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# An Anthropological Study of Associated with Non-Tribes of Gaddi Tribe in Bharmour Tehsil of Chamba District

*Pallavi Gautam*

*Himachal Pradesh University*

## ABSTRACT

### *Tribe in Question*

According to constitution of India in 1935 Parliament passed the Govt. of India act 1935 designed to give Indian provinces greater self rule and set up a national federal structure After independence the constituent assembly continued the prevailing definition of (ST) giving via articles 341 and 342 (STs) Are various officially designated groups of India? The term (STs) is recognized in constitution of India. For much of the period of British rule in Indian subcontinent, they were known as depressed classes The (STs) comprise about 8.6% of Indians Population (Acc. To 2011 census) the constitutions order 1950 lists 744 tribes across 22 states in 1<sup>st</sup> schedule. At present in Himachal Pradesh there are highest number of tribe that is there, Gaddi, Pangwala and Gujjars.

*Keywords:* gaddi tribe, hadsar panchayat, schedule tribe, non tribal area.

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# An Anthropological Study of Associated with Non-Tribes of Gaddi Tribe in Bharmour Tehsil of Chamba District

Pallavi Gautam

## ABSTRACT

### *Tribe in Question*

*According to constitution of India in 1935 Parliament passed the Govt. of India act 1935 designed to give Indian provinces greater self rule and set up a national federal structure After independence the constituent assembly continued the prevailing definition of (ST) giving via articles 341 and 342 (STs) Are various officially designated groups of India? The term (STs) is recognized in constitution of India. For much of the period of British rule in Indian subcontinent, they were known as depressed classes The (STs) comprise about 8.6% of Indians Population (Acc. To 2011 census)the constitutions order 1950 lists 744 tribes across 22 states in 1<sup>st</sup> schedule. At present in Himachal Pradesh there are highest number of tribe that is there, Gaddi, Pangwala and Gujjars.*

*In this research paper i'm focusing on Gaddi tribe of Bharmour Tehsil of Chamba District where Hadsar Panchayat is located but is not considered as Gaddi tribe. I want to that study why Hadsar is not considered as Gaddi tribe.*

**Keywords:** gaddi tribe, hadsar panchayat, schedule tribe, non tribal area.

**Author:** Masters in Sociology Department of Sociology Himachal Pradesh University Himachal Pradesh {India}.

## I. THE CONCEPT OF TRIBE

The Constitution of India gives recognition to a category of the people designated as the schedule tribes and makes special provisions for their politics representations and their economic and social welfare. Anthropologists have since the time of Lewis Morgan argued about the definition

of tribe but very little account has been taken of the tribal communities of India. 19<sup>th</sup> century scholars viewed tribal societies in the light of evolutionary theory.

This was true for the anthropologists like Lewis Morgan but also of historians like Fustel de Coulanges. Morgan sought to demonstrate the stages of the social evolution by the comparison of contemporary primitive societies. Fustel reconstructed the transformation of Greek and Roman society from a primitive to an advanced type. In all this the tribe represented a type of social organization as well as a stage in social evolution.

The evolutionary perspective has been revived in the writings of Marshall Sahlins and in Godelier's critique of Sahlins. Godelier goes back to the writings of Morgan to argue that we can understand the tribe as a type of social organization only if we view it as a stage in social evolution. The trouble with 19<sup>th</sup> evolutionists was that they too readily believed that the development of a more complex or a more advanced type of society led automatically to the effacement of the tribal type. It is a truism that tribe has preceded state and civilization on the broad scale of social evolution.

In the first essay Sahlins had considered a segmentary structure to be the defining feature of the tribe as a type of society. The significance of segmentary political system was brought to light by British social anthropologists who had worked in Africa. The initial effect of the publication of African systems was to highlight the differences between centralized and segmentary societies characterized by Fortes and Evans-Pritchard as societies of Group A and B. however it soon became apparent that the distinction between the

tribe as segmentary system and the tribe as chiefdom is relative than absolute. Gluckman published his authoritative work in which he had argued that the difference between tribes organized under chiefs and those which lack chiefs is not as great as it appears to be.

Morgan anthropologists have learnt to distinguish analytically between the band, the segmentary system and the chiefdom. But they have continued by and large to apply same term tribe to all the three. The several hundred units comprise the scheduled tribes of India cover all the modes of tribal organization from the band to the chiefdom. This was going back to 19<sup>th</sup> century when the tribal's areas began to be systemically opened up by the cononial administration. At the beginning of the 19<sup>th</sup> century the mix of the different modes of tribal organization among those who comprise the STs of today was different. Bands the hunters and gatherers still exist among the Andaman Islanders or on the mainland among the Birhors were more common then now. The segmentary mode of tribal organization was also more common in Orissa, MP, Bihar and other areas. But there were chiefdoms as well in addition to these.

The tribe as a mode of organization has always differed from the caste-based mode of organization. But tribes are not always easy to distinguish from castes particularly at the margins where the two modes of organization meet. The distinctive condition of the tribe in India has been its isolation mainly in the interior hills and forests but also in the frontier areas. By and large the tribal communities are those which were either left behind in these ecological niches or pushed back into them in course of the expansion of state and civilization. The isolation of the tribal communities is and always has been a matter of degree. Some tribes have been more isolated than others but at least in the interior areas where the bulk of the tribal population is to found none has been completely free form the influence of civilization. Their isolation whether self-imposed or imposed by others blocked the growth of their material culture but it also enabled them to retain their distinctive modes of speech. Today the most single indicator of the distinction between tribe and caste is the language. The castes speak one or

another of the major literary languages; each tribe has its own distinctive dialect which might differ fundamentally from the prevalent regional language. But sometimes this distinction does not work as there are many tribes in western India including the Bhills who do not have any language of their own and adopted the language of the region.

### *Tribe*

A tribe is a social division in a traditional society consisting of families linked by social, economic, religious, or blood ties, with a common culture and dialect. A tribe possesses certain qualities and characteristics that make it a unique cultural, social, and political entity. This post is about the major tribes in India. They are also known by the name of 'Adivasis' in India.

## II. SCHEDULED TRIBES

Article 366 (25) defined scheduled tribes as “such tribes or tribal communities or parts of or groups within such tribes or tribal communities as are deemed under Article 342 to be Scheduled Tribes for the purposes of this constitution”.

*(Article 342 in the Constitution of India 1949 Scheduled Tribes)* Article 342 provides for specification of tribes or tribal communities or parts of or groups within tribes or tribal communities which are deemed to be for the purposes of the Constitution the Scheduled Tribes in relation to that State or Union Territory. In pursuance of these provisions, the list of Scheduled Tribes are notified for each State or Union Territory and are valid only within the jurisdiction of that State or Union Territory and not outside.

The list of Scheduled Tribes is State/UT specific and a community declared as a Scheduled Tribe in a State need not be so in another State. The inclusion of a community as a Scheduled Tribe is an ongoing process.

## 2.1 The essential characteristics of these communities are

- Primitive Traits
- Geographical isolation
- Distinct culture
- Shy of contact with community at large
- Economically backward

Tribal communities live, in various ecological and geo-climatic conditions ranging from plains and forests to hills and inaccessible areas. Tribal groups are at different stages of social, economic and educational development. While some tribal communities have adopted a mainstream way of life, at the other end of the spectrum, there are certain Scheduled Tribes, 75 in number known as Particularly Vulnerable Tribal Groups (PVTGs), who are characterised by

- Pre-agriculture level of technology
  - Stagnant or declining population
  - Extremely low literacy
  - Subsistence level of economy
  - The President may with respect to any State or Union territory, and where it is a State, after consultation with the Governor thereof, by public notification, specify the tribes or tribal communities or parts of or groups within tribes or tribal communities which shall for the purposes of this Constitution be deemed to be Scheduled Tribes in relation to that State or Union territory, as the case may be
  - Parliament may by law include in or exclude from the list of Scheduled Tribes specified in a notification issued under clause ( 1 ) any tribe or tribal community or part of or group within any tribe or tribal community, but save as aforesaid a notification issued under the said clause shall not be varied by any subsequent notification
- PART XVII OFFICIAL LANGUAGE CHAPTER I LANGUAGE OF THE UNION.

### III. MINISTRY OF TRIBAL AFFAIRS

Ministry of Tribal Affairs is responsible for the overall development of the scheduled tribes in India. This Ministry was set up in 1999 after the

bifurcation of Ministry of Social Justice and Empowerment with the objective of providing more focused approach on the integrated socio-economic development of the Scheduled Tribes (STs), the most underprivileged of the Indian Society, in a coordinated and planned manner.

The Ministry of Tribal Affairs shall be the nodal Ministry for overall policy, planning and coordination of programmes of development for the Scheduled Tribes. In regard to sectoral programmes and schemes of development of these communities policy, planning, monitoring, evaluation etc. as also their coordination will be the responsibility of the concerned Central Ministries/ Departments, State Governments and Union Territory Administrations. Each Central Mstry/Department will be the nodal Ministry or Department concerning its sector.



The nature of what constitutes an Indian tribe and the very nature of tribes have changed considerably over the course of centuries. Constitution of India has recognized tribal communities in India under 'Schedule 5' of the constitution. Hence the tribes recognized by the Constitution are known as 'Scheduled Tribes'. There are around 645 distinct tribes in India.

### 3.1 Points to remember

- Total population of Scheduled Tribes is 84,326,240 as per the Census 2001 which accounts for 8.2% of the total population of country. The share of the Scheduled Tribe population in urban areas is a meager 2.4%.
- Madhya Pradesh, Maharashtra, Orissa, Gujarat, Rajasthan, Jharkhand, Chhattisgarh, Andhra Pradesh, West Bengal, and Karnataka are the State having larger number of Scheduled Tribes These states account for 83.2% of the total Scheduled Tribe population of the country. Assam, Meghalaya, Nagaland, Jammu & Kashmir, Tripura, Mizoram, Bihar,

Manipur, Arunachal Pradesh, and Tamil Nadu, account for another 15.3% of the total Scheduled Tribe population. The share of the remaining states / UTs is negligible.

- The scheduled Tribes in India form the largest proportion of the total population in Lakshadweep and Mizoram followed by Nagaland and Meghalaya.
- Madhya Pradesh has the largest number of scheduled Tribes followed by Bihar.
- Bastar district of Madhya Pradesh consists of largest number of Scheduled Tribes.
- There are no Scheduled Tribes in Punjab, Delhi, Chandigarh, Pondicherry, and Haryana.
- In Lok Sabha there is reservation of seats for Scheduled Tribes. Here also census figures are taken into account. Allocation of seats for Scheduled Tribes in the Lok Sabha are made on the basis of proportion of Scheduled Tribes in the State concerned to that of the total population, vide provision contained in Article 330 of the Constitution of India read with Section 3 of the R. P. Act, 1950.

- For Scheduled Tribes, 47 seats are reserved in Lok Sabha. The 1st schedule to R. P. Act, 1950 as amended vide Representation of People (Amendment) Act, 2008 gives the State wise break up.

### 3.2 Parliament (Articles 79-88/122)

#### Major Tribes in India: Arranged State-wise

1. *Andhra Pradesh*: Andh, Sadhu Andh, Bhagata, Bhil, Chenchus (Chenchawar), Gadabas, Gond, Goundu, Jatapus, Kammara, Kattunayakan, Kolawar, Kolam, Konda, Manna Dhora, Pardhan, Rona, Savaras, Dabba Yerukula, Nakkala, Dhulia, Thoti, Sugalis.
2. *Arunachal Pradesh*: Apatanis, Abor, Dafla, Galong, Momba, Sherdukpen, Singpho.
3. *Assam*: Chakma, Chutiya, Dimasa, Hajong, Garos, Khasis, Gangte.
4. *Bihar*: Asur, Baiga, Birhor, Birjia, Chero, Gond, Parhaiya, Santhals, Savar.
5. *Chhattisgarh*: Agariya, Bhaina, Bhattra, Biar, Khond, Mawasi, Nagasia.
6. *Goa*: Dhodia, Dubia, Naikda, Siddi, Varli.
7. *Gujarat*: Barda, Bamcha, Bhil, Charan, Dhodia, Gamta, Paradhi, Patelia.
8. *Himachal Pradesh*: Gaddis, Gujjars, Khas, Lamba, Lahaulas, Pangwala, Swangla.
9. *Jammu and Kashmir*: Bakarwal, Balti, Beda, Gaddi, Garra, Mon, Purigpa, Sippi.
10. *Jharkhand*: Birhors, Bhumij, Gonds, Kharia, Mundas, Santhals, Savar.
11. *Karnataka*: Adiyana, Barda, Gond, Bhil, Iruliga, Koraga, Patelia, Yerava.
12. *Kerala*: Adiyana, Arandan, Eravallan, Kurumbas, Malai arayan, Moplaha, Uralis.
13. *Madhya Pradesh*: Baigas, Bhils, Bharia, Birhors, Gonds, Katkari, Kharia, Khond, Kol, Murias.
14. *Maharashtra*: Bhaina, Bhunjia, Dhodia, Katkari, Khond, Rathawa, Warlis.
15. *Manipur*: Aimol, Angami, Chiru, Kuki, Maram, Monsang, Paite, Purum, Thadou.
16. *Meghalaya*: Chakma, Garos, Hajong, Jaintias, Khasis, Lakher, Pawai, Raba.
17. *Mizoram*: Chakma, Dimasa, Khasi, Kuki, Lakher, Pawai, Raba, Synteng.

18. *Nagaland*: Angami, Garo, Kachari, Kuki, Mikir, Nagas, Sema.
19. *Odisha*: Gadaba, Ghara, Kharia, Khond, Matya, Oraons, Rajuar, Santhals.
20. *Rajasthan*: Bhils, Damaria, Dhanka, Meenas (Minas), Patelia, Sahariya.
21. *Sikkim*: Bhutia, Khas, Lepchas.
22. *Tamil Nadu*: Adiyana, Aranadan, Eravallan, Irular, Kadar, Kanikar, Kotas, Todas.
23. *Telangana*: Chenchus.
24. *Tripura*: Bhil, Bhutia, Chaimal, Chakma, Halam, Khasia, Lushai, Mizel, Namte.
25. *Uttarakhand*: Bhotias, Buksa, Jannasari, Khas, Raji, Tharu.
26. *Uttar Pradesh*: Bhotia, Buksa, Jaunsari, Kol, Raji, Tharu.
27. *West Bengal*: Asur, Khond, Hajong, Ho, Parhaiya, Rabha, Santhals, Savar.
28. *Andaman and Nicobar*: Oraons, Onges, Sentinelese, Shompens.
29. *Little Andaman*: Jarawa.
30. *North-East*: Abhors, Chang, Galaong, Mishimi, Singpho, Wancho.

### 3.3 Tribes in Himachal Pradesh

1. Bhot, Bodh
2. Gaddi [excluding the territories specified in sub-section (1) Of section 5 of the Punjab Reorganisation Act, 1966 (31 of 1966), other than the Lahaul and Spiti district]
3. Gujjar [excluding the territories specified in sub-section (1) Of section 5 of the Punjab Reorganisation Act, 1966 (31 of 1966)]
4. Jad, Lamba, Khampa
5. Kinaura, Kinnara
6. Lahaula
7. Pangwala
8. Swangla.

### 3.4 Tribes of Chamba District

1. Gaddi
2. Gujjar
3. Pangwala



The concentration of these Gaddis tribes is mainly found on both sides of the Dhauladhar Range of the state of Himachal Pradesh. Quite a number of Gaddi tribes who also dwell mainly in the Bharmour region of Chamba District, in the higher regions of the Ravi River and also the valleys of the Budhil River. Other regions include Kangra district, chiefly in the villages of the Khaniyara, Tota Rani, near Dharamsala.

As per the records of the anthropologists, the origin of these Gaddi tribes has got a rich history behind it. In fact about their origination, popular myths are quite popular in whole of the state of the Himachal Pradesh. It has been assumed that the Gaddi tribes came down from emigrants who had taken refuge in the plain lands of Indian Territory. These Gaddi tribes chose these regions for the comparative security of the hills during critical times.

There is also another famous legend. According to this Gaddi tribal community, it is thought that various castes of the Gaddi tribal community have been transmigrated at different times. For instance, in the ancient times, say around, 850-70 CE, the Brahman Gaddi tribes migrated to Chamba, their present home. Majority of the other castes of Gaddi tribal community have descended to the mountain ranges to run away from the threats of the famous Mughal emperor, namely, Aurangzebat the time of seventeenth century CE.

If one dissects the whole of the Gaddi tribal society, one can find that there are several castes that are present here. These include Brahmin, Rajput, Dhangar, Khatri, Rana and Thakur. Just like majority of the tribal communities of the Indian Territory, these Gaddi tribes too are oriented towards religion as well as spiritualism. Both the religions of Hinduism and also Islam are being practiced by a large section of the Gaddi tribal community.

The Indian anthropologist has duly highlighted another esteemed spect; by nature, these Gaddi tribes are largely for their honesty, friendly disposition and peaceable life-style. Crime is almost obscure in almost all the villages of the Gaddi tribal community.

In order to meet the requirements of day to day living, these Gaddi tribes have taken up diverse occupational activities. Since these Gaddi tribes have built their settlements in the villages, they are not considered to be nomads. However, seasonal movement of sheep and goats to higher or lower pasture is a conventional practice. In general, these Gaddi tribes go with their livestock to several pastures of the upper regions of the state at the time of summer season.

As far as the languages are concerned, majority of this Gaddi tribal community converse with each other in the beautiful language of the same name. For writing, however, this Gaddi tribal community uses Takri language. However, the language had

gone into oblivion only few years back. Devangiri script is in vogue. Also under the impact of the modern day culture, these Gaddi tribes also speak Hindi language quite fluently.

#### IV. OBJECTIVE OF THE STUDY

To understand an Anthropological Study of Issue Associated with Non-Tribes of Gaddi Tribe in Bharmour Tehsil of Chamba District.

### CHAPTER II

#### V. STUDY AREA

This study conducted in the Hadsar Panchayat of Bharmour Tehsil of Chamba District. This place is considered as non tribal within tribal.

##### 5.1 Demographics of Hadsar

Hadsar is a village where road from Chamba ends and two on foot treks to Manimahesh Lake and

Kugati Pass begins. It is situated on the confluence of Budhil River and a stream flowing from Manimahesh Lake and is last village on road, which is almost 17 kms. from Bharmour. There is a temple and some shrines for the stay for pilgrims and also few shops. There are also few houses of tribal Gaddi people. Hindi is the Local Language here.

Locality Name: Hadsar

Tehsil Name: Bharmour

District: Chamba

State: Himachal Pradesh

Language: Hindi and Bhattiyali, Dogri-Kangri, Pahari

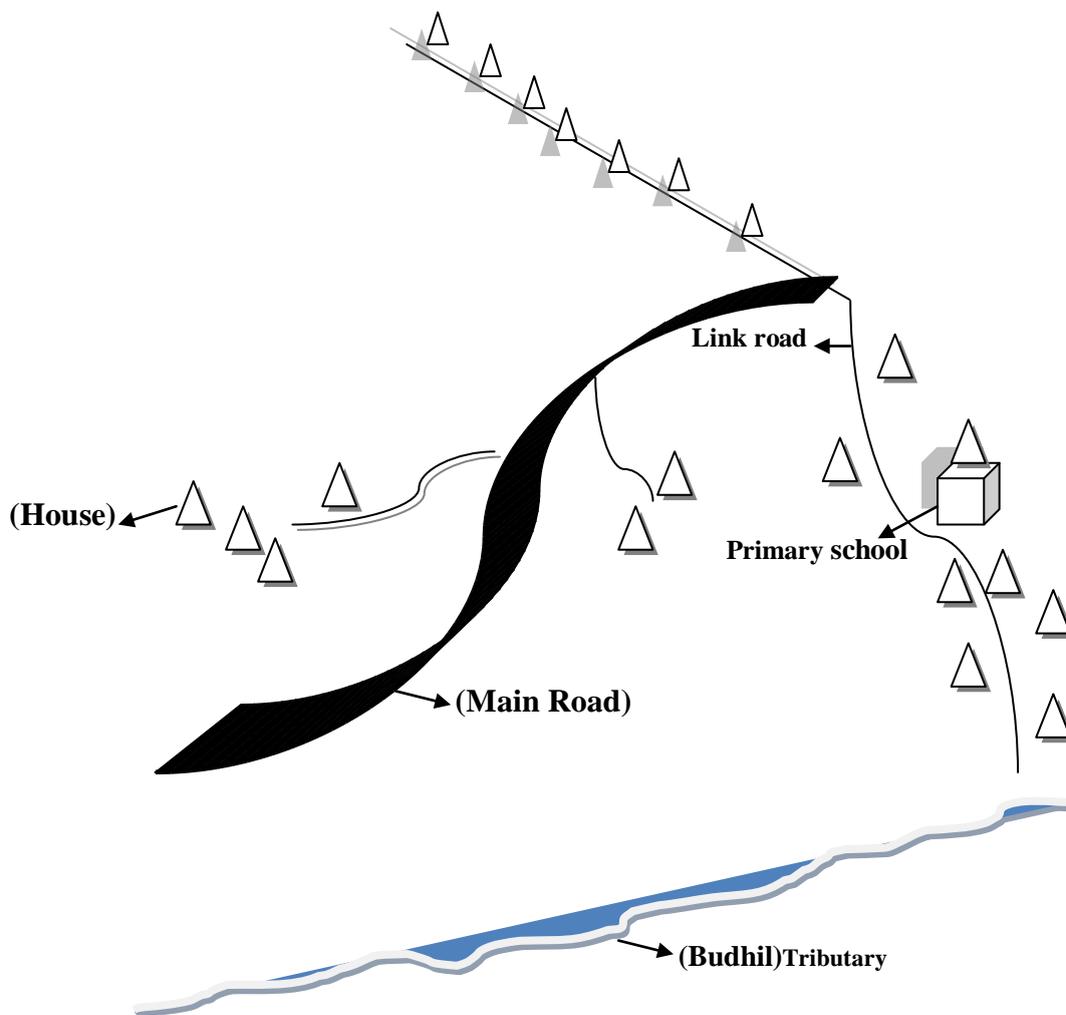
Elevation / Altitude: 846 meters. Above Sea level

##### Population of Hadsar Panchayat

Male: 172

Female: 189

Total:361



**Road map of Hadsar**

## VI. METHODOLOGY

I used historical method in this research paper. Historical method: - it is just inquiry into the past in a systematic order.

I used focus and group interview method in this research paper. A small group of the respondent is taken in this interview technique.



Group interview of the respondent of the Hadsar taken by researcher (Pallavi Gautam)



Personal interview of ex. Pardhan Sh. Vakilo ram by researcher (Pallavi Gautam)

## CHAPTER III

### VII. FINDING AND ANALYSIS

#### 7.1 History of Hadsar Panchayat

*There are two statements behind the history of peoples of Hadsar:*

- The people of Hadsar migrated from Jammu&Kashmir, the king of Chamba district Raja Meru Verman were requested to the

priest (Pandit) of J&K to worship of Manimahesh at 5<sup>th</sup> Century.

- They are the descendent of two brothers (Paru and Prahlad)

According to Ex. Pardhan of GP Hadsar, the Hadsar place was found in 5<sup>th</sup> of century by Raja Meru Verman of Chamba District. It is an ancient history of Hadsar Panchayat. The history of Hadsar is more ancient than the history of Gaddis

in Bharmour. The people of Hadsar are not permanent resident of Hadsar before 1972. According to the peoples of Hadsar before 1972 this Panchayat was under the name of Lord Gouri Shankar. They called MUJARE\* OF SHIVA themselves. Before 1972 they just work on the field of this Panchayat as MUJARE. They called this work as SATHH\*.

MUJARE\*:- Mujare means the disciple of lord Shiva according to their Gaddi Dialect.

SATHH\*:- Sathh means the people work on the land but they are not land holder of that land.

*Culture of Hadsar:* The culture of Hadsar is similar to the culture of Gaddis. They follow the traditional culture of Gaddis tribe. Their dialect, their dressing style, marriage style, occupation are almost similar to the Gaddis.

### *7.2 Why Hadsar is not considered as Gaddi tribe:*

In this study i found some reason and aspects that why Hadsar Panchayat is not considered as Gaddi tribe. According to the study there are mainly four reasons which explain that why Hadsar Panchayat is not considered the Gaddi tribe.

1. Residential issues
2. Migration issues
3. Religious issues
4. Clerical mistake

#### *1. Residential issues*

According to the people of Hadsar they are not permanent resident of this Panchayat before 1954. If we saw the history of Chamba District, the Brahmin of Hadsar village was lived from 5<sup>th</sup> of century. Before 1954, this place was under the name of Lord Gouri Shankar. After the 1954 they reclaimed for that land and gave 48\*96 claims for that land. They also told that half of the land of Chowari (Chamba) that is 791 beegha\*(a unit of land area) land of Chowari under the name of Gouri Shankar. According to Mr. Suresh Sharma it is the main reason that people of Hadsar is not considered as Gaddi tribe, because in documents they are living in Hadsar after the establishment of constitution of India, however they were lived in Hadsar from 5<sup>th</sup> of century. The NGO, who

work for this issue, told that if people of Hadsar want to notify with Gaddi tribe they have the history of minimum 70 years, whereas in documents they have only the history of 64 years, because of permanent registered in 1954. Before 1954 they are just work on that land as Mujare\* which work name is called Sathh\*

#### *2. Migration issues*

In this anthropological study I found the mythical issue, which shows that why Hadsar is not under the Gaddi tribe. That issue is Migration issue. As we seen the history of Hadsar, they were migrated from Jammu and Kashmir in 5<sup>th</sup> of century. The king of Chamba district Meru Verman was requested to the priest (Pandit) of J&K to worship of Manimahesh. In we study the migration theory; it told that if the people of Hadsar lived before the 1950, they considered as Gaddi Brahmin, but in the document they are permanent registered after the 1954. So they are just considered as Brahmin.

#### *3. Religious issues*

This is also a mythical issue. Because the financial condition of Hadsar is totally depend upon the Manimahesh yatra. From the 5<sup>th</sup> of century Brahmin of Hadsar worship the lord Manimahesh. According to the people of Hadsar whenever Gaddi tribe was notified by the constitution of India, then the Brahmin of Hadsar don't want to Gaddi as a schedule tribe, they just want to Manimahesh because Manimahesh was the main source of livelihood of Hadsar's people of that time. It was just myth that the people of Hadsar want Manimahesh in the place of Gaddi schedule tribe. But now the fact is the Manimahesh officially declared as trust in 26 June 2015, in the committee of SDM Bharmour Dr. Jitendra kanwar. Now the people of Hadsar want Gaddi tribe. Because they have no other source of livelihood accept Manimahesh yatra.

#### *4. Clerical mistake*

In this research, *clerical issue* is main issue that I ever thought behind the concept, why Hadsar is not considered as Gaddi tribe. The main reason is the name Gaddi, in revenue records the people of Hadsar was only considered as the Uchkoti Brahminnot Gaddi Brahmin. Whenever the tribes notified by the constitution of India, the peoples

perspective at that time, they are not Gaddis they are only Brahmin, because Gaddis are Adivasis. And people of Hadsar are Uchkoti Brahmin. After this perspective it declared from the constitution that Gaddi as a schedule tribe and Hadsar left from this schedule tribe. In this study we also conclude that Hadsar is considered as tribal area but the people of Hadsar didn't consider as Gaddi schedule tribe. From this confusion many peoples of this village make ST certificate of Gaddi before 1985.

*7.3 Here are some names of those people who are notified with the ST certificate*

1. Chhachhi Ram
2. Keko Ram
3. Hako Ram
4. Gijnu
5. Ramesh Sharma

## CHAPTER IV

### VIII. CONCLUSION

In this Anthropological study of Hadsar village, it concludes that this area is under the Bharmour Tehsil of Chamba district, but not notified by the constitution of India. This concept challenges the actual definition of Schedule tribe. The essential characteristics of these communities given by the constitution of India are:

- Primitive Traits
- Geographical isolation
- Distinct culture
- Shy of contact with community at large
- Economically backward

The Hadsar follows all the essential characteristics of this tribe, which is given by the Constitution of India. But the only problem is the word Gaddi. Whereas the people of Hadsar are economically backward, they have distinct culture, or geographical isolation, and also they have primitive history. The researcher is not against the policies of Govt. of India, the researcher is just highlights the issues, which shows why Hadsar is not under Gaddi tribe. There are some mythical issues like *residential issue*, *migration issue*, and *religious issue*, which define

why the people of Hadsar are not Gaddi. But the main reason behind this concept the word Gaddi. Because the Hadsar is under the Gaddi tribe but the people of Hadsar are not. The Hadsar is not only the place which is not considered as Gaddi, there are 26 Panchayat in Bharmour Tehsil which is not considered as Gaddi tribe.

In this research, clerical issue is main issue that I ever thought behind the concept, why Hadsar is not considered as Gaddi tribe. The main reason is the name Gaddi, in revenue records the people of Hadsar was only considered as the Uchkoti Brahmin not Gaddi Brahmin. Whenever the tribes notified by the constitution of India, the peoples perspective at that time, they are not Gaddis they are only Brahmin, because Gaddis are Adivasis. And people of Hadsar are Uchkoti Brahmin. After this perspective it declared from the constitution that Gaddi as a schedule tribe and Hadsar left from this schedule tribe. In this study I also conclude that Hadsar is considered as tribal area but the people of Hadsar didn't consider as Gaddi schedule tribe. From this confusion many peoples of this village make ST certificate of Gaddi before 1985.

### ACKNOWLEDGEMENT

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# Reforming the Libyan Education System: Seven Articulated Years Via a Strategic Planning Pyramid

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## ABSTRACT

This project aims to seriously reflect upon the results and recommendations of the comprehensive 16-month qualitative field study output titled “Strategic Pause on the National Libyan Education Reform Plan: Insights & Enhanced Tactics” published in 2021. That study was mainly planned to determine whether the suggested reform plan titled “National Libyan Public Education Reform: Entire Transformative Strategies, 2020–2026” (NLPER-2017) is still viable within the existing context, or if it needs to be modified or further developed in some or all of its aspects or phases.

*Keywords:* libyan entire education system is collapsing, effects of the ongoing political conflicts on education scheme, lack of parliament education polices, field work at efl department, seven rebuilt years of strategic reform plan, all to be customized in strategic planning pyramid.

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# Reforming the Libyan Education System: Seven Articulated Years Via a Strategic Planning Pyramid

Dr. Ageila Ali Elabbar

## ABSTRACT

*This project aims to seriously reflect upon the results and recommendations of the comprehensive 16-month qualitative field study output titled “Strategic Pause on the National Libyan Education Reform Plan: Insights & Enhanced Tactics” published in 2021. That study was mainly planned to determine whether the suggested reform plan titled “National Libyan Public Education Reform: Entire Transformative Strategies, 2020–2026” (NLPER-2017) is still viable within the existing context, or if it needs to be modified or further developed in some or all of its aspects or phases. Elabbar’s (2021) study raised warning signals to the “ighest level” for the government, Parliament, and all education authorities in the state of Libya, stating that the whole Libyan education system (LES) “may collapse very soon” if the various stakeholders did not adopt serious steps and fundamental measures “before it is too late” (p. 121). It also re-verified the objectives of NLPER-2017 to continue professional development (CPD) planning, involve a wider selection of stakeholders, develop extended tactical leadership models for managers, and develop policies and guidelines for implementation—e.g., quality assurance (QA) strategies, positioning of executives and directors, and centralization/decentralization of various educational associations to overcome the anticipated constraints, bureaucracy, and change resistance—all to be contained in seven years of gradual reform strategies (road map) instead of the suggested six years of LES reform as stated in NLPER-2017. This project therefore considers the previous (Elabbar, 2021) study’s results by conducting additional field investigations, searching for updated documents*

*and cases, and incorporating more participants into the study explorations. It also evaluates the Libyan Parliament’s educational policies from 2014 to 2022 and qualitatively recognizes the existing LES status in general (and ELF education specifically). The study then suggests connected stages for Libyan education reform as demonstrated in a customized strategic planning pyramid. This work aims to encourage Libyan experts, MA/PhD students, and a wide range of researchers, policy makers, and executives to take real action, engage in debate, and work toward complete gradual reform before we all regret it!*

**Keywords:** libyan entire education system is collapsing, effects of the ongoing political conflicts on education scheme, lack of parliament education polices, field work at efl department, seven rebuilt years of strategic reform plan, all to be customized in strategic planning pyramid.

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## I. PROJECT JOURNEY AND PROBLEM STATEMENT

It is important to state that this study project is a product of more than five years of inclusive continuing investigations into the Libyan education system. It has been undertaken through a sequence of comprehensive studies and proposals, all aimed to rescue the LES from near collapse by finding solid phases and actions that could lead to effective growth in administrators' mindsets, educators' skills, and

attitudes and reliability among executives and policy makers. The first proposed framework (NLPER-2017) was intended to raise awareness of the necessity of reform rather than propose solutions, as the problems faced by the Libyan higher and vocational education system, both public and private, are due to widespread and deeply rooted conditions that demand responsible reform action. Therefore, Elabbar (2017) proposed an exhaustive list of developmental phases designed for careful implementation over six years of gradual reform (p. 3).

This was followed by another detailed administrative proposal titled “Contextualizing the First Two Years of the Libyan Education Reform Proposed Strategies (2020–2026): Targeted Candidates and Reflective Activities” published in May 2018, which explained in detail the proposed Phase I activities of the first two years of the reform plan. The first phase aimed to involve key Libyan education officials and policy makers from Parliament, the government, and local education authorities during two years of continuing professional development (CPD). Elabbar (2018) explained that these two years of intensive reform preparations were necessary to develop educators’ knowledge of education and get them ready for the proposed journey.

The two years of practice will be implemented through national training programs, intensive CPD for different scales and models, teacher education projects, detailed quality assurance workshops, short- and long-term policy workshops, and curriculum and pedagogical development (both inside and outside of Libya) aimed at joining technologies within the whole education scheme. Besides running collaborative studies, reflected focus groups, reform conferences, and seminars on such suggested reform steps are the way to obtain insights about the real conditions and possible management and further development of the reform plan. These arrangements are intended to guide policy makers, administrators, and key educational figures in implementing the main goals of the proposed phases of gradual reform.

Phase II of the planned strategy was elaborated in a comprehensive 2019 study titled “Employing the Subsequent Four Years of the Libyan Education Reform Strategy: Administrations and Contributors” which described in full detail the four remaining executive years of the reform strategy after considering the prevailing constitutional laws, existing educational regulations, calculations of population increase, and estimated project costs according to the annual budget allocations of the various ministries of education.

Elabbar (2019) demonstrated that these four years of transformational acts are concerned with extending insights and suggestions concerning how to improve constraining policies, regulations, required professional development, and QA for other education contributors. It also explained how to execute the remaining steps to begin reform on the ground, alternating between the current and proposed education systems, and explained all considerations and professional measures necessary to maintain balance between these systems during the suggested six years of reform (pp. 10–18).

In 2021, another comprehensive field study was summarized in a published paper titled “Strategic Pause on the National Libyan Education Reform Plan: Insights & Enhanced Tactics,” which applied Graumann's 2020 idea of “strategic pause” to the projected reform plan and investigated the implications resulting from over ten years of instability and chaos from 2011 to 2021, and from 2017 to 2021 in particular. It also presented an in-depth assessment of the impacts of the coronavirus (COVID-19), wars, and the ongoing political conflicts which had clearly harmed the whole education system in the state of Libya.

Elabbar (2021) showed that there were still massive effects stemming from security instabilities, economic troubles, continuous political crises, and constant wars between militants, in addition to the almost total lack of teaching aids and learning facilities within the country, together with the consequences of COVID-19 and suspensions (strikes) on basic,

secondary, and even vocational university education as numerous classes were deferred, cancelled, or disrupted. Also, there were long-lasting effects of unplanned changes of systems and curriculums—for example, moving secondary education "back again" from a specialized system to a general one without clear preparations—which included the deep impacts of administrative bureaucracy, time wasted through vacations and useless exams, impairments to community culture of education, leaders' attitudes toward how education should be, and harmful interference in education management, especially in some villages and towns (pp. 123–125).

Such challenges have "clearly produced unqualified leadership in both ministries" (east and west), and a huge number of decision makers have harmed the LES instead of supporting it. Other challenges include the continued absence of lifelong learning programs and catastrophic weaknesses in the training of schoolteachers, inspectors, and university educators and administrators.

In addition to such issues, Elabbar (2021) found that the consequences of the long-term electricity and fuel crises plus the high cost of living, together with a prolonged lack of cash (money stuck in banks) and other severe problems that the country has experienced since 2014, still have great negative impacts on the psychological and emotional health of students, their scientific and absorptive readiness, and the extent of the support they receive from their teachers and families.

Also, these issues have compelled many members of schools and universities to abandon scientific research and participation in professional development and training programs, which has led to widespread disappointment among teachers, inspectors, education administrators, university educators, and parents. As a result, educational awareness has decreased to the lowest level, and constructive interaction, scientific research, and problem solving have been largely neglected.

In some cases, completion of many core subjects in schools and universities has been neglected because of time wasted in the country. Elabbar (2021) also showed that "Even after announcement of the Government of National Unity (March 2021), nothing has changes except unifying the ministers' offices besides splitting the Ministry of Education into three ministries" (meaning the Ministry of Education, Ministry of Higher Education, and Ministry of Vocational Education), all for political reasons rather than for solving the clear, deep-rooted problems (p. 130).

## II. PROJECT INTENDED GOALS

- To restructure the suggested NLPER-2017 reform plan based on Elabbar's 2021 project outcomes as clarified and visually displayed in a "ground-up" strategic planning pyramid.
- To urge decision makers and educational authorities to implement strategic reform policies with executive regulations intended to widen opportunities for tactical planning in education, implement modern education approaches, decentralize ministry control, employ dynamic leadership instead of the existing bureaucratic leadership, and engage all education stakeholders in significant of lifelong learning.
- To concisely explain the proposed key reform stages to enable Libyan legislators, educators, inspectors, administrators, interested professionals, and stakeholders to reflect, develop, and share key insights and debate the desired goals.
- To emphasize the necessity of preparing faculties of education to obtain project goals, plan policies, and prepare legislators, leaders, educators, TAs, and pre-service teachers to effectively accomplish this long-term national project.
- To engage Libyan officials, researchers, experts, and interested members in playing important roles to support and develop the idea of gradual reform as a fundamental approach for the rescue of the LES from the expected collapse.

- To raise awareness and reach a modern generation of pupils who will start a 9AM–5PM prekindergarten stage and in a separate scheme, as this suggested system seeks to begin in year eight of the reform strategy (i.e., after the seven years of gradual reform have been completed).
- To sound the warning that if all Libyan authorities do not act immediately, the whole education system will be on its way to a big collapse.
- To reproduce all determined NLPER-2017 VMGs and objectives in an accountable and developed perspective to handle the existing updates and expectations.
- To emphasize the importance of reforming the educational management mindset and culture of leadership, and to promote impression that without developed education and responsible leadership, the chaotic and dangerous state of Libyan education will never improve.

### III. BRIEF FORM OF THE LITERATURE

#### 3.1 *Education Complications in the state of Libya*

The Libyan Organization of Policies & Strategies (LOOPS) (2016-NGO) conducted a great study on the LES and came away with substantial conclusions about Libyan educational challenges. The study concluded that that LES faces “poor academic achievement, poor private education; as many of these schools are ‘places where meaningless education is provided;’” an absence of strategies for the educational process in Libya, and weak curricula taught in the different school stages. The study also stated, “We can rather say that i.) The Libyan curricula are not linked to a ‘well-done’ educational plan, and ii.) a major part of the curricula is imported from the Singaporean curricula” (representing a completely different culture and style of teaching and learning). Additionally, the study showed poor performance given the “lack of education management experts” as headmasters depend on their natural ability rather than technical management approaches to manage their schools. This causes many challenges as various school administrations experience problems in dealing with teachers, administrative hierarchies, and awareness of

individual responsibilities within school administrations (pp. 15–19).

Both El-Hawat (2006, p. 215) and Elabbar (2016) claimed that most school and university education is managed by directors who apply whatever policy they personally feel is most appropriate. This point has caused conflict between schools, universities, faculties, and even departments. For example, because of the absence of executive strategies, the ministry of education (either east or west) only permits its national university directors (presidents) to apply whatever policy they individually feel is suitable for them to use.

Elabbar (2019) explained that in 1995, the Libyan Education Authority, according to its “Vers-109,” revealed that the Libyan government simply provides general policy statements identifying the determinations of the school. For instance, the “curriculum must cover all activities in a school designed to promote the moral, cultural, intellectual, and physical development of students, and must prepare them for the opportunities, responsibilities and experiences of life and society, etc.” (p. 66). On the other hand, but in equal context, because of unique circumstances—for instance, the suspension of teaching English as a foreign language (EFL) for long time, the interchangeable management of the whole education system, prolonged civil wars (2011–present), and corruption within the scholarships program—two different generations of EFL teachers (OGT and NGT) have emerged at the university level.

With the same EFL perspective, according to Orafi and Borg (2009), the ban on the English language has deprived teachers of training in new trends in teaching and made students struggle with unfamiliar communicative technique-based activities, such as group and pair work. Orafi (2013) also highlighted that “The students only act as listeners. The students come to the school only to listen to what the teachers say. They do not think that they should actively participate in the classroom activities to learn English” (p. 5). Alhmali (2007) has stated that the objective of educators in Libya is for students to pass exams with the highest possible scores (p. 88).

Additionally, Elabbar (2019) pointed out deep influences of the administrative bureaucracy, culture, social interference, and corruption in education management. All these problems have clearly produced unqualified leadership in decision makers in both ministries (east and west) and have exacerbated the problems of the education system overall, along with the continued absence of lifelong learning programs and catastrophic weaknesses in the declared strategies of training among school and university educators and administrators (p. 77).

### *3.2 Qualitative Research: Collection and Analysis*

The process of qualitative research supports the researcher in collecting valuable data and findings, and it helps in obtaining the field study's main aims. Bogdan and Biklen (1998) added that "qualitative research is showed in the natural world and uses several techniques that are interactive and holistic. It supports gathering data that is rich in description of people, the investigation of topics in context, and an understanding of behavior from the participants' own frame of reference" (p. 10). Strauss and Corbin (1990) explained that qualitative research is generally defined as "any kind of research that produces findings not arrived at by means of statistical procedures or other means of quantification" (p. 17). Flick (2002) said that qualitative research is useful for exploring "why" rather than "how many" (p. 4). Also, Davis (1995) shows that qualitative research is emergent rather than "tightly prefigured" and is fundamentally interpretive (p. 429).

Holliday (2005) explained that qualitative research is "going to be 'open-ended,' to look profoundly into the participants' behaviors within the specific social settings" (p. 5). Berg (2004) showed that qualitative research "provides the framework to explore, define, and assist in understanding the social and psychological phenomena of organizations and the social settings of individuals" (p. 11).

Lincoln (2000) explained that qualitative research includes an "interpretive and naturalistic approach. This means that qualitative researchers

study things in their natural settings, trying to make sense of, or to interpret, phenomena in terms of the meanings people bring to them" (pp. 3–4). Noble (2013) stated that qualitative research is a generic term that describes a group of methods, and ways of collecting and analyzing data that are interpretative or explanatory in nature and focus on meaning (p. 2). Pope and Mays (1995) described qualitative research as the development of concepts which help us to recognize social "phenomena in natural rather than experimental settings, giving due emphasis to the meanings, experiences, and views of the participants" (p. 44–45). Nigatu (2009) showed that qualitative data analysis is the range of processes and procedures whereby we move from the qualitative data that have been gathered into some form of explanation, sense, or interpretation of the situations we are investigating. Qualitative data analysis is generally based on an interpretative philosophy, and the idea is to examine the meaningful and symbolic content of the qualitative data (p. 22).

### *3.3 Strategic Planning and Planning Pyramid*

Stephen J. Bigelow, (2020) defined strategic planning as a process in which an organization's managers identify their vision for the future and distinguish their organization's goals and objectives. The process involves establishing the sequence in which those goals should be accomplished so that the organization can reach its stated vision. Also, he explained that "Strategic planning typically represents mid- to long-term goals with a life span of three to five years, though it can go longer" (p. 2).

According to Bryson (1988), strategic planning is a disciplined effort to produce fundamental decisions and actions that shape what an organization is, what it does, and why it does it, with a focus on the future (p. 9). NMAC (2015) lists five essential steps in the planning process. While these steps are a suggestion, they are not the only "recipe for cooking up a strategic plan." Thoughtful and creative planners will add "spice to the mix" or elegance to the presentation to develop a strategic plan that best suits their organization" (p. 15). Indeed (2021) explained

that a strategic planning pyramid is important for any type of organization to be successful. It helps a company/organization to generate a simple plan to reach a particular set of goals. Having a strategic plan gives an organization the foundation it needs to grow. A strategic planning pyramid is a visual tool that shows the goals of a business plan from top to bottom (p. 3).

#### IV. THE FIELD STUDY PRACTICAL METHODOLOGY

As stated above, this paper is a sequence of the previous proposed four linked studies which recommend gradual national reform of the entire LES to resolve the current difficulties facing the whole education sector in the state of Libya. Thus, in addition to the substantial results and contributors noted by Elabbar (2021), this qualitative research and plan will be applied through extra semi-structured interviews, focus groups (especially EFL teachers in the Faculty of Education at the University of Benghazi), needs analysis sheets for university educators and directors and schoolteachers and inspectors, in-classroom research, and Parliament and government document analysis. All will be used as field study data collection tools, and the study will reexamine relevant previously collected data from different perspectives of understanding.

Accordingly, to accomplish the study objectives, this methodology aims to do the following:

- i. Qualitatively reexamine all collected interviews and focus group data, meet again with the positioned contributors (directors, key figures, policy makers, decision makers, etc.), analyze official documents and decrees, and reanalyze Elabbar's (2021) findings and recommendations. Additionally, the study will conduct further qualitative field work, focusing especially on the updates that have occurred since the previous work results, to distinguish how new developments may affect the suggested seven-year LES reform strategy. Moreover, this methodology will deeply examine the two latest books published by the Libyan House of Representatives displaying all parliamentary

laws and regulations from 2014 to 2022; the study will focus particularly on education laws and regulations noted in the books, if any. Also, the study will measure the impacts of the continuing absence of education policies on the LES (particularly in EFL education) and examine the anticipated effects of the splitting of government in March 2022 into two governments.

- ii. Additional field work will be conducted with various students (especially EFL students), TAs, inspectors of public and private sectors, parents, and some vocational institutes, especially the diplomatic institute of Benghazi in the Libyan Ministry of Foreign Affairs.

#### V. OUTCOMES OF THE FIELD STUDY

As mentioned above, the main goal of this work is to reconfigure Elabbar's (2017) proposed six-year reform plan as a seven-year plan, as this work is an outcome of the Elabbar's (2021) latest strategic pause conclusion and recommendations. This qualitative study concludes with shocking outcomes about the status of the LES at all levels, with the main results as follows:

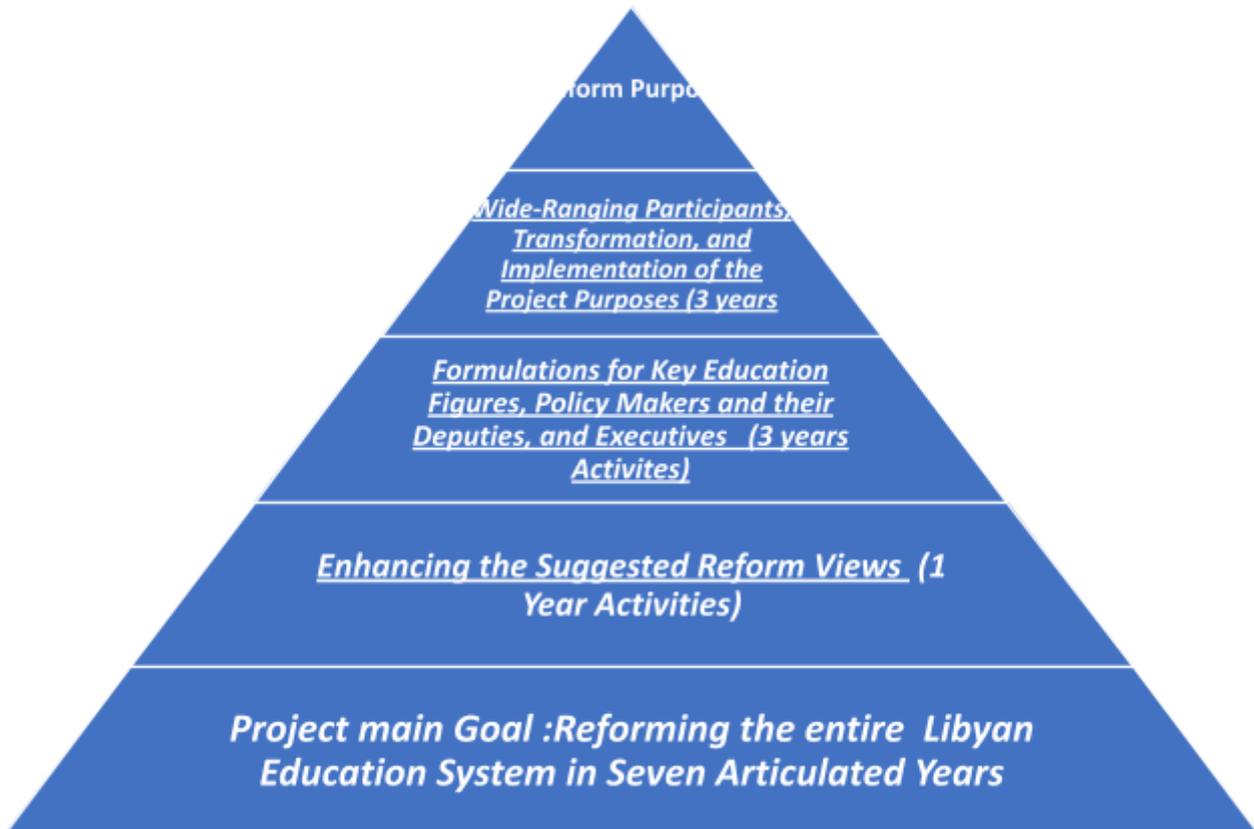
- i. The outcomes of this study project are consistent with Elabbar's (2021) findings that the whole education system in the State of Libya "may collapse" if the government, Parliament, and education authorities in the country do not take serious steps and implement fundamental measures before it is too late (p. 129). Also, this study project found additional shocking evidence about the entire education system, leadership, workers, parents, and even students.
- ii. After a comprehensive investigation of the two latest books published by the Libyan House of Representatives (Parliament) which included all rules and regulations from 2014 to 2022, the study unfortunately found no rule, legislation, or any indication concerning the status of the educational system, or even any evidence or hint as to Parliament's interest regarding the circumstances facing the LES.

- iii. The enormous impacts of political divisions and continuous upheavals, staff strikes, and long-term outages of electricity on education management, atmosphere, and leadership, in addition to civil wars, are displayed in the stability of the educational infrastructure.
- iv. There is a definite lack of progressive education and knowledge shared by and granted to secondary-education pupils who have entered the universities in recent years. This has led to impairments in the essential cognitive skills such students need to deal with the present system, which has led to academic and administrative confusion on the part of universities in handling such challenges.
- v. There are countless unqualified administrators and directors in Libyan education, and the resulting deeply rooted challenges are clearly apparent in all stages of education. There are almost no strategic or tactical policies, systematic training opportunities, or professional development programs, nor are there sufficient learning tools, aids, internet access, or even libraries.
- vi. After announcement of the Government of National Unity (March 2021), nothing has changed except a reorganization splitting the Ministry of Education into three separate ministries (Ministry of Education, Ministry of Higher Education, and Ministry of Vocational Education). This was done for political reasons and did nothing to solve the deeply rooted problems that existed. Then, in March 2022, with the GNU still refusing to handle authority, Libya became a country with two governments again (with almost five ministers of education at the same time!). As a result, conflicts have increased across all sectors, especially education, and the probability of collapse is increasing unless a miracle happens.
- vii. This study aims to alert all Libyan authorities that the whole education system has already started to collapse, and there is no way to rescue it without real desire and immediate reforming actions. Without such action, the entire Libyan educational system will fail.

## VI. FRAMEWORK OF THE SEVEN PROPOSED YEARS

The outcomes of this study have facilitated wider understanding and enabled the proposal of a clear road map for seven years of gradual reform of the different levels, personnel, and even the structure of the Libyan education system (LES). This reform plan seeks to transform the existing LES into a completely modern system while making recommendations on fixing the current exhausted system for a temporary continuation before it makes a slow disappearance. The following sections will explain the practical actions and key points of the LES reform road map using bottom-up (ground-up) preparation tactics. The suggested seven years of preparation and change should lead to a revised and improved draft constitution (for Parliament to authorize) for the modern reformed Libyan education system.

PROJECT SUMMARY



*6.1 Stage 1 (One-Year Duration): Enhancing the Suggested Reform Views*

This stage will comprise one year of expanding the ideas of the suggested reform plan. This will be accomplished by embracing a wide range of suggestions, welcoming researchers' feedback on the plan, running extra cooperative studies, and holding conferences, workshops, and televised debates on the proposal and its phases. Also, this stage seeks to engage capable community members such as graduates, TAs, parents, retired educators, social workers, well-known experts from inside and outside the state of Libya, and other interested experts in sharing ideas, insights, and recommendations. This year of managed events will enhance the whole recommended reform strategy. Accordingly, this stage must be administrated by authorities on a national scale to facilitate wider attendance, logistical participation, added value to the plan, and professional and social accreditations.

*6.2 Stage 2 (Three Years): Formulations for Key Education Figures, Policy Makers and their Deputies, and Executives*

This important stage of professional development and reform practices has been extended to three years (instead of the proposed two years) to accomplish the anticipated goals and outcomes of the mission outline. Elabbar (2017) explained that the gradual reform preparations for key education figures and policy makers aims to develop a strong base for change, and it seeks to involve the key Libyan educational figures in contributing to expert feedback on the reform plan and its required actions (p. 17). Also, this intensive training proposal requires development of educators' knowledge of schooling and perspectives regarding the wide-ranging transformation. These practices include managed professional training, CPD models, teacher education and reform training, quality assurance workshops, short-term scholarships (inside and outside the state of Libya), the use of technology, and consideration of all professional studies on

the existing LES conditions. These preparations will guide participants in putting into practice the main targets of the national education reform project.

This stage involves officials, governmental policy makers, ministry and county managers, education planners, curriculum makers (contractors), teacher trainers, ministry research and training center directors, deans of universities, and all members of faculties of education, inspectors, and new graduates.

### *6.2.1 Managed Professional Development for the Stage Members: Core Path*

These managed intensive actions emphasize the main aims and desired procedures of the LES reform strategy, and they put all targeted figures in the loop of the entire change direction. As each action should be followed by an administrative step at all levels of the plan, the following points summarize some of the recommended activities:

- i. Running ongoing workshops, discussions, and training on quality assurance to emphasize its importance for reform, coupled with comprehensive continuing debate, and cascading the newest revisions and national and international conference outcomes regarding the main constraints facing the LES to reflect the suggested results on the reformed policy and executive road map for change.
- ii. Managing intensive focus groups, monitoring, and service, and mind-mapping learning about the role of Libyan policy makers and key educational figures in employing the proposed strategies of transforming the LES. Such professional activities need be tracked through workshops, action research, field work, and comparative studies.
- iii. Training on developing education legislations, curriculum development, critical thinking, globalization, and international education, as well as the role of CPD at all levels and in policy.
- iv. Continuing training on utilizing technology in all levels of education, interactive teaching and learning, and workshops on international

languages and the role of educators, teachers, inspectors, and social workers in the intended reform strategies.

- v. Preparations on the significance of teachers' TV and children's education channels in education policy and regulations, as well as workshops on the role of modern administration in education development.
- vi. Intensive workshops and conferences on the importance of making clear policies and regulations for selecting qualified educators, assessing in-service teachers and inspectors, and suggesting ongoing professional development and lifelong learning regulations. Also included are focused classes on how to combine school education policy, organization, and knowledge with higher education policy and regulations to ensure a smooth transformation.
- vii. Holding seminars on the current reform plan and how to start the reform process, as well as scheduling research events on the difficulties facing Libyan education in terms of graduate outcomes, demands of future work markets, and how all must be reflected on the reform dynamic strategy.
- viii. Including all activity outcomes in the targeted constitution for education and the reform road map to enable other stakeholders to follow up.

### *6.2.2 Stage Two: Anticipated Products*

The anticipated outcomes of these three-year guided reform practices and leadership should achieve the following:

- i. Formalize a dynamic modern constitution for the entire Libyan education system and achieve wide involvement of the entire base and structure of the reform strategy.
- ii. Implement new IT and database frameworks for the entire LES to facilitate the application of the reform aims and growth; this should reflect the standpoints of the draft of education constitution.
- iii. Motivate policy makers and administrators to overcome the present difficulties facing the Libyan education system, and deliver ideas and contextualize suitable processes and timelines for any intended process. Also,

- motivate them toward modification of attitudes and perspectives.
- iv. Develop educators' and directors' views about the importance of classroom interaction, motivation, student innovation, creation, decentralization of education, teamwork, communicative learning, and incorporating CPD.
  - v. Develop belief among officials in the significance of quality assurance and overcoming self-interest for the sake of the nation.
  - vi. Set up criteria for capable teacher trainers, education researchers, materials developers, and policy reformers so they can participate in coming stages of reform.
  - vii. Establish strong connections with international research centers, councils, counties, and universities, and gain understanding of the latest reform studies and recommendations.

### *6.3 Stage 3 (Three Years): Wide-Ranging Participants, Transformation, and Implementation of the Project Purposes*

The three-year transformation of policy, attitudes, qualifications, and regulations aims to put into practice the project's main goals along with the last stages of production. It also aims to include widespread contributors from schools, the vocational sector, and higher education to unify a clear national attitude toward the change.

The following points summarize the required actions, participants, and institutes that are strongly suggested to participate in this stage.

All members of the last stages should also contribute and share ideas in this stage.

#### *6.3.1 Faculties of education*

It is important to include all the reform's main goals into how our pre-service teachers gain and develop their pedagogical content knowledge, as these faculties will also require good classroom equipment, teaching aids, IT systems, modern laptops, online library access, and well-trained educators who have the ability to implement the reform along the targeted path (they should have

attended stages one and two of the reform preparations).

#### *6.3.2 Ministry of education training centers (MTCs)*

Elabbar (2017) stressed that MTCs must play an important role in accomplishing the reform outcomes through a national teacher training program, action research, coaching, cascading, and transformative training in the new trend of education in the state of Libya (p. 17).

6.3.3 MTCs also must collaborate with national and international universities and county research centers that have gone through complete reform, and they must generate a bottom-up growth process for in-service teachers, inspectors, school headquarters, education administrators, and social workers to take part in framing and contextualizing the change goals and stage outputs for wider audiences.

#### *6.3.4 Government officials*

These officials are Parliament representatives, human resource educators, quality assurance administrators, and retired educators (all of whom are invited to cascade). They involve old-generation teachers, new-generation teachers, social workers, and school HQs, in addition to university educators, TAs, university deans, heads of departments, and university administrators. All such educators will want shared workshops, coaching, focus groups, and collective studies to link the main goals of the reform with practice and to unify efforts toward one goal.

#### *6.3.5 Curriculum designers*

Designers require intensive professional development on the whole reform plan, materials development, and materials adaptation to be able to achieve the following areas as mentioned by Elabbar (2017):

- i. Providing space in teachers' books to enable teachers to develop activities and use ground-up activities.
- ii. Requiring the university syllabus to meet the reform preparations in terms of content

knowledge, use of technology, and forging of languages.

- iii. Creating a core curriculum for the new generation of students who will start in the eighth year (after the seven years of reform). This core curriculum should include reading, writing, math, science, technology, Islamic studies, English language, and citizenship.

### 6.3.6 Role of social workers in the change

Social workers are important to the gradual change, so they should be involved in these activities. They will be required to further connect with traditional Libyan teachers and students and should be trained on preparing families and students to accept the gradual change.

### 6.3.7 Budget, Numbers, and Expectations

According to the ministry's unpublished report (2015), over the past 17 years, Libya has spent an annual budget of approximately 1.3 billion Libyan dinars (approximately 1 billion US dollars) for the Ministry of Education only without a clear developmental policy. This unplanned budget has led to a certain extent to corruption because it was not used to build a strong base for the approximately 1.6 million learners in schools, 289,000 learners in the vocational sector, and approximately 493,000 university students.

Elabbar (2016, 2017, p. 20–23) explained in detail the budgeting and required structure, based on the state of Libyan economic abilities and anticipation of pre-K students. Also, he explained the required tools of the modern learning environment and the importance of having well-equipped classrooms (no more than 20 students per class) and well-trained teachers and HQs. These goals can be achieved through a well-organized county system that applies the aims of this project as framework procedures.

## VII. CONCLUSION

This study and outline plan came about as a result of years of comprehensive focus on the status of the entire Libyan education system and investigation of its deeply rooted complications. It thus stresses the significance of reforming the

whole education system and then splitting the new generation of students (after seven years of responsible reform processes). Otherwise, the Libyan education system will keep collapsing until it reaches a stage where it is hard even to run a reform process. Finally, this work opens more doors and embraces debate for the sake of Libyan education system development.

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*Dr. Albano Agostinho Eduardo*

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This exploratory study looked for reflection about the education and the training of bilingual teachers due the implementation and generalization of national languages in education system of Angola, mainly in, Lunda Norte province. Does the teacher bilingual training correspond to the process of generalization of the local languages in (primary) education system is the question that is raised. The study based on the Lei nº 17/16, Lei de Bases do Sistema de Educação e Ensino, that lead the monolingual teaching with help of local languages, as well as on the statistic data point out that the generalization fase did not bring meaningful inovations regarding to the bilingual teacher training if we face the multilinguistic contexto, sociocultural needs and classroom heterogeneous. Therefore, those teacher training to be a process that need to emprove either in efective generalization either in the consolidation of ucokwe language in the teaching process.

*Keywords:* education, generalization, teacher, bilingual.

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# Teaching and the Challenges of Bilingual Teacher Training: A Look at the Process at the Stage of Generalization of National Languages

O Ensino e os Desafios de Formação do Professor Bilingue: Um Olhar Sobre o Processo Na Fase de Generalização das Línguas Nacionais

Dr. Albano Agostinho Eduardo

## ABSTRACT

*This exploratory study looked for reflection about the education and the training of bilingual teachers due the implementation and generalization of national languages in education system of Angola, mainly in, Lunda Norte province. Does the teacher bilingual training correspond to the process of generalization of the local languages in (primary) education system is the question that is raised. The study based on the Lei nº 17/16, Lei de Bases do Sistema de Educação e Ensino, that lead the monolingual teaching with help of local languages, as well as on the statistic data point out that the generalization fase did not bring meaningful inovations regarding to the bilingual teacher training if we face the multilingualistic contexto, sociocultural needs and classroom heterogeneous. Therefore, those teacher training to be a process that need to emprove either in efective generalization either in the consolidation of ucokwe language in the teaching process.*

**Keywords:** education, generalization, teacher, bilingual.

**Author:** Instituição: Escola Pedagógica da Lunda Norte/CEDES-ULAN.

## RESUMO

*Este estudo, de natureza exploratória, procurou reflectir sobre o ensino e a formação de professores bilingues face aos efeitos de implementação e generalização das línguas nacionais no sistema de educação e ensino angolano, em particular, na província da Lunda Norte. Até que ponto a formação do professor*

*bilingue é proporcional ao processo de generalização das línguas nacionais no sistema de ensino (primário) é a inquietação que o norteia. O estudo, fundamentado na Lei nº 17/16, Lei de Bases do Sistema de Educação e Ensino que orienta o ensino monolíngue com recurso às línguas nacionais, bem como em dados estatísticos, indica que a actual fase de generalização não trouxe inovações significativas no que diz respeito à formação de professores bilingues caso se atenda ao contexto multilinguístico, às necessidades socioculturais e à heterogeneidade da sala de aula. Daí, a formação daqueles professores bilingues ser um processo a dinamizar tanto na generalização efectiva quanto na consolidação da língua ucokwe no ensino.*

**Palavras-Chave:** ensino, generalização, professor e bilingue.

## I. INTRODUÇÃO

Olhar para o ensino em Angola e os desafios de formação do professor bilingue é um assunto que diz respeito à comunidade linguística e a que se refere ao desenvolvimento sociocultural do país.

Após a independência e, sobretudo, com o processo de democratização do país, várias têm sido as iniciativas que visam adequar as políticas educativas e o sistema de educação e ensino às reais necessidade de desenvolvimento local, regional e universal. Nisto, a educação tendo como faceta o ensino, este, por conseguinte, é um processo secular de várias experiências que dificilmente se concretiza sem a presença de um mediador qualificado com base em um

determinado modelo, sendo imprescindível o recurso a uma língua como via para exteriorização e explicação dos fenómenos e factos sociais.

Em Angola, o recurso à língua portuguesa como único instrumento oficial de escolarização, actualmente, apresenta implicações que levam a sociedade, os académicos e o governo a reconhecerem o seu desvio/insuficiência ao nível do ensino e aprendizagem (INIDE, 2013; Agostinho Eduardo, 2019; Chicumba, 2019), abrindo possibilidades para a implementação das línguas nacionais como um desafio para um ensino inclusivo (modalidade bilingue) que reforce a metalinguagem.

Este desafio, entende-se ser realizável à luz de uma constante articulação, em que o professor bilingue tenha a possibilidade de adquirir e aperfeiçoar competências linguísticas, comunicativas e profissionais que o permitam concretizar o Plano de Estudo, à semelhança da proposta metodológica ao nível do Curso Inovação do Ensino da Leitura (IEL) (INIDE, s/d). Tratando-se de um projecto essencialmente de pendor regional, *até que ponto a formação do professor bilingue é proporcional ao processo de generalização da língua nacional no sistema de ensino (primário e I ciclo)* é a “provocação” a que se subordina esta reflexão ao nível da província da Lunda Norte, de cuja comunidade se espera participação e colaboração.

Assim, os objectivos passam pela contextualização da actual política educativa, análise da implementação do ensino das línguas nacionais ao lado da língua portuguesa, a especialização do professor e sua distribuição no subsistema de ensino primário na província da Lunda Norte. Para o efeito, recorreu-se à observação, revisão documental, bibliográfica e à entrevista (1 coordenador, 6 professores e 4 directores), cujos dados (mesmo sendo insuficientes aos desejados) permitiram a compreensão inicial do processo de formação do professor bilingue ao nível do projecto na fase de generalização. Depois da análise dos dados, nesta sistematização, apresentam-se as considerações gerais.

## II. O ENSINO NA POLÍTICA EDUCATIVA NO CONTEXTO ACTUAL

A ideia de educação associa-se a uma realidade concreta e de valores defendidos por uma comunidade (Piletti, 2010). Nesta perspectiva, a educação promane da actualização daqueles valores que levam o homem na e em comunidade a humanizar-se cada vez mais, segundo Veiga (2003), com base em movimentos de “dentro para fora: o desenvolvimento” e de “fora para dentro: ajuda, o alimento, o apoio, a orientação dos outros” (p. 13).

Em Angola, a concretização deste propósito fundamenta-se, entre vários instrumentos, na Declaração Universal dos Direitos Humanos<sup>1</sup> que consagra a educação como um direito para o desenvolvimento da humanidade e na convenção da UNESCO<sup>2</sup>, que se opõe à discriminação na educação, bem como em outros tratados que defendem o direito a uma educação primária obrigatória e gratuita, incluindo a necessidade de um ensino secundário acessível às crianças.

Com base na *Convenção sobre os Direitos da Criança*<sup>3</sup>, aquela necessidade foi objecto de recalçamento e ampliação, comprometendo os países membros a garantirem o reconhecimento da criança como um agente activo no processo de educação, devendo os seus direitos serem observados por meio da universalização, inclusão e do respeito. Seguiram-se as agendas sobre os *Objectivos de Desenvolvimento do Milénio 2000-2015*, continuados nos *Objectivos de Desenvolvimento Sustentável – Agenda 2030*, aprovadas pelas Nações Unidas em 2000 - 2015 (UNESCO, 2015). Nesta produção jurídica, destaca-se também a *Agenda 2063* da União Africana que para além de reforçar as metas culturais, socioeconómicas, educativas, relembra a necessidade de o “virar da página” quanto às formas de injustiças herdadas da colonização.

Esta preocupação é salvaguardada nos principais instrumentos que sustentam o sistema de educação e ensino (Angola, 2010; 2016; 2020),

<sup>1</sup> ONU, (1948)

<sup>2</sup> UNESCO, (2001)

<sup>3</sup> ONU, (1989)

com base nos quais, em 2018 o governo pôs em acção o Programa de Desenvolvimento Nacional 2018-2022 (Governo de Angola, 2018), incorporando entre outras acções o “Desenvolvimento da Educação Pré-Escolar”, a “Universalização do Acesso ao Ensino Primário” e a “Adequação Curricular”, como uma resposta às necessidades de educação e ensino do país.

Nesta perspectiva, a sublime complementaridade educação - ensino deve gradualmente concorrer para, segundo Veiga (2003), “o fazer e o saber-fazer; com o ter e o saber-enriquecer; com o prazer e o saber-gozar” (p. 11), por serem parte das preocupações de uma sociedade em direcção ao seu desenvolvimento colectivo. Estas acções ao se constituírem em um apelo à consciência e responsabilidade, traduzem-se em uma orientação dentro de uma diversidade em que, por exemplo, a educação das aldeias será naturalmente diferente da educação das cidades /localidades industrializadas.

Assim, a complexidade educação - ensino, actualmente, exige dos seus actores um acompanhamento diferenciado em cada etapa, uma atitude crítica de modo a evitar-se a sua estagnação no conservadorismo e assumir caminhos inovadores. Porque as realidades tendem a mostrar que estamos perante a uma era em que o ritmo socioeconómico/político requer dos diferentes actores um olhar transformacional sobre os seus modelos de maneira que as teorias sejam acomodadas em novas práticas e tendências. Significa que qualquer modelo de educação e ensino não deve estar deslocado das exigências socializadoras e humanizantes em direcção as outras civilizações.

É nesta nobre função de complementar os distintos saberes (educativos e instrutivos) que Nóvoa (2022, p. 6) constata a necessidade de as instituições presenciais resistirem à tendência de substituição pelas virtuais, de acordo com a velocidade da tecnologia, cabendo à sociedade ajudá-las a proteger (adequar uns aos outros por meio de uma determinada educação), transformar (mudanças profundas, organizativas e funcionais) e valorizar (continuar a ser um espaço importante para a formação de novas gerações e do trabalho

do professor), ao contrário da tendência desvalorativa. Portanto, é na visão valorativa que a componente linguística, sobretudo em ambiente de multilinguismo, constitui um significativo desafio para a actualidade angolana, atendendo a região, em que o professor deve ser um agente activo determinante para a proteção, transformação e valorização da política educativa.

### III. O ENSINO BILINGUE COMO UM DESAFIO PARA A ESCOLA ANGOLANA

O ensino bilingue é deveras um suporte indispensável na integração, (re) socialização e formação de um indivíduo por ser ancorado essencialmente numa riqueza resultante de um *input* multicultural. O seu recurso a várias línguas é entendido como a via para valorização e inclusão da diversidade etnolingüística (Mello, 2010; Chicumba, 2019), sendo a língua materna o primeiro veículo de socialização. Porque é nesta língua que o indivíduo facilmente se assume como um renascentista “dono da sua história e do seu futuro”, passível a moldagem / influência e, por identificação cultural, a consciência em direcção à transcendentalização. É nesta realização que o *bilinguismo* se converte em um facto social de inclusão e partilha de valores assumidos na formação do indivíduo.

Opondo-se àquele *monolingüismo*, *mono* (uma /um), o termo *bilinguismo*, donde *bi* (duas / dois) e *linguismo* (línguas / sistemas linguísticos), o sentido desta linguagem remete para um processo de educação e ensino no qual predominam essencialmente duas culturas *vs* línguas, sendo uma Língua Primeira (L1) / Língua Materna (LM), geralmente caseira, e uma segunda, podendo ser uma língua oficial (LO) ou estrangeira (LE). No fundo, é um processo que gravita em contactos, influências, complementaridades e de uma equivalência, sobretudo, ao nível de interesses e objectivos comunicativos.

Autores como Bloomfield (1930), Weinreich (1953) e Hamers e Blanc (2000) concebem, diferentemente, o bilinguismo como sendo o recurso a duas línguas por parte de um indivíduo para efectivação da comunicação, isto, enquanto

capacidade para compreender e falar alternadamente aquelas línguas. Porém, entre várias análises, na opção de ensino, Hamers e Blanc (2000) reforçam-no como uma sistematização e realização de forma simultânea ou consecutiva, questionando os programas que priorizam a LE como matéria ao contrário de finalidade académica, para além da incompatibilidade de programas que o sistematizam numa língua diferente da nativa da criança. Já na abrangência dos mesmos programas, não muito distante da modalidade, Megale (2005) categoriza o seu ensino em simultaneidade de línguas; instrução iniciada na LM das crianças e, somente, na segunda após a aquisição de habilidades naquela para o uso académico. Na sequência, integra-se a LS, sendo a primeira introduzida posteriormente, isto é, na vertente de matéria específica.

Neste processo, ao contrário da actual heterogeneidade sociocultural, a literatura ainda denota o ensino bilingue entre o grupo de elite<sup>4</sup> (dominante) e o grupo minoritário<sup>5</sup> (desfavorecido); o primeiro estribando-se na agregação de outra língua, cultura e conhecimentos, como uma preparação para a formação no exterior, diferentemente do segundo. Daí, em estudos do género, ser ainda recorrente a associação do factor bipolarização à imersão.

Segundo Grosjean (1982), retomado no estudo levado a cabo por Megale (2005), a partir de programa canadense de imersão francesa<sup>6</sup> admite-se similitudes em relação ao modelo predominante nas escolas, pois os programas

<sup>4</sup> Com programas de imersão e recurso à escola internacional multilingues. Estas aplicam metodologias diferenciadas, combinando duas ou mais línguas no programa. É reservado para crianças de várias línguas e culturas, segundo Harmer e Blanc (2000). Geralmente, o ensino é iniciado na LM da criança, seguindo-se da LS, para posteriormente a todas as línguas disponibilizadas pela escola.

<sup>5</sup> Exemplos de grupos de indígenas no Brasil ou imigrantes hispânicos nos Estados Unidos de América.

<sup>6</sup> Baseado em Cummins (1991), o programa de imersão francesa caracteriza-se por um bilinguismo dos professores, o que permite a compreensão dos alunos quando usam a sua LM (inglês); a habilidade do professor, por meio de modificação e diversificação do *input*, ajudar a compreensão do aluno e enfatiza-se o desenvolvimento de habilidades na LM depois da imersão na LS.

tendem a assentar em interesses da classe dominante, em oposição ao dos Estados Unidos nos quais a criança do grupo minoritário é imersa na LS, servindo esta de suporte à aprendizagem da sua LM. Contudo, o programa ao não enfatizar a cultura do aluno, o autor entende haver uma submersão ao contrário de imersão neste processo. Assim, é por meio de imersão inicial/total que Hamers e Blanc (2000) advogam, de acordo com a programação, a instrução na LS incluindo nos dois primeiros anos de ensino, enquanto a LM da criança, devendo gradativamente ser introduzida e, no início da escolarização, recorrendo às duas línguas como instrumentos. Neste processo, dependendo do caso, defende-se a imersão tardia, que se evidencia pelo ensino da LM só no ensino subsequente (secundário).

Apesar daquelas visões, Mejia (2002) apela para a distinção entre o ensino bilingue e a intensificação, porque, apesar de objectivos comuns — ensino de uma LS, no primeiro caso há o ensino da matéria por meio da LS ao passo que no segundo, focado numa gramaticalização, ocorre como uma LE por acréscimo de tempo lectivo. É no âmbito destas limitações e imprecisões que Mello (2010) entende estarem, em muitos casos, os seus programas e a prática de ensino confinados a uma fase inicial, bem como a uma habilitação para integração na L2.

Na essência, há em comum o recurso a duas línguas, não obstante a similaridade dos modelos existentes, cuja sistematização do ensino deve atender aos variados holónimos; política linguística, convívio individual e cultural, objectivos institucionais, necessidades e perfil dos alunos, recursos disponíveis, meio ambiente, modelo, currículo, metodologia, por meio dos quais a literatura ressalta a educação bilingue transicional e a educação bilingue compensatória<sup>7</sup>, tudo em torno do aluno como o epicentro da

<sup>7</sup> Em Mello (2010, p. 120), a educação bilingue toma as seguintes designações: educação bilingue transicional corresponde a educação bilingue de manutenção, educação bilingue compensatória (assimilacionista, segregacionista, imersão estruturada, etc.) e a educação bilingue desenvolvimental (educação de língua abrigada<sup>1</sup> ou manutenção pluralística ou de grupo).

sistematização. Assim, na transitoriedade e na temporalidade, o recurso a duas línguas não deixa de ser uma metodologia que permite alcançar objectivos, com efeitos em outros níveis e áreas do saber.

Assim, o facto de o contexto angolano ser caracterizado por um estrato sociocultural multilinguístico submete a sua escola a uma convivência heterogênea e a adopção de uma política nacionalizante que atenda a um modelo de educação e ensino. Atendendo a sua vantagem político-administrativa, impôs-se a língua portuguesa como a única oficial do país (Decreto N.º 77 de 9 de Dezembro de 1921, Angola, 2010), sendo actualmente uma posição questionável na mentalização e afirmação social num contexto adverso — essencialmente bantu. Contudo, é na extensão da educação — ensino —, onde, para além do seu valor congregador e promocional, encontra ainda reticências quanto à replicação da variedade europeia (idealizada) face ao contexto de diglossia e de bilinguismo individual/social.

A literatura ao realçar o seu declínio, Marques (1983), Gaspar *et al* (2012) e Agostinho Eduardo (2019) destacam a insuficiência de *input* da cultura nativa (europeia), a pouca exposição e a sua descontextualização, associada à uma metodologia não direccionada, enquanto uma língua segunda. Daí, o INIDE (2013), em harmonia com aquelas pesquisas recomendar a adopção de uma metodologia que permita a transição pacífica e consciente da experiência resultante do convívio familiar, para as experiências e conhecimentos resultantes de instituições formais. É nessa perspectiva que se justifica o projecto de inserção das línguas nacionais no ensino a partir de 2010-2011, sendo a formação do professor bilingue um desafio para o êxito da modalidade.

#### IV. A FORMAÇÃO DO PROFESSOR E A SUA ESPECIALIZAÇÃO

Em qualquer subsistema de educação e ensino, o professor é um vector de quem se exige e espera referências positivas que ajudem a moldar o comportamento dos seus educandos e, com estes, a comunidade. Razão para dele se esperarem os

papéis de educador, pesquisador, instrutor e o de mediador de conflitos resultantes do processo de ensino e aprendizagem.

Com a actual revolução tecnológica, o papel tradicional e secular a ele confiado é hoje objecto de questionamento, porque a oferta político-ministerial, por exemplo, tende a não ser satisfatória para toda a comunidade apesar do seu impacto (Pardal & Martins, 2017) e, por meio de mudanças, desloca-se para a complementaridade. Este dinamismo, em meio a crise de valores e inovações sociais, justifica-se porque tanto a escola tanto o professor já não são os únicos detentores da arte de ensinar tão pouco do conhecimento pedagógico. Mas, é ainda ao professor que a comunidade (progenitores, explicadores e encarregados de educação) reserva a continuidade do papel por ela iniciado em direcção à promoção do desenvolvimento individual e colectivo. Porque, apesar de épocas, visões e de contextos diferentes, a necessidade de um profissional actuante, afectivo, humilde e que valoriza a experiência da comunidade como parte de um saber comum, tal como reconhece Gadotti (1999) citado por Nóvoa (2022), é intrínseca ao seu desenvolvimento.

Em Angola, como efeito da globalização e da reforma educativa iniciada em 2002, há uma crescente preocupação em relação à formação de professor (inicial e contínua), isto é, de um professor que seja da e para comunidade, cuja multiplicidade de relações permita efectivar as políticas educativas e de ensino. É nesta visão que a formação constitui uma das prioridades no âmbito dos desafios de reconstrução do país, segundo a Lei de Bases do Sistema de Educação e Ensino N.º 17/16 de 07 de Outubro de 2016, artigos n.º 42- 48, com responsabilidades acrescidas para instituições viradas à especialização de professores com sólidos conhecimentos (científicos, pedagógicos, práticos), enquanto perfil favorável à materialização dos interesses.

Reserva-se ao ensino secundário e ao ensino superior pedagógicos o ónus formativo de professores; no primeiro caso, virada às necessidades de educação pré-escolar, ensino

primário, I ciclo do ensino secundário (regular, de adultos, educação especial), ampliando e consolidando os conhecimentos e as capacidades adquiridas no I ciclo. Já a profissionalização é assegurada pelos magistérios, por meio de cursos em distintas especializações, enquanto a formação contínua por centros de formação de professores e outras instituições. Assim, artigos nº 49-51, projecta-se ao nível do ensino superior pedagógico a dinamização e moldagem daqueles profissionais, bem como os de outras especialidades para atenderem as necessidades, interesses e os objectivos de docência em todos os subsistemas de ensino, sendo a formação contínua extensível a outras instituições autorizadas.

Grosso modo, augura-se uma formação profissional com qualificações diferenciadas que incida sobre competências mediadas por profissionais experientes. Porém, é sobretudo ao nível do ensino superior, inversamente ao primário ou secundário, onde a maior exigência e responsabilidade tende a ser transferida, enquanto espaço para lapidação dos perfis. Razão para entre os factores concorrentes, ser o contexto de aquisição de conhecimentos onde persiste a primeira e imediata objecção às intenções políticas, consubstanciado ainda na insuficiência de investimento *vs* motivação e pesquisa na cadeia formativa.

Nesta prática, autores como Cardoso e Flores (2009) salientam limitações e inadequações nas competências do professor do ensino geral, derivadas da forma de apropriação de conhecimentos, para além da forma de administração dos mesmos na formação inicial, defendendo o seu domínio na qualificação dos professores. Apesar de se tratar de níveis diferentes, a problemática ao ser cíclica e extensiva aos cursos de licenciatura, reconhecem a tendência para metodologias expositivas, repetições, reprodução de conteúdos, para além do tempo pouco significativo reservado ao estágio do docente — conjuntura aditada por Leite Barbosa (2003) como uma contradição de ordem e sequência quanto à profundidade e ao tempo.

Portanto, entre a política e a prática, é na ineficiência desta que se solicita uma atitude diferenciada dos principais agentes e entidades, alinhando-a a construção e ascensão de uma sociedade do não para a de conhecimento. Porque, é na multiplicidade de fontes de informação e de conhecimento que a escola, mirando também o professor, é chamada a adequar não só os objectivos e os interesses, mas as estratégias interactivas, contextualizando-as, assim como, aos aspectos etnoculturais e, conseqüentemente, multilinguísticos enquanto elementos integradores.

## V. A FORMAÇÃO DO PROFESSOR PARA O ENSINO BILINGUE

O sistema de ensino angolano é uma estrutura unificada. Tanto os interesses quanto as suas finalidades se concretizam por sequências de subsistemas e níveis, cujas instituições formativas têm a obrigação de “observar elevados padrões de desempenho e alcançar os melhores resultados” (Angola, 2016, Artigo nº 14). Porque a necessidade de formação focada numa permanente colaboração institucional, actualmente, requer políticas dinâmicas que atendam as exigências no âmbito da superação de homens com base nos modelos adoptados.

Há cada vez mais o entendimento de que as mudanças de paradigmas, que incluem o sistema de ensino angolano, requerem um constante repensar sobre uma sala de aula mais inclusiva, universal e democrática cujo orientador ajude a atender a diversidade de necessidades educativas, essencialmente, focadas numa interacção activa e afectiva (professor, aluno, família e comunidade). Porque, dada a pressão e influência da informação e do conhecimento virtuais, o espaço requer muito mais complementaridade, se se tiver também em atenção os desafios relativos à desestruturação familiar e desmoralização da sociedade.

Segundo Agostinho Eduardo (2022), é com base neste marasmo *vs* dinamismo que o ensino formal, na província da Lunda Norte, proporciona uma nova consciência sobre a ascensão individual, familiar, institucional e, com isto, a necessidade de a nova geração diferenciar-se das

anteriores por meio de níveis e de novas qualificações técnico-profissionais, o que torna o processo de formação de professores uma constante preocupação.

A acção formativa ao se sujeitar aos diferentes interesses socioculturais transcende a função primária de transmissor. Porque, tratando-se de um contexto, como o descrito, além de moldá-lo para uma consciência globalizadora, deve igualmente levá-lo a ultrapassar as imposições limitadoras por aquisição de competências adicionais que o consciencializem para a inclusão daquela diversidade. Este cenário indica que os desafios de quantificação e qualificação do professor dependem, de certo modo, das necessidades educativas actuais e futuras, o que requer uma profissionalização com recurso a línguas para a multidisciplinaridade.

Dada a heterogeneidade que configura a província; famílias com históricos des e favoráveis, o que associa os alunos provenientes do primeiro grupo<sup>8</sup> a situações de adaptação escolar e, conseqüentemente, à sua vivência pouco significativa, a sua rede escolar (mais de 172 instituições) leva a admitir que a presença de um professor impregnado na cultura e língua materna *ucokwe* é, a partida, um capital que venha a facilitar a inserção, partilha e consolidação de experiências dos alunos e a construção de saberes na base da língua de escolarização – *português*<sup>9</sup>.

Assim, a distribuição do mesmo nas escolas - modelo constitui uma oportunidade para uma reflexão sobre o seu papel e sobre os critérios de formação (inicial e contínua) para o desafio de ensino bilingue; cumulativamente, ser bom falante daquelas línguas, isto é, sendo ou não falante nativo (Timbane, 2015), desde que reúna competência comunicativa aceitável e proficiência na língua *ucokwe*, enquanto elemento de imersão na cultura do aluno. Entende-se que desta forma o professor sentirá a obrigação de superação para nela comunicar, *cujos* conhecimentos e capacidades devem ser desenvolvidas para

eficácia na sala (QECRL, 2001). Junta-se a isto o desenvolvimento de competências metodológicas que o especializam, uma vez que o conhecimento empírico deve ser colmatada com o novo (Freire, 1921).

Nesta concepção está o guião simplificado para o curso Iniciação ao Ensino da Leitura (IEL) que visa metodologicamente auxiliar o professor de modo que saiba articular os distintos discurso na língua *ucokwe*, bem como explorá-los para o acesso ao conhecimento. Contudo, uma observação sobre a fase de experimentação ilustra que é a componente formativa do professor que condiciona a implementação da língua nacional *ucokwe* quando na prática se analisam certas insuficiências; desde a necessidade de superação de proficiências linguísticas e profissionais do professor à tendências para a desistência do projecto (Agostinho Eduardo, 2022).

Portanto, dada a cadeia formativa (inicial e contínua), é aqui onde se julga importante um repensar sobre uma formação linguístico-profissional diferenciada, com a intervenção do ensino superior, porém, direcionada para um bilinguismo assente na diversidade de metodologias activas, tornando o professor um agente interventivo numa prática mais colaborativa.

## VI. METODOLOGIA

No âmbito do projecto de implementação das línguas nacionais no sistema de ensino<sup>10</sup> e, conseqüentemente, de experimentação do ensino bilingue (INIDE, 2011), foca-se aqui a formação do professor bilingue na província da Lunda Norte para a sua compreensão (Marconi & Lakatos, 2003). A continuidade desta exploração é uma consequência do acompanhamento do projecto (diálogo com um responsável do INIDE/Luanda; com os chefes de departamento de ensino geral, Ex.- coordenador do projecto, directores de escolas, professores e a observação

<sup>8</sup> Educandos de camponeses, desempregados, órfãos, de fuga à paternidade, mães e pais solteiros, etc.

<sup>9</sup> *Ucokwe* e *português* por serem as principais línguas na região.

<sup>10</sup> Prevê a experimentação, implementação/generalização e a consolidação, inicialmente, no ensino primário, a 1ª a 6ª classes em escolas modelo, segundo o Projecto 292/GDG do INIDE, (INIDE, 2015) que amplia o plano de estudo para onze disciplinas.

de aulas na Lunda Norte), que inclui consultas documental e bibliográfica, o que permitiu reflectir sobre a formação e distribuição de professores (incluindo formadores).

Se por um lado, de acordo com os 11 entrevistados, a *fase de experimentação* do

projecto se caracterizou por várias dificuldades, que incluem a insuficiência de professores (Agostinho Eduardo, 2022), é inegável o seu efeito na formação e redistribuição do professor bilingue ao nível da rede escolar se se tiver em conta os dados aqui apresentados<sup>11</sup>.

*Quadro 1:* Início de formação de professor bilingue

Fases	Período	Acções	Grupo alvo
Arranque do projecto	2010	Formação de formadores	2 indicados 1 voluntário
Experimentação	2011 2013 -2014	Seminário / início do ano lectivo (Não realizado) Seminário (Não realizado)	24 formadores locais 68 professores
Generalização no Ensino Primário	2015 -2018	Nenhuma	-----
Generalização no Ensino Primário e experimentação no I ciclo	2019 -2021	Seminário (realizado em 2019)	13 professores bilingues

Se por um lado a análise dos factos nos convida ao seu aprofundamento, aplicando os métodos, mais do que (im) precisão na sequencialização do tempo, os dados indicam, segundo o autor, que após a formação de formadores provinciais a fase de *experimentação* da língua ucokwe incidiu sobre as escolas - modelo (Complexo Escolar nº 10 – Mwanguvo, Complexo Escolar Taxa Barragem, Complexo Escolar nº 14 Ex - Recinto dos Cavalos, Complexo nº 4 do Bairro Norte e Complexo Escolar Bairro Sul), sendo o arranque, 2011- 2014, assinalado pela insuficiência de condições para a capacitação de 24 formadores locais e de 68 professores (em 7 dias); 36 do município do Chitato e uma prévia desistência de

professores dos municípios de Lucapa e Cambulo, e, por conseguinte, os seus efeitos (adiamento) quanto à extensão do projecto em outras escolas. Ora, os números tendem a espelhar, de certo modo, o grau de interesse e necessidade de formação contínua, sendo significativos a continuidade do projecto e, de acordo com o coordenador, para o início gradual da fase de *generalização* no Ensino Primário entre 2015 - 2018.

Em oposição às fases anteriores, a correspondente a 2019-2021, teoricamente, período relativo à *generalização* da língua ucokwe no Ensino Primário e à *experimentação* no I ciclo, entre várias expectativas, concretizou-se a formação de 13 professores<sup>12</sup>, incluindo formadores municipais, num período de 10 dias, sendo ainda uma miragem e pouco impactante a julgar pela inexperiência e pela rede escolar primária.

<sup>11</sup> Concedidos pelo ex-coordenador provincial do projecto de inserção das línguas nacionais no sistema de ensino na província, durante a entrevista, aos 14/09/2019 no Gabinete Provincial da Educação. Recorreu-se a um telemóvel STYLO-BOLD e um Bloco de Notas com questões previamente elaboradas. A autorização para o uso das informações e dos dados reservou-se exclusivamente à investigação científica. Também foram entrevistados 5 professores que leccionam nas escolas – modelo ao nível do município do Chitato, capital da Província da Lunda Norte.

<sup>12</sup> Lucapa2, Cambulo 2, Chitato 7, Louva 1, Lubalo 1, Cuango 2, Xamuteba 1, Capenda Camulemba 1.

Por isso, quer a observação (consulta e diálogo com os directores e professores ligados ao projecto), quer os dados apontam para uma estagnação na fase de *generalização* porquanto não se vislumbram iniciativas significativas que dinamizem a qualificação de professores para a extensão da modalidade, com base nas possibilidades metodológicas de IEL e, conseqüentemente, para a elevação dos padrões de desempenho em direcção aos resultados desejados (Angola, 2016). Num contexto que se vai caracterizando por decadência no uso da língua de escolarização é espectável que o défice linguístico-comunicativo afecte grandemente a metalinguagem, — factor essencial para uma efectiva triangulação socializadora e afectiva entre a família-aluno-professor, professor-conteúdo-aluno, aluno-conteúdo-aluno, professor - reflexão -instituição, professor-pesquisa-sociedade e vice-versa.

Neste sentido, a formação ao ser igualmente dependente da proficiência comunicativa, sobretudo na sua língua materna, torna-se uma crescente preocupação a julgar pela subvalorização das línguas nacionais (indefinição do estatuto), dado o preconceito linguístico (efeito de aculturação), o que tende a arvorar a pouca proficiência nas duas línguas. Justificação para o recurso a elas pelo professor enquanto factor de familiarização e de afirmação cultural. Destas insuficiências espera-se a dinamização dos diferentes interesses e objectivos estruturantes de modo que a formação reflita as mudanças desejadas (Pardal & Martins, 2005), uma vez que do professor depende também a materialização do projecto pela exploração das competências linguísticas, em particular, de uma metalinguagem, sobretudo, tal como defende Cummins (1991), na possibilidade de modificação do *input* da realidade local.

## VII. CONSIDERAÇÕES GERAIS

O actual contexto multilinguístico indica que o início da escolarização, com recurso às línguas nacionais, caracteriza-se por uma timidez, atendendo à alteração do plano curricular (11 disciplinas) e, conseqüentemente, à iniciação do ensino das línguas nacionais como uma

necessidade de o Ministério da Educação (MED) corresponder aos compromissos internacionais e nacionais no que diz respeito aos direitos culturais e educacionais. Porém, a implementação das línguas nacionais constitui um marco para novas atitudes e reflexões, tendo em conta as exigências relativas ao enriquecimento de experiências, competências linguísticas e profissionais do professor.

Infere-se daqui que é ao nível da regionalização onde as dificuldades tendem a “testar” a vontade política educativa e de ensino. Porque os contextos de implementação e de generalização apontam para a necessidade de maior engajamento dos actores na modalidade, cuja prática se efective por via de línguas em situações reais de vivências da comunidade e a formação de professores uma prioridade.

É inegável a desproporcionalidade entre a intenção política e a formação do professor nesta tentativa de inclusividade linguística, deixando claro a necessidade de maior atenção à realização do perfil profissional do novo professor, por meio de metodologias diferenciadas, de modo que as distintas fases de implementação ocorram numa verdadeira inovação/melhoria de práticas (domínio de línguas), à supressão de insuficiências comprometedoras do projecto, a julgar pela expansão da rede escolar (Escola Pedagógica da Lunda Norte e os Magistérios) e pelas potencialidades económicas do país.

Portanto, havendo um casamento entre a formação do professor bilingue e a natureza da educação (formal e informal) existente na comunidade, *como a sociedade pode responder a este ensino, uma vez tratar-se de um desafio, essencialmente, de responsabilidade regional?*

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# Reflections of Hybridised Cum Global Facet of Identity Beyond the Colonial Discourse of Other

*Dr. Mudasir Rahman Najar (Researcher)*

## ABSTRACT

The main focus of this paper is the dynamic changes that keep on occurring in identity formation. Encountering the colonial masters for their suppression and victimization of the colonized world as 'other', the flush of resisting power in the mind of the colonized people that leads to certain reclaiming of lost identity status. So, in this state of struggle, many additional changes also happen. The perplexed discoveries related to colonial conspiracy against the Asian ethnocultural legacy has been exposed by Edward Said with magnified glimpses on the suppressed societies. Their efforts paved the way for protest literature in Africa, India and in many other previously occupied nations. Rereading and reinterpreting some colonial text in a deconstructive perspective proves physical and psychological enslaving of colonized done by colonizers.

*Keywords:* power, colonized, colonizer, governance, rights, politics, identity.

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## ABSTRACT

*The main focus of this paper is the dynamic changes that keep on occurring in identity formation. Encountering the colonial masters for their suppression and victimization of the colonized world as 'other', the flush of resisting power in the mind of the colonized people that leads to certain reclaiming of lost identity status. So, in this state of struggle, many additional changes also happen. The perplexed discoveries related to colonial conspiracy against the Asian ethnocultural legacy has been exposed by Edward Said with magnified glimpses on the suppressed societies. Their efforts paved the way for protest literature in Africa, India and in many other previously occupied nations. Rereading and reinterpreting some colonial text in a deconstructive perspective proves physical and psychological enslaving of colonized done by colonizers. The intellectuals have interpreted the colonizer-colonized encounter as bilaterally affected. Manipulating some situated conditions like diaspora and globalization, the colonial masters want to prove their pretentious goodwill for another world. The close contact of coloniser-colonised effaces the so-called essential differences amongst the various racial classes over there. Therefore, the reclamations for the lost identity elevate the intensity of struggle for the determinations of global representations with the relevant identity. Bhabha provides new insight into the colonizer-colonized relationship by using the terms like 'hybridity,' 'mimicry,' to give a broader deconstructive prospect of culture and identity. Undoubtedly, the suitable appropriation of deconstructive philosophy and other ideas by postcolonial scholars is a great success in the colonized world with the re-claiming of identity. Further research is required in the field of knowledge production and power structures of European empires in order*

*to secure a respectable and rightful place for the colonized people in the global context.*

*Keywords:* power, colonized, colonizer, governance, rights, politics, identity.

## I. IDENTITY FORMATIONS VIS A VIS POSTCOLONIAL EVENTUALITY

The process of longterm governing the foreigners on the mere pretext of civilising them is trying to change their identity by preaching them new principles of new logic. There also occurs reflexive change in the subordinates against this unjust suppression by the colonizer. The process of creating the suppressed one as 'other' below the dignity of the colonizer is the causative factor for the debate of identity. The broad concept post-colonialism has explored identity with the other social-cultural and intellectual discussions. This is evident with comments from the various critics. For instance, the spelling of the term post-colonialism or postcolonialism has also become debatable among critics. They discuss the significance of "post" and whether to put hyphen (-) after "post" or not. In this context, Bill Ashcroft et al. comment in *The Empire Writes Back*,

The hyphen in the postcolonial is a particular form of 'space clearing' gesture (Appiah 1992: 241), a political notation which, in a very great deal, says about the materiality of political oppression (198).

They emphasize that the hyphen, in the term post-colonialism, is an alternative force for restoration and regeneration of post-colonial societies. Ania Loomba, Professor of English at University of Pennsylvania, in her book *Colonialism/Post colonialism*, expresses the significance of 'post' as: "the prefix 'post' complicates matters because it implies an 'aftermath' in two senses--temporal, as in coming after, and ideological, as in supplanting.

It is second implication which critics of the term have found contestable. . ." (12). Robert J. C. Young in his book, *Postcolonialism: An Historical Introduction*, also discusses about it as: "Postcolonialism" commemorates not the colonial but triumph over it. The 'post' marks the many remarkable victories that should not be allowed to fade into the amnesia of history"(60). A Marxist, post-colonial critic, named Aijaz Ahmad, discusses power with the age-old conflicts between hierarchy and equality. With issues like class struggle and identity, Aijaz critically studies postmodernism and post colonialism. Commenting about term 'post' in one of his lectures, "Postcolonial Theory and the 'Post-' Condition", he writes: "prefix 'post' in these terms not only partakes of a generalized 'post-' condition but contains within it a sense of that ending, even if that sense of endings produces in most of them not a sense of loss but a feeling of euphoria" (364). These views enhance the validity of this concept post-colonialism for its extended project.

## II. EMERGING TRANSITIONS IN COLONIAL THOUGHT

Many changes happened with the newer interpretations of the social phenomena and even to the extent of emerging philosophies. This is also analysed via psychological, semantic and intelligency laws and is used to understand the ideologies embedded in the texts, by relating them to the historical evolution. This has revolutionized European thought that resulted in such literary and philosophical movements as Post structuralism, Postmodernism, Deconstruction and Post-colonialism. The rapid expansion of the colonial empires grew into an excess of exploitation of human and material resources of subject countries. All this did not go unnoticed; this practice of exploitation was discussed by many prominent thinkers time after time. Adam Smith, the Scottish economist and a moral philosopher, wrote *The Wealth of Nations* in 1776. In the introduction to the book, we find an inquiry into the nature and causes of wealth of different colonial empires. In response to the political economy at the beginning of Industrial Revolution (1760-1785), Smith studies the

production, division and wages of the labour. He exposes the manipulated causes and distribution of labor and wealth as per the class consciousness. This helps to unveil the political and capitalist policies against working class. The texts like these lead to Neoclassical Liberalism of late nineteenth century that raises slogan to reduce the power of government and favor the interest of self-development of an individual, irrespective of class. This gives impetus to post-colonial studies. Karl Marx (1818-1883), a German philosopher, also questions the economic perspective of society. His socio-economic theory developed in the nineteenth century; it was based on materialistic interpretation and exploration of exploitation, and social change. Marx was critical of capitalism. He believed that there is always class dominance on the basis of material that is economy.

On this assumption, he found capitalism as a refined form of feudalism. He advanced the idea of a classless society. These studies discover that dominating class creates such a sphere in which working class can think of becoming rich but would never be like their masters. To strengthen the statement, J. C. Young says that, "The term post-colonial was, therefore, first identified with Marxist practice which supports the argument for continuing to identify them [post-colonial states] closely. (59). By the early twentieth century, colonization had begun to face opposition. The excessive greed of the colonizers caused differences among themselves that eventually led to two world wars. It put the colonial motives to a hard test. Their sacred mission of civilizing, which Kipling calls as 'White Man's Burden,' proved to be a means of just fulfilling their ambitions. Hence, we can say that in the duration of two world wars, European empires gradually got weakened and started to vanish from the existing powers. That gave an impetus to post-colonial perspectives among the various regional literatures. So, there is also a good scope for a colonized people where they can create a self-sufficient living world of equality.

### III. THE DISSENT OF COLONISED AGAINST THE EMPIRE

A great social scientist and a critic, Michel Foucault, also an influential figure on post-colonialism, practised the concept of discourse that as verb means to speak or write authoritatively. This is indicated as a literary concept, that refers to a body of strategic knowledge and may be partial to constitute certain values. With the help of this, they set behaviours for people in the colonized or post-colonized societies and define people on the basis of these values. His concept of discourse leads to the existence of Said's concept of Orientalism. In their book, Ashcroft et al discuss and quote Foucault in this context as,

Truth is what counts as true within the system of rules for a particular discourse; power is that which annexes, determines, and verifies truth. Truth is never outside power, or deprived of power, the production of truth is a function of power and, as Foucault says, 'we cannot exercise power except through the production of truth' (165).

The release of the colonized from the colonizer gave them a feeling of freedom. However, the colonized was caught in another trap, i.e. neo-imperialism. There is no doubt that they took some steps towards self-independence, a way for decolonization, yet their institutions-- law, politics, religion--of governance are still intervened by European policies. After years of struggle for independence, most of European colonies like India, had apparently gained freedom by 1960. But, the colonial policies of 'divide and rule' are working covertly to keep boundaries that were there in the colonial times. This resulted in the ethnic and regional rivalries. After getting rid of the colonizers, the inhuman and unjust activities continued, mostly against minorities as in India and Pakistan; and sometimes by minorities as in South Africa by European settlers. J.C. Young in his book, *Post colonialism: An Historical Introduction*, refers to persistence of colonialism even in free and independent countries. He writes,

Post colonialism's central preoccupation is with the politics of the 'fourth world' still colonized within many officially decolonized countries. . . . The problem is compounded by the fact that at independence, power often passed to a native bourgeois elite produced during the time of colonialism that took on board many western presuppositions; for examples, the idea of nation state-itself (Young 59).

As a result, post-colonial dilemmas of identity and ethnic values come to surface, because every individual has first a personal identity and this identity gets fully shaped and constructed by social values, morals and taboos around it. By this, we agree to say that leaving three worlds behind, there is another section of people living in poverty, minorities and disputed territories within the postcolonial states. Under the intractable conflicts and unjust social hierarchy, this section is still oppressed and their voice is deliberately overlooked and not heard.

So, by the dissent of colonised people in the various social cum political phenomena. Most of the people are shocked with the unequal scale of rights and claims. By this, the binary (colonizer-colonized) has been debated and the ways under which the unjust use of power has been challenged both politically as well as intellectually.

### IV. DIASPORA, GLOBALISATION AND IDENTITY

The trace of diaspora is accepted around the eighth to sixth BC and has its origin in Jewish migration. Jews had their home in Judea, now Israel. The Jewish diaspora, first known diaspora, suffered invasion from Assyrians and later from Romans that resulted in their exile. The invaders set their own colonies there and displaced the natives. Besides, the inhuman slave trade in Africa, and Indian indentured labour in Africa left people dispersed across different regions. Diaspora is not just the geographical displacement but leaves behind the deep questions of identity formation. In some colonies, the natives were not forced to leave their

homelands. They remained there, but their own place did not belong to them. Because, everything was in the control of the colonizers, they have been deprived of their human rights. This concept of diaspora does not seem to have any concern with identity, but the root-cause of diaspora is itself under the expansive study of identity development whether in case of slavery, indenture, willing or forced migration and settlement. Due to the major political upheavals inclusive of two world wars, the causes of physical dislocation, psychological disintegration and ethnic and national identities of migrants are thoroughly debated in a broader perspective.

Moreover, the term globalization is much debated vis a vis the transitions in identity. The term has been critically interpreted as neo-imperialism in disguise has created a psychological sensibilities among the colonized. The strategic policies and principles of both are akin to exploit post-national tendencies of the colonized for development. Globalization is a Western movement of extending trade in the name of technological advancement. Telecommunications are used to offer so-called multiculturalism but under it, lies the policies of cultural relativism. No doubt, it provides some innovative developments, but it carries the tools of European imperialism and way of living. Hence, imperialist project comes to forefront under the garb of globalization and manages the exploitation of market, natural resources. Ania Loomba in *Colonialism/ Post colonialism*, discusses the strategies of colonial empires for both material and power. He explores the colonial process vis-a-vis indentured labor and West Indian plantation, and refers to term 'capitalist colonialism' as a strategy of imperialism. He writes:

"Direct colonial rule is not necessary for imperialism in this sense, because the economic (and social) relations of dependency and control ensure both captive labour as well as markets for European industry as well goods (11).

With the above ideas there also happened a change in human behaviour with the physical advancement with the surrounding agents.

Besides, globalization is a significant threat to ethnic characteristics and spiritual heritage of East. Because of their economic supremacy, Europeans claim for cultural superiority and challenge the contrasts in identity assertiveness. The trends in globalization are mostly Eurocentric, rarely for the benefit of the colonized. Postcolonial scholars are sceptic about this phenomenon and consider it as another discursive challenge from Europeans. They think it as a creation of colonialism, but by other ways. This process by other means creates a space for the integration of newer identities with the close cultural interactions and the assimilations therewith.

## V. LINGUISTIC TOOLS TO RE-CLAIM AND RE-FORM IDENTITY

In the discourse of power treats knowledge as a tool to conquer and control others. Knowledge, according to Foucault, is basically never impartial and unintentional, but there are set objectives behind it. Post-colonialism has emerged with specific tools or strategies that help critics and writers to reclaim and reconstruct certain values and ideals in societies that were once colonized. Bill Ashcroft et al. write as:

Marginality is the condition constructed by posited relation to a privileged center, an 'Othering' directed by the imperial authority. But the abrogation of that center does not involve the construction of an alternative focus of subjectivity, a new 'center'. Rather the act of appropriation in the postcolonial text, issues in the embracing of that marginality as the fabric of social experience (103).

With this reference to post-colonialism, it is apparent that minds in the colonized society have protested against the colonial injustice. They initiated strategies to destabilize the invading policies of European imperialism. It enhances the strength of the colonized and gives them a space for protest against the colonizers. This re-organizing the knowledge favours the oppressed people to voice their concerns. The alternative ways of socio-political and cultural

practices support to restoration of post-colonial society.

Religious texts are fundamental sources of knowledge and plays a vital role in identity assertion. Naturally, they have their bearing on the other fields of expertise. The Eastern ways of approaching religion are more spiritual than the Western. European attitude towards religion is secular and more liberal. They have a more atheistic and agnostic approach rather than theistic. They believe more in reason and practical. This clash leads to an argumentative confrontation between the East's theological practices and the West's rationality. With the emergence of secular tendencies, European people started to question the sacred and tended to privilege the secular. They tried to degrade sacred by relating it to ignorance, backwardness and primitivism. The power of postcolilty can prevent subjects from temptations by the colonizer's culture. This also leads to further progression with different identity formations beyond essentialism.

As we know that language plays a vital role in identity assertions, Post-colonial writers are keen to problematize language in history, literature, criticism and critical theory; their languages are considered the languages of protest. They are often in search of ways of analyzing and scrutinizing other means of composing the ideals, morals, fashions of society against European ways. Mostly, the post-colonial writers use the language of the colonizers to expand the sphere of their thinking and make their voices more appealing. Following this shift in their mode of communication, they started to translate their indigenous literature into the English language. In this way, they can articulate their minds well. It has indeed served as a powerful medium for national and ethnic integration. The practices like these are experienced in numerous regions of the world especially in Africa, Asia and Latin America to meet their original histories of ancestors for betterment and harmony of the self and its extreme demands from society. This freedom of expression is vital to realizing their dream of self-governance and individual and social space.

Hence, a peculiar shift triggers a change in identity developments.

## VI. RECONSTRUCTIVE REALM OF AFRICAN ASSERTION FOR NATIVE IDENTITY

In the developing process of the concept of post-colonialism, thoughtful and observing minds started to study, write and preach in favour of the colonized. A few among them will be introduced here as follows. a. Aime D. Cesaire Aime D.Cesaire was born in 1913 in Martinique, Africa, then a French colony. He is an African playwright, poet and post-colonial critic. In 1941, Cesaire with his wife founded the literary review, "Tropiques" with the help of other intellectuals to challenge the cultural invasion of the West and to restore the alienated and depressed African selves. Besides, Cesaire with Senegalese President Leopold Senghor and other scholars started 'Negritude Movement' in France in 1930s. They encouraged writers and people of Africa to embrace their hereditary values, accept the fact of being black, recognize the identity and history they have. While studying racial politics, Casaire wrote plays and poetry with ethnic and national spirit in them. His epic poem, (Cashier d'um retour au pays natal 1939) translated as Return to my Native Land, (1969) by John Berger and Anna Bostock is a post-colonial work. Cesaire says: Disinterring memories, all that was buried, bringing it back, presenting it so that it bursts forth fully formed up on the world - I think this sends an important signal. To express not suppress, the force of one's reaction, to wield, reinvigorating words as a miraculous weapon against the silenced world, freeing it from gags that are often imposed from within ("The Liberating Power of Words"). Cesaire has faith in his literary objectives. Influenced by surrealism, he uses the technique of distorting factual incidents to take his readers in the new version of reality, i.e. post-colonial reality. Therefore, through his practices, Cesaire opened the ways towards the hopeful future of African people. b. Chinua Achebe Chinua Achebe is a prominent African writer, born in 1930 in Nigeria. He is one of the best postcolonial novelists and critics.

Achebe writes in his famous literary essay, "The Novelist as a Teacher" (1965) as:

"I would be quite satisfied if my novels (especially one set in the past) did no more than teach my readers that their past with all its imperfections was not one long night of savagery from which the first Europeans, acting on God's behalf, delivered them" (African Writing).

The whole essay serves as a request to African writers to be teachers of their culture to restore it in crisis situation. It must refresh the repressed minds of colonialism. His anti-colonial idea, with systematic alternative ways against colonial impact, is praiseworthy in post-colonial world. Chinua Achebe in his masterpiece, *Things Fall Apart* (1958), presents the magnified view of colonial impact on the Igbo culture. Its title is taken from Yeats' poem *The Second Coming*, which is used symbolically for disintegration of African values and ideals with imperialist and colonial strategies of Europeans. Through the typical African personality of Okonkwo, African ethnic style of living is projected in the novel. Besides, the whole process of colonial policies is magnified for readers so that African readers will ponder over them and learn from their mistakes. This will also make them re-construct the culture and rectify the errors in the ethical, rational and political prospects. Achebe instructs his readers how by having weaknesses in their own native culture and institutions, Europeans succeeded in conquering them. Talking of imperialistic activities, Achebe writes in the twentieth chapter of this novel:

The white man is very clever. He came quietly and peaceably with his religion. We were amused at his foolishness and allowed him to stay. Now he has won our brothers, and our clan can no longer act like one. He has put knife on the things that held us together and we have fallen apart (Achebe 126-27).

Okonkwo, the main protagonist is shown in shocking condition while coming back to the homeland from his exile and observed the destabilization of Igbo culture. Thus, this is also a

nationalistic thinking that has been put in the text. c. Frantz O. Fanon. Fanon, born in Martinique, was a French Psychiatrist and post-colonial writer. He emphasized much on speaking native language. Fanon suggests in his works that if one speaks French they accept their culture. Because, culture is inherent in practices of language. He analyzed and revealed the sociological consequences of colonialism. Fanon believed that Whitman's value system depends on its negation of the blacks'. Hence, one's existential stability is dependent on the other. But, the psychological construct enforced by the Whites makes the blacks to suffer in their alienated selves. In his *Black Skin White Masks* published in 1952, translated by Lam Markmann. Fanon studies national culture and violence of colonialism for ethnic and national liberation. He focused on strategic policies of the colonizers and suggested collective violent nature against it. In this book, he glorifies the black identity with their sexual vitality, and exposes colonial exploitation. His works are full of argumentative practices in sociology and racial study. They have relatedness to language and reformation of cultural characteristics. This gives larger scope to the post-colonial debate that smoothens the way for reconstruction of societal processes and recovers the psychological disintegration of the colonized. Therefore, both the language along with cultural tendencies are pivotal and assertive in identity hybridisation.

## VII. THE NATIVE REFLECTION OF IDENTITY IN INDIAN CONTEXT

The changes also occurred in Asian thinking. In India, it has given birth to anti-colonial ideas in the most of texts. A group of writers and critics have tried to provide alternative ways of writing and incorporating ideas in their texts. Gandhi wrote *Sarvodaya* (Welfare for All), to convey his impressions of 'socialism' predominant in his other writings. It is his translation of Ruskin's *Unto This Last* (1862) that Gandhi speaks for and claims of Indian nationalist tendencies. He developed a new trinity to achieve his vision of a new non-violent social order: *Sarvodaya* (upliftment of all), *Swaraj* (self-government) and

Swadeshi (local economy). The term Sarvodya was appropriated for the political and social struggle against the colonizers. In this book, Gandhi tried to view the ideal state of India after releasing the country from colonial rule (Gandhian sarvodya). His *Hind Swaraj* or *Indian Rule* (1910), was an open rejection of colonial rule in India. He denied the so-called indispensable presence of the West (British) in India, and believed in the ways and style of native Indian living. He says in conclusion to this book, that only those people have patriotic spirit and belief in Indian history and culture, Who consciously believe that India is the best and the Europe is a nine-day's wonder. Such ephemeral civilizations have often come and gone and will continue to do so. . . . Those (colonized) only can be considered to be so imbued who, having experienced the force of soul within themselves, will not cower before brute-force (*Hind Swaraj*). Later, in the history of post-colonial literatures, the essential outcome has been the intellectual approach to adapt and appropriate the practice of writing in the colonizer's language. There emerge the indigenous theories in the English writings and incorporation of elements of nativity into postcolonial texts. One of the landmarks in Indian English fiction was recorded when a famous writer, Raja Rao came up with his assertive literary practices. Raja Rao was born in Karnataka in 1908, worked as a Professor at University of Texas from 1966 to 1980. His contribution is excellent to Indian English writings. Rao is of immense importance in post-colonial Indian English fiction. In preface to his first novel *Kanthapura* (1938), he gives a new field to explore by adapting a writing style in the English language. He presents Indian style by nativizing the English syntax, semantics and other structural aspects of novel writings. By projecting Indian words, scenes, myths and legends, he suggests replacing the Western notions of writing and giving it an indigenous touch. *Kanthapura* is set in 1920s and 1930s. In its preface, he writes:

One has to convey in a language that is not one's own, the spirit that is one's own. English is really an alien language to us. It is the language of our intellectual make up - like Sanskrit and Persian was before - but not of

our emotional make up. . . . And our paths are paths interminable. The *Mahabharatha* has 214,778 verses and the *Ramayana* 48,000. Puranas there are endless and innumerable... We have neither punctuation nor treacherous 'ats' and 'ons' to bother us - we tell one interminable tale. . . (Rao 5-6).

Rao talks of filling the gap between the two languages (Native and English) and the experiences and practices in them. This can only be done by adjusting the structural patterns of two languages. In the preface, Rao speaks for Indian national discourse; he indicates that a shifting and re-shifting of the English language in terms of syntax, semantics, structure, length pattern of sentences can give our literary work the potential of nativity. That means in order to express our emotions and experiences comfortably; we have to adapt the English language. *Kanthapura* is considered a live symbol of postcoloniality in its native technique and presentation. Many critics like Menakshi Mukherji called *Kanthapura* a 'sthala purana', i.e. a pure legendary narrative. The novel is mythic in its background, and tells the tale of Indian freedom struggle in a small remote village of *Kanthapura*. By this technique, Rao takes his readers into the past struggle to free India from the colonizers and to re-gain her ethnic and political identity. Besides, he writes in his preface that writer's style must hold the essence of the experiences of Indian life that is to 'think and talk quickly'. That is why, the novel is full of colloquialism, characters are garrulous, there are long breathless sentences and literary translation of Indian words, for instance, Moorthy is 'like a noble cow', 'Gandhi man', etc. This novel is Indian in its sensibility, thematic concerns, and in its characterization. It would not be an exaggeration to say that *Kanthapura* is a minor classic of Indian English post-colonial writings and is contributing text in the claims of native identity in Indian context.

Later, R.K. Narayan, an Indian English novelist also presented colonial and post-colonial conflicts in his novel, *The Vendor of Sweets* (1967). From an ironic perspective, Narayan projects the identity formation in contrast with the English

traditions. The complexity of colonial process is shown as inherent in inter-generation experiences. In this novel, it is between the father, Jagan and his son, Mali. Narayan provides an opportunity to his readers to re-live the colonial experience and its effects on Indian tradition through the tensions within the family of sweet vendor, Jagan. Jagan is straightforward, traditional Indian nationalist. This traditional and honest shopkeeper is a follower of Gandhi. He treats the British rule and its imperialistic policies with mockery. Mali, who has gone to America, gets inclined to the alien culture there. He agrees with capitalist philosophy and other materialistic tendencies. Having cynical attitude towards conventional India, he criticizes the cultural values and ideals especially notions of marriage in his native land. Returned from America, Mali has a Korean-American girlfriend. Once, patriotic Jagan thinks her as Chinese and tells Mali that he cannot think of marrying Chinese, because, they have attacked our borders. Within the post-colonial framework, the crisis in the consolidation of ethnicity has been reflected in the plot of this novel. Narayan uses irony as a tool to view the inside world of his characters. He tries to highlight the changes occurring in society and zooms on Jagan's despair about his son lost in American culture. With these illustrations, it can be said that post-colonialism in Indian context has got nourished by its focus on adapting the colonizer's language for national consciousness. Thus, these various elements that are focussing on the native effect of identity are very crucial in the overall identity formations.

#### VIII. VICTORY OF SUPPRESSED PEOPLE BY WAY OF HYBRIDISED IDENTITY FORMATION

A highly valued breakthrough that occurs when the relation of master-slave is diffused to a more advanced state identity by way of syncretism, i.e. fusion of cultures, comes forth as a subject of study for post-colonial critics. In this context, Linda Hutcheon in her essay, "Circling the Downspout of Empire: Post-colonialism and Postmodernism" writes of post-colonialism, especially from Canadian perspective. She gives

an alternative interpretation of postmodernist movement as a critique of high modernism. Post-colonialism is antagonistic to high capitalism. She exemplifies Salman Rushdie with other writers as both postmodernist and post-colonial. She talks of "fugue state" a term from medical psychology, to describe a state when an identity of any person gets blurred. In the post-colonial perspective, she suggests that forgetting about colonialism is possible only through memory of postcolonial tendencies. Hence, the assimilation whether about the colonizer or the colonized into alien culture, is always possible. She referred to a New Zealander post-colonial critic, Simon During, who argued for the distinct post-colonial identity, as "uncontaminated by Universalistic or Eurocentric concepts and images" (1937 33). Linda Hutcheon contradicts with it and does not agree in her essay as referred above: Most postcolonial critics would oppose this (uncontaminated identity) as an essentialist, I would have to agree with them that the entire postcolonial project usually posits precisely the impossibility of that identity ever being "uncontaminated", just as the word postcolonialism hold within it, its own contamination, so too does the culture itself and its various artistic manifestation, in Canada as elsewhere" ("Circling the Downspout of Empire 171"). The above statement of Linda Hutcheon is very convincing, because in the contemporary world any person's identity gets formed with overlapping by other cultures.

Thus, this discovery helps critics to expand further the field of post-colonial studies. With the more expositions in the field of post-colonialism, a new aspect of post-colonial consciousness appeared. Presenting the innovative aspect of colonial trauma, Homi Bhabha discovers another version of identity formation in the contemporary world. He studies the effects of colonialism on identity and reconstructs a strategy to unveil the phenomenon where both the colonizer and the colonized get affected. This leads to the vindictive claims of colonized who has been ignored as 'other' so far. Bhabha's famous work *The Location of Culture* (1994), is usually considered complex and often obscure in thought-making. He

is influenced by Derrida, Lacan, and Foucault. In the field of criticism, he has used many new terms- 'hybridity,' 'mimicry,' 'ambivalence', etc. The cross-cultural relationship of the colonizer and the colonized was studied by Bhabha to put forth a state of identity when one is neither the colonizer nor the colonized but a hybrid identity. The culture of any nation is never pure and distinct. Likewise, the identity formed from these influences is mixed, and not distinct. The concept of 'hybridity' has emerged in the context of post-colonial process and leads to the idea of hybrid identity. Bhabha uses the word 'mimicry' to explain the motives of the colonizer that is how he desired of being imitated by the colonized. But the effect of this mimicry on the colonizer is psychologically disturbing. The colonial masters are suffering in a double vision, i.e. whether the colonized should imitate them or not. This rhetoric of creating a congenial space for a hybridised impression of identity is more expansive and greater in magnitude.

Finally, it is very determined to say that by this dialectic power of presenting the colonial process in an innovative way, Bhabha's work of analyses, synthesis and interpretation of identity formation is landmarking in the history of post-colonial scenario and has made everlasting impact on the notions of global identity.

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# The Tree of Life and Multiterritoriality: A Tripolar Dialectic of the Self, the World and the other in an Equal Relationship in the Eastern Plains

*Ronald Fernando Quintana-Arias*

## SUMMARY

With the objective of identifying the importance of the *Mauritia flexuosa* within the multiterritoriality of the Eastern Plains. An experimental methodology is carried out that combines situational analysis, genealogy, and the historical reconstruction of social phenomena in which 87 interviews were conducted with social leaders between 2019-2021. The results expose a phenomenological reflection of different forms and conflicts against the use of natural resources in the processes of territorial occupation. The analyzes indicate a scenario of biocentric and anthropocentric conflict, due to different conceptions of human rights and property in material territories of governance, property, multiterritorial and transterritorial relational space, which can be weighed from a body that captures dynamics and exposes lines of flight that They claim the biocentric.

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# The Tree of Life and Multiterritoriality: A Tripolar Dialectic of the Self, the World and the other in an Equal Relationship in the Eastern Plains

El Árbol De la Vida y la Multiterritorialidad: Una Dialéctica Tripolar del yo, el Mundo y el Otro en Relación de Igualdad en los Llanos Orientales

Ronald Fernando Quintana-Arias

## SUMMARY

*With the objective of identifying the importance of the *Mauritia flexuosa* within the multiterritoriality of the Eastern Plains. An experimental methodology is carried out that combines situational analysis, genealogy, and the historical reconstruction of social phenomena in which 87 interviews were conducted with social leaders between 2019-2021. The results expose a phenomenological reflection of different forms and conflicts against the use of natural resources in the processes of territorial occupation. The analyzes indicate a scenario of biocentric and anthropocentric conflict, due to different conceptions of human rights and property in material territories of governance, property, multiterritorial and transterritorial relational space, which can be weighed from a body that captures dynamics and exposes lines of flight that they claim the biocentric. It is concluded that seeing life beyond economic values makes visible lines of flight within the market captures that contribute to understanding the totality of life, the relationship between human reality-environment, and environment-multi territoriality, having the potential to lead to social transformation with a new political and economic organization that has the rights of the third generation as its axis, so that society dialogues with ecosystems (nature) in a mutualism of bodies and not in the economic parasitism that compromises the environment, ecological balance, and therefore human rights.*

**Keywords:** culture and development, human settlements and land use, social structure, politics-law and economy.

## RESUMEN

*Con el objetivo de identificar la importancia de la *Mauritia flexuosa* dentro de la multiterritorialidad de los Llanos Orientales. Se realiza una metodología experimental que combina análisis situacionales, la genealogía, y la reconstrucción histórica de fenómenos sociales en la que se realizaron 87 entrevistas a líderes sociales entre el 2019-2021. Los resultados exponen una reflexión fenomenológica de diferentes formas y conflictos frente al aprovechamiento de los recursos naturales en los procesos de ocupación territorial. Los análisis indican un escenario de conflictualidad biocéntrica y antropocéntrica, por diferentes concepciones de derechos humanos y de propiedad en territorios materiales de gobernanza, propiedad, espacio relacional multiterritorial y transterritorial, que puede ser sopesado desde un cuerpo que capture dinámicas y exponga líneas de fuga que reivindican lo biocéntrico. Se concluye que ver la vida más allá de valores económicos, hace visibles líneas de fuga dentro de las capturas de mercado que aportan para comprender la totalidad de la vida, la relación de la realidad humana-entorno, y medioambiente- multiterritorialidad, teniendo el potencial de llevar a la transformación social con una nueva organización política y económica que tenga como eje los derechos de la tercera generación, para que la sociedad dialogue con ecosistemas (naturaleza) en un mutualismo de cuerpos y no en el parasitismo económico que compromete el medioambiente, el equilibrio ecológico, y por ende los derechos humanos.*

*Palabras clave:* cultura y desarrollo, establecimientos humanos y uso de la tierra, estructura social, política-derecho y economía.

## I. INTRODUCCIÓN

*“Toda relación de un sí con otro sí requiere como punto de partida, no ese sí-mismo, un yo-el mío o el del otro, sino su común posibilidad trascendental, que no es otra cosa que la posibilidad de su relación misma: la Vida absoluta”* (Henry, 2000).

El mundo como un sistema, que es más que la suma de sus partes, se ratifica al estudiar el funcionamiento de los ecosistemas, así como en la historia de las poblaciones humanas (El YO) y no humanas (El OTRO); se expone en la relación entre los cambios geográficos, la densidad de las poblaciones humanas (OTROS YO), la diversidad de especies y, por ende, en la estructura y funcionamiento del ecosistema.

Un ejemplo de la manera como se han relacionado el yo, el mundo y el otro se evidencia con el cambio climático (McCarty, 2001), el cual ha sido un fenómeno histórico relacionado con la intervención antrópica (El YO) y a la cual se le atribuye la extinción de varias especies animales y vegetales (EL OTRO) así como culturales (OTROS YO), lo que sucedió con las culturas Maya y Tiwaku en los períodos de sequía y en la bonanza de la agricultura (Brenner, y otros, 2001).

Es precisamente la naturaleza intrínseca del conflicto en lo social lo que expone la relación yo-mundo-otro y lleva al planteamiento de la pregunta sobre la manera como los diferentes tipos de territorios entendidos como cuerpos, son productores y producidos por distintas relaciones biológicas y disputados cotidianamente por distintas relaciones sociales, económicas y políticas.

Para ello se toma como eje central de análisis la *Mauritia flexuosa* o árbol de la vida bajo categorías fenomenológicas, con el fin de identificar su importancia dentro de la multiterritorialidad de los Llanos Orientales, con base en una comprensión fenomenológica de los seres humanos, el mundo y los territorios como

carne del mundo, como inmanencia del cuerpo a partir de la encarnación privilegiada que tiene el *Homo sapiens* desde Michel Henry (2000) y la que se le da a todas las formas de vida desde Maurice Merleau-Ponty (1945, 1964).

La categoría de carne expone que el mundo como principio fenomenológico es lo que aparece y descansa en la percepción (el yo), y en el ser percibido (los otros), que no deja de ser inmanente, involucrando otras dimensiones perceptivas, y otras maneras de ser de esa corporalidad. Ejemplo de lo anterior sucede con la intromisión de los seres humanos en determinados entornos, haciendo que estos entornos u otras formas de vida, perciban esta intromisión y trasformen sus dinámicas como sucede con las migraciones de especies animales o fenómenos hidroclimáticos locales, regionales, y globales por la tala de especies vegetales nativas, y la siembra de especies no nativas.

De esta manera, el territorio se encarna a través de relaciones de poder sociales, ambientales y económicas, en donde la experiencia cotidiana capacita a través de sensaciones interiorizadas por dinámicas entre lo público o lo que todos saben y lo carnal o lo propio. Esta relación público-privado hace de la experiencia en el mundo una conjugación de diferentes perspectivas de cuerpos que terminan desencarnados o adaptando una nueva carnalidad o expresión de la conciencia en el territorio, como sucede con la extrapolación de la sensibilidad de los derechos humanos hacia "el otro" o la naturaleza, adoptando usos y normas más respetuosas con el medio ambiente.

Por otra parte, también se puede concebir el territorio como un "cuerpo sin órganos", en el que confluyen producciones e intensidades deseantes, que se expresan a través de las emociones y pasiones de distintos actores, lo que permite ver más allá de la subjetivación y explicitar esos deseos en su potencia creadora. Lo anterior implica una lógica muy diferente de la de los dualismos cartesianos, para considerar al territorio como un espacio donde confluyen producciones deseantes con distintas formas de relación, subjetivación y objetivos, exponiendo al territorio como un cuerpo vivo que se expresa a

través de las emociones y pasiones de distintos actores (Deleuze & Guattari, 2010).

El territorio no solo abarca la encarnación de los ordenamientos de poder, normas, valores, formas de significación, discursos, lenguajes (Foucault, 2008), sino una totalidad abierta de interacción y conflicto de intensidades de las culturas humanas (otros y/o) con disputas dentro de los principios de multidimensionalidad, pluriescalaridad, conflictualidad y desterritorialización (Mañano, 2009), en los territorios materiales fijos y/o fluidos. Lo anterior implica que las disputas territoriales no se limiten a la dimensión económica y se amplía a los campos estético, teórico e ideológico, permitiendo comprender las luchas que han propiciado afectaciones biocéntricas, así como las ontologías relacionadas para la afirmación de la vida.

La multidimensionalidad es un principio que une espacio y relación a través de las interacciones con una intencionalidad social, económica, política, ambiental o cultural. Para ello se parte del principio de Searle (1995) de intencionalidad como una decisión histórica que determinan la dirección de los pensamientos de las personas para la construcción y defensa de las acciones políticas, la cual expone la libertad que proponen diferentes culturas para una realidad (Arendt, 1998). Por otro lado, la pluriescalaridad se comprende a partir de Lacoste (1988) como una tipología de "territorialidad diferencial", que se evidencia en la conflictualidad por disputas territoriales en escala internacional en el transterritorio, pero que se mantiene en territorios a escala nacional, provincial y municipal.

La desterritorialización se entiende al interior de la multiterritorialidad como un proceso de disputa territorial generador de conflictualidades (Haesbaert, 2004), en las que el capitalismo extermina las relaciones no capitalistas a través de lo que Harvey (2003) define como acumulación por despojo, comprendida por la destrucción de puestos de trabajo, la precariedad de las relaciones laborales y la destrucción de los territorios campesinos e indígenas.

La conflictualidad expone el enfrentamiento permanente en las interpretaciones que objetivan las permanencias y/o superaciones de las contradicciones producidas por las relaciones del yo, el mundo y los otros, que se evidencian de acuerdo con Mañano (2008) en clases sociales, grupos sociales, instituciones, espacios y territorios, que se dan por espacios y territorios heterogéneos polarizados como sucede con la visión del uno-diverso, consenso-crítica, regla-conflicto, normalidad-diversidad, centralización-centralidades, territorio-territorios.

El territorio de gobernanza es el territorio de la nación que intenta ocultar los diversos territorios garantizando el mantenimiento de la subordinación entre relaciones y territorios dominantes y dominado (Mañano, 2009). Por otro lado, el territorio de propiedad privada es el construido por las relaciones sociales practicadas por las clases sociales, en el que se da la disputa territorial por el control de las formas de uso y de acceso a los territorios a través de la desterritorialización, y el control de territorialidades desde la acumulación por expropiación, ya que los sujetos, los grupos sociales, y las clases sociales no existen sin sus territorios (Harvey, 2003).

Finalmente, el territorio relacional reconoce el carácter jurídico, pero no le está subordinado, contempla la multiterritorialidad del territorio de propiedad privada hacia el territorio de gobernanza, y la transterritorialidad que va más allá del plano nacional y que se inserta en la vida cotidiana, por las conflictualidades entre las clases, grupos sociales, la sociedad y el Estado, dividiendo la circulación de mercancías, las dinámicas de las transnacionales y las de economías no formales y/o ilegales (Mañano, 2009), que en el texto se evidencian dentro de los conceptos de desarrollo sostenible (Brundtland, 1987) y derechos de tercera generación (ACNUR, 2017).

El desarrollo sostenible más que garantizar los recursos para las generaciones futuras, ha sido utilizado en la pluriescalaridad o territorialidad diferencial para darle legalidad a la extracción y el aniquilamiento de los recursos naturales

aceptando el daño viendo la necesidad de compensar por este, representando una conflictualidad por un daño antijurídico en el que las autoridades ambientales han sido capturadas por lógicas económicas de los mercados de ganadería, hidrocarburos y el cultivo de Palma Aceitera. Por otra parte, los derechos de tercera generación son vistos como un derecho humano multidimensional que contempla la solidaridad y un ambiente sano, en el que no prima el derecho individual del cuerpo de la propiedad industrial, sino que prevalece el derecho colectivo de la vida de todos los cuerpos encarnados para un ambiente sano.

Estas disputas territoriales involucran formas de encarnación, que se han evidenciado históricamente en los Llanos Orientales desde la colonia, en donde los europeos buscaron ecosistemas en otras regiones del mundo no solo por un interés productivo y económico, sino también por la búsqueda del control de la mano de obra y el deseo de la modelación de los paisajes locales a sus lugares de origen, cimentando las bases para la visión de los “despensa europea”, en donde se implementaron modelos económicos que actualmente son el motor económico de la región y que han llevado a la destrucción de formas de vida humanas y no humanas, la subutilización del potencial económico de ecosistemas endémicos como el árbol de la vida, y el desequilibrio ecosistémico que representa la pérdida y fragmentación de los Llanos Orientales.

Teniendo como referente todo lo anterior, el manuscrito tiene el objetivo de identificar la importancia de la *Mauritia flexuosa* dentro de la multiterritorialidad de los Llanos Orientales, viendo estas dinámicas como disputas por corporalidades encarnadas y en conflictos de intensidades que atraviesan los territorios, a través de modelos de desarrollo articulados a políticas neoliberales productoras de desigualdades, que no solo amenazan la consolidación de la democracia, sino los derechos de todas las formas de vida. Para ello se plantea una metodología experimental que combina análisis situacionales, la genealogía, y la reconstrucción histórica de fenómenos sociales, como una manera de evidenciar distintos

procesos de ocupación territorial hechos por los cuerpos de las economías extractivistas dominantes, que se relacionan con la importancia del Árbol de la vida para las formas de vida humana y no humana en los Llanos Orientales.

## II. METODOLOGÍA

Entre el 2019-2021 se realizaron 87 entrevistas a líderes ambientales y sociales en Castilla la nueva y Romeral de la región del Meta, bajo una experimentación entre la genealogía y la metodología de reconstrucción histórica de fenómenos sociales (Howell & Prevenier, 2001) y análisis situacionales (Gluckman, 1958 [1940]) a través de un proceso descriptivo- analítico-pragmático, que expuso el territorio como un cuerpo sin órganos. Cabe resaltar que esta metodología no hace todo el proceso de descomposición de lo metafórico, lo simbólico y la semiótica de las narrativas usadas, ya que sólo se enfatizan algunos aspectos que sirve para descomponerlas y ver su potencial a través de la perspectiva dialéctica.

Las entrevistas tuvieron dos momentos que se relacionaron con temas como “*la importancia del morichal para la identidad de la región, así como para la relación Hombre-naturaleza-territorio*” y “*la importancia de otras economías características de la región para el medio ambiente, la sociedad y la economía*”. En el primer momento se estableció contacto directo en campo y se establecieron lazos colaborativos, el segundo momento se dio por la coyuntura del COVID 19 y la cuarentena estricta en la que se encuentra la población, lo que llevo a que algunas de las entrevistas se realizaran via telefónica o a través de diferentes plataformas virtuales.

Es de resaltar que dado los problemas de seguridad del país relacionados con la persecución y asesinatos a la que han sido sometidos los líderes ambientales y sociales en el país, las identidades de los informantes se mantendrán en el anonimato. Sin embargo los argumentos que identifican actores y sus acciones, pueden evidenciarse con demandas de conocimiento público como las hechas por la mesa hídrica del piedemonte llanero, o las del informe del 14 de

mayo del 2020 de las *organizaciones sociales y de Derechos Humanos pertenecientes a la Red Llano y Selva* durante el Covid-19 (CINEP, 2020).

Los análisis de las entrevistas se realizaron en términos del dramatismo, la metaforización y los símbolos que envuelven a través de una lectura dentro de la dialéctica de Maurice Merleau-Ponty bajo tres momentos:

(1) Mostrar que la noción de cuerpo puede ampliarse en su significado con la fenomenología de la carne y se la ligó a una noción de territorio para concebirlo como una entidad viva. (2) Caracterizar este territorio como un cuerpo sin órganos, cuya carne está atravesada y constituida por relaciones, tensiones y conflictos de intensidades *deseantes* diferentes a través de las emociones y las pasiones, que llevan a una construcción simbólica y a la capacidad conflictuarse y transformarse (Deleuze & Guattari, 2010). (3) Revisar críticamente la noción de dialéctica hegeliana antropológica (Hegel, 1982) y sartriana teleológica, para mostrar que es posible concebir una dialéctica tripolar: yo-mundo-otros.

La dialéctica tripolar consiste en un conflicto entre dos principios opuestos con uno que pretende articular a los dos primeros de manera creativa y productiva, para que emerja un nivel superior (no conciliador ni carente de conflicto), donde el despliegue concreto de la sociedad se desarrolle y no devenga en una espiral de violencia. Lo anterior lleva a contemplar desencarnaciones, modificaciones, y otro tipo de intensidades, o transformaciones de posturas por el encuentro de argumentos y perspectivas en virtud siempre abierta e incierta de la cooperación de los demás sin anular la individualidad a través de la fenomenología del cuerpo vista como la totalidad de la vida.

De esta manera, la narrativa se concibe como un ejercicio de experimentación en el que los estudios sociales se configuran como una serie de relatos que incorporan metáforas, expresiones dramáticas, relatos de vivencias, recreación de experiencias, descripciones densas, (Geertz, 2003), lo que se combina con un rastreo histórico

bajo la perspectiva de la serie crítica- ficción- experimentación (García, 2019), donde la crítica permite evidenciar líneas de fuga, la ficción- creativa visibiliza las posibilidades y las transformaciones, y la experimentación expone tensiones y resistencias cotidianas.

En este marco experimental, no se desconocen la importancia de los líderes sociales entrevistados (campesinos, indígenas, obreros, y estudiantes), pero enuncia otras posibilidades a través de la dialéctica entre intensidades de cuerpos físicos encarnados, que se confrontan con los agenciamientos de las otras intensidades en una dinámica de desterritorialización y reterritorialización, generando una tensión productiva y creativa donde se analizan conflictos de una situación concreta, contemplando las encarnaciones o formas históricas del discurso más allá de relaciones intersubjetivas de familiaridad o afectos, de organizaciones políticas y herencias culturales en un gran cuerpo sin órganos que el manuscrito denomina territorio.

Lo anterior propicia la cooperación de cuerpos sin órganos con principios opuestos, al exponer la lucha entre lo biocéntrico y lo antropocéntrico, por lo que se da una transición de la Biopolítica que le da valor al árbol de la vida ya sea por su historia antropológica o su valor económico como recurso o no en el mercado mundial, hacia una Zoé política que sitúa la importancia y multiterritorialidad de la *Mauritia flexuosa* dentro de los territorios materiales de gobernanza, propiedad y relacional de los Llanos Orientales.

### III. RESULTADOS

Las 87 entrevistas a líderes ambientales y sociales exhiben un territorio como un cuerpo sin órganos y un espacio dialéctico, que se relaciona con “*la importancia del morichal para la identidad de la región, así como para la relación Hombre-naturaleza-territorio*” y “*la importancia de otras economías características de la región para el medio ambiente, la sociedad y la economía*”, a través de una dialéctica tripolar en la cual un principio se articula con dos que entran en conflicto, para originar un nivel superior que no

devenga en una espiral de violencia, a través de “El YO” (las acciones del ser humano), “EL OTRO” (aquellos que se ven afectados por el efecto antrópico, y “EL MUNDO” (Todo lo que compone el planeta tierra).

La madre tierra es el ser donde nos encontramos todos, a ella no le importa si somos ricos, pobres, indígenas, negros, blancos, animales, plantas (...) todos somos hermanos, me entristece ver como el dinero corrompe al Hombre, acá hay muchos actores como los de las petroleras, los ganaderos, y los de esa palma que llaman africana (...) algunos palmeros se asocian con los petroleros o los ganaderos, y esos tiene negocios con grupos armados (...) a nosotros nos han quitado todo y a veces con complicidad de nuestra gente, hay muchos hermanos que han vendido su espíritu (...) sé que el dinero es importante pero deja de serlo si perdemos nuestra alma, si perdemos a nuestra madre, si perdemos a nuestra identidad.

En la historia de mi Pueblo el morichal es muy importante, mi abuelo decía que en la madre tierra todo lo solido era la carne y lo liquido era la sangre (...) Muchas de las costumbres de mi pueblo se basan en el morichal, si lo analiza bien este es un cuerpo, tenemos muchas relaciones e historias que demuestran el respeto y la importancia que tiene este cuerpo no solo para los seres humanos sino para todos los animalitos y el agua.

El moriche tiene innumerables usos, nosotros hacemos muchas artesanías con ellos, mi tío estuvo en un proyecto donde hacían gasolina con esta palma (...) el problema es que estos lugares sagrados han sido tumbados para darle paso a cosas del petróleo, la ganadería o esa Palma africana, tengo 70 años y le puedo decir que el paisaje ha cambiado mucho y que ya no se ven los animalitos como antes.

La ganadería es una actividad económica representativa de nuestra región, en todas las imágenes muestran la belleza de los paisajes y hombres y mujeres con caballos, pero estas tierras le pertenecen a muy pocas familias que

por diferentes acciones se han hecho dueños de estos territorios, muchos dependemos de estas empresas mi papá era jornalero de una hacienda importante del otro lado, a él le pagaban por quemar el monte y poner vacas ahí (...) antes no había control y se dañaron muchos lugares.

La Palma Aceitera es muy importante para la región, muchos trabajamos para las palmeras que están acá, la llaman el desierto vede, yo he podido ver como se han talado lugares para sembrar esta planta, le digo que donde esto crece dejan de crecer otras plantas, hay muchas ratas y obvio culebras, algunos se aprovechan de estos lugares para robar (...) estos cultivos han generado empleo, yo me he movido por este medio y le digo que tienen muchas denuncias por explotación laboral.

Hablar de los Llanos sin hablar del petróleo no es posible, desde que tengo memoria acá siempre han estado las petroleras, eso mueve mucha plata (...) nosotros como comunidad nos hemos movilizad por la contaminación que se ha hecho al agua, en esas empresas hay mucha rosca y poder (...) ellos llegan con promesas de progreso y hemos podido ver que la plata se la roban, ponen una cancha de futbol y pavimentan calles, dicen que protegen a las personas y animales pero solo eso(...) en los llanos sabemos que está mal depender del petróleo, porque cuando eso se acaba la gente no sabe hacer nada y ya no hay naturaleza.

A nosotros nos quitaron todo, nosotros vivíamos de la tierra pero llegaron echando bala y sacaron a nuestras familias diciendo que esa tierra era de ellos, ahora hay mucho problema para recuperar esas tierras, donde estaba la casa de mis abuelos había petróleo y nos dicen que eso no es de nosotros porque ahora tiene pozos allá (...) yo se dé más casos de familias que las sacaron a bala para sembrar palma y meter ganado (...) ya no hay animales y escasea el agua.

Lo anterior, son antecedentes que sirven como indicio para identificar la importancia de la *Mauritia flexuosa* dentro de la

multiterritorialidad de los Llanos Orientales, a través de una alteridad que es constitutiva de la dialéctica histórica que no es solo entre el mundo y el yo, y se aproxima a una lógica intermedia que se relacionan con los derechos de tercera generación que establecen que los derechos de la naturaleza son fundamentales para la supervivencia de la especie humana.

De esta manera, se expone una reflexión fenomenológica del cuerpo vista como la totalidad de la vida a través de la dialéctica entre intensidades de los cuerpos físicos encarnados del árbol de la vida, las comunidades indígenas, las economías dominantes, en una dinámica de desterritorialización y reterritorialización, enmarcando un conflicto territorial de los pequeños productores y aquellos que plantearon el modelo territorial (Rivera, 2007) en favor del capital financiero internacional bajo el concepto de “desarrollo sostenible.

#### IV. ANÁLISIS DE RESULTADOS

*"No hay manera de definir al individuo, al grupo, a la comunidad, a la sociedad sin insertarlos en un determinado contexto geográfico, territorial"* (Haesbaert, 2004, p. 20).

Las relaciones biológicas, sociales y económicas del árbol de la vida desde la perspectiva de Merleau-Ponty de la carne, es una manera de contemplar los derechos de la tercera generación y la transición de lo Bios o lo antropocéntrico hacia lo Zoé o lo biocéntrico, derechos que de acuerdo a Gudynas (2009) le otorgan su valor inmanente e independiente de las evaluaciones subjetivas, que en el manuscrito se ve en los territorios materiales de gobernanza, propiedad y relacionales (Mançano, 2009).

Lo anterior es analizado bajo una dialéctica entre: (1) El territorio del árbol de la vida, (2) La intensidad indígena, (3) La intensidad de las economías extractivistas dominantes, en la que esta última es una metáfora de la sumatoria colectiva de cuerpos humanos que hacen parte de una ficción jurídica organizada que les da derechos y beneficios de una actividad con fines de lucro, que eventualmente entra en conflictos

con todos los cuerpos de formas de vida, al afectar irremediamente el sistema mundo.

De esta manera, las formas de respuesta del derecho individual y subjetivo de las economías dominantes, puede que no violen la ley, pero si causan un daño al mundo ambiental al que tienen derecho otros cuerpos humanos y no humanos, exponiendo la necesidad de reivindicación de cuerpos encarnados con diferentes lógicas de biosaber, biopoder y bioresistencia en un mismo territorio. Dicho de otra manera, el biosaber visto como la hibridación de la biología con otras disciplinas (Doctorado en estudios sociales, 2018) se relaciona con el biopoder, para que el cuerpo del árbol de la vida tenga una bioresistencia que trasciende las lógicas de captura de los cuerpos económicos.

Lo anterior es una antesala en la que las relaciones de intensidad se conflictúan y transforman para delimitar el compromiso que se tiene al formar parte de un cuerpo económico, social, político, o ambiental que legaliza la posesión del territorio a través de la recolección de tasas, actividades económicas productivas y extractoras que depredan, contaminan y alteran la integridad funcional del ecosistema y por ende aceleran los procesos hidrolimáticos en la escala de tiempo y espacio (Gurrutxaga, 2004).

De esta manera, se expone la necesidad de una planificación bajo una visión crítica de valores antropocéntricos que se aproximan al enfoque biocéntrico al trascender la relación “ético-estético-política” del capitalismo post industrial (Arcos, 2009), viendo como solución de mercado algo más que la innovación tecnológica y la eficiencia energética (Paterson, 1996), y dar soluciones a problemas de sustentabilidad ambiental en planes de conservación de la biodiversidad (Pabón, 2009), que el manuscrito propone como: “El mercado verde del árbol de la vida: una captura de dinámicas que exponen líneas de fuga que reivindican lo biocéntrico”

EL TERRITORIO DEL ÁRBOL DE LA VIDA. Importancia biocéntrica e inmanente de un territorio multidimensional.

La *Mauritia Flexuosa*, *morichal* o el llamado árbol de la vida por Humboldt & Bondpland (1826), es una especie de la familia arecaceae restringida a la zona tropical de Suramérica (Ponce, 2000), que se caracteriza por formar asociaciones en tierras acidas en Colombia, Brasil, Venezuela, Bolivia, Surinam, Trinidad y la Guyana francesa e inglesa (Cabrera & Wallace, 2007), que en el caso de Colombia se encuentra distribuida en los Llanos Orientales en el piedemonte andino, en formaciones de sabanas y en la selva húmeda del Amazonas, Caquetá, Guainía, Guaviare, Putumayo, Vaupés, y Vichada, donde se le conoce como moriche o cananguche (Garzón & Leyva, 1993); (Galeano & Bernal, 2010).

Las relaciones ecológicas del árbol de la vida lo categorizan como un ecosistema vital o un territorio multidimensional de la llanura aluvial colombiana, ya que está relacionado con las zonas de drenaje en la altillanura diceptada y arroyos pequeños, llegando a representar el área basal total hasta del 75% en la altillanura plana, y el 24 % en la sabana (Da Silva, 2009), una característica que hace del árbol de la vida un cuerpo vital en el que circulan flujos de relaciones y potencias, al que se le asocian otros cuerpos por su importancia para la protección de cauces de agua permanente en regiones donde existe una estacionalidad climática marcada (Ponce, 2002), entre los que sobresalen cuerpos de familias vegetales como la Poaceae, Cyperaceae, Melastomataceae, Labiatae, Xyridaceae, y Eriocaulaceae (San Jose, Montes, Mazorra, & Matute, 2009).

Esta asociación de cuerpos vegetales hace que el ecosistema del morichal almacene hasta 600 toneladas de dióxido de carbono por hectárea, lo que representa cinco veces más carbono que cualquier otro ecosistema tropical (IPCC, 1996); (Freitas, y otros, 2006); (Del Castillo, Otárola, & Freitas, 2006). Convirtiendo este territorio en un espacio propicio para la reproducción animal y una fuente de recursos alimenticios para varias especies de aves como guacamayos y loros; mamíferos como tapires, pecaríes y monos, así como de peces y tortugas (Brightsmith & Bravo, 2006), quienes en su conjunto son a su vez

dispersores de semillas de las regiones donde éste ecosistema se distribuye (Da Silva, 2009)

Lo anterior ha hecho que diferentes grupos humanos como los indígenas colonos y campesinos hayan construido una concepción de territorio-cuerpo alrededor del árbol de la vida, que usan discursos económicos, sociales y ambientales que vinculan cosmovisiones, ontologías, epistemologías, éticas, estéticas, y políticas, en una lucha histórica por apropiarse, explotar, territorializar y desterritorializar. Enmarcando una territorialidad diferenciada de cuerpos humanos y metafóricos como el de las economías, que ha llevado a una conflictualidad que no solo son conflictos encarnados en el territorio, sino que son intensidades opuestas (extractivismo, colonos, indígenas, campesinos) del cuerpo sin órganos del territorio bajo análisis, en las que se ven afectadas tanto los grupos humanos como muchas especies animales y vegetales que ya no se encuentren en la zona.

**LA INTENSIDAD INDÍGENA.** Una dialéctica pluriescalar de valores de uso del árbol de la vida y la desterritorialización.

La importancia inmanente del árbol de la vida, hizo de éste un cuerpo vital y un territorio multidimensional para que las etnias originarias de la zona donde se encontraba, establecieran mitos que explicitaban la importancia de este ecosistema o cuerpo (EL OTRO), para la supervivencia de la etnia (El Yo) y su relación con todo el planeta (EL MUNDO), como sucedió en los Llanos Orientales con la encarnación de este cuerpo en su cosmovisión: “*La (...) lectura de los mitos Sikuani, nos revela en el campo científico una completa cosmogonía, coherente con precisos sistemas astronómicos de medición de los ciclos climáticos, rigurosas taxonomías zoológicas y botánicas, formulaciones de relaciones abstractas mediante modelos biológicos, etc.*” (Ortiz, 1982. Pág. 13 & 14)

Es precisamente la categorización científica en la que se enmarcan los múltiples usos reportados para el árbol de la vida, en todas sus partes: hojas, ramas, tronco, raíces, savia, fruto, flor, semilla (Del Castillo, Otárola, & Freitas, 2006). Sin

embargo, la relación mítica del árbol de la vida con las etnias indígenas Huitotos (Garzón & Macuritofe, 1992), Yukuna (Van der Hammen, 1991) y el pueblo Guahibo o Sikuaní en los Llanos Orientales (Rojas, 1994), se ha visto trasgredida por el encuentro de lógicas territoriales que ha llevado a la pérdida de este ecosistema y por consiguiente a la desterritorialización de los referentes simbólicos-culturales y de la identidad individual y colectiva (Zapiain, 2011), así como la pérdida en el equilibrio entre la población y el paisaje (Mendoza, Ortiz, & Pardo, 2008).

En este sentido, como lo dice Haesbaert (2004, p. 20) "*no hay manera de definir al individuo, al grupo, a la comunidad, a la sociedad sin al mismo tiempo insertarlos en un determinado contexto geográfico territorial*", y el cuerpo indígena se ha encarnado en el árbol de la vida por el entrecruzamiento entre territorios de espacio relacional, gobernanza, y propiedad, en un sincretismo de saberes hacia el árbol de la vida en países como en Colombia, Brasil y Perú (Henderson, 1995); (Padoch, 1988) que reportan diferentes valores de uso y recalcan una importancia mayor que la económica (Ruiz, 1993).

Dentro los usos del árbol de la vida se registran para Venezuela "pan" (Braun, 1968) y "juguetes" (Gragson, 1995). Para Perú "artesanías (brazaletes, bolsos, cinturones, sombreros, hamacas, trajes)" (Del Castillo, Otárola, & Freitas, 2006) "helados", "dulces" "aceites" (Balick, Palmas neotropicales: nuevas fuentes de aceites comestibles, 1982) "tortas", "harinas" (Quispe, Ayala, Ingunza, Landeo, & Pascual, 2009) y "alimento de ganado" (Aspajo, 2010). Para Brasil "canoas" (Pio, Balick, & Pinheiro, 1987) "aceites", "helados" y "refrescos" (Descola, 1989)). Para Ecuador "cremas cosméticas" (Alvear, 2012), "vino" (Borgtof & Balslev, 1993) "helados" "refrescos", "tortas", "combustible", "cuerdas", "sogas", "techos", "paredes", "vestido", "medicina", "artesanía", "pesca" (FAO, 1983), "almidón (sagú)", y "jabón" (Bohorquez, 1976). Para Colombia "biodisel" (Forero, Gnecco, & Torres, 2003), "artesanías", "techos", "chicha", "harinas", "sogas", "envoltorios de alimentos" (Mesa, Toro, & Isaza, 2016), y "juguetes" (Balick, 1979). Asimismo, en el árbol de la vida se crían y

comercializan larvas del "Mojojoy" (*Rhynchophorus palmarum*) que crecen dentro de su tronco en descomposición o estípites (Mesa, Toro, & Isaza, 2016).

Cabe resaltar que, al analizar al cuerpo sin órganos indígena en el territorio de espacio relacional, se evidencian las razones de la conflictualidad hacia los procesos de desterritorialización de los cuerpos de las economías dominantes, y la razón de la resistencia a las transnacionales por la desterritorialización que provoca la deforestación y la producción de nuevos territorios que en el futuro pueden ser controlados por ellas (Stavenhagen, 2005). Lo anterior ha caracterizado un cuerpo de resistencia multiterritorial constituido por movimientos socioterritoriales indígenas, colonos, campesinos, obreros y estudiantiles, cuya intensidad ha tenido como eje central el problema de la venta de tierras como un asunto de seguridad nacional, relacionada a la utilización de los territorios de los países pobres y a la dependencia tecnológica y económica hacia los países ricos, lo que en pocos casos ha llevado a la desterritorialización de las transnacionales.

LA INTENSIDAD DE LAS ECONOMÍAS EXTRACTIVISTAS DOMINANTES. Una historia de encarnaciones y desencarnaciones por intereses productivos hacia el petróleo, la palma aceitera, y la ganadería.

Los procesos de reestructuración territorial por la circulación de mercancías han hecho que las empresas expandan o pierdan territorios, de acuerdo con el aumento y disminución del consumo de sus productos, como se ha visto en los territorios del narcotráfico, o con la república de la soja creada por la transnacional Syngenta en los territorios de Argentina, Paraguay, Brasil y Bolivia (Mançano, 2008b). En el caso específico del objeto de estudio se seleccionan los motores económicos del plan de desarrollo forjadas en zonas de importancia forestal del país, que iniciaron en la zona con la ganadería, seguida de la Palma Aceitera o Africana y por último con la explotación de hidrocarburos legal o ilegal (Paredes & Hernández, 2013) bajo el lema de

industrias pilares del desarrollo socio-económico (Gudynas & Ghione, 2010).

El sincretismo de la intensidad meramente económica capitalista, ha expuesto una conflictualidad en la que prevalecen los derechos colectivos sobre los subjetivos e individuales, con la excepción teórica si se atenta contra la seguridad de la vida misma de la persona, cuya trampa radica en que en el sistema mundo los cuerpos sin órganos de economías generadoras de empleo benefician a cierto sector social y sus derechos, pero no reducen los efectos ambientales intergeneracionales que afectan a todas las formas de vida. De esta manera, los modelos predictivos establecieron que la interacción de los cuerpos de estas economías ha ocasionado un incremento en la temperatura (0.1-0.2°C) que ha acrecentado la vulnerabilidad de especies del bosque seco y los glaciares de montaña, contribuyendo al aumento de lluvias en las zonas bajas y en el nivel del mar (3 a 5 mm por año), así como cambios de temperatura en las zonas altas (Enquist, 2002). Lo anterior ha producido colonización, desterritorialización, fragmentación a través de dos procesos. El primero es la expansión que afecta los derechos e intereses de sectores sociales que no necesariamente se encuentran organizados y se encuentran en diversos sectores sociales, por lo que no son fáciles de identificar. El segundo es la transformación o desterritorialización de cuerpos que se evidencia con nuevas generaciones sin interés en el uso y manejo de la tierra (Leff, 1986), ocasionando la venta de espacios adecuados para la producción con ecosistemas endémicos, a través de lo que Harvey (2003) denominó una lógica de territorio que lleva a la privatización y mercantilización de los bienes naturales, y una lógica de capital que conlleva a la liberalización comercial, la promoción de inversiones, y el despojo del campesinado.

La ganadería como intensidad de los flujos económicos de esta misma corporalidad física, se contempla como una actividad económica que consolidó el modelo político y económico de control del territorio de mediados del siglo XX a través de la propiedad privada (Van-Ausdal, 2009). Lo anterior hizo de este cuerpo económico un territorio multidimensional que ocasionó la

desterritorialización de cuerpos humanos y no humanos, la deforestación del 60% del país (Grau & Aide, 2008); (García, 2012) y la erosión y compactación del suelo que no tienen esta vocación de uso, a través de 23 millones de cabezas de ganado vacuno a nivel nacional (cinco millones en los Llanos Orientales), y cinco millones treientos mil cabezas de porcinos a nivel nacional (treientos cincuenta mil ubicados en los Llanos Orientales) (ICA, 2017).

Cabe resaltar que para la ganadería la desterritorialización y la conflictualidad multidimensional que afecta lo biocéntrico con el suelo, son problemas que ahora está generado la minería (FNG, 2013), ya que la conflictualidad histórica se ha solucionado con la ganadería intensiva, y se compensa con tener 8 veces más valor de producciones que el sector de palma, y ser el sector agropecuario más grande del país vinculando pequeños productores entre 600.000 ganaderos (CONtexto ganadero, 2019). De esta manera, pareciera que la conflictualidad que atenta contra las fuentes de agua, las zonas de importancia ecosistémica como humedales (Morichales) y páramos (Triana, 2010) y los procesos hidroclimáticos a escala global (Acosta, 2015), se compensa con una sumatoria de cuerpos económicos que generan empleos.

La Palma Aceitera (*Elaeis guineensis*) es una intensidad cuya importancia económica dentro del mercado mundial la ha convertido en un territorio multidimensional que ha hecho de Colombia el primer exportador de aceite de Palma Aceitera de América Latina y el cuarto del mundo (González-Cárdenas, 2016), convirtiéndolo en la principal fuente de empleo del país e incentivado la implementación de este monocultivo en el 71% de los Llanos Orientales (UPRA, 2017) al reconocerlo como Zona de Interés de Desarrollo Rural, Económico y Social (ZIDRES) (Congreso de Colombia, 2016).

Sin embargo la Palma Aceitera representa una conflictualidad ambiental, ya que al ser una especie no nativa introducida como actividad económica en la década de los treinta del siglo pasado (Aguilera, 2002), impide el crecimiento de otros árboles a su alrededor por la sombra que

propicia durante su desarrollo, convirtiéndose el lugar perfecto para los nidos de ratas, serpientes y zancudos que no solo afectan la salud humana, sino la de otros animales (Grupo semillas, 2008). Asimismo, tiene una alta absorción de nutrientes que lleva a la eliminación de la capa orgánica (Mingorría & Gamboa, 2010) y reduce la vida útil del suelo a 40 años (Environmental Justice Atlas, 2013), lo que se puede reducir por el uso del glifosato (Sterren, Uhrich, & Benintende, 2016), llevando al territorio a una infertilidad cuya recuperación de ser posible, tomaría aproximadamente 25 años (Mingorría, 2017), afectando todos los flujos de energía y la biodiversidad.

Lo anterior ha caracterizado una pluriescalaridad de conflictualidades por disputas territoriales en escala internacional en el transterritorio, que ha llevado a que se le conozca como el “desierto verde” que ha traído el exterminio del árbol de la vida y la desterritorialización de actividades agrícolas como el arroz en el piedemonte llanero, haciendo que las aves se reduzcan en un 90% por la pérdida de zonas de alimentación y reproducción (Tamaris-Turizo, López-Arévalo, & Romero-Rodríguez, 2017)

La conflictualidad de la intensidad de la Palma Aceitera vista en el campo social expone consecuencias multiterritoriales devastadoras para la vida de los trabajadores y la biodiversidad colombiana, con derechos pensionales violentados a los trabajadores (Environmental Justice Atlas, 2013), el desplazando indígenas y campesinos (World Rainforrest Movement, 2018), productos alimenticios asociados con enfermedades cardio-respiratorias (OMS, 2003); (Chen et al., 2011), y derivados industriales más destructivos atmosféricamente que el mismo petróleo (Monbiot, 2007) que incrementan el calentamiento global (Mingorance, Minelli, & Le du, 2004).

La minería como intensidad, se define como una actividad económica que en Colombia es el principal motor de desarrollo (DNP, 2014) ya que genera la mayor renta fiscal (Martínez, 2018), cuyo 73% al ser generado en los Llanos Orientales (Arauca, Casanare, Meta, Vichada) (Willat, 2013),

expone un escenario multidimensional que ha determinado la dirección de las acciones políticas, una conflictualidad por disputas territoriales en escala internacional en el transterritorio, que ha llevado a una desterritorialización al interior de la multiterritorialidad generando la destrucción otros tipos de economías, la precariedad de las relaciones laborales, y la destrucción de los territorios campesinos e indígenas.

El principal escenario de conflictualidad socio-económica que se evidencia en que los Llanos Orientales, es que sus necesidades básicas insatisfechas van del 24% en áreas urbanas al 70 % en áreas rurales (Unión Europea, Unillanos, 2011), pese a representar el 73% del cuerpo económico que mayor renta fiscal genera para la nación. Lo anterior expone la “*maldición de petróleo*” o la corrupción de los líderes que administran las regalías provenientes de su explotación (Duriugbo, 2005), en un modelo económico dependiente como se ejemplifica con el Casanare, en donde la economía departamental no se alistó para dejar de depender de las regalías petroleras y la población olvidó la vocación agrícola del suelo (Chaves, 2014).

Desde el punto de vista de la conflictualidad económica, social, y ambiental se ha establecido que así se cumplieran las normas y se aplicaran las tecnologías ambientales de procedimiento ambiental y tecnología ambiental (Calao, 2007), los costos ambientales jamás podrá ser recuperados, ya que comprometer el aire, el agua, la energía, las materias primas, el equilibrio ecológico, la prevención de riesgos, y la biodiversidad (Márquez, 1994) es arriesgar la seguridad alimentaria y alejarse de la sustentabilidad (FAO, 2015).

Esta conflictualidad entre la seguridad alimentaria y ambiental vs seguridad laboral y económica, se ha expuesto en consultas regionales de explotación que han evidenciado que la mayoría de las poblaciones locales rechazan la aplicación del Plan Nacional de Desarrollo frente a la minería en su territorio, ya que esta destruye el tejido social de las comunidades al impactar la naturaleza y el medio ambiente, provocando

daños a la salud y desplazando comunidades (Garay, 2014).

Pese a esto, la minería se ha abanderado en la seguridad laboral y económica, llevando a una desterritorialización al interior de la multiterritorialidad que ha normativizado el acaparar el uso de los bienes comunes de agua, tierras y petróleo, como se evidencia en el CONPES 3762 de 2013 que agiliza los procesos de licenciamiento ambiental y la adquisición predial sin participación comunitaria en los proyectos mineros, decretos como el 934 de 2013 que imposibilitaba la regulación minera por los concejos municipales y asambleas departamentales, así como las investigaciones de la Procuraduría Nacional a los funcionarios públicos que permitan realizar consultas en temas mineros.

Lo anterior expone los conflictos de desterritorialización que ponen en riesgo todas las formas de vida, por el exterminio del capitalismo a las relaciones no capitalistas en un territorio donde “se asesinan o amenazan a quienes se oponen a la industria” (OILWATCH, 2003, p.8), poniendo en riesgo la provisión nacional de alimentos (Unión Europea, Unillanos, 2011) por el desplazamiento de campesinos y pequeños productores, así como la disminución de áreas destinadas a cultivar productos básicos de alimentos y la destrucción de los territorios campesinos e indígenas.

Asimismo, el análisis del territorio relacional expone flujos de simbiosis de economías dominantes como sucedió con la empresa AGROCASCADA de la petrolera Pacific Rubiales, la cual se originó para pagar pasivos ambientales del petróleo sembrando Palma Aceitera, con el compromiso que Colombia debía suministrar agua de producción tratada para la extracción de este hidrocarburo, el cultivo y sus productos derivados, dejando para Colombia pérdidas de \$37.260.662.404 (COLPRENSA, 2017), un claro ejemplo que demuestra que en la polarización de riqueza con intereses de producción, las regalías de explotación y los pagos ambientales de los recursos naturales, no satisfacen las necesidades

económicas y acrecientan las deudas sociales y ambientales.

El MERCADO VERDE DEL ÁRBOL DE LA VIDA: una captura de dinámicas que exponen líneas de fuga que reivindican lo biocéntrico.

La implementación del mercado verde del árbol de la vida cuenta con antecedentes latinoamericanos que relacionan la biología-ecología-usos, en los sectores de: mercado de carbono, ecoproductos industriales, así como de bienes y servicios sostenibles provenientes de la naturaleza, en biocomercio y dos subsectores. El primer subsector es el de “no maderables” por todos los usos asociados a este ecosistema (medicinal, culturales, ambientales, alimentación, construcción, utensilios y herramientas, combustible) (Paniagua-Zambrana, Macía, & Cámara-Leret, 2010). El segundo es el de “turismo de la naturaleza” por su valor estético y recreativo (Machado-Allison, Mesa, & Lasso, 2013), ya que al ser habitad y soporte de reproducción, crecimiento, migración, y descanso de la fauna acuática y silvestre (Colonnello, Müller, Rincón, & González, 2011), es un hábitat clave que desempeña un papel importante en la compleja cadena alimenticia del bosque tropical (Bodmer, Aquino, & Puertas, 1997) y, por lo tanto, una fuente de atractivos turísticos naturales.

Este proceso de captura de la economía reconoce que los pagos ambientales con la siembra del Árbol de la vida, posibilitan la reparación para la conservación y propagación de este ecosistémica endémico para el beneficio de todas las formas de vida, pero dado que luego de ocurrida su devastación los efectos podrían ser de carácter irreversible, es una manera de prevenir y reparar más que compensar a modo de responsabilidad civil extracontractual, como ha sucedido en Perú, Brasil y Venezuela en el que ha sido usado para la recuperación de suelos, la protección del recurso hídrico (Trujillo-Gonzalez, Torres, & Santana-Castañeda, 2011), la mitigación del cambio climático (IPCC, 1996); (Freitas, y otros, 2006) y como ecosistema estratégico que protege especies en peligro de extinción (Del Castillo, Otárola, & Freitas, 2006), como la Paraba Barba

Azul (*Ara glaucogularis*) en Bolivia (Herrera, Varragas, Sandoval, Perskin, & Rendón, 2007).

La premisa de “*actividades económicas en la que se ofertan bienes o servicios que generan impactos ambientales positivos y además incorporan buenas prácticas ambientales, sociales y económicas con enfoque de ciclo de vida, contribuyendo a la conservación del ambiente como capital natural que soporta el desarrollo del territorio*” (Ministerio de Ambiente. 2014, p.53), ha sido la base del Plan Nacional de Negocios Verdes del Ministerio de Ambiente y Desarrollo Sostenible, cuya visión establece que para el 2025 los mercados verdes de carbono, ecoproductos industriales, bienes y servicios sostenibles provenientes de la naturaleza, estarán posicionados y consolidados en la economía Nacional (COLCIENCIAS, 2017), como se estipula en la agenda 2030 en la cumbre para el desarrollo sostenible a la que se encuentra adscrita Colombia (ONU, 2015).

Lo anterior es el antecedente normativo en el que el árbol de la vida y sus subproductos representan una importancia económica (Padoch, 1992), social, industrial, ecológica y medicinal (Rojas et al, 2008), y llevó a establecer las bases científicas y técnicas en el plan de manejo de la *Mauritia flexuosa* en el Caquetá, determinándose que florece y fructifica durante todo el año, tiene una vida productiva de 40 años, (Triana & Molina, 1998), y que 7 meses después de su floración los frutos tienen su tamaño máximo (Urrego, 1987), el cual si es liofilizado tiene 5 veces más beta caroteno que la espinaca (Martiarena & Quispe, 2008), y en estado natural tiene un 20% de aceite comestible (Balick 1979) y un 80% con proteínas y vitamina A y E, llegando a tener mayor vitamina A que la zanahoria, lo que en conjunto le da varias cualidades medicinales como la prevención del Alzheimer (Criado & Moya, 2009).

Desde el punto de vista comercial, se ha establecido que las puestas inician desde los 5 años (Del Castillo, Otárola, & Freitas, 2006), produce 290 kilos por palmera, 5 toneladas de aceite por hectárea igual que la Palma Aceitera y el doble que la soja, sin los costos de implantación de este cultivo (Bejar, 2014), lo que la convierte en

una opción de desarrollo sostenible en el mercado local, nacional e internacional. Lo anterior se ratifica con la demanda de productos exóticos en mercados de Asia, Europa, Estados Unidos, de los frutos sin procesar, enlatados o transformados, siendo un recurso de exportación como sucede en Perú, cuyos frutos son vendidos para la elaboración de helados en Japón (Triana & Molina, 1998).

Asimismo, sus frutos son una opción para conseguir carbón activado (Zamora, 2010), un producto usado en medios líquidos y gaseosos para “purificar” (Reinoso, 2005), el cual es un mercado de gran demanda mundial que aún no es aprovechado en Colombia y le ha dejado a Perú entre el 2012-2016, \$16.850 millones de dólares con una tendencia de crecimiento anual del 11% por importaciones de 15392 toneladas (Centro Internacional del Comercio-ITC, 2019).

La experiencia peruana de la importación y exportación de los productos derivados del árbol de la vida, ha establecido que el mercado de Iquitos consume diariamente 5,82 toneladas de sus frutos (Rojas, y otros, 2001) y que 50 toneladas son empleadas diariamente en chupetes, helados, mermeladas y yogures a lo largo de toda la nación (Del Castillo, Otárola, & Freitas, 2006). Cabe resaltar que el hecho que el árbol de la vida tenga un valor de uso en el mercado, ha fomentado su destrucción (palmeras femeninas y masculinas) en la extracción de sus frutos, bajo métodos de cosecha destructiva (Bernal, y otros, 2011) que generan un ambiente propicio para el desarrollo de una economía de auge y quiebre, agotando el recurso y desplazando el mercado (Isaza, Galeano, & Bernal, 2013).

Este estudio subraya la importancia de confrontar los derechos del mundo con las obligaciones de cuerpos económicos con modos de producción, en una lucha donde los derechos individuales de cuerpos económicos bajo el lucro, tienden a prevalecer sobre los derechos colectivos. Un ejemplo de la captura de la economía que a su vez plantea dilemas bioéticos y líneas de fuga se ve en el estudio de enfermedades para fijar características como el enanismo con técnicas de polinización controlada (Del Castillo, Otárola, &

Freitas, 2006), a través del programa de mejoramiento genético del Aguaje 2010-2020 (INCAGRO, 2010) y la selección de semillas que constituyen los bancos de germoplasma (Argüello, y otros, 2007), lo que a su vez lleva a reducir la presión sobre las poblaciones naturales del árbol de la vida siempre y cuando estén acompañadas por políticas para su conservación.

Cabe resaltar que la limitante principal de frutos extraídos con métodos destructivos son los factores biológicos como la identificación de semilla femeninas y no los económicos por la demanda del fruto (Wiersum, 1996), lo que hizo necesario recopilar el proceso de domesticación y las técnicas de predicción de sexo por factores ambientales, ecológicos y morfológicos de las poblaciones humanas que lograron integrarla a sus sistemas agroforestales (Pinedo-Vasquez, Layne, Pinedo-Panduro, & Barletti, 2001), así como la evaluación del efecto de la cosecha de frutos en la dinámica poblacional que han llevado a lineamientos e indicadores para la formulación de planes de manejo y de normas que permitan la conservación a través del uso del árbol de la vida (Isaza, 2015).

Los mercados verdes ofrecen la posibilidad de reivindicar lo biocéntrico del árbol de la vida a través de las categorías de mercados de carbono, el de bienes y servicios sostenibles provenientes de la naturaleza en el sector de agrosistemas sostenibles, y en el sector de biocomercio en el subsector de turismo de naturaleza. Lo anterior es un horizonte de posibilidades para situar desde la economía ambiental políticas de preservación y conservación por el valor inmanente del árbol de la vida, evidenciando desde las lógicas del mercado las externalidades positivas que representa su existencia para disminuir los efectos del cambio ambiental global por la deforestación y la degradación de ecosistemas, lo que permite trascender el enfoque antropocéntrico que solo le da importancia al árbol de la vida por los productos derivados que se obtienen en su intervención.

El “turismo de la naturaleza” se enfoca en el valor estético y recreativo del árbol de la vida (Machado-Allison, Mesa, & Lasso, 2013), ya que al

ser hábitat y soporte para la reproducción, el crecimiento, la migración, y el descanso de la fauna acuática y silvestre (Colonnello, Müller, Rincón, & González, 2011), es clave en el papel de la compleja cadena alimenticia del bosque tropical (Bodmer, Aquino, & Puertas, 1997) y, por lo tanto, una fuente de atractivos turísticos naturales. De esta manera, la recuperación del árbol de la vida desde este enfoque, tiene un efecto colateral en su inmanencia como base de flujos de energía y redes tróficas, haciendo que su vinculación productiva como mercado verde sea una línea de fuga de lo biocéntrico o la protección de ecosistémicas locales por su inmanencia que no solo beneficia a las poblaciones humanas, sino a todas las especies que dependen de él.

El mercado verde en la categoría de bienes y servicios sostenibles provenientes de la naturaleza en el sector de agrosistemas sostenibles, es la captura económica donde las industrias petroleras, ganaderas y la de Palma Aceitera pueden pagar sus pasivos ambientales. De esta manera, la protección del árbol de la vida incentivando su conservación al aplicar los instrumentos económicos y tributarios contemplados en materia ambiental de los Negocios Verdes en Colombia (Ministerio de Ambiente y Desarrollo Sostenible, 2014), llevará a que las empresas salvaguarden las fuentes de sus materias primas, beneficiando la sostenibilidad ambiental de la región y, por ende, la sostenibilidad de sus negocios al equilibrar los intereses de uso del suelo tradicional y de explotación occidental o nomotécnico, permitiendo el desarrollo de modelos más integrados tanto en la diversidad de especies, como en los arreglos productivos posibles de implementar (Ocampo, 1999).

Todo lo anterior expone dinámicas que pese a estar capturadas dentro de las lógicas de mercado, representan líneas de fuga que reivindican lo biocéntrico a través de un ecosistema endémico, lo que es clave para el equilibrio ecosistémico fundamental para la disponibilidad de agua, los ciclos biogeoquímicos y la biodiversidad (ECOPETROL, 2010). De esta manera, se habla de una economía que se aleja del modelo puramente extractivo y se acerca más a la industrialización y

a la producción de conocimiento de las economías más exitosas (De Ferranti, Perry, Lederman, & Maloney, 2002), relacionando el biosaber, el biopoder y la bioresistencia en una relación biología-ecología-usos para la construcción de territorios de paz, con una preservación y/o conservación que aporte a propósitos de comercialización bajo parámetros de sustentabilidad y de los derechos de tercera generación, sin dejar los recursos a cargo del mero mercado como básicamente ha ocurrido hasta ahora.

## V. CONCLUSIONES

El árbol de la vida y la multiterritorialidad: una dialéctica tripolar del yo, el mundo y el otro en relación de igualdad en los llanos Orientales, es una forma de ser en la vida pluralista que no obedece a una dialéctica de Sartre (teleológica) o Hegel (antropológica), en la que la inmanencia y trascendencia vistas desde Ponty y Henry, evidencian que todas las formas de vida están dentro de un mismo cuerpo sin órganos o territorio, en una relación que va más allá de la encarnación privilegiada de los seres humanos en el mundo, para contemplar la importancia económica-social-ambiental de ecosistemas endémicos como el árbol de la vida dentro de la multiterritorialidad de los Llanos Orientales, y avistar la relación de las dinámicas realidad humana-entorno, y medio- ambiente- multi-territorialidad que permiten la transición de lo Bios o lo antropocéntrico hacia lo Zoé o lo biocéntrico, que sitúa la importancia y multiterritorialidad de la *Mauritia flexuosa* dentro de los territorios materiales de gobernanza, propiedad y relacional de los Llanos Orientales.

La metodología planteada bajo la experimentación entre la genealogía y la metodología de reconstrucción histórica de fenómenos sociales y análisis situacionales, permitió un análisis en términos del dramatismo, la metaforización y los símbolos dentro de una dialéctica tripolar entre intensidades de cuerpos físicos encarnados, que se confrontan con los agenciamientos de las otras intensidades en una dinámica de desterritorialización y

reterritorialización, donde el despliegue concreto de la sociedad se desarrolle a través de la fenomenología del cuerpo vista como la totalidad de la vida y no genere violencia, en un gran cuerpo sin órganos que el manuscrito denomina territorio.

El análisis de las intensidades del árbol de la vida, el cuerpo indígena, el mercado verde, y las economías extractivistas dominantes, no desconoce las intensidades de otros movimientos como los campesinos, obreros, y estudiantiles, pero exponen cuerpos con formas de encarnación y desencarnación desde los territorios materiales de gobernanza, propiedad, y relacionales. De esta manera, se enuncia una dialéctica entre intensidades que no se realiza para suprimir contradicciones, sino para establecer nuevas posibilidades, que vayan más allá de planes de desarrollo y la polarización histórica de la riqueza, como la anulación de la participación ciudadana de tipo consultivo para la explotación de recursos en su territorio, y el privilegio de la existencia de economías dominantes que acaban los ecosistemas base de los que dependen varias formas de vida.

Las lógicas de captura de la economía, han enmarcado una forma de neocolonialismo que, bajo políticas de unidad nacional, hablan de sostenibilidad en contextos insostenibles y ponen en riesgo la "infraestructura natural" por el acaparamiento del uso de los bienes comunes de agua, tierras y recursos naturales, no solo imprescindibles para la continuidad de los procesos económicos y sociales, sino para la supervivencia de todas las formas de vida, lo que enmarca un nuevo horizonte de tensiones productivas y creativas que generan otro tipo de experiencia territorializada, que expone que las externalidades desde la inmanencia del árbol de la vida va más allá del pago por pasivos ambientales ya que relaciona la protección de formas de vida humanas y no humanas, a partir de la recuperación de suelos, la protección del recurso hídrico, y la mitigación del cambio climático.

Debido a la tensión jurídica entre la forma tradicional de captura de mercado para

compensar daños ambientales con otras formas de prevenir y reparar a modo de responsabilidad civil extracontractual, la siembra de ecosistemas endémicos como el Árbol de la vida y su mercado verde expone una línea de fuga como resultado de la dialéctica de intensidades de cuerpos que colaboran y producen nuevas posibilidades, como se evidencia con la baja probabilidad que un ecosistema endémico con múltiples valores de uso llegará a ser un “desierto verde”, ya que directamente potencializa las comunidades locales, posibilita el aumento de la capacidad de respuesta ante el efecto antrópico y salvaguarda todas las formas de vida, e indirectamente posibilita una ética hacia el biocentrismo que fortalece los derechos humanos de tercera generación que reconfiguran el enfoque Biopolítico dominante hacia uno Zoe político.

La tensión dialéctica que existe al hablar del mercado verde del árbol de la vida no como una captura del mercado, sino como una línea de fuga que posibilita respetar, distribuir y construir un movimiento envolvente que imponga el bienestar general de la comunidad sobre los intereses particulares de la producción y de la industria contaminante, promoviendo el bienestar desde lógicas económicas con valores distintos a la acumulación y a la generación del capitalismo salvaje. Lo anterior no niega su posibilidad de captura como modelo económico, pero expone que es una línea de fuga si implica una transformación social con una nueva organización política y económica que tenga como eje los derechos de la tercera generación, para que la sociedad dialogue con ecosistemas (naturaleza) en un mutualismo de cuerpos y no en el parasitismo económico que compromete el medioambiente, el equilibrio ecológico, y por ende los derechos humanos.

Las desencarnaciones van a favor de la vida cuando significan cambios de posturas para reconocer la importancia de otras formas de vida más allá de la captura del mercado. Sin embargo, las desencarnaciones que han sido consecuencias no sólo de la violencia armada sino de legalidad al daño dentro del marco normativo, se evidencian con la predilección de los derechos individuales de las economías dominantes, sobre los derechos

colectivos de los cuerpos humanos y no humanos que entran en conflicto en un territorio, por la migración o la perpetuidad de los actores económicos dominantes que anulan otras formas de vida, como sucede con las especies en peligro de extinción a causa de estas actividades, y el desplazamiento de habitantes del campo a las grandes ciudades.

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# Evolution of Violin Making, From the Myth of Stradivari to the Violins of the Future

*Massimo de Bonfils*

## ABSTRACT

The good news is that Stradivarius are works of art that still produce what they were made for, a beautiful sound, and any violinist would love to have a violin that sounds like that. The bad news is that the Stradivari are few (about 500 worldwide), very expensive and around them there are strange interests. The question is: isn't 300 years of technological progress enough to enable us to build instruments that sound like a Stradivarius? Or are we but business is more important? Does the world of culture always have to wait for the beasts of profit to feed themselves? Meanwhile, are we hiding the Truth?.

*Keywords:* lutherie, sound, stradivari, violin.

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# Evolution of Violin Making, From the Myth of Stradivari to the Violins of the Future

Evoluzione Della Liuteria, dal Mito del passato al possibile futuro

Massimo de Bonfils

## ABSTRACT

*The good news is that Stradivarius are works of art that still produce what they were made for, a beautiful sound, and any violinist would love to have a violin that sounds like that. The bad news is that the Stradivari are few (about 500 worldwide), very expensive and around them there are strange interests. The question is: isn't 300 years of technological progress enough to enable us to build instruments that sound like a Stradivarius? Or are we but business is more important? Does the world of culture always have to wait for the beasts of profit to feed themselves? Meanwhile, are we hiding the Truth?*

**Keywords:** lutherie, sound, Stradivari, violin.

**Author:** Santa Cecilia Conservatory of Rome, Dean of the Lutherie Department.

## ESTRATTO

*La buona notizia è che gli Stradivari sono opere d'arte che producono ancora quello per cui furono create, un bel suono, e qualunque violinista vorrebbe avere un violino che suoni così. La brutta notizia è che gli Stradivari sono pochi (circa 500 in tutto il mondo), costosissimi e intorno a loro girano strani interessi. La domanda è: 300 anni di progresso tecnologico non sono sufficienti a renderci capaci di costruire strumenti che suonino come uno Stradivari? O lo siamo ma il business è più importante? Il mondo della cultura deve sempre attendere che le bestie del profitto si sfamino? E nel frattempo rimandiamo il futuro?*

**Parole chiave:** liuteria, suono, Stradivari, violino.

## I. INTRODUZIONE

Qualunque violinista vorrebbe avere un violino che suoni come uno Stradivari, ma pochissimi possono permettersene uno. Gli Stradivari che ci sono pervenuti sono pochi (circa 500 in tutto il mondo) e tutti costosissimi a prescindere dalle loro condizioni: quasi tutti sono stati oggetto di numerosi interventi di restauro, parecchi non sono in buone condizioni e comunque nessuno di loro è più esattamente così come lo realizzò il grande maestro cremonese. Nel contempo l'industria del falso ha prodotto lungo i secoli una montagna di imitazioni e non è escluso che siano tali anche alcuni dei più blasonati Stradivari che ancora si esibiscono in giro per il mondo, sicuramente opera di liutai molto capaci ed altrettanto avidi. Infine, intorno a loro girano strani interessi: scienziati che continuano a condurre eterni e costosi studi per scoprire quello che sappiamo già, giornalisti superficiali che continuano a scrivere articoli contraddittori sulla misteriosa magia degli ineguagliabili Stradivari mentre altri annunciano che il segreto di Stradivari invece è stato appena svelato da questo o quel ricercatore, venditori di strumenti e case d'asta che continuano a gonfiarne i prezzi e infine impresari di concerti che continuano a sostenere un illogico marketing secondo cui solo se un violinista suona uno Stradivari sarà più pagato, perché ci sarà più pubblico. Stradivari usava delle ricette o tecniche segrete, misteriose e cabalistiche? Davvero non siamo stati capaci di comprenderli con tutta la tecnologia che abbiamo accumulato negli ultimi 300 anni? In conclusione, i suoi strumenti hanno davvero un suono ineguagliabile o siamo ormai in grado di realizzare strumenti con la stessa qualità del suono? Se lo siamo, la cosa non interessa solo perché questo business non va fermato?

## II. VALORE DEGLI STRUMENTI STRADIVARI

Antonio Stradivari rappresenta l'eccellenza della Liuteria Italiana nel mondo. Un curioso destino lo accomuna a Wolfgang Amadeus Mozart: entrambi questi geni furono dimenticati a lungo dalle loro città di origine, tant'è che entrambi alla loro morte furono sepolti in luoghi oggi nemmeno più rintracciabili, ma in tempi moderni si è intuito l'immenso vantaggio economico di una loro rivalutazione. Visitare Cremona e Salisburgo trasmette la medesima impressione: ora loro ne sono i cittadini più stimati (e redditizi).

Felicemente, il valore delle loro opere resta nel tempo. Tornando a Stradivari, ovviamente il valore dei suoi strumenti non è solo economico ma soprattutto artistico, solo che la maggioranza delle persone si ferma a questa semplice consapevolezza. Pochi si rendono davvero conto di quanto accade ormai da molto tempo e che proverò a raccontare. Il valore economico degli Stradivari è impressionante. Se un grammo d'oro costa oggi circa 54 euro, un grammo di uno strumento di Stradivari arriva a costare anche 50 mila euro<sup>1</sup>: non possiamo quindi definire uno di questi strumenti "solo 2 pezzi di legno, un po' di colla e mezza tazza di vernice". Gli interessi economici sono enormi, a cominciare dal mondo degli investitori economici: è noto che investire acquistando strumenti musicali famosi assicura una rendita molto superiore e più sicura (e più difficilmente tracciabile dal Fisco) che qualunque altra, che siano bitcoin, quadri d'autore, gioielli, metalli rari o altro. Molte sono le prove di quanto questi violini stimolino gli istinti più brutali: dal furto del 1987 con relativo riscatto dello strumento del violinista francese Pierre Amoyal<sup>2</sup> che coinvolse antiquari, investigatori privati, boss della 'ndrangheta (mafia calabrese) e ricettatori, al commerciante austriaco Dietmar Machold<sup>3</sup>

<sup>1</sup> Una viola Stradivari è stata messa all'asta dalla casa Sotheby's e Ingles & Hayday di New York nel Giugno 2014 per 45 milioni di dollari

<sup>2</sup> Meo Ponte, *Torino, 'Liberato' Lo Stradivari Rapito* (9 aprile 1991) La Repubblica - <https://ricerca.repubblica.it/repubblica/archivio/repubblica/1991/04/09/torino-liberato-lo-stradivari-rapito.html>

<sup>3</sup> Michael Shields, *Stradivarius dealer gets six years for embezzlement* (9 novembre 2012) Reuters - <https://www.reuters.com/article/uk-austria-stradivarius-idUKBRE8A81FQ20121109>

condannato nel 2012 a sei anni di carcere per appropriazione indebita nei confronti di alcuni suoi clienti, al musicista e commerciante russo di violini falsi Sergey Diatchenko<sup>4</sup> che una volta scoperto si è suicidato, sino al liutaio svizzero Claude Lebet<sup>5</sup> cui i clienti a Roma chiedevano di restaurare i propri strumenti e invece lui li vendeva, oppure riceveva l'autorizzazione a cederli e poi non corrispondeva il denaro ai proprietari. Potremmo continuare a lungo.

Abbiamo compreso che sono tante le categorie interessate agli strumenti musicali di grande valore: venditori di strumenti, case d'asta, collezionisti, musei, manager di società concertistiche, ricercatori scientifici, giornalisti, esperti e infine anche i poveri violinisti che sognano di poter disporre di uno Stradivari.

Vogliamo però distinguere fra costo economico e valore artistico. Il costo degli Stradivari è fuori scala rispetto ad altri strumenti dello stesso periodo e con caratteristiche acustiche pari se non superiori, come i violini dei Guarneri. Trovo interessante la spiegazione che offre Benjamin Hebbert<sup>6</sup>: "Considerando il mercato dei violini nel 18° secolo, alla fine degli anni '20 del Settecento Cremona aveva cessato di fornire strumenti a mecenati reali e aristocratici e la morte di Antonio Stradivari nel 1737 e Giuseppe Guarneri del Gesù nel 1744 fu non la fine di un'era d'oro, ma la fine di un precedente catastrofico declino. .... Con l'apertura del mercato nell'Ottocento è nata una tradizione borghese inventata - basata solo in parte sulla storia della liuteria cremonese - per gonfiare i prezzi di mercato degli strumenti antichi, stabilendo il moderno meccanismo di

[reuters.com/article/uk-austria-stradivarius-idUKBRE8A81FQ20121109](https://www.reuters.com/article/uk-austria-stradivarius-idUKBRE8A81FQ20121109)

<sup>4</sup> Massimo Lugli, *Arrestato per la truffa degli Stradivari, allievo di Karajan si uccide a Roma* (1° Novembre 2008) Repubblica - <https://www.repubblica.it/2008/11/sezioni/cronaca/violini-truffa/violini-truffa/violini-truffa.html>

<sup>5</sup> Giuseppe Scarpa, *Le nuove truffe del liutaio tra violini, viola e violoncello* (31 dicembre 2013) La Repubblica - [https://www.repubblica.it/cronaca/2013/12/31/news/le\\_nuove\\_truffe\\_comiche\\_del\\_liutaio-74815929/](https://www.repubblica.it/cronaca/2013/12/31/news/le_nuove_truffe_comiche_del_liutaio-74815929/)

<sup>6</sup> Benjamin Hebbert, *The Invention of Tradition: The Values of Stradivari Violins*, Hobsbawm and Ranger's (Cambridge University Press, 1992) - [https://www.academia.edu/149100/The\\_Invention\\_of\\_Tradition\\_The\\_Values\\_of\\_Stradivari\\_Violins](https://www.academia.edu/149100/The_Invention_of_Tradition_The_Values_of_Stradivari_Violins)

mercato.” Prezzi gonfiati, dunque, sin da allora. Ma qual è il loro reale valore artistico?

Siamo convinti che la maestria di Stradivari sia al di sopra di ogni considerazione: i suoi strumenti sono dei capolavori che trascendono le opere artistiche figurative come quadri e statue perché riescono ancora ad adempiere il ruolo che fu loro assegnato sin dall'inizio: suonare. Ecco perché apprezzo molto più un Living Museum come quello della Orpheon Foundation<sup>7</sup> piuttosto che, ad esempio, il Museo degli Strumenti Musicali di Santa Croce in Gerusalemme<sup>8</sup> a Roma: la

<sup>7</sup> Iniziativa nata su impulso di José Vázquez (1951-2021), Orpheon è un ensemble specializzato nell'esecuzione della musica del Rinascimento e del Barocco rispettando l'estetica dei diversi stili che abbracciano questi periodi. L'ensemble utilizza strumenti della collezione privata del suo direttore, il Prof. José Vázquez, dell'Università per la musica e le arti dello spettacolo di Vienna, che comprende oltre 200 strumenti a corda scelti - violini, viole, violoncelli e viole da gamba - dal XVI, Secoli XVII e XVIII e archi storici, tutti in condizioni originali o fedelmente riportati alle misure originarie del Rinascimento, del Barocco e del Periodo Classico. Questa collezione di pregiati strumenti antichi, riconosciuta come unica al mondo dai direttori e curatori di prestigiosi musei (Metropolitan Museum di New York, Smithsonian Institute di Washington, Sotheby's London) è esposta in tutta Europa, insieme ai concerti della Orpheon Consort, finanziato in parte da una generosa sovvenzione del programma della Commissione Europea: Culture-2000. Orpheon promuove corsi gratuiti e spesso presta gratuitamente i propri strumenti storici a strumentisti che abbiano dei progetti meritevoli come concerti, dischi, concorsi ecc. - <http://orpheon.org/home/orpheon/>

<sup>8</sup> Inaugurato nel 1974, sorge accanto alla Basilica di Santa Croce in Gerusalemme in un importante sito archeologico che comprende un complesso di edifici e di impianti cistercensi dei secoli III e IV d.C., tra i quali il Palazzo Imperiale, il Circo Variano e l'Anfiteatro Castrense. – Chiusi nelle teche e non raggiungibili fanno mostra di sé. L'accesso agli strumenti è regolato dalle Raccomandazioni del CIMCIM (1985): Commissione Internazionale per le Collezioni di Strumenti Musicali del Consiglio Internazionale dei Musei (ICOM) Per Regolamentare L'accesso Agli Strumenti Musicali Nelle Collezioni Pubbliche ove è detto: “Le presenti raccomandazioni si riferiscono solo incidentalmente al pubblico tradizionale; il termine “visitatore” sarà qui usato per indicare lo studioso, l'esecutore o il costruttore qualificato i cui interessi specialistici possono richiedere un contatto ravvicinato con gli strumenti. Non si potrà mai rimarcare a sufficienza quanto l'accesso diretto e il contatto fisico con gli strumenti di una collezione pubblica debba essere considerato come un servizio eccezionale che, nell'interesse stesso della ricerca qualificata, deve essere consentito solo a visitatori realmente competenti. ... L'uso di un qualunque esemplare museale comporta un evidente

differenza è immensa. Una cosa è fare di tutto affinché gli strumenti musicali suonino, un altro è evitare il più possibile che ciò accada per non sciuparli abbandonandoli in una teca di vetro. Cos'è più meritorio: stimolare l'utilizzo di strumenti musicali storici e di grande valore investendo così nel più grande patrimonio che esiste, quello della Cultura Musicale degli Esseri Umani, o costringere al silenzio degli strumenti fatti per suonare? Credo che la mia opinione sia chiara.

A tutte queste considerazioni va anche aggiunto il fatto che gli Stradivari, come ogni altro strumento di quello splendido periodo (Amati, Guarneri, Bergonzi, Gagliano, Guadagnini, Testore, Grancino, Carcassi, ecc.) sono affascinanti perché hanno saputo attraversare la Storia per giungere

*rischio di danneggiamento meccanico. Le tensioni generate nell'accordatura di uno strumento a corde o quelle causate dall'introduzione di aria umida in uno strumento a fiato non possono essere calcolate preventivamente, e possono facilmente superare il livello che lo strumento è in grado di sopportare. Situazioni potenzialmente rischiose per uno strumento a corde si possono eludere evitando di portarlo fino al normale diapason d'esecuzione. ... Lo strumento può essere danneggiato se è suonato incorrettamente o portato ad una accordatura troppo alta. In strumenti considerati fragili il periodo in cui la corda viene sottoposta alla tensione necessaria per essere suonata dovrebbe essere strettamente limitato. I suonatori dovrebbero usare un panno di pelle per proteggere lo strumento dallo sfregamento contro i vestiti e da contatti non necessari con l'epidermide; accessori per suonare (come la mentoniera) dovrebbero essere usati solo laddove risultano storicamente corretti. Dovrebbero essere montati da personale del museo o sotto la sua supervisione. ... Ogni esecuzione con uno strumento dovrebbe essere studiata in modo da raggiungere il più vasto pubblico possibile. RegISTRAZIONI e trasmissioni vanno perciò incoraggiate più che i singoli concerti. In tutte queste situazioni il museo non deve delegare alcuna parte della sua responsabilità a coloro che attendono all'esecuzione. Gli strumenti che sono stati restaurati, proprio in virtù di quel fatto, sono soggetti a danneggiamento meccanico più degli strumenti che non possono essere riusati. Tali strumenti restaurati rimangono inoltre sensibili alle condizioni climatiche e alla tensione meccanica e dovrebbero essere trattati con la stessa cura di ogni altro oggetto del museo. Particolare attenzione dovrebbe essere prestata per evitare di assoggettare lo strumento ad improvvisi sbalzi di umidità quando lo si sposta in ambienti differenti. Inoltre, dovrebbero essere tenute in adeguata considerazione le conseguenze del surriscaldamento dovuto all'illuminazione del palco scenico.”-<http://museostrumentimusicali.beniculturali.it/>*

sino a noi: la Rivoluzione francese, Napoleone, la travagliata Storia dell'Unità d'Italia, la prima e la seconda guerra mondiale, ascesa e caduta dell'Unione Sovietica, la conquista della Luna, ecc. Suonarne uno è ascoltare la Storia. Sicuramente inoltre musei, collezionisti e commercianti di strumenti troverebbero intrigante poter esibire (o possedere, o comprare e vendere) strumenti che abbiano anche avuto un ruolo storico come la viola di Mozart o Beethoven o Dvorak, oppure il violino di Paganini o Einstein, ecc. Dovremmo però chiederci cosa invece spinge un musicista alla ricerca di uno Stradivari: un violinista cerca uno Stradivari o un Guarneri perché cerca un suono che lo soddisfi e gli consenta di esprimersi senza limitazioni dovute a ciò che hanno fra le mani. Poter suonare un violino che consenta all'esecutore di produrre un suono che lo soddisfi, puro e pulito, dolce ed etereo o potente e imperioso che sia. Questo è l'unico fine di uno strumentista, e gli Stradivari consentono di raggiungerlo. Qual è il segreto del loro autore?

### III. IL SEGRETO DI STRADIVARI

Il Segreto di Stradivari; sorprende quanto interesse acquista un argomento se gli si associa la parola "Segreto" o "Mistero". Decine di esperti e scienziati<sup>9</sup> conducono da decenni studi

<sup>9</sup> Negli USA sin dal 1963 Saunders, Schelleng e Hutchins hanno fondato la CAS (Catgut Acoustical Society), dedicata alla scienza ed all'arte della liuteria. Sono più di 40 anni che i membri della CAS pubblicano i loro studi sul CAS Journal. Gabi Weinreich ha sviluppato ulteriormente il loro lavoro. La CAS ora è parte integrante della Violin Society of America and the Papers VSA (Violin Society of America) che pubblica un giornale biennale. Il Prof. Joseph Nagyvary della Texas A & M University (ormai in pensione) ancora oggi conduce approfonditi studi sulla composizione chimica del rivestimento degli Stradivari, il loro sottofondo e la loro vernice (Discover Magazine Luglio 2000 e Science Daily 25 Gennaio 2009).

In Svezia da 35 anni viene condotto un importante studio nell'Università KTH da un Gruppo di scienziati guidati da Erik Jansson ed Anders Askenfeldt sui violini e sugli archi.

In Germania, Heinrich Dünwald ha recentemente completato un esteso studio statistico sulle frequenze acustiche di risposta di circa 700 violini Italiani antichi e moderni di alta liuteria al fine di identificarne le differenze che caratterizzano le differenze fra antico e nuovo.

In Australia un Gruppo di ricercatori della New South Wales University di Sydney sta studiando le caratteristiche di violino, chitarra flauti ed ottoni.

approfonditi per comprendere quale sia il Segreto che ha permesso a Stradivari di costruire strumenti così apprezzati e performanti; peccato che lungo il tempo ancor più numerosi esperti e scienziati<sup>10</sup> sia del passato che nel presente hanno condotto studi serissimi mediante i quali hanno appurato che il grande maestro cremonese non ha nessun Segreto e ogni elemento che ha utilizzato (gli ingredienti per la vernice o la colla, il legname stesso) erano comunemente disponibili ai suoi

In Italia continua il proficuo lavoro della Università di Pavia che utilizza il Laboratorio "Arvedi" di Ricerca e Diagnostica non Invasiva dell'Università degli Studi di Pavia dedicato allo studio dei materiali di strumenti musicali storici presso il Museo del Violino di Cremona.

<sup>10</sup> Che gli strumenti musicali ad arco siano stati oggetto di studio e indagine sin dal lontano passato lo dimostrano Silvestro Ganassi dal Fontego (la Regola Rubertina), Michael Praetorius (Syntagma Musicum) e Diderot e D'Alembert (con la voce Liuteria nella loro Encyclopédie), ma volendo indicare solo gli studi Stradivariani possiamo partire dalla metà dell'800 con George Dubourg, Charles Reade, George Hart, Charles Goffrie, Friedrich Niederheitmann, George Gemünder, Antoine Vidal, the foundation of the monthly magazine Strad, August Riechers, John Broadhouse, Théodore Dubois, Henry, Arthur ed Alfred Hill, Auguste Tolbecque, Walter H. Mayson, George Foucher, Horace Petherick, Domenico Angeloni e così via. Un esercito di esperti i cui studi hanno certamente costituito la base di partenza per Simone F. Sacconi (I Segreti di Stradivari, Libreria del Convegno, Cremona 1972) nella cui prefazione leggiamo: " Nel titolo del libro figura messa tra virgolette e al plurale la parola 'Segreti' che, di solito, associata nel singolare al nome di Stradivari, si crede dia la misura della grandezza del liutaio di Cremona. Si è voluto, così, demitizzarla per il rifiuto di ridurre l'arte alla concezione materiale di un Segreto, che implica alla fine e comunque una rivelabilità del medesimo, in questo caso di una ricetta, sul tipo di quelle di cucina o di farmacia, se è attorno alla vernice soprattutto che si è sbizzarrita la fantasia popolare".

tempi. Ancora tanti sono anche i giornalisti<sup>11</sup> che hanno continuato a scrivere articoli sul magico Segreto che evidentemente pervade gli strumenti di Stradivari, proprio mentre altrettanti loro<sup>12</sup>

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<sup>11</sup> Sarah Kim, *Stradivarius: Unsurpassed Artisan or Just Lucky?* (16 Gennaio 2008) SerendipUpdate, <http://serendip.brynmawr.edu>

Elbow Music Column, *The real secret of Stradivarius?* (22 Agosto 2014) <http://www.elbowmusic.org/>

Spinella Alberto, Caponetti Eugenio, Licchelli Maurizio, Saladino Maria, Malagodi Marco, Weththimuni Maduka, *A step forward in disclosing the secret of Stradivari's varnish by NMR spectroscopy* (9 Agosto 2017) Journal of Polymer Science Part A Polymer Chemistry

Graham Tibbetts, *Secret of Stradivarius violins' superiority uncovered* (1° Luglio 2008) The Telegraph

Bruno Fazenda, *Scientists are trying to uncover what makes Stradivarius violins special – but are they wasting their time?* (20 Dicembre 2016) Phys Org

Steph Yin, *The Brilliance of a Stradivari Violin Might Rest Within Its Wood* (20 Dicembre 2016) The New York Times

Emma Saunders, *What makes the Stradivarius violin so special?* (21 Giugno 2011) Entertainment reporter, BBC News Ben Guarino, *The secret of the most famous violins? A bath, say researchers on the hunt for Stradivarius mystique* (23 Dicembre 2016) The Washington Post

Rebecca Tan, *The Secret Of The Stradivarius Is (Partly) In The Wood* (21 Dicembre 2016) Asian Scientist Magazine

James Randerson, *Stradivari's secret could be 'brutal' woodworm treatment* (30 Novembre 2006) The Guardian

Tom Whipple, *Stradivari's secret could be a drop of fungicide* (20 Dicembre 2016) Science Editor for The Sunday Times.

Gualtiero Nicolini, *I Segreti di Stradivari* (6 Luglio 2018) - <https://www.iltitolo.it/i-segreti-di-stradivari/>

Mario Boivin, *Stradivarius' Secret, Kinder Concerts* (10 Aprile 2016) National Center of the Arts, NAC Orchestra for Jeunesses Musicales Canada, 2015-2016 Season

Paloma Valeva, *Le Secret de Stradivari enfin révélé?* - [www.palomavaleva.com](http://www.palomavaleva.com), professional luthier (2017)

Newsweek, *The Secret of The Stradivarius Sound* (27 Ottobre 2002) News Staff

Jennifer Ouellette, *A Violin's Warm, Mellow Sound Comes From Its Varnish* (3 Agosto 2016) Gizmodo, [www.gizmodo.com](http://www.gizmodo.com)

Gabriel Weinreich, *Cremona Violins: A Physicist's Quest for the Secrets of Stradivari* (Ottobre 2010) Physics Today, page 54

Space, International News, *The secret of sound of Stradivarius violins is covered in secret preservative* (22 Dicembre 2016) The Earth Chronicles of Life

RTBF.be, *Le secret du Stradivarius résiderait dans de petites imperfections* (2 Dicembre 2012) Belga News, Radio Télévision de la Belgique Française.

<sup>12</sup> Paola Maria Farina, *Violini Stradivari, una nuova ricerca ne svela il segreto* (4 Maggio 2022) <https://www.revenews-it.cdn.ampproject.org/v/s/www.revenews.it/arte/>

colleggi ammettono che i più recenti e seri studi sull'argomento negano la stessa cosa.

2022/05/04/violini-stradivari-ricerca-svela-il-segreto/amp/Gianni Fochi, *Il mistero di Stradivari? Proprio nessuno...* (30 Dicembre 2009) Avvenire - [https://www.avvenire-it.cdn.ampproject.org/v/s/www.avvenire.it/amp/agma/pagine/stradivari-senza-misteri\\_200912301120315930000](https://www.avvenire-it.cdn.ampproject.org/v/s/www.avvenire.it/amp/agma/pagine/stradivari-senza-misteri_200912301120315930000)

Brigitte Osterath, *Secret of Stradivarius violins revealed* (27 Luglio 2021) Paul Scherrer Institute/ - <https://www.psi.ch/en/media/our-research/secret-of-stradivarius-violins-revealed>

Gramilano, *The secrets of the Stradivari and Guarneri sound* (28 Novembre 2021) <https://www.Gramilano.com/2021/11/the-secrets-of-stradivari-and-guarneri/>

Joseph Nagyvary, Renald N. Guillemette, Clifford H. Spiegelman, *Mineral Preservatives in the Wood of Stradivari and Guarneri* (22 Gennaio 2009) PLOS ONE - <https://doi.org/10.1371/journal.pone.0004245>

Nicola Arrigoni, *Non esiste il segreto di Stradivari* (7 Febbraio 2013) La Provincia di Cremona

Benoit Fauchet, *Secret of Stradivarius violin varnish picked apart* (5 Dicembre 2009) The Sydney Morning Herald

Steve Connor, *Solved: the mystery of why Stradivarius violins are best* (1° Luglio 2008) Science Editor, The Independent Martin Swan, *The Secret of Stradivari Finally Revealed!* (1° Aprile 2017) professional luthier, [www.martinswanviolins.com](http://www.martinswanviolins.com)

Alberto Francavilla, *Stradivari, Svelato il mistero della vernice dei violini* (4 Dicembre 2009) - <https://www-blitzquotidiano-it.cdn.ampproject.org/v/s/www.blitzquotidiano.it/musica-showblitz/stradivari-mistero-vernice-violini-stradivari-166863/amp/Redazione CremonaOggi, Scoperto il segreto del suono perfetto dei violini Stradivari> (3 Maggio 2022) <https://www.cremonaoggi.it/2022/05/03/scoperto-il-segreto-del-suono-perfetto-dei-violini-stradivari/>

Ian Sample, *Scientists find secret behind sweet sound of Stradivarius violins* (21 maggio 2018), The Guardian - <https://www.theguardian.com/science/2018/may/21/scientists-find-secret-behind-sweet-sound-of-stradivarius-violins>

ORDIS - Commissione Europea, *Studio rivela il segreto delle vernici Stradivari* (7 Dicembre 2009) - <https://cordis.uropa.eu/article/id/31556-study-reveals-secret-of-stradivarius-varnishes/it>

Jennifer Ouellette, *Study confirms superior sound of Stradivari is due to how wood was treated Chemicals used to soak the wood include borax, zinc, copper, alum, and lime water* (17 September 2021)- <https://arstechnica.com/science/2021/09/study-confirms-superior-sound-of-a-stradivari-is-due-to-the-varnish/> Alessia Manfredi (July 2, 2008) *La perfezione unica dello Stradivari, Il segreto è nella densità del legno*, La Repubblica

CORDIS - Community Research and Development Information Service, (7 Dicembre 2009) *Study reveals secret of Stradivari's varnishes*, by Wiley (Angewandte Chemie International Edition); Cité de la Musique; Staatliche Akademie der Bildenden Künste, for European Commission) S.C., *Le Stradivarius n'a (presque) plus de secret* (5 Dicembre 2009) [www.20minutes.fr](http://www.20minutes.fr), CULTURE QS

News Asia, Culture Column, *Stradivarius violins' distinctive sound uncovered* (August, 2017)

La semplice Verità è che le tecniche costruttive e gli ingredienti sono stati oggetto di approfonditi studi da molto tempo e numerosissimi esperti seri hanno escluso qualsiasi ingrediente magico od esoterico. Fra i cosiddetti segreti ne possiamo elencare alcuni ormai ben noti emergenti dal contenuto della corrispondenza fra Stradivari ed i suoi committenti: in fase di sgrossatura interna del piano e del fondo usare il sistema del 'tunnel' guidato da un foro di trapanatura controllandolo con una catenella (ne parla chiaramente l'ottimo liutaio italiano Fabio Fortunato<sup>13</sup>), anche esporre lo strumento appena finito al sole, poi apporre un buon sottofondo prima di verniciare (onde evitare la penetrazione della vernice nelle fibre del legno) e infine verniciare al sole. Potremmo continuare a lungo.

Se allora gli aspetti principali sono ormai noti, perché continuano ad essere finanziate e condotte delle eterne ricerche su quello che si sa già? E soprattutto perché giornalisti superficiali e disinformati continuano a usare titoli "gridati" cercando ripetutamente di resuscitare un Segreto che non c'è più per poi dichiararlo risolto in qualche altro articolo seguente? Per lo stesso motivo per cui un violinista sarà più facilmente invitato da una Società Concertistica a esibirsi (e sarà pagato meglio) se preannuncia che userà uno Stradivari. Parlare di Mistero e di Segreto rende. Procura più denaro a ricercatori e venditori, più lettori ai giornalisti e più notorietà ai concertisti. Quel nome ormai è un must del concertismo, e chi non vuole ascoltare il suono di una leggenda? Eppure in questi violini ben poco è rimasto del grande Maestro.

#### IV. EVOLUZIONE DELLA LIUTERIA

Gli Stradivari – come tutti gli strumenti del '700 – sono stati tutti modificati, compreso il famoso Messiah<sup>14</sup>. Tali modifiche sono state imposte da

Lara L. Sowinski, *Unlocking the Key to the Stradivarius Violin, Supply and Demand Chain* (5 Dicembre 2016) Executive, <http://www.sdexec.com/magazine>

<sup>13</sup>Antico metodo di costruzione dei violini (<https://www.youtube.com/watch?v=nHzvq32J41U>)

<sup>14</sup> Il Messia (noto anche come Stradivari Messia-Salabue) è un violino realizzato a Cremona nel 1716 da Antonio

esigenze esecutive (repertorio che cambia, luoghi ove si suona, mutazioni dell'organico dei complessi orchestrali, ecc.). A tale proposito ho trovato molti articoli<sup>15</sup> interessanti che trattano l'argomento.

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Stradivari. Appartenente al cosiddetto periodo d'oro (1700-1725) del liutaio cremonese, è uno dei violini di Stradivari meglio conservati anche se il liutaio Jean-Baptiste Vuillaume ne sostituì la catena, il manico, la tastiera, la cordiera, i piroli e ovviamente il ponticello. Gli Hill di Londra poi hanno sostituito ulteriormente la catena. Oggi è esposto presso l'Ashmolean Museum dell'Università di Oxford, nell'omonima città inglese.

<sup>15</sup> Hwan-Ching Tai, Yen-Ping Shen, Jer-Horng Lin e Dai-Ting Chung, *Acoustic evolution of old Italian violins from Amati to Stradivari* (5 Giugno 2018) Proceedings of the National Academy of Sciences of the United States of America - <https://www.pnas.org/content/115/23/5926>

Julia Rothchild, *The Evolution of the Violin's Sound* (8 Maggio 2015) Yale Scientific - <https://www.yalescientific.org/2015/05/the-evolution-of-the-violins-sound/>

Meridee Duddleston, *The Evolution of the Violin's Sound and Design* (2 Gennaio 2017) <https://www.wrti.org/post/evolution-violins-sound-and-design>

Elias Dann, *The Second Revolution in the History of the Violin: A Twentieth-Century Phenomenon*, College Music Symposium 17, no. 2 (1977): 64-71 - <http://www.jstor.org/stable/40373889>.

Chitwood D., *Imitation, genetic lineages, and time influenced the morphological evolution of the violin* PLoS ONE (2014) 9(10) - DOI: 10.1371/journal.pone.0109229 dove leggiamo: 'Numerose innovazioni sul design del violino hanno incrementato le proprietà acustiche e la suonabilità dei violini'.

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## V. L'EVOLUZIONE DEVE CONTINUARE

Alcuni motivi che hanno spinto il mondo della musica a chiedere ai liutai di modificare i violini del '700 – inclusi gli Stradivari – sono:

### 5.1 La Dimensione Dei Luoghi Di Concerto

La musica in epoca barocca veniva suonata per il diletto di corti reali e famiglie nobili che potessero pagare dei musicisti per i propri salotti. Per questo uso furono concepiti gli strumenti barocchi con un volume adeguato. Solo in seguito accadrà che tali concerti si tengano in sale da ballo, sale da concerto e nei primi teatri, anche se questi ultimi inizialmente saranno più che altro destinati alle opere vocali con accompagnamento strumentale. A partire dall'800 le sale da concerto e i teatri avranno dimensioni sempre maggiori, come ad esempio il Grosser Musikvereinsaal<sup>16</sup> di Vienna del 1870 (2000 posti) o la Royal Albert Hall<sup>17</sup> di Londra del 1871 (5272 posti). Oggigiorno tutte le nuove sale da concerto sono gigantesche e anche se rispettano i più moderni criteri acustici come le sale progettate dal prestigioso studio di ingegneria giapponese Nagata Acoustics<sup>18</sup>, un violino costruito con i criteri del '700 non riuscirebbe a farsi udire senza richiedere uno sforzo all'esecutore.

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Colin Barras, *Violins evolved by Stradivarian design* (10 Ottobre 2014) New Scientist <https://www.newscientist.com/cdn.ampproject.org/v/s/www.newscientist.com/article/dn26369-violins-evolved-by-stradivarian->

<sup>16</sup> Il Musikverein di Vienna in Austria (costruita nel 1870) è una sala da concerto considerata tra le più eleganti al mondo ed è la sede principale dei Wiener Philharmoniker.

<sup>17</sup> Inaugurata nel 1871 dalla regina Vittoria, è una delle sale da concerto più apprezzate della Gran Bretagna e ospita più di 400 eventi ogni anno.

<sup>18</sup> Ad esempio, Guangzhou Opera House e Shanghai Symphony Hall in Cina, New World Center Concert Hall a Miami Beach, Walt Disney Concert Hall a Los Angeles e Muriel Kauffman Theater at Kauffman Center for the Performing Arts, Kansas City negli USA, Grand Auditorium de la Maison de la Radio a Paris in Francia, Elbphilharmonie ad Hamburg in Germania, Mariinsky Theater Concert Hall a St. Petersburg in Russia, Danish Radio Concert Hall a Copenhagen in Danimarca, Helsinki Music Center Concert Hall in Finlandia, Tokyo Metropolitan Art Space Concert Hall, Kumamoto Prefectural Theater Concert Hall e Matsumoto Performing Arts Centre in Giappone.

### 5.2 L'organico Degli Ensembles All'interno Dei Quali I Violini Venivano Suonati

In epoca barocca i brani di musica da camera vennero concepiti, appunto, per essere eseguiti in camere o stanze a ciò destinate dal ricco committente, in genere un nobile ricco che amava ascoltare musica in casa sua per sé ed i suoi ospiti. Ad esempio le Sonate per violino di Arcangelo Corelli furono inizialmente immaginate per gruppi di 3 esecutori con violino e basso continuo, cioè cembalo e viola da gamba (o violoncello) che raddoppiasse il basso. Anche in caso di esecuzione di concerti per violino solista come le 4 Stagioni di Antonio Vivaldi il solista dialogava con altri strumenti ad arco e al limite con un cembalo o una tiorba che si interessassero del basso continuo. Le cose nel tempo sono mutate; già al tempo di Wolfgang Amadeus Mozart nell'organico orchestrale dei concerti per violino e orchestra vengono inseriti i primi fiati (oboi e corni) e il solista iniziò ad aver bisogno di maggior volume per emergere; risalgono a questo periodo i primi sostanziali interventi di modifiche ai violini barocchi che includono la sostituzione del manico con un altro più lungo e con differente angolo di innesto ma salvando il riccio originale tagliandolo dal manico iniziale, una tastiera più lunga, pirolì, ponticello, cordiera ed apertura della cassa armonica per sostituire la catena con una più lunga e spessa. Beethoven però nel suo concerto per violino amplierà ulteriormente la massa Sonora orchestrale introducendo anche flauti, clarinetti, fagotti, trombe e percussioni. Infine con i concerti per violino e orchestra di Jean Sibelius o Aram Khachaturian nell'orchestra verrà inclusa l'intera banda aggiungendo ai precedenti anche l'ottavino, il corno inglese, raddoppiando i fagotti, i corni e le trombe ed inserendo tromboni, bassotuba e tutte le percussioni. A questo punto le esigenze acustiche del violino erano al limite.

### 5.3 Lo Stile Di Scrittura Delle Composizioni Musicali

Anche il modo di scrivere la musica ha subito notevoli cambiamenti estetici che presuppongono anche una tipo di suono nuovo e spesso una massa sonora maggiore. Basterebbe osservare il modo di scrivere per violino di Johann Sebastian

Bach e paragonarlo prima con quelli di Niccolò Paganini, Henri Wieniawski e Pablo de Sarasate, e andando ancora più avanti con le partiture violinistiche di Aram Khachaturian e quelle più recenti di Cornelius Cardew e Agustin Castilla-Avila. Facendo un paragone con l'arte figurativa, siamo passati da Caravaggio e Guido Reni a Pablo Picasso e Lucio Fontana. I colori e il disegno non sono più gli stessi e a volte non si usa nemmeno più il pennello.

Tutti questi motivi hanno spinto molti liutai prima a modificare tutti i violini barocchi in modelli classico/romantici con maggior potenza di suono, ma poi anche a cercare, parallelamente alla produzione commerciale di strumenti classici, di modificare ulteriormente i propri modelli alla ricerca di un suono ancora più forte e più bello. In questo non hanno commesso alcun sacrilegio, visto che già in epoca barocca il primo a cercare di migliorare sé stesso fu lo stesso Stradivari; infatti nel suo laboratorio sono state ritrovate quasi una ventina di sagome di modelli differenti. D'altronde basterebbe studiare con attenzione i suoi strumenti in ordine cronologico per accorgersi della sua costante ricerca di una migliore estetica e di una migliore resa acustica. Stradivari ci ha così lasciato un forte messaggio, opposto a quello che sostengono tutti: migliorare i propri strumenti è giusto e opportuno. Considerare il suo ultimo modello la perfezione assoluta intangibile ed imm modificabile vuol dire tradire lo sforzo di una vita. Negli scorsi due secoli tutti i liutai hanno modificato i violini barocchi, ma altri liutai hanno sperimentato anche nuove soluzioni costruttive. La storia della liuteria ne ricorda molti, fra cui Jean-Baptiste Vuillaume, Hermann Ritter, Thomas Zach, Johannes Matthias Augustus Stroh, François Chanut, Felix Savart, Théophile Villard, Lionel Tertis, Heinrich Dessauer, Alfred Stelzner, Eugen Sprenger, Carleen M. Hutchins, Franz Zeyringer, Otto Erdesz, Giuseppe Virzi, Iginò Sderci. Altri liutai sono nostri contemporanei, come F.A. Saunders, David Rivinus, Marty Kasprzyk, Joseph Curtin, Douglas Martin, Hans Johannsson, Tyler Thackray, Berl Mendenhall e così via. Tutti hanno cercato e continuano a cercare un suono migliore.

## VI. COME RISOLVERE IL PROBLEMA DEI VIOLINISTI?

Un bel suono è esattamente quello che cercano i violinisti in uno strumento, che sia uno Stradivari o altro. Ma tutti i violinisti che non possono permettersi un vero Stradivari, neppure uno di quelli più rovinati ed economici, come possono rimediare? Ed ecco allora che l'attuale business della liuteria moderna del nostro Paese, un fenomeno che difficilmente conosce crisi, viene in aiuto. Molti violinisti americani, giapponesi, russi e di ogni altra nazione pensano che sarà sufficiente recarsi a Cremona per trovare un ottimo violino Italiano costruito quasi come faceva il grande Antonio a un prezzo molto più ragionevole. Solo che non è sempre vero. La liuteria Cremonese d'autore mostra una grande attenzione per l'estetica dei propri strumenti ricopiandone quasi ossessivamente uno dei modelli Stradivariani (magari *il Cremonese* del 1715) ma il suono sembra essere un elemento meno importante; anche per le giurie della *Triennale di Liuteria* di Cremona l'estetica è sempre stata fondamentale: la sagoma elegante, la verniciatura impeccabile e le rifiniture perfette, ma se ci fosse un nodo nel legno gli esperti escluderebbero immediatamente quello strumento, anche se avesse un suono eccellente. Come sono lontani dall'ottica di un violinista. A nessun concertista interessa un violino verniciato come un comodino della camera da letto ma con un suono aspro o afono. Accetterebbero facilmente anche un nodo (e ce ne sono di violini antichi famosi con nodi evidenti) ma con un bel suono. Ecco dunque che agli acquirenti che obiettano al liutaio che il suono del violino che gli propongono non è bello viene data sempre la stessa risposta: "Gli Stradivari suonano bene perché hanno 300 anni; aspetti altrettanto anche lei e rimarrà soddisfatto". Assurdo.

Ma c'è di peggio. Anche a Cremona ci sono liutai<sup>19</sup> che truffano i violinisti che vi si recano per acquistare un violino d'autore Italiano e si ritrovano fra le mani uno strumento di fabbrica bulgara o rumena riverniciato, ma a prezzi

<sup>19</sup> Fabrizio Loffi, *Liuteria della vergogna* (15 Settembre 2014) Mondo Padano - [http://www.mondopadano.it/stories/attualita/8472\\_liuteria\\_della\\_vergogna/#.YwOtC3ZByoo](http://www.mondopadano.it/stories/attualita/8472_liuteria_della_vergogna/#.YwOtC3ZByoo)

altissimi! Intendiamoci: non c'è nulla di male negli strumenti di fabbrica, utili nei primissimi anni di studio per tutti coloro che non possono permettersene uno migliore, ma truffare il prossimo è un reato. La soluzione ideale sarebbe invece saper costruire ancora oggi violini con le stesse qualità degli Stradivari, e si può fare.

## VII. ALCUNI VIOLINI MODERNI SUONANO ANCHE MEGLIO DEGLI STRADIVARI

La ricerca più seria mai realizzata è il Double-blind violin experiment<sup>20</sup> condotto fra il

<sup>20</sup>Ed Yong, *Violinists cannot tell the difference between Stradivarius violins and new one*, (2 Gennaio 2012) Discover Magazine

Ian Sample & Gina McColl, *Million-dollar Stradivarius loses out in the playoffs with modern violin* (4 Gennaio 2012) The Sydney Morning Herald

Laurie Niles, *Stradivari loses out in blind-testing study of player preferences for old and new violins* (3 Gennaio 2012) News Column, The Strad; vedi anche *What Really Happened in that Double-Blind Violin Sound Test* (7 Gennaio 2012) Violin.com

Laurie Niles, *Comparing Strads and Moderns: the Paris Experiment*, (21 Ottobre 2014) Violinist.com; vedi anche Stephanie Pappas, *Legendary Stradivarius Loses to New Violins in Blind Tests* (7 Aprile 2014) Live Science

AFP Miami, *Ditch the Stradivarius? New violins sound better* (9 Maggio 2017) The Straits Times; vedi anche News Column, *Players favor new violins over old in largest ever blind testing experiment*, (8 Maggio 2017) The Strad; vedi anche Claudia Fritz, *Soloist evaluations of six Old Italian and six new violins*, Josephcortinstudios.com

Emma John, *What's so special about a Stradivarius?* (6 Agosto 2013) The Guardian

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Pam Belluck, *A Strad? Violinists Can't Tell!* (7 Aprile 2014) The New York Times

Karen Hopkin, *Expert Violinists Bad at Picking Strads; Ten violin soloists who played different instruments blindfolded then picked a Stradivarius over a modern instrument as being the superior violin at rates no better than chance* (28 Aprile 2014) Scientific American

Ed Yong, *Stradivarius Violins Are not Better Than New Ones* (7 Aprile 2014) National Geographic

News Column, *Blind-tested soloists Unable to tell Stradivarius violins from modern instruments*, (6 Aprile 2014) The Strad; vedi anche Associated Press, *Blind playoff of Stradivarius violins and new ones leaves old Italians a little flat* (8 Aprile 2014)

The Guardian News Column, *Loud & Clear: Researchers Find Contemporary Violins Project Better than Strads* (6 Giugno 2017) The Strings Magazine

2010 e il 2013 a Indianapolis, Parigi e New York da un gruppo di esperti liutai e violinisti oltre al coinvolgimento attivo del pubblico. I risultati di tutte e tre le edizioni sono stati i medesimi: al primo posto si è sempre classificato uno strumento moderno (anche se non sempre lo stesso) e all'ultimo posto uno strumento antico italiano (anche se non sempre lo stesso). Esperti, liutai, pubblico e gli stessi esecutori hanno confermato le eccellenti qualità acustiche degli strumenti moderni, regolarmente superiori a quelle di molti eccellenti strumenti antichi Italiani fra cui diversi Stradivari. Certo, va detto che gli strumenti moderni che hanno partecipato sono stati selezionati fra quelli dei migliori liutai viventi; la stessa selezione è però stata fatta anche nei confronti degli strumenti antichi, scelti fra quelli con il miglior suono. Con buona pace dei liutai Cremonesi, all'estetica ed alla bellezza della vernice non è stata data alcuna importanza. In questo studio è stato seguito il criterio della scelta che avrebbe fatto un violinista, uno che con uno strumento musicale ci fa la cosa più ovvia: lo suona.

A conferma di tutto questo aggiungiamo la esperienza personale di uno stimato violinista tedesco riportata dalla rivista inglese The Strad<sup>21</sup>:

Rubrica Cultura, *Gli Stradivari sono sopravvalutati, dice la scienza* (10 Maggio 2017) Il Post, [www.ilpost.it](http://www.ilpost.it)

Léa Peillon-Comby, Claudia Fritz, *Sound projection: Are Stradivarius violins really better?* (9 maggio 2017) CNRS - <https://www.cnrs.fr/en/sound-projection-are-stradivarius-violins-really-better>

Associated Press Report, *Blind playoff of Stradivarius violins and new ones leaves old Italians a little flat*, (8 Aprile 2014) - <https://www.theguardian.com/science/2014/apr/08/violin-stradivarius-old-new-better-scientific-test>

Christopher Joyce, *Double-Blind Violin Test: Can You Pick The Strad?* (2 Gennaio 2012) NPR Culture - <https://www.npr.org/sections/deceptivecadence/2012/01/02/144482863/double-blind-violin-test-can-you-pick-the-strad>

Adrian Cho, *Million-dollar Strads fall to modern violins in blind 'sound check'* (9 maggio 2017) <https://www.science.org/content/article/million-dollar-strads-fall-modern-violins-blind-sound-check>

Philip Ball, *Science can tell us only so much about Stradivarius violins* (8 Maggio 2017) - <https://www.nature.com/articles/nature.2017.21954>

<sup>21</sup> Christian Tetzlaff on his 2000 Greiner violin (24 Novembre 2017) <https://www.thestrad.com/video/christian-tetzlaff-on-his-2000-greiner-violin/7316.article>

“Christian Tetzlaff switched from playing older instruments to a modern one built by the German luthier Stefan-Peter Greiner. ... He suggests that “Stradivari and Guarneri 'del Gesù' were fantastic violin makers but their instruments are not good because they are old and Italian, but because they are well built - and this is something that somebody nowadays can also do.” Appare definitivo anche il giudizio di Sid Perkins<sup>22</sup> specialmente quando afferma 'Per i giovani musicisti, il messaggio è: "Dovrebbero essere disposti a usare un violino nuovo invece di uno antico, anche se è stato realizzato da un liutaio famoso. ... Un musicista dovrebbe essere riconosciuto per come suona, non per lo strumento che sta suonando."

Il vero problema è superare un tabù economico-culturale. Attualmente un violinista sa che se suonerà in concerto uno Stradivari avrà più pubblicità, più pubblico, più lodi dalla critica, più attenzione dalle agenzie concertistiche e infine un compenso maggiore. Se lo stesso violinista suonerà uno strumento moderno perderà tutto questo, ma forse potrebbe avere un suono migliore. I liutai moderni possono costruire strumenti con suono eccellente sin da subito e senza attendere 300 anni. Dunque dev'essere anche possibile non solo raggiungere Stradivari ma anche superarlo. Ma prima bisogna formare una nuova generazione di liutai.

## VIII. UN FUTURO POSSIBILE: LIUTAI MIGLIORI PER I VIOLINI DI DOMANI

Sono sicuro che nel mondo sono molti gli Istituti di formazione per Liutai che stanno pensando ad affrontare questa sfida; anche in Italia ve ne sono diversi ma desidero illustrare la nostra iniziativa. Il Conservatorio Santa Cecilia di Roma ha fondato nel 2011 un Corso di Liuteria a livello Universitario che affronti proprio queste tematiche, offrendo un attrezzato laboratorio e un

livello di istruzione più moderno e competente, ricco della tradizione Italiana ma anche interessato alla innovazione. Gli attuali docenti sono il sottoscritto (Storia ed Evoluzione della Tecnologia degli Strumenti ad Arco), il M° Mauro Fabretti (Docente di Laboratorio, il vero padre del violino Santa Cecilia) e il M° Massimo De Notti (Assistente del Laboratorio). Attualmente abbiamo una media di 50 studenti da una dozzina di diverse nazionalità. Oltre a insegnare a costruire strumenti classici, è stato condotto con successo uno studio sperimentale per realizzare un nuovo modello Santa Cecilia di violino ergonomico presentato ad aprile del 2019 al 22nd International Symposium of the ICTM Study Group on Musical Instruments a Lisbona, Portogallo (vedi Fig.1).

<sup>22</sup> Sid Perkins, *Tests challenge whether centuries old violins really are the best ever - Again and again, scientists find, new instruments can sound as good as the famed oldies* (12 Dicembre 2019) Science News for Students - <https://www.sciencenewsforstudents-org.cdn.ampproject.org/v/s/www.sciencenewsforstudents.org/article/tests-challenge-whether-centuries-old-violins-really-are-best-ever>

**22<sup>nd</sup> Symposium of the  
ICTM Study Group  
MUSICAL INSTRUMENTS  
10-13 APRIL, 2019  
LISBON – Portugal**

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**Universidade Nova de Lisboa**  
Av. de Berna, n.º 26 C, 1069-061 Lisboa, Portugal

**April 11, 2019 - 3 p.m.**

Massimo de Bonfils / Mauro Fabretti / Luca Minervino  
**Beyond Stradivari: The New Santa Cecilia  
Violin Model**  
(with practical demonstration)

Fig. 1: Poster della presentazione del nuovo violino Santa Cecilia a Lisbona

Lungo gli anni abbiamo collaborato con varie Università nei Corsi di Ingegneria negli Strumenti Musicali (Università *La Sapienza* di Roma e l'Università Politecnica *delle Marche* ad Ancona). Nel 2016 abbiamo anche organizzato la prima edizione del *Santa Cecilia Violin Making International Competition* ove abbiamo accolto più di 100 strumenti partecipanti da 24 nazioni differenti. Due giurie hanno lavorato insieme, una di liutai e l'altra di concertisti, e la stampa nazionale ed internazionale ha mostrato grande interesse. Nell'ottobre del 2019 abbiamo anche aperto il nostro stand al World Music China Expo, a Shanghai. Inoltre abbiamo anche organizzato Seminari e Conferenze in varie Università e Conservatori Italiani. Abbiamo partecipato al 35th World Conference of the International Society for Music Education - ISME il 21 Luglio 2022 a Brisbane (video su YouTube [https://youtu.be/G4zCumwgT\\_4](https://youtu.be/G4zCumwgT_4)), alla Conferenza Internazionale della European Platform for Artistic Research in Music - EPARM di Oporto (Portogallo, 2018), al

9th International Conference of New Musical Concepts di Treviso (2022), al 10th International Scientific Meeting for Sound and Musical Instrument Studies di Castelo Branco (Portogallo, 2021), alla International Conference on Education, Research and Development di Elenite (Bulgaria, 2017). Abbiamo anche pubblicato alcuni articoli presso IJMSTA International Journal of Music Science, Technology and Art (2022), IJMRA - International Journal of Multidisciplinary Research and Analysis (2022), EPRA - International Journal of Multidisciplinary Research (2022).

## IX. CONCLUSIONE

La liuteria classica si è evoluta. Liberiamo gli strumentisti dal ricatto di dover lottare per acquistare pochi antichi Stradivari ai prezzi assurdi di un mercato drogato. Quello era un mito del passato. Guardiamo ai violini di un futuro ormai reso possibile. Abbiamo ora la conoscenza e

la capacità per poter formare una nuova generazione di liutai che sappiano costruire ottimi strumenti musicali ad arco, con eccellenti standard acustici e adatti alle esigenze delle nuove sale da concerto e della musica moderna. Se Antonio Stradivari fosse tra i nuovi liutai, sarebbe d'accordo. Forse fra loro ce n'è uno. Forse ce ne sono tanti, e aspettano solo di poter emergere. Un futuro possibile.

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