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(Eds.)

From School Inspectors to School Inspection

**Supervision of Schools in Europe from
the Middle Ages to Modern Times**

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*Tomáš Kasper, Martin Holý, Marcelo Caruso
and Markéta Pánková*

School Inspectors and School Inspections from the Middle Ages to Modern Times: Introduction to the Topic

To this day, the topic of school inspection is one that is often overlooked in historical educational research. Compared to more traditional heroes of educational development or to more groundbreaking innovative educators, school inspection may have appeared old-schooled and machine-like. Only recently more scholarly attention has been devoted to it (compare the list of literature at the end of the publication). There are several reasons for this. Firstly, the topic is now related to the broader context of school inspection and supervision, that is, it refers to the question of practices, discourses, and power relations included in the regulation of school operations and in the actions of relevant actors. Rules, order, and supervision has helped to reconstruct and, above all, to interpret crucial control processes in formal and informal education, upbringing, and socialization (Caruso 2003; Geis/De Vincenti 2012). Secondly, the question of inspection and supervision of the operations and development of schools is also intimately related to the democratization of school life and the entanglements between schools and local communities (Binder/Oelkers 2017; Binder/Oelkers 2020; De Vincenti/Grube/Rosenmund 2011; Horlacher 2011a; Horlacher 2011b; Criblez 2007). Thirdly, school inspection plays a crucial role in those works analysing the institutionalization modern schooling, including the transformation of Latin schools in the Late Middle Ages and early modern period and into modern ‘national’ school systems beginning at the end of the eighteenth century (Winter 1901; Kahl 1913; Hammerstein 1996; Bobková-Valentová 2006; Hoffmann-Ocon 2009; Criblez 1999; De Vincenti 2009; Osterwalder 2011; Condette 2017; Holý 2018; Kasper/Skiera/Grimm 2019).

Recent scholarship has focused on the role of supervision over school systems, in which inspection served not only to track the fulfilment of educational goals but also to provide support for educators. Supervision actively promoted the professionalization of teaching, mostly by training teachers in local meetings and associations as well as by establishing important elements of professional life, such as educational publications, congresses, specialized teacher conferences, and publi-

cation of specialized educational literature, among others. Inspection also focused on the teaching process in terms of content and methodology, while at the same time it observed the internal life of schools and the behaviour of teachers towards their students and the general public. As a formal component of the modern school system, inspection, whose institutionalized beginnings can be traced to the Late Middle Ages and the early modern period, facilitated the evolution of modern education. It tracked the attendance of the children; it controlled their manners and the behaviour of the teachers: it kept an eye on the material conditions of the schools; it proposed changes in instruction and discipline. Inspection, therefore, should not be viewed merely as a supervisory body of an 'external' object, but also as a part of schooling itself. Inspection oversees and legitimizes a given school system and its educational concept, thus strengthening it and, in many regards, enabling it to evolve.

The publication *From School Inspectors to School Inspection. Supervision of Schools in Europe from the Middle Ages to Modern Times* contributes to this broader and more ambivalent view of the formation of inspection and supervision over modern school systems. It primarily focuses on Europe, both geographically and culturally. Within this narrow space, it addresses a longer period of history, spanning from the late Middle Ages to the twentieth century, although the bulk of contributions deal with developments after the last decades of the eighteenth century. The contributions call attention to both the institutions of inspection including, its relevant actors, and the processes of inspection and supervision over school teaching and school systems. Attention is devoted not only to the visible, defined institutions of inspection, but also to the 'hidden' or more subtle media of inspection and supervision applied in modern schooling and education: It looks at what we would call a supervision mentality. A number of contributions offer a view of the processes by which constructs of self-identity and the identity of others, such as 'foreigners' or religious 'others', were imposed within the educational systems of multinational European countries in the nineteenth and twentieth centuries as well as in the religiously diverse European territories of the Late Middle Ages and early modern period. The book examines how the formation of school inspection in various parts of Europe came about and how its activities related to Europe's political and educational challenges. Among them the contributions look into the religious diversity, the connection between mass education and the 'creating' of the citizens of nation states, the professional development of educators, the development of school operations and the types of schools, including the implementation of particular educational methods, an education code, teaching procedures, and the question of the language of instruction, as well as curricular issues, encoded and controlled in books, textbooks, and teaching materials, maps, and illustrations.

The first section of the book focuses on the earliest times of organized supervision over education, starting with the Late Middle Ages. Supervisors and inspectors were only slowly and gradually being recruited from the ranks of laymen, and there were only vague indications of a path towards professional school inspection and supervision over education, that is distinct from the field of Church inspection and visitation. The contributions reunited in this first part of the book provide us with glimpses into very different realities from those we assume as typical of school inspection. In this sense, they help to contour a better understanding of the changes and transitions to the dominant approaches and processes of supervision in modern education. In comparing views of premodern and modern education, we see that many characteristics of inspection and supervision are quite similar. This arouses the question whether general problems and concerns are involved in this field, well beyond of the specifics of these two quite long periods of time. Yet we also see important changes leading to the institutions of modern school inspection of the nineteenth and twentieth centuries. On the one hand, there is a gradual, but significant transition of many inspection practices from early modern education to schooling in the modern period. On the other hand, it is clear that the premodern community of scholars, still with close ties to the Church, exerted its own powers to specifically direct and pursue its educational goals and methods, that is, without the need to establish an independent institution of inspection.

The second part of the book devotes attention to the gradual formation of specific inspection bodies, their functioning, their standing in the governing institutions of education, and the role they played in the formation of modern school systems. There is a special focus on what is usually termed as Western education and the transfer of the inspection culture within European states and regions of multinational empires and nations. The question is how this transfer of inspecting practices, bodies and discourses related to the establishing of the dominant learning centres responsible for setting the course within education, to the development of modern pedagogical discussions and, later, to educational research, to the role of education experts as well as to the evolution of teacher training. Taking all these subjects together, inspection was no minor factor in the development of modern education itself.

In the introductory contribution, Marcelo Caruso analyses fundamental questions concerning the evolution, function, structure, and notable figures of school inspection in mass elementary education in the nineteenth century. He asks: *How was it possible that this older institution of parochial reminiscences was revived, now slightly more secular in appearance, in the nineteenth century? What was the exciting and new element in the institutionalization of school inspection? Which historiographical shifts might be necessary in order to grasp the meanings of this development?* Caruso points out that in the Western world, it is not until the Enlightenment that a modern school inspection begins to form in the hands of a modern state

ridding itself of the influence of ecclesiastic institutions and traditions of religious supervision over education (in both the Catholic and Protestant worlds). For their existence, nation states required a fully organized system of inspection and supervision (with sufficiently educated and trained officials) in order to 'dictate', efficiently and uninterrupted, the individual areas of life within modern society in their entirety. In his contribution, Caruso marvels at how comparative and transnational historical-pedagogical research has yet to devote adequate attention to the topic of school inspection. It may seem a somewhat bland aspect of the formation and functioning of the modern school system, but this is not the case. Both the inspectors themselves and their inspection reports indicate that the work was interesting and diversiform, not boring and purely bureaucratic. They had a major influence on the evolution of schooling and modern education.

The contributions in the first part of the publication devoted to supervision over school operations and instruction in the Late Middle Ages and early modern period show how the question of the sequence of instruction, or more specifically its organization, which was addressed in a school rules, did not carry as much importance in the area of supervision as in later periods; rather, emphasis was placed on fulfilling the educational mission of individual schools and educational institutions and their relationships with ecclesiastical and secular authorities. Thus, as shown by Mährle, supervision concerned the advancement of confessional policy goals and religious politics through educational institutions. Primarily in the case of higher Latin schools, at the end of the sixteenth century, confessional political interest was a fundamental focus of school supervision. In the sixteenth century, religious policies were an important instrument of secular authority and had a considerable bearing on the functioning of school systems. While the inner workings of a school and the sequence of instruction were codified and standardized within the school regulations of the given school or religious order, supervision over the fulfilment of confessional-political goals was, in many respects, based on unwritten customs or the authority of the person (private, scholarly, political) conducting supervision and inspection.

Likewise, a contribution by Stephanie Hellekamps and Hans-Ulrich Musolf examines the dual role of supervision in the early modern period. On the one hand, in the seventeenth century supervision was part of the pedagogical everydayness of higher schools. It addressed content and methodology, teacher conduct, and the administration of exams and disputations. Supervision was carried out only in part by laymen and on the basis of their expertise as legitimized by the state authority. Far more commonly, supervision was conducted by representatives of the community of contemporary scholars recruited mainly from ecclesiastical circles.

Insight into the supervision of Latin preuniversity schools in the early modern period is provided in a contribution by Martin Holý and Kateřina Bobková. The authors devote attention to the dominant urban schools of the pre-White

Mountain era as well as to church schools, which were prevalent in the system of Latin schooling after 1620. In doing so, they highlight various institutions of inspection and their mechanisms. They unambiguously show how several of the functions of school supervision in the early modern period were identical to those of the inspection overseeing the activities of public elementary schools in the nineteenth century. Inspection took into consideration not only the school buildings but also the didactic sequence of instruction, the conduct of teachers towards pupils and their overall public appearance, the social and cultural life of the schools, and school administration. Occasionally, inspection and supervision over schools also produced information on the state of affairs in the families of pupils or about the pupils themselves. This is namely discussed in a contribution examining inspection reports from the second half of the seventeenth century from schools for poor boys (Perret). The transition from confessional school inspection to a secular and modern form of supervision is analysed by Braunschweig-Wolfenbüttel Jean-Luc Le Cam. His contribution to the Braunschweig-Wolfenbüttel area illustrates changes in the modern system of inspection that not only relied on a new anchoring and administration of the school system but also required a functional bureaucracy and the cooperation of teachers while at the same time pursuing systemic changes in the area of content and methods of instruction, the standing of pupils and teachers, and the relationships between schools and supervisory bodies.

The second, more comprehensive part of the book is devoted to the evolution of inspection in the formation of modern national education systems within the European civilizational milieu. On the one hand, in the nineteenth century (namely the second half), education was an important means of forming national identity and national awareness; on the other, it is obvious that under circumstances when multinational states and composite states in Central, Eastern, and South-eastern Europe did not correspond to ethnic, cultural, and language boundaries, the nationalization of education was not promoted by sovereigns. Moreover, the republican and democratic processes of forming the modern nation, such as in the Swiss confederacy or in Holland, were not popular political models in many parts of Europe (Horlacher 2011; Tröhler 2006). Because school inspection in most areas of Europe was intended to help maintain the social order of states that were often multinational, one of its tasks was to ensure that the national interest did not eclipse the interests of the states or deny anyone access to public elementary education. It has been shown that school supervision was not the product of national institutions but rather of state institutions (within a provincial system of government) and was largely shaped through special pedagogical discussion, such as in the case of the formation of modern schooling itself. The gradually forming specialized and independent institution of school inspection owed its specification, role, and function both to enlightened political efforts and to professionally anchored (namely philanthropically oriented) pedagogical discussion. For this

reason, the institutional and specialized focus of inspection in the cultural-geographical milieu of Central, Eastern, Southeastern, and, to some extent, Western Europe was relatively consistent. The modern European educational system was anchored in school laws (*Schulordnung*) and underpinned by faith in the ideas of pedagogical philanthropinism (in the method of J. I. Felbiger), the methods and tenets of which were developed in so-called exemplary normal schools (Schmitt/Horlacher/Tröhler 2007). The institution of the normal school *de facto* fulfilled not only an exemplary function but also an inspection and supervisory function. Its model was the standard by which modern education in a sizeable number of European countries was to be developed. Normal schools served as institutions in which the individuals responsible for advancing education (including those who served in a supervisory function) were to become familiar with the standard by which education was to be gradually unified in most parts of Europe (Polenghi, Meda).

At the same time, the developing modern European educational system was systematically examined and evaluated, i.e. inspected and supervised, as part of regular surveys on the state of schooling and the system of personal visits by inspectors, as was also the case in the premodern period (Tröhler 2016; Tröhler 2014; Tröhler/Schwab 2006). It was inspectors who oversaw fulfilment of pupils' educational obligations together with the sequence of instruction and teacher conduct. This educational-cultural mission based on a consistent pedagogical model and similarly formulated educational and edifying goals strengthened the uniformly shaped European educational milieu, which over time was consistently and successfully expanded by the evolving modern state with an ever smaller ecclesiastical influence in public education. The uniformity was evident in the process of shaping the modern system of schooling as well as in the question of didactic teaching methods, the formulation of educational targets and curricula, and in the goals pursued in the professional training of teachers. It is examined in contributions not only on the Czech lands but also on Silesia, Hungary, the Austrian lands, Bosnia-Herzegovina, and the territory of the Lombardo-Venetian Kingdom. This uniform approach is absent only in the Habsburg Monarchy. As illustrated by other contributions, schooling and school supervision in Germany and the Swiss Confederacy were subjected to similar processes (Gabriela Wüthrich).

In that sense, inspection in the Western civilizational milieu became both an official supervisory body for modern education as well as an institution that supported and facilitated its independent functioning and, particularly, its continued development. Supervision led to the automatization and thus strengthening of the foundations upon which the cultural mission of modern education was built. A uniform concept in the preparation of teachers ensured 'consistency upon entry' among the officials within modern mass education and a coherent vision for educational goals, content, methods, and evaluation. In and of themselves, the method books and pedagogical texts intended for the preparation of future teachers had a

normative and exemplary effect, thus they helped shape the professional views and pedagogical experience of those involved in modern education. Many times, their influence had a far greater impact on the activities and evolution of the school system than did the external supervision provided by public exams and school inspection. Moreover, the frequency of inspection visits was often considerably limited, and plans did not always correspond to reality. Despite this, the system of public exams was important, as demonstrated by Golob in a contribution analysing exam protocols, overall attendance of public exams, and the media used to provide information about exams. Public exams not only enabled supervision over the results of education but also made it possible to compare results, review expenditures, and oversee the achievement of learning targets. Although it was not common for many members of the public to observe exams, the fact that they could attend fulfilled an important psychological role – anyone could at any time see for themselves what results were being achieved. Education was a public affair, and this was true for supervision as well.

Even though the modern state did not view support for private confessional schooling as an important priority, the liberal conditions of the nineteenth century made this type of education possible. An example of this is found by looking at inspection of Jewish schools in Germany in the nineteenth century, including the standing of the schools and the attitudes of the major society towards this educational institution (Gräbe, Wermke). In the example of Hungary, Janos Ugrai examines the connections between the formation of modern schooling and supervision at the end of the eighteenth century and ecclesiastical influences, which, however, quickly declined. Modern public schooling, together with inspection and supervision, was rapidly shaped primarily by state interest. This led to a weakening of the confessional investment of the Protestants in schooling in Hungary, and the earlier substantial differences between the Catholic and Protestant school systems became less significant and diminished.

As the modern state reformed various aspects of the lives of the citizenry (and also monitored them), inspection and supervision earned an indelible place in modern society, while at the same time school inspection represented a natural part of the everydayness of schools. Inspection and supervision were not intended to be a form of punishment but rather a means of managing, deciding, influencing, planning, and also supporting educators in their pursuit of expected and desired results. In locations where the plan and supervision were executed by individuals with better qualifications and training, the pursuit of educational goals was easier and more successful. In locations where inspection and supervision supported the improvement of the material conditions of schooling, we see greater success in achieving reforms in mass education and the goal of being useful citizens for the good of the state, be it in elementary schooling (Klečacký, Staněk) or vocational schooling (Kadlec).

The aforesaid concept of inspection and supervision was rigorously developed in the Czech and Austrian lands of the Habsburg Monarchy, but it also took hold in other places away from established centres. We see a similar picture for Silesia in a contribution by Marzena Bogus-Spyra. In another contribution, Snjezana Susnjara looks to the example of Bosnia and Herzegovina. These studies show that the differences between the various lands and regions were not small. The centres attempted to take on a leading role in educational reform and school supervision, thus transfer took place in the spirit of dissemination of the model from the centres to the regions. We should not regard the dynamics of the formation of the school system, educational processes, and school supervision merely from the 'one-way' or 'colonization' viewpoint, i.e. from developed centre to underdeveloped region, despite the fact that inspection of mass schooling in the nineteenth century is an example of a relatively hierarchical institution. For the most part, inspectors were appointed from the ranks of secondary school teachers or school directors. They were individuals with many years of experience, higher education, and higher social status, who, as a result, were often more loyal to the political representation or social order. We would have to spend more time looking for inspectors who revolted against the social order than for those who respected the social functions of modern schooling and education. With the gradual democratization of society and the professionalization of teacher training, the group of inspectors grew not only in number but also in terms of their professional and social diversity (in some cases also in terms of gender). Inspectors thus played a key role in school reform, not only keeping watch over the state of the school system and education but also frequently instigating changes to it with regard to reformatory pedagogical demands under discussion at the time. Inspectors, then, represented more than mere bureaucratic state supervision over the functioning of education; they were active and (often in multiple respects) interesting and specially skilled individuals working in support of school reform. They continued in their own pedagogical education and were active in the continued education of teachers. This professional and civic openness of those involved in inspection was weakened by undemocratic practices in the school system, insufficient professional preparation, and oftentimes national preoccupation.

Despite the fact that the political representatives of multinational states and composite states worked to suppress the nationalization of schools and education, they could hardly prevent it from happening at the turn of the nineteenth and twentieth centuries. Despite the formal requirement that inspectors should respect equal access to education and promote the same learning conditions for all nationalities living within the state, it has been shown that many of them failed to exercise nationalistic restraint or moderation. While there was more success in limiting religious intervention in school operations and educational processes, national in-

fluences grew stronger at various levels of the school system, including inspection and supervision. In the multinational shape of many states and, particularly, in light of demands for legal equality among the citizens, any (namely social, national, or confessional) discriminatory approach to general public education posed a fundamental problem. Therefore, one of the tasks assigned to inspection by modern school administration was supervision over a democratic approach to the education of all citizens regardless of nationality or language. At the same time, frequently successful nationalistic movements called on the government, higher administration, or autonomy to ensure the separate development of education in national languages. This concerned a substantial portion of the Czech lands within the monarchy, for example. As demonstrated by one of the contributions (Puš), inspection was also shaped according to an ethnic criterion, and inspectors of a particular national language were tasked with supervising the operations and development of schools for a given nationality. Data from their inspection reports were, among other things, intended to ensure that conditions for the operations and development of schools with different languages of instruction were equal or, at least, equivalent. On the one hand, it was the role of inspection to promote equal conditions for citizens of all nationalities; on the other, inspection also included a certain degree of competitive observation related to the 'own' and the 'other's' communities. In some respects, this was a positive dynamic in the development of schooling, but it also led to the perception of the other nationality as a competitor or even as an opponent, whose goal was not only to have more schools but also better overall teaching conditions for the good and development of the nationality. Whereas inspection, from an institutional point of view, should have diminished the importance of nationality in the evolution of modern elementary schooling, the force of emerging cultural and political nationalistic contexts rather prevailed. Furthermore, the question of national identity in relation to school socialization and education also played a fundamental role in many European states and composite polities. Inspection was intended to determine whether the nationality aspect prevented citizens from accessing public education, though in doing so, it brought more attention to the sensitive question of nationalization of the school system. Two contributions examine the way in which the national aspect was pursued in school supervision (not only from the position of inspection but also curricula, teaching activities, educational tools, etc.). The first of these contributions looks at the broader implications of the means and media of national inspection of the school system (Schatz). The second contribution focuses on school inspection prior to the denationalization amid the interwar developments in the multinational Czechoslovakia (Kasper). The text thematizes how so-called protectionist national organizations, which were to guarantee every citizen access to education in his or her national language, often gave rise to an environment of national supervision. In schools, therefore, care was taken to ensure not only

fulfilment of the universal right to education in one's native language but also a sufficient level of national awareness.

In sum, school inspection and supervision are inherent aspects of the operation of the school system. This apparatus is by no means a mere additional layer in the fabric of modern schooling, but a constitutive part. If modern school systems embody a particular amalgamation of 'pastoral' and bureaucratic ways of doing, seeing and speaking, school inspection may specifically represent the bureaucratic part of schools. Yet inspection and inspectors cannot completely escape from the 'pastoral' – educational, pedagogical, guidance-related – side of schooling. As the contributions in this book show, inspectors were embroiled in these questions, even at a political level. There is no modern school until today without any form of inspecting activities of some kind. It is in this sense, that school inspection remains inherent to the emergence of modern school systems.

A further question related to the forms and specific functions of school inspection as well as to their change over the course of time. As usually in all things educational, changes took place rather gradually, sometimes in almost imperceptible ways. Yet not only gradual changes characterize the histories of school inspection, as in the case of the end of clerical inspection in the German states after 1919 that took place under almost revolutionary conditions – the transition from a monarchy to a republic and, as in the case of Bavaria, under the authority of a kind of local *sowjet* – and with radical consequences. If the system of education typical for a given period and social constellation falters, there is a rebuilding and regrouping of the goals of education and thereby also of the institutions responsible for supervising the system and ensuring that it functions properly. If educational goals (and the institutions pursuing them) are no longer able to uphold the functions that guarantee stability and order in society, and if they cannot legitimize the principles underpinning their functioning, educational systems begin to erode. These are typically gradual and not revolutionary changes, the dynamics of which, however, can be substantial and have a considerable impact over a brief period of time. Researchers tend to devote attention to changes in education that are important for order in society.

From the perspective of continuity and discontinuity, the subject of inspection and supervision over education has, more or less, eluded consistent scholarly attention, despite the fact that educational changes often point to these areas with remarkable precision and clarity. In the case of the formation of a modern system of schooling in European states, the processes relating to the emergence of inspection and supervision were ones of laicization, professionalization, systematic state bureaucratization, centralization, nationalization, democratization, and those of public service, all of them encompassing and complex changes. To which degree, the analyses presented in this book are related to one or more of these big narratives of the changes characterized as 'modern' will remain a question of historiographical controversy.

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Marcelo Caruso

Inspection and Inspectors in Modern School Systems. Genealogies and Historiographical Remarks¹

Similitudes are not always visible at first sight. Let us take Henry Barnard (1811–1900), an American lawyer, member of the Connecticut House of Representatives, chancellor of the University of Wisconsin-Madison, and first United States Commissioner of Education. This reputable career does not seem to have anything in common with Leopoldo Lugones (1874–1938), the multifaceted Argentinian author, poet, essayist, novelist, historian, diplomat, and journalist; or with Paul Lorain (1799–1861), the French historian and translator of Charles Dickens; or with Raja Sivaprasad (1823–1895), the Indian scholar, translator, linguist, and historian; or with Laureano Figuerola (1816–1903), the Catalan lawyer, economist, and politician who during his tenure as minister of economy in the late 1860s introduced the *peseta*, which remained the Spanish currency until the Euro replaced it. To be sure, each was already a famed personality during his own lifetime, and – even Lugones – entered into public life in the nineteenth century. Beyond these traits, they share a commonality that few would expect: all of them acted as school inspectors at some point in their lives. The list of remarkable personalities that played a role in the construction and consolidation of modern school inspection is probably longer. Yet, as these few names already show, school inspection – the epitome of the boring and the bureaucratic in school systems – may have been not only a field offering comfortable positions but also an exciting activity heralding a new era of modern school education and enabling the incumbents to pursue further studies, occupations, and objectives.

How was it possible that this older institution of parochial reminiscences was revived, now slightly more secular in appearance, in the nineteenth century? What was the exciting and new element in the institutionalization of school inspection? Which historiographical shifts might be necessary in order to grasp the meanings of this development? Here, I will address these (very broad) questions in order to connect the emergence and development of school inspection in the nineteenth

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century with emerging historiographical perspectives. Of course, this strategy of presenting and discussing some insights based on the extensive international scholarship on the issue is strongly constrained by limited space, which has resulted in some superficiality, as well as by the contexts I have addressed in my own research. I will focus largely on Western developments. Moreover, my emphasis will be on primary schools and will largely avoid the question of inspection of secondary schools and institutions for teacher training, among others, since the systemic aspects of an increase in compulsory primary schooling were the leading force in establishing what I would call ‘mass inspecting’ as a distinctively modern phenomenon.

1 Genealogies of Modern School Inspection

To my knowledge, there are no traces of people ‘officially’ trusted with the task of school inspection in ancient and early Christian times. Since the development of Western formal schooling was, to a large extent, inextricably linked to religious institutions, the inherited entanglements between religious and teaching communities presumably impeded the development of specific roles for inspecting and controlling schools and education. This general trend in Western Christianity was by no means an exception. The absence of inspection roles related to education and schooling seems to describe not only the situation in medieval Islamic (Berkey 1992) and Jewish education (Kanarfogel 1992) but also in ancient India (Scharfe 2003) and even in Sung China, where control of relevant aspects of education was closely attached to government examinations (Lee 1985). In sum, controlling and eventually changing education was instead a function of communities of scholars bound to traditions; it was not the duty of particular officials.

Even one of the earliest recorded figures usually identified as being in charge of school inspection, the Western Christian *scholasticus*, denoted only a person that had been sufficiently and soundly ‘schooled’, not a person who inspected schools. Whereas this meaning, which comes close to that of ‘scholar’, lasted in Byzantium, Western Christianity did not know any special position or dignity related to all things educational for rather a long time. To some degree, the ascendancy of Christianity as pastoral care and spiritual guidance (Foucault 2007) demanded that all the possible roles of pastoral care be combined without looking for specific educational roles. Only the *Institutiones Aguisgranenses* of 816, which was in force throughout the Kingdom of the Franks, stipulated that one suitable member of the collegiate church should be responsible for the teaching of the young. Gradually, over the course of centuries, this *scholasticus* became a recurrent term for the differentiated function of a person in charge of teaching (Schaefer 1910, 80). In most cases, this initial association with direct teaching loosened (Lorenz 1992). The *scholasticus* as a fully literate person may have been heavily involved in questions

relating to administration, libraries, archives, and correspondence (Scheffler 2008, 140), so that a series of deputies and agents (rector, magister) actually kept schools working, and the scolasticus retained only the general oversight of the educational institutions (Habel 1912, 24).

Since the nineteenth century, classic historiography has paid significant attention to the further development of the institution of the scolasticus in the context of cultural renaissance and urbanization during the Late Medieval Period (Hasselbach 1920; Paulsen 1885; Scheffler 2008). By that time, the scolasticus, initially only in charge of a specific cathedral school, derived from this function a general right to oversight and control of all schools in operation in the diocese, something that was rarely, if ever, achieved. Moreover, the appointment of 'schooled men' to this position allowed for variations, including married laymen (Zahnd 1995, 9). This right to oversight and control was generally acknowledged and only became a contentious question when ambitious city councils established their own schools in late medieval times.

The establishment of universities across Europe institutionalized schools and schooling as functional orders still intimately related to the medieval *ordo* yet now constituting a more autonomous space (Kintzinger 1991, 44–46). These institutions notwithstanding, new forms of school oversight were still widely lacking, even in those cases, such as in some Italian cities, where universities played a role in the provision of elementary (Latin and vernacular) schooling (Grendler 1989). Only in the context of the commotion caused by the Lutheran Reformation and Catholic Reform did an old Christian institution, trusted with the oversight of local communities and churches, bounce back from neglect: the canonical visitation. Visitations had developed during late antiquity as a lawfully defined action of visiting communities and churches within a bishopric. Visitations originally combined two differentiated purposes. They were concerned with the supervision of church life and exhibited a pastoral motif. The focus was not only on control but also on providing advice and counselling according to the central role of the Christian pastorate, which included the conduct of the local clergy (Peters 2003, 151). The further development of visitations led to the neglect of the pastoral aspect and shifted towards general oversight and control, including some aspects of education (Flade 1934/35).

Christian reformers from all denominations revived the old institution of episcopal visitations, these being one of the earliest techniques for stabilizing the new Lutheran reformation in the German lands. Luther himself wrote detailed instructions for visitators, and these general church inspections now included the local schools (Michel/Bauer 2017). If in late medieval times a nascent impulse for lay control of education had worked in many city councils, now the turbulences unleashed by the Reformation reinforced the crucial role of the churches in controlling education. Visitations, taking place with a certain periodicity, were

by no means a guarantee of successful confessionalization. As Gerald Strauss famously showed some decades ago based on his analysis of visitation documents, the Lutheran reformation was not successful among the rural population in Saxony, precisely the state where Luther himself had contributed to the enforcement of this revitalized form of inspection (Strauss 1978). Regardless of the relative ineffectiveness of the general visitations, at least in the early days their long-term effects should not be downplayed: the field of school inspection remained closely related to the Churches and their representatives throughout the following three hundred years.

At the end of the eighteenth century, the main problem school inspection faced was how to grapple with the growing sense that schools were in urgent need of reform. Whereas for a long time visitations were intended to secure the bare minimum in the functioning of schools and, in some cases, to police textbooks and teachers, the critique of the old European social and political order developing in the eighteenth century increasingly advocated changes and reforms under the slogan of an 'enlightenment'. It was a decisive question whether the old actors trusted with the oversight of schools could assert themselves in view of the new demands (Fookien 1967). One sweeping reform at this time, the Austrian school regulations successively issued after 1774, hinted at the new threat to the ecclesiastical oversight of schools. Although many of these reforms are inextricably associated with the name of Johan Ignaz von Felbiger, a canon regular of the Order of St. Augustine, changes in the higher level of administration suggested that state officials, not members of the church, were preferred for being ultimately in charge of education (Boyer 2012, 136). Still, at the more local level, churchmen usually remained in charge of direct inspection of the new 'normal' Austrian schools (Engelbrecht 2015, 94). Moreover, the disturbances following the French Revolution actualized the role of the churches in the pursuit of political order and social discipline. The so-called political constitution of the schools in the Habsburg Monarchy (*Politische Verfassung*) reinstated the central position of local churchmen for inspection of schools in 1806 (Maier 1967, 60–62).

An interpretation of these conflicting developments as involving only Catholic countries confronted with the sweeping claims of the Catholic Church would be premature. A comparative view can sharpen the intricate paths traced during the transition(s) from church-modelled visitation to fully fledged state school inspection. A case in point would be Spain, a country that almost epitomized both Catholic Europe and regalist policies committed to strengthening the state. There, after the expulsion of the Jesuits from all Spanish territories in 1767, the central state explicitly trusted collegiate organizations, old schoolteacher guilds, with the immediate care of city primary schools (Caruso 2021, 118–120). Individual inspecting positions emerged for at least a group of reform schools in Madrid, and this group of reformers who came from the bureaucracy and the military extended

their sphere of influence well beyond the capital city and even presided over the relaunch of entire urban school systems, as in the case of Cádiz (Caruso 2016). Still, these groups had to compete with other more conservative organizations, such as the Charity Committee, which also reached a powerful position in the changing fortunes of Spanish politics of this time. Yet even when a truly national system of school inspection came into operation in 1825, in the worst years of the neo-absolutist political repression, moderate liberals were appointed to important positions in these inspecting councils (Puelles Benítez 1999, 85). The pressure to reform Spanish education resulted in the appointment of new professionals to important positions of oversight (Comas i Rubí 2001), even before a centralized system of school inspection for the whole country, advocated by liberals, became a reality after 1849 (Ramírez Aísa 2003).

If the Spanish case shows that there was not necessarily a link between Catholic allegiances and the development of a genuine state-controlled school inspection in the nineteenth century, the case of Prussia, together with almost all other German states, indicates that Protestant territories also relied heavily on the personnel of the inherited church structures in the times of accelerated educational reform. The General State Laws for the Prussian States, promulgated in 1792, included among its 17,000 articles some regulations concerning education and schools. These regulations redefined the status of schools and universities in the country and defined them as state institutions (*Veranstaltungen des Staates*) (Heinemann 1974, 330). At the same time, however, the potential revolutionary meaning of these regulations was overwhelmingly tamed by the concrete mandate on how to supervise and inspect schools. Indeed, churchmen continued to exert these functions, but now they did it on behalf of the state. Only in the 1870s, during the culture wars (*Kulturkampf*) between the Prussian state and the Catholic Church, did these paragraphs have tangible consequences, providing the justification for the dismissal of numerous Catholic school inspectors. Similar constellations of competences and rights existed in other German states, such as Bavaria (Caruso 2003, 64–65) and Saxony (Moderow 2007, 124–125). In all these cases, new inspectorships emerged against the influence of the churches in the 1870s, and other ‘experts’ were appointed (Berg 1973; Caruso 2003, 113–140; Moderow 2007, 355–360). When major European countries such as France (1833) and England (1839/1847, on denominational lines) introduced professional school inspection on a national basis in the nineteenth century (Ball 1963; Ferrier 1997), there was a growing sense in Western Europe that it should be professionals or experts who conduct school inspections. With the very salient exception of the German-speaking countries, the European countries that served as references for the advancement of schooling and education in the Americas, Asia, and Africa in the late nineteenth century had practically ceased to employ the inherited churchmen as inspectors for visiting schools. Not only as state agents but also as inspectors on behalf of

school and missionary societies (Bartle 1984), school inspectors became actors in the landscapes of schooling around the world. It was in this time that the need arose to recruit inspectors from among persons working in quite different fields and, as a novel phenomenon in the process of state-building, the task seems to have been sufficiently attractive. Not only did inspectors increasingly act as observers and controllers of the forms and pace of schooling in a particular country, but school inspectors – not least through colonialism and cultural mimesis (Fletcher 1982) – travelled to and inspected schools in many countries around the world (for the Ottoman Empire: Fortna 2002, 96–98; for Ireland: O'Donovan 2017; for Japan: Platt 2004, 155–160; for Russia: Seregny 1999; for Thailand: Sukontarangsi 1966). The era of mass inspection began and has remained one of the most characteristic features of modern school systems since the nineteenth century.

2 Locating Inspection in Educational Historiography

The setup of local, regional, and national systems of school inspection was a success story. Even in cases such as in India, where school attendance in the context of the whole school-age population remained quite low, there were formal inspecting systems in place in which the aforesaid Raja Sivaprasad worked (Stark 2012). The promises of a system of thorough school inspection fired the imagination of observers interested in education around the world. The West African physician James Africanus Beale Horton (1835–1883), with his background in missionary schooling and English university studies, was quite assertive in this respect: 'An inspector of schools should be appointed whose duty would be to see that strict uniformity is observed in all the schools and that master and teachers attend properly to their work' (Horton 1868 bei Adick 1992, 236). He was somewhat more cautious about general authorities governing education and schools: 'It will be not out of place if a minister or officer of public instruction be created, with suitable councils, to regulate and improve the educational branch not only in the Colony of Sierra Leone but also in the other colonies of Western Africa' (Horton 1868 bei Adick 1992, 236). Although not mutually exclusive, an inspector 'should be' appointed, whereas a minister 'will be not out of place'.

Transnational and comparative educational historiography has reversed Horton's preferences. When discussing the question of the worldwide expansion of the modern type of schooling, scholars have mostly looked to ministers and ministries rather than to inspectors and inspection. Undoubtedly, national histories of education traditionally consider the basic facts and processes of establishing systems of school inspection during the establishment of national education systems; however, this does not translate into works dealing with the transnational

level of schooling or with comparative approaches. For instance, when discussing the dynamics of the political construction of education, Ramirez and Ventresca focused only on ministries (Ramirez/Ventresca 1992). In a matrix describing the emergence and consolidation of the institutions of education in six core nations, William Cummings considered aspects of centralization and control as central dimensions in this process, yet the very mechanisms and offices in charge of it, inspection and inspectors, are not explicitly addressed (Cummings 2003, 122). This general relative neglect of the question of school inspection in discussions about transnational features of modern education is somewhat counterintuitive, since 'it is easier to create a cabinet ministry with appropriate policies for education or for the protection of women than it is to build schools and organize social services implementing these policies' (Meyer/Boli/Thomas/Ramirez 1997, 154).

This general tendency is quite unexpected when one considers two of the major elaborations from historical comparative sociology advanced at the end of the twentieth century focusing on the emergence of national education systems. Works by Margaret Archer (*Social Origins of Educational Systems*, 1979) and Andy Green (*Education and State Formation*, 1990) constituted major efforts in taking comparison seriously while testing ideas and hypotheses of theoretical relevance. Both works were widely praised for their comprehensive approach and – regardless of shortcomings in detail – provided significant insights. I will only briefly present their main explanations for the emergence of modern systems of education and will point out the counterintuitive absence of a consideration for school inspection.

To put it in a nutshell, Green's book reviewed the literature dealing with the emergence of core national education systems and advanced the idea that neither industrial capitalism and functionalist ideas of education nor liberal and democratic theories could account for the commonalities and differences of the educational systems under consideration. Rather, the process of state formation in its distinctive features in different contexts seems to explain to a good extent both the emergence of each respective system of education and some of its particular and uneven features. With ostensible post-Thatcherite critical fervour, he concluded: 'Mass schooling did not arise spontaneously from popular demand or from the action of market forces alone. It was to a large degree organized from above by the state' (Green 2013, 297). Margaret Archer, for her part, delivered a theorizing of educational change in which not one single factor but rather a constellation of forces can be deemed a major driver for the consolidation of particular variations of educational systems. Her book focused on the field of forces leading to centralized/decentralized educational structures. In her view, the main difference accounting for these different outcomes lies in the varying forces shaping the respective process of transition between older and newer forms of education in the nineteenth century. The process of restriction emphasized the rollback of older, mainly religious forms

of school education, whereas the process of substitution attached importance to the creation of alternatives that would compete with these older forms of schooling. Restriction was characteristic of secularizing strategies using the possibilities of political power of centralistic states (e.g. France), while substitution represented an arrangement in which religious offers of schooling (e.g. England) could be accommodated within the new structures of schooling (Archer 1984).

It is indeed quite striking that school inspection does not represent a central subject of these two major books. Certainly, the terms ‘inspection’, ‘inspectors’, and ‘inspectorate’ appear time and again (Green 2013, 270–271), yet there is no substantial analysis of the question of school inspection. The main leitmotifs of these analyses, however, such as state formation, group competition, and strategies of imposition of modern education, are really not far from the structure, reach, workings, and dynamics of school inspection. Moreover, the characteristics of school inspection may have served as central arenas for examining these processes and, in doing so, complemented abstract macrosociological discussions. By including inspection in their analyses, these authors could have been more specific in their considerations, particularly through the analysis of one concrete field of action in which local, national, state, religious, and communal factors can be combined with each other. Apparently, school inspection was not interesting enough to look into, although inspectors and inspection certainly embody major dilemmas that these works helped to understand. Dusty and routinized school inspection seems to be a boring field of research for advancing grand narratives or major hypotheses related to the history of education. The aforesaid persons acting as school inspectors in the nineteenth century might have told these sociologists otherwise.

3 Historiographical Approaches: History of Knowledge, Deeducationalization

Of course, the cursory comments about these two outstanding comparative and historical works cannot replace an extensive review of the history of school inspection and school inspectors. Nonetheless, these comments about missed possibilities and telling absences show that school inspection has not been affected by the last waves of historiographical analyses. I do not see a consistent cultural, linguistic, visual, spatial, material, postcolonial, or miscellaneous turn in the bulk of the scholarship dealing with school inspection, but promising shifts are underway. For example, the traditional question of social control may benefit from sources other than the state archives, such as the voices of the inspectors themselves (James/Davies 2009). Newer historiographies, including the history of emotions, are being connected to the experience of inspection (Grigg 2020), an approach that is methodically challenging but rewarding for historians (Milewski 2012).

Returning to the type of inspectors working in the school system during the time of consolidation of school inspectorates, I see at least two reasons this field of activity was anything to them but conventional and wholly bureaucratic. First, inspection was certainly an innovation that combined disparate forms of knowledge in their activities. On the one hand, they had to come to terms with a growing body of educational knowledge coming from strengthened reflections, systematic considerations, refined observations, and reform proposals. Moreover, at the turn of the twentieth century, more consistent insights into the early time of educational research summed up the existing knowledge about school education. On the other hand, following the theoretical insights advanced by Ian Hunter in the early 1990s from a Foucauldian perspective (Hunter 1994, 1996), inspectors had to embody and represent a second crucial form of knowledge – that of administration and bureaucracy (Maddock 1995). They had to deal with a wealth of information; they were expected to organise the data collected in their extensive inspection travels; and they had to report in accordance with categories originating in the legal sphere and translated into the everyday life of the nation-state by administrative practices. It is no surprise that, from the point of view of other administrators, inspectors eventually became too educational and, in the view of schoolteachers, increasingly came to represent the traditionally dreaded bureaucracy. School inspectors had to come to terms with the double requirements of modern schooling in a much more balanced (and tense) way than schoolteachers themselves, those ‘street-level bureaucrats’ (Lipsky 2010) who dealt with students and parents on a daily basis.

Second, school inspectors represented only a field-specific shape of broader trends in state formation. Inspection was a more general activity within the overall design of the modern national state. Inspectors had eminent responsibilities in the fields of health, work relations, production sites (mines, factories), the military, and so on. The state equipped all of them with considerable authority. According to my hypothesis, inspection epitomized the new strength of administrative states of the nineteenth century. Inspectors acted as a critical link in the chain of command and the chain of communication that made up much of the substance of the modern state. It was this unprecedented reach of the administrative state, facilitated by inspections in all fields, that in turn gave inspectors considerable regulatory and corrective powers. The task of inspecting and ordering – not only in the case of schools – implied a simultaneous participation of these groups of persons in some of the most prestigious and exciting endeavours of the nineteenth century, such as state-building, science and specialized knowledge, and the classic but now enhanced authority of command.

In general, a consideration of school inspection from the viewpoint of the history of knowledge is still emerging. Only in a few cases can we find scholarship focused on knowledge and expertise (Southwell 2013), although in some cases the more

individual approach is still quite conventional (Ortells Roca/Traver Martí 2018). In the case of the generalization of other inspecting roles in the construction of the modern state, something that I would term the 'inspecting state', I am not aware of major contributions simultaneously addressing different fields of inspection within the enhanced state competencies at the national, regional, and local levels. In this sense, the historical research on school inspection could profit from two different, albeit related, historiographical shifts. First, the historiography of school inspection may gain important insights from an analysis of the forms and variations of knowledge that inspectors as a group brought into the educational system together with an analysis of the knowledge inspectors produced during their work. A flourishing historiography of knowledge formation, circulation, reception, and hybridization hints at the many paths for development of these perspectives (Burke 2000, 2014; Etzemüller 2009; Sarasin 2011; Vogel 2004). Second, a deeducationalized perspective on the subject considering commonalities and specifics of different modes of inspecting within the structures and workings of the modern state may also help to decode the specific traits and challenges of school inspection. Comparison would also be a useful perspective but should now be related to different societal fields in need of inspection. Instead of continuing a kind of monologic history of school inspection as relating to education and school only, this second thread of analysis would take seriously the second term in the compound 'school inspection', which until now has been heavily dominated by the word 'school'.

These are admittedly only two possible modes of problematizing the historical emergence of school inspectorates among other possibilities concerning gender relations, materialities of inspecting, the effects of inspection, and the growing ossification of school inspection after its promising inception. I dare say that the perspectives presented herein are sketchy; I have mentioned them only in a very cursory way. Hopefully, expanding the historiographical emphasis on inspection and inspectors will give us some useful insights into the reasons for the involvement of such interesting personalities as Figuerola, Sivaprasad, Lugones, and others as school inspectors during the epochal endeavour of the systemic institutionalization of education in the long nineteenth century.

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From School Inspectors to School Inspection. Supervision of Schools in Europe from the Middle Ages to Modern Times explores a broader and more ambivalent view of the formation of inspection and supervision over modern school systems.

It primarily focuses on Europe, both geographically and culturally. Within this narrow space, it addresses a longer period of history, spanning from the late Middle Ages to the twentieth century. The contributions call attention to both the institutions of inspection including its relevant actors, and the processes of inspection and supervision over school teaching and school systems. The book examines how the formation of school inspection in various parts of Europe came about and how its activities related to Europe's political and educational challenges.

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