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**THE STUDY OF SCHOOL EDUCATION THROUGH
HISTORICAL AND PEDAGOGICAL MODELING**

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Abstract

The article deals with school education as a significant fact of pedagogical history, the study of which allows one to explain and understand many of the problems and realities of the contemporary system of Western education. School education is viewed through the prism of certain parameters, united in the concept of “basic model of school education”. As the basic models, the author singles out the “Studium” school, traced back to the texts of the German school statutes, and the “Convictus” school, approved by the Society of Jesus (SJ). The criterion for this distinction is the normative *regulation* of school education in Europe in the 16th century. The conducted research reveals common and specific features in the two basic models of school education and brings out the main attributes of schooling which are preserved in modern educational practice.

Thus, the undertaken historical and pedagogical modeling through the construct of “the basic model of school education” makes it possible to approach the understanding of the ontogenesis (*origin and formation*) of Western school education within the broader phenomenon of the system of Western education in general. In turn, the use of such a concept has a great potential for a better comprehension of realities of modern education.

The bibliography includes 21 scientific publications as well as references to the original German and Latin texts

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Keywords: Martin Luther, School statute, “Studium” school, Society of Jesus, Ratio studiorum, “Convictus” school



1. Introduction

Despite some peculiarities, Russian school education belongs to the Western pedagogical tradition, which is confirmed by a number of historical facts. Thus, the first schools in Moscow appeared in the “German Quarter” (“Nemetskaya sloboda”, originally the site of the settlement of any foreigners) under the patronage of Ernest The Pious, Duke of Saxe-Gotha (1601-1675), a well-known philanthropist and patron of arts and sciences (Polyakova, 2014). Since the 17th century the works of the “brilliant” Erasmus of Rotterdam (1469-1536) had been actively translated and made use of in Russia (Sofronova & Romanova, 2017). The further development of the system of school education in Russia took place under the obvious influence of the German school tradition. A number of contemporary Russian specialists in the field of history of education view the Russian school as a product of the historical development of the European model of education.

2. Problem Statement

In this connection, the question arises of understanding school as a kind of *social institution* or a *pedagogical institution* (Academy of Public Administration [APA], 2017), a *product* of the division of labor into physical and intellectual, or a *means of legitimization* of education (Dobrenkov & Nechaev, 2003), an *agent of socialization* of the individual or “*officina humanitatis*” (“*workshop of humanity*”) (Comenius, 1651). These interpretations link school to the social sphere, which is explained by the specifics of the term and the denoted historical and genetic phenomenon (school) that was born in human society in the evolving process of transferring collective experience from the older generations to the younger ones.

3. Research Questions

All this allows us to emphasize once again the interdisciplinary and methodological pluralism of pedagogy as a science (Cambi, 2017, p. 410), which links together the functioning of school in the space of social structures, roles and status. In order to understand the importance of school in the life of society and an individual, as well as the possible prospects for the development of education in general, we have to concentrate on the following:

“... what *pedagogical tasks* of the formation and development of representatives of the younger generations school solves with the help of pedagogical tools;

why school education is the optimal pedagogical way of solving them;

how school organizes *pedagogical activities*, interaction between the participants of pedagogical communication and the pedagogical process in indissoluble unity of all necessary elements;

what the features of the *educational environment of school* are, how this environment relates to the social and cultural milieu of the educational establishment;

what pedagogical ideas, impressions, teachings, theories, concepts, technologies, techniques are embodied in school practice, how school practice influences their genesis and transformation” (APA, 2017).

4. Purpose of the Study

The elucidation and analysis of these issues within the framework of historical and pedagogical research will allow us to approach the solution of the *basic question of pedagogy* (the purpose of the Study): "... the question of how and how education, upbringing and training of a person can and should be organized on the basis of his/her maximum possible personal involvement in the pedagogical process and effective use of the available reliable knowledge of his/her upbringing and learning potential; available pedagogical methods and means of working with him/her; all types of available resources; needs and demands of all spheres of society (economic, social, political, spiritual) and its various entities and members" (APA, 2017). Also it determines the ways in which the reform of Western school education as a whole (Laeng, 2014, p. 27) should be carried out.

5. Research Methods

Considering that *basic question of pedagogy* is the cognitive component of pedagogical institutionalization, it is advisable to use some theoretical construct for a fundamental comprehension of any pedagogical phenomenon, which will reflect certain aspects of problems arising from the *basic question of pedagogy*. When studying school education in historical and genetic retrospection, it is the *basic model of school education* that is naturally assumed to be such a construct.

In this case, the *model* is understood as an *idealized object of study*, created on the basis of the analogy of its (object) system expression. Being similar to the phenomenon under investigation (in our case, *Western school education*), it displays and reproduces in a simplified form the structure, properties and relationships between the elements of this phenomenon (Federal State Budget Educational Institution of Higher Education «Industrial University of Tyumen» [IUT], 2014). In the process of modeling certain concept-forming features, manifestations and properties of the object (school education) are distinguished in their historical and genetic dynamics, in the process of formation, which should lead to an understanding of its (object's) structure and functions in a kind of "pure", idealized form. The *basic model of school education* that arises on the basis of this approach, like every speculative model, shows the framework of complex phenomena and processes, freeing them from accidental details and particulars that obscure their essence. This makes it possible to create a typology of pedagogical phenomena and to reveal their specific features.

Hence, it is clear that modeling is a special way of studying a complex (pedagogical) phenomenon that allows a researcher to solve a number of problems of gnosiological, heuristic and prognostic character, and it is not without reason that this method is often used in modern pedagogical studies (Haris, 2018). In this interpretation, the *basic model of school education* leads to the comprehension of the essence of any pedagogical phenomenon – in this particular case, history of the Western school.

6. Findings

6.1. Key aspects

The formation of a social phenomenon that is an object of a special study, including the prototype of the model being created, can be traced on historical material. But historical approach is fraught with

the danger of “*getting lost*” in the abundance of data, since *Western school education* in historical and pedagogical retrospection is an extremely voluminous subject, especially considering that school itself as a kind of pedagogical institution has deep historical roots that go back to the practice of apprenticeship and even to the rituals of primitive initiation (Polyakova, 2015). If we turn to the more recent (in comparison with the prehistoric one) educational experience of ancient (ancient Greek) pedagogy (where the concept of *σχολή* (school) as an institution that later won over the entire Western educational space first emerged), we have to note, for example, Becky’s statement that Marrou’s work “History of education in ancient times” (*Histoire de l’éducation dans l’Antiquité*) is basically “...a history of school presented as an organized and authorized set of activities, primarily intellectual ones” (Becchi, 2016, p. 310). The invariable (basic) aspects of these activities are predetermined by answers to the questions: *who, how* and *for what purpose* is taught, constituting, in Becky’s opinion, Marrou’s “standard” frame of discourse.

It is indicative that a similar understanding of the correct functioning of school was proposed much earlier (before Marrou and Becky) by John Amos of Comenius in his “Laws of a Well-organized School” (*Leges scholae bene ordinatae*, 1652): “... The work [at school] is the *central purpose*, for which there are schools; partly – in the *resources* intended to achieve the *purpose*: place, time, samples of what needs to be done, books; partly – in the mode of action, or *method*.”

Persons are partly those who draw knowledge, that is, *pupils* along with their Decurions, partly those who teach knowledge – school (public) teachers along with private educators under the supervision and guidance of the rector; then those who put the case into motion – the inspectors and school superiors” (Comenius, 1652).

At the same time, work and people are bound by certain bonds – by *discipline* (*disciplina*) that must have its boundaries. The main *purpose* of the Christian school, according to the Czech teacher, should be “... *tanquam Virtutum et Humanitatis officinae* (functioning as virtue and humanity workshops)” (Comenius, 1652).

It is quite clear that these are the same basic aspects that were presented in the Marrou and Becky scheme, where they were only formulated in a more abstract way (a model again!). In this respect, they differ little from the abovementioned questions which are central to our interpretation of schooling. First of all, they indicate that the study of school (school education) should be conducted in the *interpersonal* form, which involves understanding interactions within the school community – the teacher-pupil, pupil-pupil and teacher-administration relationships (organization of pedagogical activity and educational environment). Secondly, it is necessary to understand in what way (*how*) the educational process is carried out (what pedagogical ideas, impressions, teachings, theories, concepts, technologies, techniques are embodied in school practice). And finally, thirdly, it is necessary to consider what *purpose* education pursues (what pedagogical tasks are solved).

In other words, there is a certain scheme for studying the phenomenon of school education, which makes it possible to single out in the extensive historical and pedagogical material the so-called constructive principle linking the facts of the pedagogical past together in a chain of origin, formation, development, normative design and public recognition of the pedagogical phenomenon (school

education). All this is passed through a certain educational practice, the manifestations of which allow us to identify key points, key aspects in the formation of the *basic model of school education* in the West.

6.2. Two models of school education

Thus, *the basic model of school education* is used as a conceptual *core* in order to approach the understanding of the ontogenesis (genesis and formation) of Western school education within the framework of a broader phenomenon – the system of Western education in general. At the same time, it provides a clue both to the link between the facts of the social and pedagogical past, and to the normative design of the two *models of school education* in the 16th century, conventionally designated as the “Studium” school and the “Convictus” (the Latin variant of the name will be used from this point on) school. The first model was realized in the so-called “popular schools” of Martin Luther (1483-1546) and his followers; the second one – In the *collegium* of the Society of Jesus (the Jesuit Order).

When distinguishing and characterizing these models, it is expedient to use the scheme described earlier. As indicated, the key *parameters* of these models are as follows: *who* (learns), *how* (by what methods) and *for what purpose*. The greatest difficulties in describing models are associated with the first parameter, since it reflects the *interpersonal* nature of school education, which involves analyzing not only the learners, but also other individuals and institutions related in some way to teaching: first and foremost the teachers, then the school and city administrators, as well as the families and the members of the Order of Jesus (when characterizing the Jesuit collegiums). Discussing the notion of “pedagogical space” (*spazio pedagogico*), Gennari defined these relationships as “academic, housing and social space” (*spazio scolastico, abitativo e sociale*) (as cited in Lombardi, 2017, p. 358). At the same time, the teaching methods, theories, technologies, etc., which form the basis of pedagogical activity, are also directly reflected in the interpersonal relationships of school education.

6.2.1. The first parameter: *who* (learns)

The *interpersonal* parameter is associated with the immediate participants of the educational process (people, personalities), that is, with *those for whom* (the pupils) and *those with whose help* (the teacher, first of all) the process of education and upbringing (socialization in a broad sense) is being carried out by the school. This is the “most fundamental” of the basic aspects, which determines the interpretation of all other parameters of the *basic model of school education*.

The framework of the *interpersonal parameter* of the model reveals distinct *construct dichotomies*, which reflect the essential (material) relationships within the school organization and school life and enable us to get to the heart of the phenomenon of the *West European school*. These *dichotomies* are “pupil-family”, “pupil-pupil” and “pupil-teacher”. Very important in this case is the presence in all three dichotomies of the concept of “pupil”, that is, the *one who is taught* (Marrou-Becky), which is fundamentally significant for such parameters as methodology and *goal-setting*.

The “pupil-family” dichotomy is related to the inter-institutional relations of the child pupil and the family in which the first stage of socialization and education in general takes place. In accordance with this criterion, the educational institutions of the Reformation period, represented in Luther’s educational program (Polyakova, 2016), can be characterized in terms of regulation of “school leisure

time” as “Studium” schools, since training in them was limited to several hours a day. This pattern was set down in numerous school statutes, which in turn were constituent parts of the Church Charters (*Kirchenordnung*), which were massively spread in the Germanic lands during the period. In the 16th century such statutes were published in Braunschweig (1528), Wittenberg (1533), Hanover (1536), Württemberg (1559), etc. The principal characteristic of the “Studium” schools is that it preserves the child’s connection with the family, with his own social environment and the way of life adopted in this or that estate or order. According to Luther, the task of the family was also to teach crafts to the child; the school only performed educational functions within the bounds that the average German family could not aspire to because of lack of experience.

Jesuit collegiums are a typical example of the “Convictus” school, implying the constant presence of a pupil at school (except for summer holidays). Such a system did not take shape immediately and, most likely, was caused by the influx of pupils from other cities or even countries, many of whom could not afford to “rent a house”. Thus, the Jesuit collegiums solved one of their most important tasks, which consisted in teaching absolutely everyone, regardless of their financial means and even of their religion. In addition, it should be borne in mind that such an organization of the “common life” corresponded to the ideas of the Order and, in general, to the communal spirit of early Christianity, and also carried echoes of both the polis system and the Jewish unity synthesized by Christianity (Shmonin, 2016). Often the collegiums were a unified system of establishments that included a school, seminary (bursa), a church, dwelling houses (boarding houses), outbuildings (Lyavshuk, 2015), theaters (Mashevskaya, 2017).

It should be noted that both these *models* of the organization of study time have been preserved so far and are manifested in their pure form or in mixed varieties everywhere in contemporary traditional schools (schools of study), *boarding schools*, schools of special education, etc. This suggests that during the period (16th century) there really were two systems of education with clear *basic characteristics* of the relationship between the *child pupil* and the *family*, with which he either preserved a close connection or was parted from in order to obtain an adequate education within *another* (brotherly, Christian) family.

The “pupil-pupil” dichotomy reflects the organization of children inside school, their relations with each other and the division of pupils into classes. The need for age gradation of students had already been understood in the educational system of Ancient Greece. However, it is difficult to say whether school learners of those times were to stay at the place of training, or whether academic studies were regulated with respect to time. But it is quite certain that such a division took place in the 16th century with the German reformers, as is stated in the works by a friend and associate of Luther, Philip Melanchthon, who proposed to break children into groups which he called “Haufen”.

The *class-lesson system* (at least a hundred years before Comenius), recommendations on the order in which school subjects should be studied during the day, week, etc., the description of classrooms are present in school statutes, which confirms an accurate regulation of these components of school life in Protestant schools. Over time, these rules were specified, responsibility was toughened and control over the observance of statutes on the part of city and church authorities was strengthened.

The Jesuit collegiums managed to borrow all the best aspects of school life regulation from their religious opponents and bring the organization of the *class-lesson system* to perfection. In addition to a strict gradation of pupils by means of classes (grammatical classes, poetic and rhetoric classes, etc.) (*The*

jesuit Ratio studiorum, 1600), the Jesuits introduced, in imitation of the model of the Roman Senate, elements of self-government (*magistratus*), with posts, the highest of which could be won by the pupils who had best performed some special academic tasks (*The jesuit Ratio studiorum*, 1600). Such competition created an additional motivation for learning and, at the same time, in a certain way optimized the relations between children. In addition, the basic “Ratio studiorum” Statute of the Order clearly prescribed the rules for conducting lessons in the basic subjects of the curriculum of the Jesuit collegiums.

It seems that it is the “fundamental” approach of the creators of the *class-lesson system* to the organization of school education, their awareness of its *basic nature*, which has been able to survive the centuries and the various methods of teaching and learning that explains why it (the *class-lesson system*) retains its key positions in modern schools. It can be seen that even in such innovative concepts of the 20th century as the creation of special educational environment by Montessori and Dewey (Cambi, 2015, p. 129), both dichotomies of *basic school models* are quite clearly traced. Thus, it is obvious that the German school statute of the 16th century and the “Ratio studiorum” gave a very clear idea of the existence of a particular normatively fixed *educational environment* that served certain educational, social and ideological purposes.

The “pupil-teacher” dichotomy belongs to the social aspect of school as an *institution*. The “pupil-teacher” relationship in schools of the 16th century was inevitably influenced by the social and historical conditions of the educational process, traced both in “Studium” schools and in “Convictus” schools either explicitly or implicitly. The problem of the teacher (or mentor) becomes especially important at this time (16th century) – it is an object of interest, it is tackled in treatises, the work of teachers is subject to regulation. This is due, apparently, to the growing involvement of the mass of population in general education and the notorious incidents of employing uneducated or even immoral people in the capacity of schoolteachers. Apparently, therefore, Luther devoted the greater part of his work “A sermon on the need of sending children to school” (*Eine Predigt, das man kinder zur Schulen halten solle*, 1530) to the problem of teaching, where, in particular, he stresses the importance of comprehensive training of teachers. Other Protestant leaders (Melanchthon, Sturm, Zwingli, Curione) also actively advocated the importance of teaching.

German school statutes, in addition to imposing requirements for the teachers’ professional qualifications, prescribed special rules of conduct and a dress code. “Ratio studiorum” is on the whole a codified set of instructions for teachers, which even lists recommendations for teaching particular subjects.

The regulation of certain aspects of the teaching profession is a confirmation of the fact that the educational process in the era of the *Reformation* and *Counter-Reformation* rose to a completely new level of its social significance, when education as represented by its main participants – pupils and teachers – acquires not only institutional and regulatory, but also *substantive and organizational* character. Undoubtedly, a Protestant teacher and a Jesuit teacher (a member of the Society of Jesus), or a highly qualified specialist in any field, differed both in the nature of their activities, in their level of education, and in their place in the educational space of the school. But these differences were, rather, of confessional, ideological nature; in the specified period the very figure of a teacher in itself acquires all

clear attributes of an educator and a specialist who is responsible for the “product” that he produces; this is of paramount importance because it anticipates the contemporary attitude to teaching. That is, the teacher’s personality and competence are obviously viewed as the *basic component* of the characteristics of the teaching profession.

6.2.2. The second parameter: *how* (by what methods) learning

Interpersonal relations in school are directly linked to the parameter “*how*” (what pedagogical ideas, impressions, teachings, theories, concepts, technologies, techniques are embodied in school practice) or with the *means* of achieving the teaching goals. German school regulations and “Ratio studiorum” give some idea of the means of education and upbringing in that epoch. Thus, the Württemberg Church Order (*Hochfürstlich Württembergische große Kirchenordnung*, 1559) describes in detail the principles of dividing children into classes, the daily and weekly schedules, as well as the set of textbooks and methods of working with them, the principles of setting and doing homework, etc. A significant part of the recommendations contains a description of what is necessary to read from the catechism for the purpose of raising children in the Fear of God, when and how (*Württemberg Church Order*, 1743). Moreover, the Statute contains certain rules (*Statuta*), according to which the teacher should educate boys in piety (*Württemberg Church Order*, 1743). There are also requirements for him to come to school in appropriate garment and bring all the necessary textbooks so as not to fetch them from home during lessons; there is a reminder of the need of calling the roll at the end of each lesson and, in case of anyone missing classes, of finding out the cause and imposing an appropriate penalty, if necessary.

The Statute pays much attention to the problem of discipline. First of all, the disciplinary organization within the pupils’ groups is worth notice. Thus, in *decuries*, into which the classes in Latin-speaking schools (*gymnasiums*) were divided (Polyakova, 2016), the elected *decurions* (“group leaders”) were supposed to spy on their mates and report every breach of discipline to the preceptor. (Polyakova, 2016). Supervision of children in German-speaking schools was even stricter: teachers had to control children not only at school, but also at church; to question them about the contents of the sermon after listening to one; to prevent children from missing classes, or going home without permission, or from shouting and talking. Surveillance of students continued even outside school; for this, pupils had “secret agents” in their midst, whose task was to ensure that children immediately went home after lessons, otherwise they were punished (*Württemberg Church Order*, 1743).

In “Ratio studiorum”, the idea of the methods of education is present everywhere – in substantiating the division of children into classes and within classes, in prescribing rules for teachers, pupils, etc. *Competition* was regarded as the main means of developing the cognitive activity of Jesuit pupils. The competitive spirit was cultivated by teachers all the time: through essay contests, debates, games, exams and in class during the school year. Winners received special honors at the end of the academic year.

Ratio allows us to conclude that all the successes and failures of the students were closely monitored. At the beginning of each new academic year, teachers gave the prefect a list of their class in

alphabetical order, with the “rating” of the pupil opposite each name – the best, good, average, etc., also expressed in the numeric form (from 1 to 6) (*The Jesuit Ratio studiorum*, 1600).

As far as punishment is concerned, it should be noted that the Jesuits did not seek to use this disciplinary measure in the extreme form of corporal punishment. Even if such penalties were applied, they were not carried out by the teachers, but by laymen who did not belong to the Society of Jesus, – so-called *correctors*.

It can be seen that with respect to *the means of achieving the objectives of learning (how)*, the “Studium” school and the “Convictus” school did not differ much: in either case the pupils were divided into classes and even into “variously successful” groups within the class; memorization, recitation were used as the primary method of learning; spying and informing on one’s classmates were encouraged in the course of interpersonal relationship; corporal punishment was not welcomed, though sometimes found necessary. However, it must be recognized that the Jesuit system of education proved to be more effective owing to the active use of competition in the process of teaching, yet basically it should be noted that in this respect both types of schools used the same methods with slight modifications.

6.2.3. The third parameter: for what purpose learning

Perhaps this similarity of models of school education is due to the invariant purpose that was pursued in the spread of education and the opening of schools both by the Protestants, beginning with Luther, and the Jesuits – namely, fostering a true Christian. It is through this purpose that the ideological component of these models is clearly expressed. The main thing that education has always striven for is the formation of a person, an individual, *an intellectual or a polity man* – a citizen of his polis (from *Socrates, Plato or sophists*), *a citizen or orator* (from *Cicero and Quintilian*), the reincarnation of the *image of God (Bild von Gott)* in man (*Augustine of Hippo and Rhine mystics*), the development of a true human and a Christian (in *Comenius*), as well as the *training of a performer* of certain social procedures (*priest, scribe, artisan, clergyman*), etc. Education has always represented a dual system addressed to the exterior world (the social, institutional side), and to the interior man (the anthropological or humanistic side), and this feature of education was noticed in ancient times, which gave rise to reflections on *care, paideia, humanitas*, etc. (Caputo, 2014).

From ancient times man had tried to pass his experience, property (including intellectual heritage), traditions, on to the younger generation – in other words, to socialize it. This was achieved by involving the younger members of a community in the life of the elders; yet, apart from participation in common activities; this required a certain special (theoretical) preparation. All this was reflected in various types of cultural succession – *mentorship, apprenticeship, formal schooling*. The main purpose was to form a *worthy member of a community: of a tribe, a policy, a state, a guild, a Christian community, a party*, etc. The diversity of names in this case is not accidental, because different epochs and varying cultural and civilizational environments brought to the fore different objectives.

By the 16th century in the Western world (Europe), the understanding of socialization had been implicitly entering a new phase: the profession-oriented interests, confined to the training of specialists who would be able to act under the new conditions of market-based culture associated with written language, merged with the objectives of Christianity, which was being renovated by the Reformation and

Counter-Reformation. Both the reformers and the Jesuits had a twofold *purpose*: to prepare their worthy successors and followers in the cause of Christian renovation (understood in various ways) and at the same time to promote their version of Christianity. German statutes clearly prescribe how to raise a *good Lutheran*, and “Ratio studiorum” – a *good Catholic* (Jesuit). In the next century, Comenius would define the task in another way – a true man, a true Christian. The *goal-setting* does not change significantly – in either case school trains a functionary, who is willing to assert himself in the society of the time and also to contribute to the improvement of this society.

The ideological (Christian) aspect of the school models coincides, regardless of the irreconcilable strife between the two trends in Western Christianity. But the confrontation of the two branches of Western Christianity and the two approaches to the organization of educational process produced a new entity – the Western school with its two basic varieties: the “Studium” school and the “Convictus” school. The fact that these models were formed precisely during the period of the highest confrontation of the competing Christian doctrines testifies, as it seems, that Christianity as a whole – the Christian world outlook and Christian ethics in particular – became, owing to a long historical, genetic, and civilizational development, essential attributes of Western culture, and the *basic model of school education* became the conceptual core of the ontogeny of its educational system.

7. Conclusion

This study demonstrates the potential of historical and pedagogical modeling through the construct of the *basic model of school education*. The description of certain parameters of the model of school education corresponding to three basic pedagogical questions (*who, how, for what purpose* is taught) entails a number of additional criteria and assessments. In the end, a sort of *frame-matrix* is built that allows filling, supplementing and specifying the gaps in scientific knowledge on the basis of specific historical material. Thus, *the basic model of school education* brings the researcher closer to the understanding of the ontogenesis (creation and formation) of Western school education within the broader framework of the Western educational system. Moreover, this model is not close-ended, it retains mobility, flexibility, since pedagogical knowledge is inexhaustible – there will always be new facts and interpretations of familiar pedagogical phenomena. Thus, the use of the *basic model of school education* has a great potential in modern study of educational reality.]

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