pressed to spend a great proportion of its budget on the expansion of infrastructures throughout the country and consequently, the resources allocated to education were scarce regarding the overall project of construction of mass schooling as well as other levels of the education system. Hence, it might have been assumed by education politicians in the 1870s that employing women as teachers would allow the expansion of mass schooling - and the State was already under pressure to expand it following the patterns of 'core' countries - without overspending its education budget too much. In parallel, this policy was pursued within discourses from State officials and politicians on women's inherent capacity for childrearing which should be extended to public educational institutions. These pressures on the State were not functionally articulated because the State had also to confront ideological representations about women as non adequate educators. Nevertheless, the State's initiatives and the 'new orthodoxy' of *women's work* were gaining ground and provided support for the

continuation and expansion of women's employment as primary teachers.

Women constituted at the time a potential workforce with few possibilities of finding work available, other than in teaching. However this did not impede them from appropriating teaching to give themselves a more independent life or a life of their own. Undoubtedly, their movements remained quite restricted. Carolina Cortesão, a primary teacher for a short time (between 1908-1912) before her marriage, told me, in her centenary year, that just before the republican revolution she had lived in the school where she used to teach with a domestic employee and that she was always 'chaperoned' when she went out. As Copelman (1985:7) stresses with regard to English women teachers, this was "to reassure the world that her physical movements were as constrained as ever". In spite of this, women teachers were able to sustain different lives from other women living in the domestic sphere. Carolina Cortesão, unlike her two sisters, who remained at home and later married, told her parents of her wish to become a primary teacher: it was her own desire for autonomy and independence, and certainly an aspiration to influence the community where she was going to teach. Compared with governesses, women teachers in State schools were more independent and harder to patronise (Copelman 1985). Presumably, for the great majority of them teaching represented the concretisation of their aspirations for independence, personal expression and an opportunity to influence the community in which they lived (Vaughn-Roberson 1984), although in unequal conditions from their male colleagues.

Chapter 3

Governesses in the Domestic Sphere - Women Teaching within the Home

Having analysed the production of specific education policies in the 'public' sphere, in this chapter I intend to focus on the 'private' sphere. Thus, by looking at governesses in the 'householdplace' an attempt is made to relate the feminisation of teaching to a sexual division of labour in the 'domestic sphere' where women were in charge of educating children. It was probably this fact which inspired the State in its policy-making with regard to who should sit in the teacher's chair.

In order to deal with this question, an analysis of some of the novels of the period 1870-1910 may help to disclose social representations of women as educators. Under study here is the existence of an activity already pursued by women either as a paid activity or 'naturally' provided, as in the case of mothers or other female family members acting as educators. In part, due to the lack of other sources, novels are here considered as important sources on women working within the household and may have implications for their transition from the domestic sphere to the public domain.

It is worth underlining that I am not unaware of the complexity and tensions which the very concepts of private and public spheres embody. Both concepts contribute to understanding the issues to be confronted here: women's involvement in education and teaching, within the family and the household, and

later, under the conditions of the expansion of mass schooling, teaching the working and lower-middle classes. Therefore, I pursue a review of some of the traditions which contribute to an understanding and questioning of the assumptions on which both concepts are based, although I realise that such a complex issue may be oversimplified. This is a risk one often takes in writing a thesis: i.e. there exist constraints of time and space.

Secondly, a detailed analysis of the situation of women as educators in the 'domestic sphere' in the nineteenth-century is presented, using mainly the characters and situations that novelists created around women as educators in the household. The use of novels may raise questions of their legitimacy in a Social Science research project. Indeed, within a positivist approach, they would not be compatible. However, in the perspective of Sousa Santos, and what he terms an "emergent paradigm" (Santos 1987), the boundaries between fiction and social science are blurred. "What exists in [the humanities] in terms of the future is their resistance to the subject/object distinction and their preference for an understanding of the world rather than its manipulation" (1987:44). In this sense, fiction may reveal, to a certain extent, the situation of women in society. Moreover, in many novels written by women, such as *Caiel*, a republican and feminist sympathiser, there also emerges a real concern for the improvement of women's lives.

Specific forms of social life and ways of seeing may therefore be revealed through the analysis of fiction, taking into account its "biases and partialities" which, as Julia Swindells stresses, in her study on *Victorian Writing and Working Women* (1985), need to be critically assessed:

(...) Texts themselves are imaginative constructions with their own biases and partialities, and it is through a critical awareness of the partialities of the text in our readings that a complex understanding of history emerges (Swindells 1985:118).

Certainly, novels can reveal how complex is the representation of women and be a contribution to understanding gender relations and the ideologies supporting them (Swindells 1985). However, in this research on governesses, they will be used perhaps in a more restricted way, since my concern is mainly with the discovery of their lives and their status among middle and upper-middle class families. In the absence of other sources, the analysis of novels documents the lives of women as educators in the household (albeit necessarily through the ideological models of the nineteenth-century novel), thus contributing to the constitution of a broader memory on women.

Private and Public Spheres: reviewing the concepts

The problems and tensions embodied in the concepts of 'private' and 'public' spheres are directly connected with the ideology of 'two separate spheres' of nineteenth-century society. Both spheres were perceived as specialised domains in terms of aims, processes, experiences and feelings. However specialised they were, they did not enjoy equal status, since the private/domestic sphere was clearly subordinated to the public domain (although there was strong rhetoric, at the time, about the family as the private moral domain).

As many authors have pointed out, Social Sciences have been sometimes parasitic of common sense categories, without

questioning them in what concerns family and household issues and their relationships to the world of paid and unpaid work. In this respect, Parsons is a paradigmatic twentieth-century author offering an elaborate version of the perspective of the two separate spheres. He analyses society as organised around a sexual division of instrumental and expressive roles: the first characterises men, and is functional to their mobility into the public sphere; the second describes women in their specific concern with nurture and caring in the home or private sphere. What emerges from Parsons' perspective is a kind of immutable human nature: men related to 'culture', women tied to 'nature'. The domestic sphere and the family may be perceived as relatively dependent and determined by the external force of society, and functional to male instrumentality (Morgan & Taylorson 1983).

Long before Parsons, the 'separate spheres' perspective had been challenged. This challenge found its origin in different traditions. One of them was the 'utopian socialists', represented by the works of Owen, the Saint Simonians, Fourier. Owenism clearly questioned such a division in its radical defence of the emancipation of all humanity, not only on economic and political grounds but also in cultural and emotional terms. It advocated "sexual democracy", marriage reform and "free union" (Taylor 1983).

Another contribution came from some of the writings of Marx and Engels. Marx, although in a peripheral way, analysed the entry of women into the public sphere in terms of its effects on the redefinition of family relationships and roles. Through women's work outside the home, equality within the family would be achieved:

How terrible and dysfunctional the dissolution, under the capitalist system, of the old family ties may appear, nevertheless modern industry, by assigning as it does an important part in the process of production, outside the domestic sphere, to women, to young persons and to children of both sexes, creates a new economic foundation for a higher form of the family and of the relations between the sexes (Marx in *Capital*, p.489-90, cit in Beechey 1987: 184).

For Engels, the transition of women to the public sphere, to the world of material production, would offer new roles for women, and particularly for their emancipation from conditions of submission. The entry of women into the labour market would put an end to male power in the proletarian family.

But the strongest challenge to the view of two separate and specialised worlds for each sex came primarily from the feminist movement in its different traditions.

'First wave' feminism (Banks 1986; Walby 1990) questioned the basic division between the two spheres by advocating women's suffrage, and with it their potential entry into the world of politics. Further, it supported women's education as a way of gaining qualifications to enter the 'world of work'. Other basic citizenship rights were also fought for and gained such as the right of married women to own property. 'First wave feminism' also obtained the laws on divorce and legal separation for women. Therefore, the basic division between private and public spheres was questioned by opening up the public sphere to women, mainly in terms of education, work, training and franchise. Apparently, the domestic sphere as a site for both men and women, rather than just women, was hardly questioned at this time, although Walby (1990:188) emphasises the British feminists' claims for "collective rather than private organization of meal preparation".

The exploitation of women's domestic work in the home was also an area of concern (ibidem:189).

The changes to which 'first wave' feminism contributed can be better understood through Walby's perceptive analysis: it represented mainly a change from forms of "private patriarchy" (meaning the exclusion of women from the public arena, and their seclusion under the power of a male head in the household) to forms of "public patriarchy" (where women are not barred from the public arena, but remain subordinated within it). This meant, at the same time, that women were able to gain access to the "citizenplace", ie, gaining entry to the State, and thus being recognised as having some legal rights:

A more intense form of private patriarchy was dramatically reversed during the period at the turn of the century. The twentieth century has seen a shift in the form of patriarchy from private to public as well as a reduction in the degree of some specific forms of oppression of women.(...) First wave feminism achieved a victory principally at the political level of the state; the eventual changes at the economic level provided the material possibility of the mass of women taking advantage of their legal independence (Walby 1990:184-85).

Later versions of feminism have centered more on the sexual division of labour within the home, on sexuality and control of biological reproduction and on equal pay. In one of the traditions, the equation of the domestic sphere with oppression and the public sphere as liberation for women has been questioned. It has been argued that women are confronted with exploitation, competition and aggressiveness in the public sphere. Further, their entry into the labour market has meant they have the double burden of two jobs, at home and at work. Women should retain their power in the domestic sphere, and pressure the State and society in general to

recognise domestic work as socially necessary work to be paid by the State.

Another feminist line of argument, in an attempt to overcome the limits of the first marxist generation, has focused on women's work in the domestic sphere. This debate has become known as the 'domestic labour debate'. Without going into the complexity of the debate, it is argued that domestic labour is 'necessary work from the social point of view', and contributes to reproduce the conditions of existence of capital itself. Hence, within the household, women are perceived as involved in production as well as in reproduction.

It may be summed up that all these traditions contribute, although in different and unequal ways, to a better understanding of the complex world of gender relations in such areas as paid employment, household production, education, sexuality and State intervention. By their questioning of the concepts of 'private' and 'public' spheres, these perspectives provide a dynamic and non-deterministic view on women's situation, brought about by industrialisation. However, to question their basic assumptions and uncover their tensions and contradictions is not to assume that they should be put aside. Linda Nicholson stresses that the concepts of 'public' and 'private' should be retained within gender and feminist analyses. Her view appears particularly relevant when dealing with the emergence of women outside the 'householdplace':

[The categories of 'private' and 'public'] have played an important role within feminist theory, and I believe rightly so. Many feminist theorists have correctly intuited that these categories point to societal divisions that have been central to the structuring of gender in modern western society, at least (p. 36). (...)

The conclusion I wish to draw (...) is primarily methodological: that an important task for feminist theory is to

show the historical origins and evolution of those divisions others have assumed to be inevitable (Nicholson 1992: 43).

In fact, "the historical origins and evolution of these divisions" may become more perceptive when using the concepts of 'private' and 'public' forms of patriarchy, according to Walby's proposal (1990). It better situates the position of women within social conditions which are patriarchal in themselves.

Women Educators in the *Private* Sphere

Some English studies focus on the transition of teaching activity, as *women's work*, from the domestic to the public spheres (David 1980, Burstyn 1980). They identify educational activities within the home, who performed them, what status was given to them, the conditions under which they were conducted, and the aims pursued. The authors analyse the relations of continuity between the domestic sphere and teaching activities in the State sector.

Miriam David (1980) details governesses' activities in teaching girls and little boys, in nineteenth-century middle and upper-middle class homes. They already represented a sizeable sector of the workforce (up to 30.000). The number of jobs advertised in the daily newspapers suggest that approximately a hundred a day were appearing in the *Times*, in the 1840s. David calls our attention to the difficult situations governesses lived in, due to low salaries, lack of employment security, and harsh treatment from some of their employers. She quotes from M. J. Peterson (1972):

Their position was, as Peterson (1972, p.5) has cogently argued, contradictory: "the governess was a testimony to the

economic power of the Victorian middle class father, as were servants, carriages and the other 'paraphrenalia of gentility'. In addition, "the governess was also a lady of leisure". Therein the problem. Those women who had to seek employment as governesses, although from middle-class backgrounds, were seen as failures of that system. "Society has thought fit to assert that the woman who works for herself loses her social position" (ibid.). However, as Peterson goes on to argue, "the position of the governess seems to have been appropriate because, while it was paid employment, it was within the home. The governess was doing something she might have done as a wife under better circumstances. She avoided the immodest and unladylike position of public occupation (David 1980:109).

In Portugal, many testimonies in fiction and biographical literature indicate that the presence of a governess in the home was a widely accepted model, particularly in girls' education.

As already stressed, middle and upper-middle class girls, in the second half of the nineteenth-century (and even later on, in the twentieth-century) were taught by governesses (mostly foreign women) notions of Portuguese language, foreign languages, piano, history and geography, arithmetic and geometry. The life of Alice Pestana (1860-1929), future pedagogue and novelist, connected to the republican and feminist movements (writing under the pseudonym of Caiel) illustrates the case. She was taught by foreign governesses in what was considered to be the most suitable education for a girl of this social group (Rosa 1989). Many other cases could be put forward. One of these is worth mentioning due to the evidence given in an unpublished diary, completed in 1899, by a middle class girl, aged 17, who gave detailed information of the number of English and German lessons she had received from foreign governesses. She also studied piano with members of her family. And it becomes clear how sewing was an important part of her educational background (*unpublished diary* 1899).

In Caiel's novels, there are constant references to (foreign) governesses who taught girls what was considered as suitable to their 'social standing': many of her female characters are from middle or upper-middle class backgrounds. In the novel *Desgarrada* (1902), it is said, at a certain point, about Germana's breeding:

(...)[Germana] was not short of governesses. She was taught French, English, piano, singing, embroidery, decorative painting.

Some pages later, the governesses' activities concerning the education of this girl appear as more comprehensive, embracing moral and religious attitudes, praised as conforming to the social rules accepted for a 'girl of respect':

(...) One of the French governesses with whom [Germana] used to go out walking, from her childhood, made her familiar with the church of Saint Luis. She has carried on with these visits since then. (...). The Sunday excursion to that church was the unique moment when Germana could be free from the oppressive and humiliating inspection of aunt Andreлина (*Desgarrada*: 65-66).

In another novel from the same author, *Madame Renan* (1896), the character of the English governess emerges:

Miss Burke was the *governess* who António do Amaral Gorjão provided for his daughter, after her mother's death, when she was fourteen (...) Miss Burke had been living with that family for nine years, treated with affection and courtesy by her previous pupil, who could not stand, in her loving heart, to see her either returning to England, where she had none, but poor relatives; or entering a Portuguese family to educate children at an age when all of them were displeasing unless they were her own grandsons(1896:72).

In many other Portuguese novels the English governess is present, not as the main character, but as an essential persona in the upper-middle and middle class social environments. In *Os Maias*

(1888), one of the most famous novels of Eça de Queiroz¹, the daughter of Maria Eduarda, is educated by an English governess, Miss Sara, who followed the family everywhere.

Other cases point also to the prominence of the English governess in the education of middle class girls, but in a somewhat different perspective. Again, it is clear that the education of a girl in those social groups aimed mainly at securing her a stable place in marriage. However some of the literature clearly shows that the governess also promoted the concept of the 'new woman' who was not so much a 'lady of leisure', but the woman who, in physical terms, would be well fitted to bear her offspring, and at the cultural level would be able to be a partner for her husband and a good manager at home. For example, the daughters of Feliciana Montanha, a rich Northern landowner widow, were educated by a foreign governess and this was perceived as a good investment in the marriage-market as well as effective in attracting a specific kind of man, who would view that kind of education as "not at all superficial" and suitable for shaping a future partner for a man's life (Caiel in *Genoveva Montanha*, 1897). The novel *Margarida*, of Júlio Lourenço Pinto (1880)², also supports this argument: the English governess, Miss Lyndsey, is depicted at first by her physical appearance as displeasing to her pupil's eyes. The girl sees miss Lindsey as "ugly", "raw-boned", "with angular cheeks, bony hands and wearing flat boots as sandals", etc. However, later on, Margarida came to admire the character and ideals of her governess - her intelligence, level of instruction and affection

¹ One of the most known Portuguese writers (1848-1900) and considered as a master in the realist novel.

² A Portuguese writer who lived in late nineteenth century who documented the lives of the middle classes of Oporto.

were very much praised. Margarida felt she was distancing herself clearly from the unhealthy ways of living of Portuguese society:

(...) her own feelings were that she was coming to life, in a kind of rebirth, with new light coming into her mind; she was beginning to understand her mission as a woman in a different way (*Margarida* 1880:128-129).

Generally speaking, in these novels, the governess is remembered with respect, nostalgia and sometimes even as being the only person who listens to the girl's problems. The fact that so often governesses were foreigners (at least in the novels) with an origin in wealthier countries, appears to have contributed to their greater acceptance by these specific social groups. They could be seen as representing a more 'civilised and prestigious world'. Considering that these women had, in principle, a lower status than their employers, this acceptance becomes significantly more visible. A question equally worth considering is the fact that these foreign women were seen as contributing to a more rational and healthy education of upper-middle and middle class girls, particularly with regard to physical education and sports, a fact which may also have contributed to their more open reception.

However, in other passages, the evaluation of the activities carried out by governesses is expressed in rather negative terms. It is the lack of a reflexive culture and a creative practice which appears in the words of Caiel (1902:8) to characterise the quality of the work they carried out. It is possible that Caiel was mainly referring to the Portuguese governess, since in another novel she was much more concerned with the need to set in motion an institution for the education of governesses (1892). Clearly in relation to foreign governesses, it was the threat to

national culture that they represented to middle class households which was most feared by both Caiel (1898:61) and M. Amalia Carvalho (1891:104).

The important point to make about the governess's status concerns the way she was perceived as someone who, by her presence, brought support to and reasserted the social status of middle class families and their daughters. This is in tune with the British case, where the governess has been referred to as the person who should become part of the entourage of people paid by the family to show its wealth and high status or at least to transmit that image (Delamont 1979; David 1980; Burstyn 1980; Dyhouse 1981). The disregard which the already established middle classes expressed for the attitudes of the *nouveaux riches*, considered as ridiculous and inappropriate, for imitating them in buying the services of governesses, is a recurrent topic in Portuguese novels and brings support to the argument just outlined.

As stressed, there are quite frequent references to the social status of the governess particularly in the way she was related to the status of her employers. She was represented in the novels as being treated with deference and affection, attitudes which covered up disdain for her position as a salaried worker. Nevertheless, there are many other passages where her low status is emphasised, within a highly stratified society:

None of these gestures were able to overcome Miss Burke's feelings of ill-consideration, thus she took refuge in her perpetual shyness and oppression. (...) Seeing the other families' governesses treated as simple servants, Miss Burke felt this coarse treatment as if it were done to herself (Caiel, *Madame Renan*, p. 72).

Similarly, in the novels *Os Noivos* (1896) and *O Salústio Nogueira* (1909), from *Cenas da Vida Burguesa* (Scenes of Bourgeois Life), by Teixeira de Queirós³, there is the character (a secondary one) of the governess who gives piano lessons:

(...) Ermelinda Travassos, a young woman, thin, very sad, crossed everyday the 'Passeio' at eleven o'clock and lived with her old and blind aunt whom she supported with her work (1896:226).

In this novel, the poor financial situation of the governess is stressed as is her need to work for a salary in order to be able to survive. Her pupils are the daughters of civil servants, perceived as "a very good clientele for a beginner", although later on it is also pointed out that they have some difficulties paying her, given that "they are always short of money". As a result, another governess, older and more experienced, gives her advice to keep a proper distance from her pupils, never accepting invitations to eat at their homes, as this might be used as an excuse for not paying her. Hence, she concludes:

(...) [The parents of these girls] should not have ambitions, such as having their daughters learn piano. If they do not have money for such things, they should send them instead to be cooks, not teach them niceties (1909:64).

In the two novels just mentioned, which are a sequence, the social position and status of the governesses are clearly stated. Salústio Nogueira, member of Parliament and aspirant to become Minister of State, advises his mistress strongly that she should not maintain a close relationship with the two governesses mentioned above:

It is most probable that you will not meet these two ladies

³ A Portuguese writer (1848-1919) whose concerns were the 'bourgeois comedy', inspired by models of naturalism.

again, unless unexpectedly in the street. These are haphazard relationships which should be forgotten with the same facility as with which they were made. Hence I advise you to be careful in the way you deal with them, so that, when we are married [and I am a Minister of State], they will not come to visit us (*O Sallustio Nogueira*: 81).

In the short story "The Governess" (from the collection *Contos e Fantasias*, 1899), Maria Amália V. Carvalho presents the main character, Martha de Vasconcellos, who teaches the daughters of a rich dignitary. This man is depicted as a *parvenu*, to express his recent upward mobility and his lack of cultural capital. There are constant references in this novel to the inferior status attributed to the governess by this dignitary's family, although she has received an education quite uncommon for the time:

(...) She was conscious of the paucity of her destiny; even so she did not learn to be humble. They did not speak much with her; however she did not appear to feel the quite brutal disdain confronting her in that house (p.204)

(...)

They paid her in full and generously; they demanded the right to the services for which they had paid" (p.207).

It is also said that Martha was compelled to work to make a living, being the orphan of a rich man who intended to give her, as compensation for being an illegitimate daughter, a refined education.

Single women were not the only women who could become governesses. In another of Caiel's novels ("A Vida por um Prejuízo", a short story from 1908), a woman, married to a civil servant with a fairly low salary, wants to give private lessons (French, English, German, piano) as a governess for the well-being of the family. However she is confronted with the most stubborn resistance from her husband:

(...) He warned her not to mention such nonsense again(...). They were neither living in England nor in the States. They were living in Portugal: they had to submit to its tradition and

habits(...). What would their friends say if he should submit himself to such humiliation? Because the blame would fall on him. And her relatives? and her relationships in high society? How sorry they would feel for her destiny! Work was still seen in Portugal as a misfortune, slavery for a woman. And the slave woman would lose all her prestige. She would find, to her surprise, that old acquaintances would slyly turn their backs on her in the street. Her female friends would not offer to carry her in their carriage to go to the Avenida or to Campo Grande, nor invite her to their theatre boxes in S. Carlos (the opera house). In Portugal it was still not possible for a woman to compete with a man working for a living. She would lose in consideration the miserable little that she had earned.(...) Portugal was not at all ready for feminist philosophies (Caiel 1908 :22-24).

However, in the long absence of her husband in the North of the country, where he had gone to await the fortune of an old dying aunt, she became a governess in a private house, teaching the daughters of a widow. The life of this married couple ended in divorce.

Hence, in these and other pages, the governess is typically a single, widow or married woman, in each case, coming from the impoverished middle class, someone who is confronted with economic difficulties, in contrast to the material conditions she has enjoyed in her childhood. She attempts to find in the teaching of children in private settings a way of overcoming economic difficulties. This domestic environment is not *her* home. Hence she is perceived as losing her previous status. She is "a failure of the system" as Peterson and David both stress (David 980:109). However, the fact that this work is carried out within the domestic sphere is reinterpreted within the ideological conditions of the period. It is perceived as suitable for her, given that there exists a consensus of *her main mission as an educator* (Costa 1892, Caiel 1892, 1893, Pereira 1897, Carvalho 1885,1903), but also because it is an activity carried out within the domestic sphere, perceived as the most suitable place for a

woman's activities. Therefore, governesses are classified as female paid work in the home, having upper-middle and middle class children as their clients.

With regard to other social groups, there are references to a kind of 'dames' school' for farmers' daughters in the North of the country: the teacher is referred to as the local priest's sister, who teaches girls, in her own home, sewing, embroidery, crochet, and also how to read and write, while her brother teaches latin to the boys (Camilo Castelo Branco, in *A Brasileira de Prazins*, 1882, p. 18).

The education of working class girls does not appear as a concern for the nineteenth-century Portuguese novelists, at least as far as my research demonstrates. Working class girls' education is solely dealt with by some social reformers, who disclosed their ideas about how asylums should be reformed in order to teach girls to become proper servants. It seems very clear that the reformers were guided by a strong social control perspective, which may be related to the political and social context: a highly stratified monarchist society, unquestioned in its social ranking (Costa 1892, Carvalho 1885, Neves 1888). As will be seen in the next chapter, a different perspective on working-class girls' education was sustained mainly by socialists and feminists, though with different assumptions. I will return to this topic below when searching for explanations for novelists' selective choice of topics.

Certainly, teaching in the home was not always a paid job: women as 'mothers', 'sisters', or as other family members, also taught children. Paulina (a young married woman living in

France due to her marriage to a rich tradesman), in Caiel's *Madame Renan*, states firmly to her husband her desire to educate their daughter herself, thus opposing her entry to a religious boarding school (in contrast to the educative models of the French aristocracy and bourgeoisie, cherished by Monsieur Renan, Paulina's husband). In the following year, a compromise was reached and Paulina took charge of her daughter's education.

Moreover, women also educated their sons, albeit in this respect things were not so straightforward. Alfredo Pimentel, in *Os Amores de Camilo* (1899), tells us that it was Camilo's wife, Ana Plácido⁴, who taught reading to their two sons (Pimentel 1899: 372-3). When the two boys were 11 and 12, Camilo decided to take his family to Coimbra, in order to continue their sons' education. But even in Coimbra, a centre of learning for males *par excellence*, it was the novelist's wife who remained responsible for their sons' education (1899:376). There are however clear hints in some of the writings of the time that boys should be educated in boarding schools, away from the maternal nest perceived as a threat to their emergent masculinity. Women were perceived as too indulgent, too timid, in short as unfit to provide a strong and virile upbringing to their sons (Carvalho 1885).

Many other quotations can be taken from Portuguese literature at the end of nineteenth-century, documenting the involvement of women teaching within the family. For example, in Júlio Dinis's⁵ novel, *A Morgadinha dos Canaviais* (1868), Madalena, one of the main characters, explains that she was educated by her

⁴ Both Camilo and Ana Plácido were remarkable writers of the second half of the 19th century.

⁵ Júlio Dinis (1839-1871) wrote several novels, inspired in general in the lives of those in small villages and represents the transition from romantism to realism.

mother and that only after her death was she taught by a governess (p. 91). Clearly, only educated women were able to undertake teaching in the family. Moreover, the woman as teacher within the family was highly recommended by social reformers and educators. This can be understood in terms of the promotion of a new model of the 'modern woman' as 'man's companion', in opposition to the so-called 'lady of leisure'. Caiel was an earnest defender of the mission of the mother as educator and teacher within the home. She did not agree with the idea of a governess fulfilling these functions (Caiel 1892). This topic is to be tackled in the next chapter when *maternalism* shall be analysed and described in the terms of the support it received from different ideological traditions.

In clear contrast to the place the novels granted to governesses, the character of the schoolmistress working in the State education system only enjoyed peripheral treatment. From the research carried out, the woman teacher does not appear to have appealed to the novelists of the late nineteenth-century. Even among the women writers who then emerged as a "new boom", in the words of Pereira (1986), neither Guiomar Torresão, representing the Ancient Regime supporters (see Dacosta 1973:534) nor Ana de C. Osório, "the organic intellectual *par excellence* of that period" (Pereira 1986:76) who was connected with both republican and feminist movements, mention the schoolmistress in their novels. This absence becomes even more striking when educational documents (eg. the *Report of Escola Maria Pia*, 1885-6) are considered, where the "glamour of Teacher Colleges" for young women is emphasised as well as the strong competition existing for places at these colleges:

The energy, interest, and enthusiasm that female youth and ladies demonstrate for primary teaching is obvious. There is strong competition for entry into teacher colleges as if through them it were possible to obtain social ranking; a great number apply for their examinations both from the middle classes, who do not intend to be downgraded, and from the lower classes, who want to move upwards by merit (1886:6).

Additionally, other writers show that Teacher Colleges were the main target for a broad group of women seeking qualifications to obtain a job outside the domestic sphere. Both Caiel (1893) and Osório (1905) refer to the unique opportunity that teaching offered, and both applaud the opening up of new areas of work for women to overcome the problem of unemployment forecasted for this sector.

Although the primary schoolmistress was rarely characterised in the novels of the period, she appears in *Madame Renan* (1896), mentioned earlier. Caiel brings her to life in the character of a Teacher College student ('normalista'). One becomes aware of the low status granted to her by the middle and upper middle classes: Vasco, a final year medical student, is attracted to this student, a cobbler's daughter. However, he dislikes the way she dresses which he sees as ridiculous and extravagant, as well as her lack of attention to personal hygiene; and when thinking of her age - only sixteen - he begins to doubt her ability to teach:

Vasco observed carefully, in a curious way, this half-schoolmistress, almost a child, who within some months would be applying herself to the great and supreme mission of educating the people (*Madame Renan*, p. 10).

And afterwards when he questions whether the girl has made the right choice, we can understand, from her mother's

answer, how important teaching was to the skilled working class she represented:

"At least if she were a seamstress or a shop assistant... but this! .."- and she looked disdainful - "To be a teacher is quite different (...) It has been hard for us to have her studying for so long without earning money!...And the books! They cost an enormous amount of money!.. And she must dress more carefully to look respectable!..." (ibidem: p.11)

On the basis of this novel, it appears that women teachers were attributed a low status by the upper middle classes of the time. There are also clear indications that a teaching qualification was important for it represented upward mobility or, at least, a way of securing an already established status.

Women teachers and governesses served different clienteles: in the domestic sphere, they were teaching for the most part middle and upper-middle class girls, while in the public domain, although they began by teaching the daughters of craftsmen, towards the end of the century, they evolved towards a more comprehensive clientele of working class boys and girls, albeit in a still restricted version of mass schooling. Questions remain unanswered as to whether or not women who taught in each of these spheres were recruited from different fractions of the middle or working classes. The research carried out on the basis of evidence from literature and from educators' and politicians' writings of that period is not conclusive.

On the question of why there were so few women teachers appearing as main characters in novels of the period, this absence may be related to the social and ideological conditions in which writers were producing their works. They were quite dependent for their own survival on the interests of readers who were more

interested in romantic love stories than in the complex world of work. Moreover the schoolmistress carried with her the 'stigma' of having to work for her living. She was also perceived as an independent woman, an idea which ran against the widely accepted ideals of femininity of that time.

Conclusion

This chapter has documented the existence of women as educators in the domestic sphere (i.e. in the 'householdplace') either as governesses or as family members, through an analysis of late nineteenth-century Portuguese novels. It has focused some of the conditions in which they worked as salaried workers in middle and upper-middle class homes. Their social origins as well as the social status they brought with them to the families in which they worked (in particular when they were foreigners) have been referred to. The fact that the English, German and French governesses were often a symbol of greater status for families may be related to the semiperipheral situation of Portuguese society and the admiration that a more 'rational' and 'healthy' education for girls awoke for in these social groups.

However, although they carried with them considerable status for middle and upper-middle class families, it has also become clear that they were often granted an ambiguous status within these families. If in fact they were sometimes accepted as confidants to the girls of whom they were in charge, at other times they were made to feel that they should keep a proper distance, for they were salaried women, and, as such, were seen as having 'failed' within the social groups from which they came.

The ambiguity of their status was even greater since, although they were working women, they were perceived, within ideological middle and upper-middle class representations, as in a 'better' situation than those who worked outside the household. However, working in this situation constituted a continuation of the "private forms of patriarchy" to which Walby (1990) refers. Although the male head of household was not a relative, he was indeed someone who paid a salary and who could exert, at times through his wife, control and despotism on the salaried woman teacher. In such a situation, she could not enjoy the rights that were slowly being granted to those women who worked in the public sphere.

What I would like to underline, as my final remarks for this chapter, is the following: firstly, the fact that women performed activities of teaching within the household, mainly as educators of girls, probably inspired State policy-making in education in its attempt to attract women into mass schooling as teachers.

Secondly, this chapter has also revealed the status that teaching by women either within the household or in state schools had for different social groups. If it represented an opportunity of upward mobility for the daughters of the 'labour aristocracy', and a possibility of securing a status for the middle-classes, it was clearly perceived as a dishonourable way of living for women of upper-middle class origin.

Chapter 4

The Emergence of a 'New Orthodoxy': Public Debates on Women's Capacities and Education in Portugal (1870-1910)

Introduction

The discourses on women's physiological and psychological capacities and conditions may reveal that the transition of women (in particular middle class women) from the domestic sphere to the public domain, at the turn of the nineteenth-century, was greeted with apprehension by certain sectors of Portugal's 'intellectual community'. These discourses were organised as a public debate, attempting to define women's 'nature' as well as their *educability* in specific terms, in a changing context of patriarchal relations. From this debate, a 'new orthodoxy' on women's lives emerged, defining how women's lives should be constructed and regulated. Before this period, women were defined (in particular middle class women) as occupying a 'separate sphere' from their male counterparts. Their energies were channelled into the home either in domestic production, child care, or, in the case of privileged groups, into those activities seen as more appropriate for women of the 'leisured classes'.

In Portugal, women were defined by their functional and instrumental bond with the family, in much the same way that Martinez (1986) argues could be found in Spain and indeed in all the countries where patriarchal relations prevailed. In the new debates that ensued, alternative views emerged, which framed

women's lives in different ways. The home and the family still remained their first priority. But from then on, women were defined as having special qualities that men lacked. It started to be acceptable that single and widowed women should be allowed to work outside the 'private sphere'. Even those who were married were allowed to work for their economic survival, if faced with their husbands' inability or incapacity to support a family. Women's presumed 'specialised' qualities were used to legitimate their entry to specific occupations.

In fact, these discourses can illuminate the transition of women from the "private forms of patriarchy" to the "public forms of patriarchy" (Walby 1990). The case of teaching illustrates this transition well: especially when the State was expanding its intervention into mass schooling, laying the foundations of an expanding education sector, and a large workforce was required to carry out the task of 'educating the people's children'. Women who had been teaching in the domestic sphere (where mothers or governesses used to teach mainly middle- and upper-middle class girls) were offered the opportunity to work in this growing domain. But in reality they were only able to occupy the low-status posts in teaching; the posts of school management and inspection remained a male preserve.

The assumption that these debates appear to be concerned mainly with the transition of middle class women into work in the public sphere needs some clarification. In fact, women from other social class origins had already been working outside the home for a long time. Scott and Tilly (1982) have shown that working class women in the nineteenth-century were working, in England and France as well as in Italy, in textile and cloth making, domestic

service and agriculture. It was estimated that approximately one-quarter of women were connected with only two sectors (textile and agriculture) in the middle of the century. For peasant women and those working in industry, the much quoted expression: 'the proper place for a woman is in the home' held little meaning. For these social groups, women's paid work was part of the normal pattern of life. Women, as members of the family, had to contribute to the family economy.

In Portugal, some studies (in the region of Coimbra) also demonstrated the visibility of female employment, other than domestic service, for example in small trades, and in less developed industries in the transition from the Ancient Regime to modern times (Mota 1986; Mendes 1986). This work profile was maintained throughout the nineteenth-century. Pereira (1897) offers detailed information about women's factory work (e.g. the salaries they earned), focusing especially on what he called "domestic industries" (as dressmakers, seamstresses, milliners, lacemakers or cooks) which produced for the market. Thus, the concept of the 'separate spheres', confining women to the home and child care was neither an all embracing feature of all historical periods nor did it apply to all social groups. It is argued in this chapter that women's transition from the private sphere to the public domain was not discussed so passionately or urgently until middle class women (or, at least those aspiring to middle class jobs) wanted to work and their 'invasion' of the public sphere required some legitimation. Undoubtedly, working class women were also living within a context of patriarchal relations; however patriarchal relations defined working class women differently,

given the economic pressures to earn a living and to ensure the survival of the household.

In this chapter, the intention is to examine the heated debates which focused on the question of the legitimacy for women (in particular middle class women) to work outside the domestic sphere, at the turn of the nineteenth-century in Portugal. The analysis examines the different ideological positions around the most debated issues of the time: (i) 'women's nature' and (b) the 'aims of women's education'. Differences between the approaches taken by (and internal divisions among) 'positivists' and 'egalitarians' will be discussed. Secondly, the analysis clarifies what were the main points of agreement between adversaries in this debate. By identifying such ideological differences and commonalities, a clearer idea of the 'new orthodoxy' emerges and also a sense of how far it represented a negotiated construction within the contested terrain of patriarchal relations.

The Emergence of the 'New Orthodoxy' : divisions in the public debates

The debates about women's position in society in Portugal in its semiperipheral situation, revolved around women working outside the domestic sphere. The participants were well aware of the importance of these issues for the preservation of the society in which they lived. As a result, the tone adopted in Portuguese writings is often passionate and heavily rhetorical, demonstrating the diverse implications of such concerns, *but* also fear of the changes that were forecast.

By the end of the nineteenth-century many Portuguese writers - doctors, journalists, teachers, politicians - had analysed

the female condition, especially comparing women's physical and mental abilities, to those of men. They developed similar arguments, in spite of approaching the subject from somewhat different political and ideological perspectives. From these debates a kind of 'new orthodoxy' (albeit one that was challenged) on the woman question was produced and developed by these writers, some of whom occupied strategic positions in the dissemination of these views. The main strands of these debates can be identified in the paragraphs that follow.

'Women's 'nature'

The first divisive issue, in this broad debate, that was crucial for its participants concerned 'women's nature'. Many authors wrote extensively trying to explain the differences between the sexes. As one author asserts (Mello 1910), this seemed to be a central question which the new emerging positivist sciences ought to be able to answer. The ways in which Portuguese 'intellectuals' reflected on this question echoed many of the debates taking place in other countries. Many attempted to confine the changes projected for women's role in society within strict boundaries; others however tried to adopt more open views and practices to allow change to take place.

It was not only the specific physical traits that constituted 'women's nature' which were the focus of this debate. Certainly Portuguese intellectuals examined the physical differences and the majority of these writers concluded that women were physically inferior. From there it was a natural progression to move on to establish women's mental inferiority from a detailed examination of weights, of measures, of the

texture of the skin and organs, of the mass of nervous tissues and the convolutions of the brain - the assertive 'discoveries' of physiology, biology, craniometry. Bisseret (1979) comments that these sciences were developing at the same time as an influential bourgeoisie was attempting to legitimate its social and political power.

On the whole it was doctors and physiologists, within this 'hygienist' tradition, who emphasised women's mental inferiority. Politicians (Costa, 1870, 1892), journalists (Mello, 1910), writers (Azevedo 1905; Carvalho, 1885) and teachers (Neves, 1888, Pereira, 1897) also adopted this stance, but from different ideological and political perspectives. For most of these commentators an organic and functional bond existed between physiological, biological and psychological elements, which allowed them to endorse the notion of female fragility as both physical and mental. As a consequence, many asserted that women needed the protection of men. We shall identify this group as 'positivists', most of whom were male.

M. Amalia Carvalho as a woman is a rather unusual example of such 'positivists': she was a correspondent for a Brazilian newspaper and an extraordinarily erudite woman, being acquainted with many of the scientific and artistic publications of her time and actively promoting many royalist conservative views. A detailed examination of Amália Carvalho's work is justified in terms of her influence and the popular reception of her works, unparalleled for a woman at the time. Not only are there frequent quotations from her works in the literature published on the subject, in various political and ideological traditions (Campos, 1891; Costa, 1892; Pereira, 1897; Azevedo, 1905; Almeida, 1909),

but also some of her works were reprinted several times (such as *Cartas a uma Noiva* [Letters to a Bride] [1891], with 10 editions). She stresses in her *Cartas a Luisa* (Letters to Louise (1885) :

In this momentous and serious question, physiology, the great modern master, must inevitably be taken seriously. It demonstrates that the woman is an infirm person.

For her, female physiology and psyche were intimately connected, thus producing an unbalanced being, with an excessive and disturbed sensitivity. This was a topic to which Carvalho often returned. She concentrated on the female mentality which she saw as requiring a strong moral and religious (i.e. Catholic) education, especially if married women were to maintain the socially acceptable rules and standards of them as loyal and subordinate companions to their husbands.

Similarly, other authors in this tradition argued that women were weak, fragile and sick; they needed special protection both by the State and men. Given that, they stressed that 'the woman's place is in the home'. One of these authors concluded in the most patriarchal tone:

(...)being aware of the debility of her own sex, she will be submissive (to the husband) because this is her own inevitable duty (Pereira, 1897:15).

All these authors identified women as more affectionate and men as more rational and intellectual, and all assumed women's intellectual inferiority:

The inequality of the human body between the two sexes, concerning bones, muscles, nerves, is scientifically proved. Brain functions depend essentially upon these elements; therefore these functions must follow the inequality of the causes. Where have we seen that two machines, one strong and the other weak, might present a similar product? (Costa, 1892:417)

The work of Spencer and also a somewhat vociferous tradition supporting Darwin and the evolutionist anthropologists was reworked through the Portuguese physiologists and anatomists' writings. Educationists', politicians' and teachers' comments also demonstrated the influence of Darwinism (such as Costa, 1892, in his adoption of the exteriority vs. interiority debate, and the contrast between the activity and dispersion of the male sex, vs. passivity and concentration of the female sex). Some of them, writing at the beginning of the twentieth century, revealed their rather mechanical and misogynist views on female nature and abilities. For example, women were said to be heavily dependent upon their genitalia, which in turn ruled their brains. One writer claimed that "the woman thinks with her uterus" (Trombetta 1910). This led inevitably to the belief in the mental inferiority of women coupled with the notion of their unique mission as biological reproducers and as guarantors of the purity of the race. In general, the 'intellectual inferiority' of women, or at least their presumed inability with abstraction, was explained as nothing other than an entirely natural phenomenon. These authors opposed any attempt to link women's presumed intellectual inferiority with the process of socialisation, on the grounds that their own conclusions were based on solid scientific principles and were therefore completely reliable (Azevedo, 1905:153). Thus it was legitimate, for them, to claim that:

Men have a more extensive, balanced and impartial mind which is a stronger basis for running the family (...) (Given that) the law is virtuous in ascribing to men the authority within the family (Azevedo 1905:243,245).

The support from the medical profession (at least, a well established fraction of it) for this view of women as sickly and

weak-natured was also evident in England. Duffin (1978:26) stresses that doctors were acting in their own interests, by adopting this view as a basis for establishing a clientele which required the specialist's attention. At the same time, women were attempting to enter medicine at the university level. They were perceived as a threat by the medical profession, which was struggling to assert its own expertise and control over the field. By claiming that women had a weak and sickly nature, doctors were able to justify their prejudiced opinion. In both countries, women's emergence from the domestic sphere was awakening suspicion and fear and the debates clearly demonstrated the attempt to contain such undesirable changes and frame patriarchal relations in a different perspective.

However, some voices could be heard attempting to consider the existence of different male and female natures, without implying necessarily a relationship of subordination between them. For this tiny minority which struggled for an 'egalitarian' perspective, to speak of female fragility and subordination simply confirmed the social conditions of female socialisation. Thus, they advocated changes in female socialisation and living conditions, with equal access to education, work and public life in general. They opposed sexual discrimination in Portuguese education and culture. These 'egalitarians', as it were, maintained relationships with sectors of Freemasonry, the feminist movement and the traditions of 'utopian' socialism. After examining the scientific theories, they argued that even if some characteristics were gender specific,

(...) many others can only be ascribed to individual differences and these cannot be determined accurately (Almeida, 1909:32).

This group stressed the role of "different conditions of education and environment" to explain the differences between the two sexes. Almeida, as a doctor, reflected on his own professional practice and the social and political environment as a Freemason and a (utopian) socialist. What feminist interventions there were seemed to avoid engaging with such physiological or biological arguments and remained mainly at the political and cultural levels.

The Aims of Women's Education

The second division in these debates (which follows from the first) concerns the aims for women's education. Many writers traced a distinction between 'instruction' and 'education': for some 'education' was emphasised and used to refer to the socialisation in norms and values suitable for the female sex and social status (Carvalho 1885); others argued that 'instruction' was equally important for women seeking an autonomous life (Osório 1909).

Three perspectives on the aims of female education can be identified, instead of two in the previous question (although the first two can also be identified as 'positivists'). These are:

- (i) 'Woman's domestic confinement' - an extreme position which involved an obsessive redefinition of female education, emphasising social control and the improvement of domestic life. The home and the family would be the focus of girls' education. Any notion of female involvement in the political sphere was rejected and, indeed, any activities outside the domestic sphere were thought inappropriate.
- (ii) 'Woman's conditional work' - a less extreme version which endorsed women's activities outside the private domain but only under certain conditions, which reaffirmed that 'the best

place for a woman is in the home'. It also offered clear indications of the most suitable work for women according to their status.

- (iii) The 'egalitarians' in contrast were diametrically opposed to the first two maintaining that education and work were necessary for female autonomy, and attempting to fight against indifference and traditionalism in Portuguese social life.

These three perspectives will now be examined in more detail.

(i) *'Women's domestic confinement' view*

In this perspective, the main target of criticism was 'education for embellishment', seen as frivolous and reprehensible from the moral point of view. Such educational goals were also perceived as disfunctional in terms of the new roles reserved for women, by the emerging scientific view on the 'sanitation' of family life. Amália Carvalho epitomised the 'positivist approach' referred to earlier, when she discussed the "social destiny of women" and opposed women's transition to public life. Instead she concentrated solely upon renewed forms of domesticity:

I want women to be inside their homes, and I want them to stay there; but I want them to be conscious of the role they have to fulfil (1885:38).

It was a nurturing role, caring about the relationships within the family, giving emphasis to a woman's selflessness:

[A woman needs] to be the honest companion of a working man, to understand her husband, to love him, to forgive him the small imbalances of humour, not demanding from him any sacrifice of dignity, to prefer an obscure poverty to an illegitimate affluency, to live in the intimacy of his mind and his heart, to deny herself for the sake of her spouse and children's lives - this must be the divine aspiration of a true woman (1891:121).

According to Amalia Carvalho the best education for "a girl in common conditions of birth, milieu and fortune" (i.e. a girl from the middle classes) was one that would prepare her for her "duties as mother, spouse, housekeeper and educator in early childhood" (1891:153). As she stated repeatedly, it was not 'instruction' that ought to be the main concern - this should be functional to the social status of each girl. Rather, a 'modern woman' needed to learn moral rules and values for her role in family life, in other words, she needed *education*. This emphasis on women's role in the domestic sphere was so strong that it is not surprising to find that any alternative approach was opposed by Carvalho. Work in the public domain was seen as an American influence, based on assumptions of "a female generation able to struggle for life, prepared to compete with men for careers, independence..." (1891:154); in other words, a product of a socially and economically advanced society. Clearly such goals were inconceivable in the backward Portuguese society (which she analysed, adding some racist comments):

(...)here in this small part of the Peninsula, modern civilization has been introduced recently and without preparation. The refined society, which a gentleman establishes for himself and his wife, is only skin deep. Underneath the veneer of gentlemanly conduct resides the disdain of the Arab or the brutality of the barbarian. Here the idea of the woman as independent from the man through instruction and professional abilities whether artistic or scientific is simply a dream (1891:155).

At other points in her writing, Carvalho argues that paid work caused anomie in the way it questioned the concept of separate spheres for each man and woman, which in her view were unambiguously hierarchical. Women had to maintain their subordination to male authority and will. This view was enforced

by the notion of a woman's weak physical nature, unable to sustain a career in the public sphere given her emotional instability, tendency to physiological crises, and mental inferiority. Work outside the domestic sphere would only lead to a deterioration in her health:

She will never be a punctual civil servant or a dutiful and impartial magistrate, or a firm and effective machine operator, or a doctor, or a legislator. Those who pretend to persuade her to claim these male privileges must hate her and want to lose her for ever (1885:218).

Submit her to the mental strain of hard, methodical, almost sacred work and you will destroy her by the sheer weight of this hard duty (1885:164).

The feminist struggle for franchise was also condemned:

I think that the idea of a woman in Parliament is just as absurd as a woman-soldier or a woman-priest (Carvalho 1885:38).

Carvalho warned of the dangers of denying the division of the sexes into two separate spheres. The danger of the "war of the sexes" was addressed in her early works, in terms of a "brutal struggle" which could develop between couples. Instead of being "two partners, two companions, two co-workers in the great work of life", they were transformed into "two irreconcilable enemies, two ferocious adversaries" (1891:156). In later works, she pointed to the "hostility between husband and wife" which, in addition to this "awful utopia of free love", was supported by "the radicals, the progressives and the socialists from the traditions most at odds with the actual state of society" (1909:264). The idea of such women in the public sphere was grotesque to Carvalho who held the following opinion of English suffragettes:

(...) the girl who wants to know, to fight on, with men, in competition with them, in laboratories, schools, hospitals,

universities! Who is a suffragette and hits and is hit in grotesque fights with the police; who throws stones at the secretaries of state, who is caught by the gigantic policemen to be taken to the police station, with her hair messy, her dress in tatters, yelling, kicking, possessed!...What an awful, awful transformation! (1913:84)

Therefore, in her view, education for women should distance itself from two dangers. On the one hand, a frivolous and disfunctional education could disrupt a marriage, due to the woman's inability to understand and follow her husband's interests. On the other, it was necessary to stop the emancipation of women, because their femininity was at risk in the competition with male companions, finally becoming their enemies.

(ii) *'Women's conditional work' view*

The differences between this perspective, exemplified by the work of Costa (1870, 1892), Pereira (1897), Caiel (1892,1898,1900) and Lima (1892) and the perspectives discussed above should be made clear. All of the above authors in this perspective supported not just liberal monarchy and traditional republicanism, but also intervention in the field of popular education for both sexes. They represented a mixture of 'public educators' and 'industrial trainers', using Raymond Williams's categories (1962), and promoted the expansion of public education both in its own right, and on the grounds of the contribution it could make to a more productive society, through a professional education for working class' girls. In the position represented by Amália Carvalho described above, there was no enthusiasm or support for mass schooling; the main concern was to preserve an earlier tradition - a private high school for middle- and upper middle class boys and, for girls from these social groups, an

education in the domestic sphere. Furthermore, when there was a public debate about the opening of State high schools for girls, she clearly opposed it, arguing that they were premature "given the backward mental state of girls in the country" (1891:163-64). She also believed that the State should not intervene in the education of children from powerful social groups. Their daughters' education was their own affair.

In clear contrast with this position, the four authors referred to above demonstrated their concern with popular education. Pereira, for example, published in the *Biblioteca do Povo e das Escolas* (People and Schools Library Collection), a collection of books with the most diversified topics: 237 volumes were printed between 1881 and 1913 with the aim of diffusing among the working classes principles and views of a rationality considered as superior. Carolina Lima, a schoolteacher, presented a paper in support of working class girls' education in an International Pedagogical Congress in 1892. Others were also clearly involved in the formulation or the scrutiny of policies for popular education: Caiel was sent to other countries to observe vocational female schools in order to contribute to the development of policies in this field; António da Costa was twice Minister of State for 'Public Instruction' and was a clear supporter of popular education and female education in State schools.

These campaigners defended the extension of women's education to vocational and higher education and career opportunities in terms of women's economic survival. However, even within this perspective, it was thought that women should confine themselves to what was gradually considered as *women's work*. Some pointed to "artistic, pedagogical, industrial or trade

occupations as appropriate to the female sex" (Costa 1870:144); or to "educative and domestic industries" (Pereira 1897), for example, primary teaching and such activities as clothmaking, lacemaking and baking pastries - activities which were unsuitable for men. Even those campaigners more closely related to the republican movement (represented here by Caiel) assumed that women's activities outside the home would be located in appropriate areas, such as the teaching of children or working in specific manual working class occupations.

Other studies which have analysed women's education at the end of the nineteenth-century (Mayeur 1977, 1979, and Margadant 1990, investigated French society; Delamont & Duffin 1978, Dyhouse 1981, Burstyn 1980, Vicinus 1985, studied English education) have identified the demographic problem of women substantially outnumbering men. Similarly, at the end of the nineteenth-century, the gender imbalance in Portugal gave rise to a concern about the enforced 'idleness' of women, who were unable, for different reasons, to fulfil their mission as mothers and educators. In this context, the authors using this perspective attempted to bring legitimacy to women's work by stressing that it was a moral necessity for those women experiencing economic difficulties - widows or those married to men unable to earn enough money to support the family. Such commentators also added, however, that working class women would contribute more to the well-being of their families if they did not have to go out to work, but took in work at home, thereby avoiding "the disgrace and shame of going out to work" (Caiel 1892:17):

It is necessary to organize the system of female industry, in order that the factory woman ceases to exist. Instead we should have the industrious mother who, while she presides

over the pans and her children's naive games, earns enough pennies to make a living (Caiel 1900:84).

In this perspective the position of the factory woman was unfortunate because she was contributing to the "degradation of the race": her children were weak and infirm (Pereira 1897). Caiel was unusual in recognising the double burden of the factory woman who had to carry out her work on the shopfloor as well as her work in the domestic sphere for the reproduction of the family.

J. Stuart Mill's theses on women's emancipation and the equality of education and of access to all areas of work for both sexes were rejected by the supporters of this second perspective (as they were by the first). Separate spheres were proposed for each sex, namely scientific and political activities for men and education and moral work for women. Channeling women towards scientific and political work meant they had to face "the arid career of positive sciences and passionate politics" (Costa 1870:137) and in turn, such reversal might lead to male involvement in domestic activities. To change the social order to that extent would be opposing nature and would produce "social chaos". A humourous and even sarcastic tone (clearly sexist) was adopted when there was any mention of women working in the public sphere in 'unsuitable' areas, i.e. jobs which did not conform to the stereotype of women's work. Again the question of women's paid work and public participation, especially concerning women's access to Parliament and their franchise, was analysed in terms approaching anomie.

Margadant (1990) studying the republican and monarchist views in French society, found a very similar situation to that represented by Portuguese monarchist and republican perspectives.

Around 1880, both right and left views in France strongly advocated the role of women in the home as socialisers of children and moralisers of social life. Working outside the home was justified only for those who needed to make a living. The view of Jules Ferry and his republican partners closely resembled that of Jean Jacques Rousseau regarding the education of girls for domesticity:

As progressive as they may have looked beside the clerical Right, however none of these reformers envisaged giving men and women the same rights. Neither in his views on marriage nor in his advocacy of girls' education did Ferry, any more than his supporters, take the individual as the basic social unit in defending women's right to more instruction. For him, as much as for the Right, the family headed by the father and the husband, remained the building block of French society. Ferry limited his concerns to the impact of girls' education on their duties in the home (...) to make them better wives and mothers (Margadant 1990: 28).

Undoubtedly, the same would apply in general to monarchists and republican views on women's education in Portugal, at the end of the nineteenth-century: education was not seen as women's right on the basis of social being; instead of rights, the language focused on dutiful mothers and wives to which all education should be directed. However non-discriminatory views were already being developed because of growing numbers of spinsters, widows and married women who were in a difficult economic position: either their presumed 'idleness' or their unbearable economic situation gradually helped to legitimate middle-class women entering non-manual jobs in the public sphere. However, they were still being advised to direct themselves to these specific areas of the 'workplace', which were perceived as more appropriate for women's activity due to their 'specialised' qualities.

(iii) *The 'egalitarian' approach*

The functionalism inherent in the first two perspectives, which saw women's education in terms of their role in the family as wives and mothers, was not endorsed by the third perspective which adopted a more critical stance. Undoubtedly this perspective on women's education and autonomy was innovative and radical for the period. The concern with working class issues was shared with the workers' and socialist movements, focusing in particular on the problems facing working-class women and the contradictions in the popular view that women were the best educators of their children, and therefore should stay at home. Ana Osório (1905), a republican and feminist campaigner, for example, commented:

And still there are people who advise them to stay at home to educate their children, instead of going out to earn their bread with honest work. But to teach what, if they do not know the basics, if many do not know how to read and write!

and later she added:

Of the million Portuguese people who know how to read and write, only one third are women! (Osório 1905:50-51).

The discussion of 'women's education' emerges here with specific emphasis on a co-educational setting, which commentators took from Scandinavian and French writers. From there they went on to support a perspective of equal access to any type of occupation, expressing opposition to the view that certain areas of work were more suitable for women:

(...)all careers should be open equally to individuals of both sexes, but there are occupations where to exclude women is not just a crime, it is an absurdity (Osório 1905:47).

Presumably teaching was one of them, as women's special 'calling' for teaching children was sometimes mentioned.

There was a stronger emphasis on questions of 'instruction' than in the previous approaches, since its importance was recognised if women were to achieve equal status with men in the world of work; and work in itself was perceived as the route to women's freedom. Osório, for example, outlined the aims of education to enable women to achieve autonomous status, as follows:

(...) to educate the Portuguese girl in a somewhat virile mood, giving breath to her atrophied lungs, enlarging her corset, attempting to avoid contacts with frivolous and flirtatious girls, making her study seriously in order to achieve her own independent situation and the superiority of an autonomous being (1908:23).

Women were to have equal rights, the same as men, which meant they are no longer at the disposal of others - they should be perceived as individuals:

Women have the right to think what men think, to want what men want, to voice opinions as men do, they have the right to be considered as individuals (Osório 1908:23).

This support for the autonomy of women - aimed apparently for a man's world or, at least, a world already constructed by male rules - was coupled both in the feminist writings of Osório and Velleda with an emphasis that women needed to be involved in the social problems of their time. The socialist Velleda struggled against the indifference she found among educated women, even among those who called themselves feminists, towards the education of working class women. She launched courses for illiterate working class women, and a series of conferences where topics around women's emancipation were

debated. Ana Osório was one of the first speakers invited to deliver her paper on 'Women's Civic Education' (1908). Maria Velleda also struggled against what she saw as the "apathetic and egoistic life of the 'menage'" (1909:134). Female education, she argued, should be directed towards the "understanding of all social miseries and the search for their palliative" (Velleda 1909:137). Osório in turn stressed that women "should be sympathetic to their own society to the same extent as men" (1908:22). A true civic education for women should engage with contemporary social problems and social life beyond the home, with a clear conviction that :

(...) women are not intruders in their own country. They must convince themselves that the time is past when their fatherland was their husbands' fatherland; where their families were their husbands' families; and that [the time in which] marriage - where they would become the property of their husbands' clan - [has already passed] (Osório 1908:26).

Within this perspective, all authors shared a critical view of marriage, refuting its presentation as the only future for women. Other forms of partnership, such as cohabitation, were accepted (Almeida 1909). They criticised the way the 'marriage-market' was seen as the only socially acceptable path for women, just as the 'labour market' was seen as an appropriate path for men in life. They rejected the view that girls should be the "eternal aspirants of marriage", waiting passively for that moment to arrive. Rituals of access to the marriage market were denounced - "it is the time that the daughter goes to the show" (Osório 1905:107) - as well as the process by which these goals were realised ("she realized her ambition, she finally got settled", Osório 1905:118).

If the criticisms of marriage were clearly voiced, so too were specific aspects of girls' education. These writers opposed a frivolous education, or an education which bound girls to a precocious maternity and made them irresolute and empty-headed as a result of the kind of socialisation girls receive and expectations about their behaviour:

With a doll we don't learn to become mothers (...). What is learned is to imitate mum and to want a live toy similar to the artificial ones. Up to now, women have been created solely to serve men, and not for themselves and the imitation ability, which is innate, has been detrimental to their development. A doll does not turn girls into good mothers; what it does is to produce a child bowed under the burden of a responsibility which is not even useful (Osório 1908:18).

All of these authors maintained that it was through education that women, both working-class and middle-class, would realise their potential and achieve better conditions in their lives.

The Emergence of the 'New Orthodoxy': commonalities

From these descriptions of public discourses, it is possible to find areas of agreement between different protagonists.

In the first place, almost all of the contributors to the debates emphasised the need to 'educate women', arguing against those who saw education as dangerous and subversive. Some attempted to prove - and others merely assumed - that the educated woman, on the one hand, would keep her feminine attributes of elegance, beauty and mental dispositions of caring and delicacy, and on the other hand, would not neglect her primary duties at home and her main mission as an educator.

Secondly, they criticised openly what was called an 'education for embellishment', an ideal developed by the aristocracy and upper-middle classes for their daughters, which, it was said, the middle and lower-middle classes in trade and State bureaucracies attempted to imitate. It was an education centred around learning foreign languages, and brief notions of history and geography, some drawing and needlework. They particularly criticised what they saw as a sole preparation for young women to go into dancing saloons to show off, live a life of luxury and frivolity, in order to 'catch a husband'. For many of them, this kind of education led to major crises in marriage as a result perhaps of the inability of such women to be adequate companions to their husbands or to understand the husbands' professional duties. They might cause bankruptcy to their families by foolish spending; or breaking rigid social codes concerning the relationships between the two sexes, particularly for married women.

Thirdly, they advocated the woman's role in the 'moralisation of family life', its 'regeneration', and their responsibility to sustain and rationalise family life, in accordance with the recent 'discoveries' of positivist sciences. This concern was shared with the hygienist and philanthropist movements, analysed by Donzelot (1980), to promote a hygienic and controlled life, as a barrier against physical and moral degeneracy and anomalies, brought about by an unbalanced industrialism. Donzelot points out that this perspective cuts across another, which originated in Jules Simon's ideas:

(...) woman, the housewife and attentive mother, was man's salvation, the privileged instrument for civilising the working class. It sufficed merely to shape her to this use, to furnish her with the necessary instructions, to instill in her the elements of a tactics of devotion, in order for her to

stamp out the spirit of independence in the working man
(Donzelot 1980:36).

Donzelot looks at this redefinition of family life around the woman's role as an alliance between what he calls "promotional feminism" and a "moralising philanthropy". Such an alliance was engaged in a struggle on two fronts. On the one hand, against prostitution and the brothels, and on the other hand, against the convents and the backward education provided for girls. In the Portuguese context, there is an affinity between Donzelot's "familialist" strategy and what Costa described as the "reorganisation of the national industry of motherhood and family" (Costa 1870:132). This strategy had, as its main target, the definition of the working class woman's mission as one of achieving the "social retraction of the husband and children" (by making the home appeal more to the husband, keeping him away from the inn, and regulating children in a sanitised environment); while for the women of the middle classes, the strategy was one of directing them to become an "instrument of cultural diffusion on the outside" of welfare and educational norms (Donzelot 1980:46). The home was proclaimed, by many of the Portuguese debaters, to be the "realm of love and work", to which female education should be oriented. Here the concern for the 'moralisation of the family' through the intervention of women was frequently reiterated.

Fourthly, it may be said that the authors reviewed here (apart from those who almost excluded women's activities from the public sphere) supported forms of *maternalism*, as defined by David (1980). Even among the egalitarian approaches which appear to refuse a pre-definition of female activities within the public sphere, there were assumptions about teaching as a suitable

activity for women. The support for women teachers developed mainly after the *1878 Educational Reform Act*. António da Costa, a leading education politician, was a clear example of the support for such *maternalism*. He asserted that his guiding principle in formulating educational policies was that "man must be educated by woman" (1870:225). She was a natural educator given her role in the family and household; she never fails to educate her offspring, while he doubts whether man has the character and ability to succeed (Costa 1870:127). Children are naturally drawn towards women, rather than men, because "the child started life in the womb, where it gained its first experiences" (Costa 1870:214). Costa paid tribute to the inherent feminine qualities of "affectionate delicacy and sensitivity" which explained women's interest in children. The woman-educator, even beyond the domestic sphere, was needed for her "sweet feelings (...) and comfort to the mind" (1892:375) which she would bring, as inherent qualities, to the relationships developed with pupils in school. Quite often he referred to her "main mission as an educator" which should be supported by a strong moral and religious education to confront her "exaggerated imagination" (Costa 1892:401).

Caiel, a female educationalist connected with the feminist and republican perspectives, and closely involved in the scrutiny of policies concerning girls' education, corroborated that there was a wider social and political role to be played exclusively by women:

(...) childhood protection and education; the surveillance, management and inspection of primary schools; the management of State social services (Caiel 1898:45).

Caiel justified this, for single women, given their "strong affection and full commitment" (1898:60). In her definition of the "role of the teacher", she also praised qualities perceived generally as female qualities. The teacher should have:

(...) a delicate and caring attention when exercising the job of affection, of philanthropy, of cooperation, a mission of impeccable pupil artistry (Caiel 1900:17).

Even in a more clearly identifiable feminist perspective within the republican movement (Osório 1905), this appeal to women as teachers was also shared. It was the new type of woman who Ana Osório wanted to see at the top of primary schools and colleges (1905:93) on the basis of a specific vocation for teaching children.

Conclusion

In the period 1870-1910, a new role for women was emerging but not in any uniform or consistent way. The most revealing factor was the conflict over gender roles. Many leading figures in Portugal at the time felt compelled to enter the debate; and 'experts' drew their own conclusions from their respective professional fields. Within the 'positivist' perspective, doctors appear to have dominated the field (increasingly as substitutes for priests) not by their number, but in terms of influencing politicians, journalists and pedagogues. However, there was a crucial difference between doctors (or those more closely influenced by them) and educators in what concerned women's roles and their education. Among doctors, generally, the emphasis was more upon the importance of motherhood for a 'healthy race',

and women's role in biological reproduction, while among educators women's role as socialisers of children was the main concern.

It is important to stress that almost all of the authors believed in education for women and stressed their moral function. For many of them, the main emphasis was upon women as the regenerators of family life which contrasted sharply with their assumptions about the physical and mental inferiority of women. A moral power was assigned to women around their role and situation in society in nineteenth-century reasoning. However, and in accordance with Duffin (1978), the moral power granted to them was mostly a 'chimera' since it was confined to the domestic sphere, with the exception of middle class charity work. The moral power ascribed to women was symptomatic of the implicit presupposition of the nineteenth-century thinkers that:

(...) women lacked sexuality. Women might be morally superior in the negative sense that they lacked corrupting sexual drives, but they were always morally inferior by virtue of their weaker nature (Duffin 1978:70).

Women's autonomy was of no interest to the majority of these writers. Rather they were searching for the most fashionable discoveries of positivist sciences to legitimate and frame women within patriarchal relations - albeit in a different context, that of the "public forms of patriarchy". They were not particularly interested in exploring the potential tensions existing between their claims that there was a 'need for women's education' and such biologically determined views on women's infirm and weak psychic and social life. Many of the contenders perceived education in terms of social control rather than for development of individual capacities, a view which presumed women's limited

intellectual ability and their specific 'vocation' in the domestic space caring for other members of the family.

The views outlined have endorsed certain activities in the public sphere seen increasingly as *women's work*, provided certain conditions were fulfilled. Teaching was becoming one of these areas. Therefore, between 1870 and 1910, when mass schooling as a State initiative was progressing in Portugal (though in poorer and more precarious conditions than in core countries), the view emerged about women having inherent qualities for teaching children in primary schools. As teachers they were perceived as suitable caretakers of young children, due to their 'natural' tenderness and affection, but as women they were considered as weak and intellectually limited.

The 'new orthodoxy' was actively constructed as many of its elements were accepted by the different ideological sectors. However, other components were challenged by those who came from political and social movements, inspired by philosophers and social scientists critical of the theories of Spencer, Comte and "Social Darwinism" (Dyhouse 1976, 1981). Actually the liberal philosophy of J. Stuart Mill stressed that women needed to achieve freedom and self determination, i.e. the same legal and political rights as men, although the same consideration was not extended to women's rights in the family and its sexual division of labour (see Okin 1980:226). His influence was a challenge to the 'positivist' views on the situation and status of Portuguese women. Others authors, such as Owen, the Saint-Simonians and Fourier were also referenced, although to a lesser extent by those who fought for more egalitarian conditions in women's lives in Portuguese society.

The strongest challenge to the view of two separate gendered worlds came primarily from the feminist movement. "First wave" feminism (Banks 1986) also had its representatives in the country. Although there is still very little research on this movement in Portugal, it seems as if early versions of Portuguese feminism were 'moderate', opting for the use of group pressure and negotiation with the Republican movement and parties rather than for the organization of demonstrations and rallies (Silva 1982:7). Some of the more preeminent figures of this movement have been discussed in this analysis (Caiel, Osório and Velleda), revealing the different positions among women during this period.

This chapter, in articulating the emergence of the 'new orthodoxy' about women's situation at the end of the nineteenth-century and the beginning of the twentieth-century, both in terms of its divisions and commonalities, illustrates Walby's thesis about women's transition from "private" forms of patriarchy to "public forms of patriarchy". It also demonstrates that this transition was fiercely debated and became an arena of contestation and negotiation, in the specific conditions of Portuguese society.

