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## **Intellectuals, public opinion and democracy. On Ortega y Gasset's social education**

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# Intellectuals, Public Opinion and Democracy. On Ortega y Gasset's Social Education

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## Abstract

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Democracy is usually conceived, within both public discourse and political debate, not only as a form of government but also as a positive value that deserves to be universally pursued. However, many criticisms to democratic models have contributed to question this assumption, calling into question a superficial notion of the term. Indeed, a lack of political awareness and social reflection in public opinion is evidently responsible for disruptive failures in advanced models of democracy, opening the way to populisms. Significantly, these inner pitfalls of democracy were patently evident to Ortega y Gasset who, from the end of 1920s, questioned the ways through which intellectuals could effectively contribute to forge opinions and habits of individuals and communities. To lead the beleaguered mayhem caused by an exceptional form of hyper-democracy, he unceasingly strove to define an original intellectual commitment to mass education. This paper offers a critical analysis in historical context of Ortega y Gasset's political and educational project to reform humanities and promote an aware political participation.

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**Keywords:** Ortega y Gasset, intellectual history, education, philosophy, political community

# **Intelectuales, Opinión Pública y Democracia. La Educación Social de Ortega y Gasset**

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## **Resumen**

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La democracia, tanto en el discurso público como en el debate político, se concibe frecuentemente no sólo como una forma de gobierno, sino también como un valor positivo que merece ser universalmente perseguido. Sin embargo, muchas críticas a los modelos de democracia han contribuido a cuestionar esta postura, poniendo en duda la validez de este concepto, tachándolo de superficial. De hecho, la ausencia de conciencia y reflexión política en la opinión pública determinan el posible fracaso de modelos avanzados de democracia, abriendo el camino a distintas formas de populismo. Ya desde finales de la década de los '20 Ortega y Gasset subrayó la relevancia de algunos problemas y desafíos constitutivos de la democracia, preguntándose cómo los intelectuales podían contribuir de forma eficaz a forjar las opiniones y las costumbres de individuos y comunidades. Para gobernar el desorden caótico, causado por el dominio de la hiperdemocracia, Ortega propuso una nueva concepción del compromiso intelectual dirigido hacia la educación de masa. Este artículo ofrece un análisis crítico, en el contexto histórico, del proyecto político y educativo de Ortega y Gasset. Un proyecto finalizado a reformar las humanidades y fomentar una participación política responsable.

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**Palabras clave:** Ortega y Gasset, historia intelectual, educación, filosofía, comunidad política

One needs to decide between these two incompatible tasks: either one comes to the world to do politics, or one comes to make definitions. The definition is the clear idea, rigorous, without contradictions, whereas the acts that it implies are confused, impossible, contradictory (Ortega y Gasset, 2010, v. 4, p. 206)<sup>1</sup>.

There are two kinds of men: the busy and the worried, politicians and intellectuals. The act of thinking implies the fact of taking care before dealing with something, it means to be worried about things, it means to interposing ideas between the desire and the execution. An extreme worry leads to *apraxia*, which is a disease. Indeed, the intellectual is almost always a little sick (Ortega, y Gasset 2010, v. 4, p. 210-211)<sup>2</sup>.

**B**y considering these words that Ortega wrote in 1927 in his essay on the French politician Comte de Mirabeau it could seem paradoxical to trying to conceive his own intellectual meditation as intrinsically linked to a political activity. Indeed, in this text, he traced a radical distinction between men of practical and theoretical mindsets, and he did so in a way that appears to render incompatible the two spheres. However, the study of the authentic reasons and motivations laying behind this thesis can help us understanding their extremely contingent and political intentions, contributing to elucidate the intrinsically political character of the entire Ortega’s philosophical activity. Indeed, in this specific case, at least two reasons sustained such a radical statement.

On the one hand, Ortega traced this radical contraposition as a self-justification for having recently stepped back, in 1926, from his prolific and long-lasting activity as a political commentator in several liberal newspapers, such as *El Sol*. A decision that he took after the exacerbation of the censorship exercised by the dictatorship of Miguel Primo de Rivera (Fonck, 2010). On the other hand, he instrumentally used the thesis about the constitutive lack of normative reasoning of politicians as a *via negationis* argument to prove the necessity of giving to the intellectuals a proper space in the Spanish political life.

Philosophers, Ortega argues, are often expelled from the political scenario, but this does not mean that a critical aptitude should not be adopted in politics.

In fact: “Time by time society becomes more complicated, and politicians increasingly need to be more like intellectuals” (Ortega y Gasset, 2010, v. 4, p. 222)<sup>3</sup>. Consequently, he strongly criticized the common misconception of the successful politician conceived as a charismatic and authoritative man of deeds. According to him, if such authoritarianism were not combined with the ability to persuade the masses by rationally defending the legitimacy of a given form of government, all politicians would have experienced a very fragile and short-lasting political leadership.

Consequently, the thesis purported by the Spanish philosopher, rather than constituting a proof of his abandonment of political activity, is indeed a representation of his proactive attempt to gather new consensus in his intellectual circles, with the aim of promoting the organization of an intellectual dissent against the dictatorship. Thus, even such an apparently harsh defense of the neutral, abstract and universal character of philosophy purported by Ortega ultimately appears to be motivated by political intentions. This is just an instance of a more general trait that undoubtedly characterizes Ortega’s works, and that Cerezo Galán perspicaciously resumed affirming that Ortega’s philosophy is always a practical reason, and, as such, is polarized towards the sociopolitical sphere (Cerezo Galán, 2011, p. 34). It seems even possible to go a step further, stating that politics served to Ortega as a valuable object of philosophical reflection, up to the point that it determined his intellectual agenda throughout his whole life.

This article aims to demonstrate the validity of this statement by focusing on some specific cases. Accordingly, the next pages will exhibit the inner connection between these two sides of Ortega’s thought through the study of the role he assigned to humanistic education in society. It does so by adopting a rigorous textual analysis connected to the historical context, by studying Ortega’s utterance in relation to the socio-cultural conditions in which he lived, according to the methodology of intellectual history (Richter, 1995; Skinner, 2002). In fact, by considering his role as a philosopher and a public intellectual through a not exclusively theoretical perspective but also a historical and sociological one (Angermuller, 2013; Collins, 1979 and 1998), it is possible to affirm that Ortega’s life, thought and circumstance constitute an indivisible unity. Therefore, the article adopts a multilevel analysis that considers the philosophical discourse in its synchronic and diachronic dimension, with a particular emphasis on its formal construction and

transmission. In other words, the different philosophical ideas purported by Ortega concerning the educative process will be theoretically and historically scrutinized in relation to the Spanish political and social history.

Consequently, the purpose of this article is threefold: firstly, it aims to prove that throughout his entire life Ortega always tried to convert a recurrent idea in a political practice: i.e. the thesis according to which the health of a political community depends on the degree of education of its citizens. Secondly, the article will demonstrate that from this idea Ortega developed a comprehensive theory about the political role of intellectuals – conceived as groups rather than individuals – as active creators of social consensus and political legitimacy. Finally, it argues that contrary to a widespread elitist interpretation of Ortega’s thought, his contribution on the importance of an enlightened form of education does represent a profoundly inter-class and democratic project. A project that can also give us the opportunity of reflecting about the limits and possible improvements of our view about the nature of democratic practices.

### **A Philosopher in the Political Arena**

Teaching and communicating his ideas to a vast audience constituted the main goal of Ortega y Gasset from his very youth, at least since he was a student at the Faculty of Philosophy of the University of Madrid (Tabernero del Río, 1993). His very biography is that of a predestined cultural leader. Indeed, thanks to the personal relationships of his family – that belonged to a long tradition of liberal politicians (Valero Lumbreras, 2013) – Ortega’s life had soon be characterized by a regular attendance to the most educated social milieu of the Spanish capital (Zamora Bonilla, 2002). Thus, the consistent social capital he inherited from his family gave him the opportunity to gain a relevant notoriety within the Madrilenian bourgeoisie, in particular thanks to his journalistic activity in the family’s newspaper, *El Imparcial* (Blanco Alonso, 2005). Very likely, the political career should have appeared to Ortega as the natural path to follow in a country characterized by a reduced social mobility and a quite restricted oligarchy (Fradera, & Millan, 2000; Moral Roncal, 2003). However, without discarding the possibility of

intervening in politics, he chose another path, preferring to follow his personal vocation by studying philosophy.

As a student in Madrid, he took advantage of the first occasion that was offered to him – a scholarship funded by the *Junta para la Ampliación de Estudios* (JAE) – and decided to ameliorate his philosophical knowledge in Germany. In Marburg, he discovered an academic reality that surprised and shocked him, being very different from the one he was accustomed to in Spain. From then on, Germany represented to him a model to emulate, a cultural ideal that he and his country should have to pursue. Thus, at the age of 23, Ortega expressed the certainty of having a proper mission to accomplish, a personal life project: enhance the social conditions of the Spanish society not by acting as a politician, but rather through an educative activity (García Nuño, 2014). This personal goal is clearly expressed in an interesting series of articles he anonymously wrote for *El Imparcial* in 1906, signed with the initials X.Z. The series is significantly entitled *La Universidad española y la Universidad Alemana*. This brief comparative study reveals the presence of what he called a fix idea, an oppressive mania: “The reform of the concept common people generally have of culture” (Ortega y Gasset, 2010, v. 1, p. 133)<sup>4</sup>. Accordingly, as he wrote in *El imparcial* when defining Politics he affirmed that:

Politics means an action on the indeterminate will of people, not on their muscles; that is to say an education, not an imposition. It does not mean giving laws, but giving ideals. And by saying ideals I do not mean anything vague and womanly, but any possible spiritual or material improvement (Ortega y Gasset, 2010, vol 1, p. 135)<sup>5</sup>.

Indeed, during his youth Ortega was persuaded that politics had mainly to be concerned with the construction of myths and ideals, and with the ability of politicians to persuade people to pursue them. Therefore, his pedagogical commitment implied a constant effort towards the implementation of an effective social education in Spain (Elorza, 2002)<sup>6</sup>. For this reason, he soon enrolled in the Spanish Fabian Society (Abellán, 2005), created in 1907. He endorsed a liberal pedagogical ideal that focused on the development of individuals – and in particular, of those who were better equipped with intellectual and material resources – in order to favor a general improvement of the social conditions through this minority influence.

Consequently, in a country characterized by a very poor educative level in comparison to the other European nations (Nuñez, 2005; Scotton, 2014), the primary goal Ortega wanted to accomplish consisted in promoting a reform of the educative system. Indeed, in the same year in which he began his academic career as a professor of Metaphysics, in 1910, he pronounced a very relevant conference that marked his entire following career: *La pedagogía social como programa político*. In that occasion, he vindicated the importance of reforming an old and conservative educative arrangement by promoting a laic, liberal and socialist reform of education.

This was just the first of a long series of public discourses in which Ortega directly intervened in the Spanish political debate, breaking the line between academia and politics. Another very significant instance is represented by the very famous conference, in 1914, which marked the establishment of the *Liga de educación política*. In this case, he formally acted as the spokesperson of a political association, of an entire generation of young intellectuals and members of a growing bourgeoisie who wanted to regenerate the Spanish society: the famous *Generación del '14* (Costa Delgado, 2015; 2019). To counter the pernicious practice of *caciquismo* (González Hernández, 1999; Villacañas, 2014) Ortega assigned to the University, conceived as a laboratory of intellectual thinking, a leading role in determining the ends that political leaders should have to realize.

Around the pivotal figure of Ortega started to orbit an entire generation that, more than a common philosophical view, did share similar opinions concerning the political tools to be adopted to promote a social, cultural and economic improvement. Therefore, when Ortega wrote his manifesto for the *Liga de educación política*, he was legitimizing a political intervention via an educative reform: “For us the first thing is to promote the education of a minority in charge of the political education of the masses” (Ortega y Gasset, 2010, v. 1, p. 739)<sup>7</sup>. Evidently, at that time, what rendered Ortega’s philosophy appealing was not the content of his original theoretical meditation, but rather his ability to be a reference point for an entire generation. Back to his very youth, his political thought can easily be interpreted as a “polyphonic practice of positioning” (Angermuller, 2013, p. 296) both in the academia and in politics.

Such political education of the masses coincided with his attempt of forming a new leading class, opened to the European cultural innovations.



Accordingly, the creation of the *Revista de Occidente* in 1923 constituted another proof of this continuous effort of forming a new intellectual minority able to change the political scenario.

After this long and very fruitful project, it is necessary to skip to the end of the 1920s before encountering in the biography of Ortega y Gasset another direct intervention in the political life of his country. Indeed, Ortega perceived the dictatorship of Primo de Rivera and the hegemonic role played by traditionalist thinkers such as Ramiro de Maeztu a substantial failure of his educative proposal, and a victory of the authoritative dogmatism (Villacañas, 2000). This state of affairs led Ortega to experience a profound dissatisfaction towards politics. However, when politics invaded the academic niche in which he sheltered, in particular on the famous closing of the University of Madrid in 1929, he manifested all his disappointment for the violent and oppressive regime that was leading the country, resigning from his role as professor. He criticized the students' drift towards violence and the extreme politicization of the University of Madrid, interpreting them as symptoms of the spreading of populism within the academia: "During several years, I have had to find a place outside the university building due to the frequent screams of the students, parked in the corridors, that made impossible to understand each other in the classroom" (Ortega y Gasset, 2010, v. 4, p. 1039)<sup>8</sup>.

When, 9 October 1930, the University re-opened, Ortega's popularity was at its best, in particular thanks to the publication of the *Rebelión de las Masas*. Some students belonging to the FUE (*Fundación Universitaria Escolar*) invited him to give a conference on the most urgent topic at stake: the future of the University after the end of the dictatorship. The recent dramatic events called for a meditation on the social role of this institution, its scope and aims. Ortega accepted the invitation. Not only he gave this conference, but he also published his reflections on *El Sol* and, soon after, he published these articles as a book entitled *La Misión de la Universidad*. This threefold circulation of his theses makes patent the will of the philosopher to target the public opinion through all the possible channels offered to him (Blanco Alonso, 2005). He conceived his role as similar to that of an enlightened philosopher who wanted to contribute to forge a critical public opinion.

Indeed, such a critical public opinion, according to Ortega, was completely and dramatically absent in Europe during the 1930s. In particular because of two main reasons. The first was the new scientific discoveries that had

contributed to alter both the specialized and the common vision of the word; the second was that scientists and intellectuals had renounced to offer a new overall understanding of these discoveries to a large audience, to put them in a broader a meaningful picture. Consequently, in order to build a modern public opinion it would have been indispensable to promote a reformed program of education and civilization among the population. This would constitute a long time process that would have involved both a cultural and a political education of the masses to reassure the validity of social institutions. In particular by exhibiting the historical reasons that brought to their creation and maintenance over time (Sánchez Cámara, 2003).

In this context, the *Misión de la Universidad* not only constituted a philosophical and pedagogical text, but also a political one. Indeed, in its introduction Ortega presented himself as a spiritual guide for his students, as a heir of the tradition of pedagogical renewal started by the *Institución Libre de Enseñanza* (Ortega y Gasset, 2010, v. 4, p. 1034-1035). The University reform was considered as a priority to counter what he interpreted as the supremacy of an undisciplined mass that had entered this educative institution, after having obtained a more significant role in society. His students were part of these masses; they were no longer an elite as before. However, this diagnosis offered by Ortega is not as pessimist as it appears. Indeed, whereas *Rebelión de las masas* constitutes the *pars destruens* of Ortega vision of democracy, *Misión de la Universidad* is its *pars construens*.

Interestingly enough, since his audience was paradigmatically changing and the masses had entered the university, Ortega had to critically reconceive his own social and academic role as a leading philosopher, in order to maintain his social status. This is a clear demonstration of the impossibility of reducing any philosophical theory to a mere theoretical standpoint or interchange of ideas, being philosophy always related, on the contrary, to practical and political situations, intentions and ends that enliven a given society in a specific time (Skinner, 2002).

In particular, for restoring an authentic democratic practice Ortega considered as indispensable to reverse the process of depersonalization that was taking place both within and outside the academia: “To act on a mass you have to stop being one, you have to be a living force; you have to be a group in shape” (Ortega, 2004-2010, IV, p. 1040)<sup>9</sup>. Accordingly, the educative reform proposed by Ortega dealt with the social category of the mass-man,

the *hombre masa*. With this term he indicated a mediocre person whose cognitive abilities, character and desires revealed an uneducated person who, in his everyday life, simply conforms to the rest of the population without thinking autonomously:

It is possible that never the average person has been so far below his own time, below what it demands to him. For this reason, shady, fraudulent actions have never been so abundant. Almost no one is responding to his true and authentic destiny. The average man lives by subterfuges with which he lies to himself, pretending to live in a very simple and arbitrary world, despite the fact that the vital conscience makes him scream that his true world, which corresponds to his full essence, is enormously complex, precise and demanding (Ortega y Gasset, 2010, v. 4, p. 559)<sup>10</sup>.

The rebelled masses did represent an inescapable reality of the new society, but this phenomenon should not be simply accepted, but rather managed and countered by a pedagogical activity. This meant that the University should have to assume such responsibility, being open to a larger audience in comparison to the past. Since the mass-men and the low social classes had been conquering an increasing relevance within the political life, Ortega considered that the University would have undergone the same destiny: becoming a mass institution. In order to avoid that this process underpinned the cultural leading role, played by the University, it was necessary to change its functioning and goals, which had proved to cause more harms than benefits. Indeed, the University should have become a promoter principle for the European history (Ortega y Gasset, 2010, v. 4, p. 568) by constructing a barrier against the hyper-democratic and irrational character of the mass-men. This goal would have been rendered possible only through the construction of a comprehensive understanding of the new scientific and social world, and by the following transmission of a systematic culture – conceived as “a system of vital ideas possessed by each historical epoch” (Ortega y Gasset, 2010, v. 4, p. 568) – to the whole population. To do this, given the low level of the students – i.e. of the mass man – it would have been necessary to introduce a new basic pedagogical principle; i.e. the principle of economy:

It is necessary to start from the average student. Then it is necessary to consider as the kernel of the entire university institution, as its pivotal point or primary figure, *exclusively* that body of teachings that can be rigorously demanded, or, in other words, only those teachings that a good average student can really learn (Ortega y Gasset, 2010, v. 4, p. 549)<sup>11</sup>.

The University had to guarantee a basic understanding of the main scientific questions, so to offer to everyone the minimum background indispensable for taking an active and meaningful part in the public debate. For this reason, teachings should focus exclusively on general notions that all and each person could have understood and from which everyone could have significantly benefited:

It is necessary to reconstruct with the scattered pieces - *disierta membra* - the vital unity of the European average man. It is necessary that each individual or - avoiding utopianisms - many individuals, become, each one in his individuality, the whole man. Who can do this but the University? (Ortega y Gasset, 2010, v. 4, p. 542)<sup>12</sup>.

The worry showed by Ortega was based on the persuasion that the masses were going to play a progressively important role in the political sphere. For this reason, it would have been indispensable to promote a new model of mass education. In fact, the public opinion of an authentic democracy could not have been just the expression of unthinking wills and instinctual reactions, of what Ortega called the “reason of unreason” (Ortega y Gasset, 2010, v. 4, p. 419). On the contrary, it had to possess a rational and critical view on social issues in order to guarantee a real political participation (Peris Suay, 2009). Ortega’s aim was avoiding the proliferation of hyper-democracy, which is the situation in which all opinions, even the dumbest, count equally (Ariso, 2013). For these reasons, he advocated for a critical education whose main goal was that of constructing a reflexive public opinion.

With the end of Primo de Rivera’s dictatorship new political forces appeared on the horizon and new political projects were planned. In that context, Ortega immediately brought his educative theories to politics. He did so, in particular, in the occasion of the political campaign of 1930, in the

theatre of the city of León, when sustaining the recently born *Agrupación a Servicio de la República*:

I tell you this: the most difficult idea of the world, when thought by a man with full clarity, can be exposed so that it can be understood by the most humble understanding and by the least cultured soul. (...) Since democracy is something that is done with the people, all true democracy is, at the end, education and teaching for the people (Ortega y Gasset, 2010, v. 8, p. 489-490)<sup>13</sup>.

The possibility of creating a republican government acquired a progressively larger number of supporters. On the 10th of February 1931 the *manifesto* of this new political association was published in *El Sol*. Significantly, before its publishing, the Manifesto had already circulated within the University of Madrid (Márquez Padorno, 2003). In this text, Ortega justified his role as an active politician by saying that the urgency of the political situation had rendered indispensable for all to leave their professions and serve the public good (Ortega y Gasset, 2010, v. 4, p. 660). Ortega definitely passed the border between politics and academia, being persuaded that it would have been necessary to realize the political reforms he always envisaged, and to construct: “A Republic that wakes up in all the Spaniards both dynamism and discipline, calling them to resuscitate the history of Spain (...) demanding a lot from each citizen” (Ortega y Gasset, 2010, v. 4, p. 661)<sup>14</sup>. Evidently enough, in his critiques to democracy Ortega did not exhibit any elitism. On the contrary, he strenuously defended a project of political reform with the aim of building a critical and rational public opinion.

This is true also in relation to the evolution of his thought and public activities during the last part of his life, a period that many critics have directly associated to a silent (Elorza, 2002) or even overt endorsement (Morán, 1998) to Franco’s regime<sup>15</sup>. Indeed, with the victory of the far-rights movements, after the civil war Ortega decided to reduce his public utterances regarding political topics, preferring to observe a performative silence<sup>16</sup>. A silence that has recently been interpreted as a partial and indirect critique to the dictatorship, or as an attempt to open a dialogue between opposing fronts (Giustiniani, 2007b; Martín, 2014). However, his limited intervention cannot be understood without taking into account the sociological and historical conditions under which he lived, and that always constitute paramount

features of any philosophical activity practiced within an institutionalized framework (Angermüller, 2013). Indeed, Ortega was progressively losing both a receptive audience and the connection to the social institution to which he pertained. Consequently, even though he remained a leading member of an international scientific community, he was losing his social position, accordingly reducing his symbolic status.

In any case, Ortega’s scholars have been paying no attention so far to the evolution of his pedagogical thought during the ‘30s, even if, as proved, it constitutes a litmus test for understanding his political standpoint. Significantly, not only he never denied the theses he pronounced in his discourse in León, but also he directly criticized the pedagogical policies of those governments that produced a mentality that debases the masses (Ortega y Gasset, 2010, v. 5, p. 285).

In this context, the critique to the scholastic pedagogy that Ortega developed during the 1940s in *La idea de principio en Leibniz*, or his book on Vives, can be said to constitute clear instances of a direct opposition to the new scholasticism implemented by the regime in the University of Madrid (Conderrana Cerrillo, 2013; Scotton, 2017). The most patent defense of a democratizing education in the last period of Ortega’s life can be found in the creation of what has been defined as a challenge to the Franco regime (Abellán, 2006): the *Instituto de Humanidades* Ortega funded together with Julián Marías in 1948, when he went back to Madrid from his Lusitanian exile.

Various members of Franco’s regime perceived such Institute as a serious risk for the stability of the dictatorship, in particular since it could have questioned the legitimacy of the new intellectual and political elite. This is proven, for instance, by the worries expressed by the director of the recently funded review of the CSIC, *Arbor*, Pérez Embid, to the traditionalist thinker Calvo Serer, regarding the fact that Ortega was acquiring a growing popularity, in particular within the youngest generation of students:

Meanwhile Ortega, Marías, García Gómez, Sambricio and others have opened *Aula Nueva*, a sort of independent Faculty of Philosophy with classes and monographic courses to which all the students of the Faculty have enrolled. All the young graduates go there as desperate souls (as cited in Díaz Hernández, 2008, p. 171)<sup>17</sup>.

Indeed, through the *Institute* Ortega was trying to actively taking part in the cultural and political Spanish life. His main aim was playing a leading role as an independent scholar and not as an organic intellectual of the regime. For this reason, he refused all public endorsement to his project, and chose not to give his lessons in the University. For the same reason, he also decided to refuse the financial help that the Rockefeller Foundation had offered him, counting exclusively on the matriculation fees of the Institute's students. In this way, he accepted the difficult task of building a new educative institute with a complete different scope and purpose in respect to the official academia. His project was that of constructing in Madrid an oasis for the practicing of philosophy. A clearly utopian ideal that sprang from his desire of realizing what he always considered as his intellectual mission.

In the prospectus of the Institute, Ortega particularly focused on the meaning of humanities in historical and sociological perspective. The premise that opens this short pamphlet reveals at least two important and apparently opposed features of Ortega's last project: a) the global scope of his theoretical analysis, not limited to the Spanish scenario but opened to a constant confrontation with different philosophical traditions and disciplinary perspectives; b) the intention to delve into the concrete living conditions of the post-war society, and of doing this by focusing specifically on the Spanish case.

Regarding the first aspect, in line with his previous meditations (Monfort Prades, 2010), Ortega pointed out the necessity of defining humanities as an interdisciplinary set of knowledge that, under a unifying philosophical concept, would have to include different approaches such as that provided by linguistic, philology, ethnology, historiography – as Ortega called it, *historiology* – and economy. Accordingly, the Institute should have been conceived as a collaborative project in which the activities of different scholars and, hopefully, students, would have been aimed at analyzing relevant problems, thus contributing to shed light on a complex and fragmented reality. The prospectus was indeed an “essay on interdisciplinary” (Graham, 2001, p. 426), both regarding its principles and its subsequent practice. As Ortega put it:

If we want the disciplines of Humanities to regain their true vigor it is necessary to struggle for the reintegration of culture in its entirety,

trying to limit, through all possible means, its specialist dispersion that is, on the other hand, inevitable (Ortega y Gasset, 2010, v. 9, p. 1179)<sup>18</sup>.

Regarding the second feature, it is possible to notice in these texts recurrent references to the Spanish cultural scenario. Not only Ortega frequently criticized the scholastic tradition, but also, and foremost, he directly invited the Spanish population to collaborate in his new project. In the dumb cultural atmosphere of Franco’s Spain Ortega was aware of the political prudence he had to observe to avoid any repression. For this reason, on the one hand he vindicated the aristocratic character of his intellectual project, but on the other he overtly called for the widespread stimulus of this project in the civil society. In summary, the *Instituto de Humanidades* constituted Ortega’s response to the main troubles concerning the new role of the intellectuals, the academia and the philosopher under Franco’s regime. By 1948, Ortega dealt with new radical problems, concerning both the cultural situation of his country – substantially deprived of a real freedom of speech and democratic participation – and the global situation in which the intellectuals were trying to regain a meaningful role after the drama of the WWII. Even in this tragic period, Ortega affirmed the necessity for the intellectuals of continuing to foster a reflexive and critical attitude among the population. Therefore, also in the last part of his life, traditionally conceived by many interpreters as a turning point towards more conservative positions and towards the rejection of a democratic outlook (González Cueva, 2006 and 2009; Achiri, 2012), Ortega resembles to a radical thinker that critically counters the social reality with the aim of profoundly changing and democratizing it. Not to an embittered aristocrat.

Consequently, it is possible to affirm that the *Instituto de Humanidades* paradigmatically reveals the constant attention paid by Ortega to the importance of educating citizens to live a democratic life. A constant idea that he never denied, even when he changed his methods and languages in relation to changing political circumstances.

### **Humanities and Political Engagement: Ortega’s Concept of Democracy**

The diachronic evolution of Ortega’s pedagogical thought demonstrates that his ideal of humanist education has always been linked, during all his life, to



a direct political intervention aimed to forge a critical public opinion. This was because he attributed to philosophers and intellectuals, conceived as groups of active political agents, a prominent role in determining the norms and aims of a given society. This fundamental idea was based in particular on two basic assumptions.

Firstly, Ortega's political thinking stemmed from the premise according to which the increasing importance of the masses in the political life determined the need, *de facto* rather than *de jure*, of rethinking the very nature of democratic representation. Indeed, representative democracy was, according to Ortega, anachronistic, since it rested on principles that were no longer commonly accepted by the population. We can call this first premise as *the rebellion premise*. Furthermore, Ortega's study of the characters of the mass-men and his insistence on the necessity of promoting a new humanistic education for converting the average human beings in authentic human beings, unmasked a second premise of his reasoning. I.e.: the optimistic assumption according to which people, when addressed as individuals, can be prepared to live a meaningful and not hetero-directed political life. We can label this second premise as *the reforming premise*. This second features of Ortega's thought clearly counters the pessimist views that was common among sociologists and philosophers during the same period (Riesman, Glazer, & Denney, 1950).

Indeed, by focusing specifically on the second part of Ortega's life it is possible to highlight the existence of a sociological reflection that clearly follows the pedagogical concerns he exhibited during this same period. As already proven, from the end of the II Republic Ortega was perfectly aware of the fact that intellectuals, in Spain, had been relegated to a marginal position, in particular in comparison to the previous *Edad de Plata*. Under a new authoritarian regime, being an intellectual was synonymous of being a communist, a Freemason, an atheist and ultimately an immoral person. In that context, there was no longer any space for an intellectual intervention that was not directly ruled by the instituted power. Accordingly, Ortega started to question what to be an intellectual was meant to be: if philosophy is conceived as a form of intellectual *parrhesia*, that is the effort of understanding, claiming and defending the truth reached via a deliberative process, how would philosophy accomplish this social and political mission? In addition, what happens if philosophy is put under oppressing conditions? Ortega answered

to these questions in particular in the two courses he gave at the *Instituto de Humanidades: Del Imperio Romano* and *El hombre y la gente*.

As previously demonstrated, in Ortega's writings it is possible to notice that the masses do possess the germs to become active and conscious citizens. This is because society is regulated by some basic norms, that Ortega calls *usos*, defining them as "fossilized ideas". These consist in a set of concepts, actions, and behaviors that are executed apparently unconsciously by people in society, producing the distorted effects of mass democracy that he denounced in his famous *La Rebelión de las masas*. Consequently, in this coexistence of other-directed life and autonomous life it would be possible to notice an apparent paradox, which however constitutes the theoretical premise of Ortega's reforming will:

We just said that human life, a radical reality, had two forms: the authentic one, which is the personal life, and the pseudo-form of it, which is the collective life. This is the only thing that sociology does study. But this collective life - today we have discovered it completely - flows and springs from the authentic personal life. And this is, in short, what you have to study: this personal life, this human life is history (Ortega y Gasset, 2010, v. 9, p. 361)<sup>19</sup>.

Hence, according to Ortega, there still is a place for those intellectuals who had apparently lost their ability to influence the public opinion: they should dedicate themselves to comprehend and communicate to the population at large the reasons sustaining the historical development of society, with the goal of promoting a better and critical understanding of the present. Thus, Ortega strengthened the connection between education and politics, by affirming that the political role of intellectuals would consist in a continuous teaching and learning process directed to the individuals who compose the mass. Accordingly, he criticized any form of intellectualism and propagandistic politics, as the one purported by the regime (Ortega y Gasset, 2010, v. 5, p. 544).

In fact, when Ortega wrote his essay on the Roman Empire this was a very popular topic among the new organic intellectuals of Franco's regime. In such a context, he provocatively entered in the Spanish intellectual debate by radically changing the general standpoint. The crisis of the social and political life of the Roman Empire would reveal, according to him, that no social reality

could be maintained into existence without the support of a basic condition of harmony among the members of that very society. That is to say, without a social consensus. However, this cannot be imposed violently. On the contrary, it has to be built and transmitted through an intellectual activity, not a mere propaganda, since all propagandistic actions do produce negative results, not taking into consideration the vital needs that ground the construction of the very set of beliefs shared by a society. As he put it, the national propaganda was only “the gas of passion, which gives souls a hot air illusion” (Ortega y Gasset, 2010, v. 6, p. 93).

The responsibility of building this peculiar consensus was attributed by Ortega to the intellectuals, always conceived as a group of people acting together towards a common goal. In an unpublished note to *El Hombre y la Gente* conserved in his personal archive, it is possible to find a revealing commentary:

All social reality is a use. But the use, before, was the invention of the individual and the cultivation of a group. If the performance of both the individual and the group is not rendered possible, hence society will die when the government dies (Ortega y Gasset, 2010, v. 9, p. 361)<sup>20</sup>.

Thus, also in the last years of his life, Ortega evidently defended the role of intellectuals and cultural minorities, conceived as responsible for the creation and maintenance into power of social uses. Governments are transient and their appeal is always temporary. On the contrary, the long-term legitimacy of a system of values is always the product of an intellectual influence rendered possible by the ability of single persons to be active receivers of this message.

Thus, the apparently conservative character of Ortega's thought turns out to consist in a constant preoccupation in laying the necessary groundwork for the development of an authentic democracy, not ruled by the *doxas*, but characterized by an open and generalized critical reflection. If people were deprived of this peculiar civic education, then demagogic forms of populism would surely substitute democracy. In this scenario, Ortega conceives philosophers as "slaughterers", because of the cruelty with which they destroy widely accepted beliefs to turn them into meaningful knowledge. Indeed, citizens have to perceive themselves as a constitutive part of the society to

which they belong, participating to it according to their abilities, and being conscious of their limits.

Intellectuals, according to Ortega, are therefore responsible for the development of the public opinion through a process of humanization of the *demos*, a mass that is assuming an increasingly important role in the political decision-making. Consequently, promoting an adequate education represented the task in which intellectuals have to be involved in a context in which the mass no longer recognized any legitimate form of authority. Accordingly, it is possible to affirm that the sociology developed by Ortega ultimately contributes to respond to a very urgent question: if we want that democracy does not become something that legitimizes its opposite, how can people be empowered so to be able to govern themselves? (Brown, 2010).

Democracy is usually naively conceived as a positive value *per se*. However, as Ortega contributed to demonstrate, the term can assume very different connotation, and only when sustained by a critical civic education, directed towards all the people independently from their status, it can turn out to be a meaningful form of government. The videocracy (Sartori, 1997) of the 1990s and the current upheaval of digital populism (Elmer, Langlois, & McKelvey, 2012; Neuman, 2016; Dal Lago, 2017) reveal how democracy is constitutively a fragile and demanding concept that has to be continuously implemented through meaningful practices.

In conclusion, education did play a fundamental and constitutive role in relation to the development of Ortega’s philosophy throughout his all life, being always intrinsically linked to his political concerns. Indeed, he unceasingly argued that only a proper civic education would enable citizens to participate, not only actively but also consciously, in the political life of a society and in the democratic process of decision-making. Consequently, only this type of education would have been capable of subverting the main characteristics of the mass-people, that is, their lack of interest in listening to other points of view, their absence of critical reasoning, and inability to tolerate different opinions and ideas. This educative reform constituted, according to Ortega, the most urgent mission that philosophers and intellectuals had to accomplish. A mission that, to him, was always linked to an ethical ideal of authentic life, mirrored in the concept of humanistic education. According to his cultural ideal, Ortega conceived democracy as the best form of government for the active development of individual and social

capabilities, and he tried to put this ideal into practice even under oppressive conditions, by creating the Institute of Humanities. A project he realized always bearing in mind that: “all people should have the inexcusable duty of being intellectuals”. (Ortega y Gasset, 2010, v. 9, p. 1108).

## Notes

<sup>1</sup> All Ortega’s writings are quoted by referring to the last edition of his complete works. The author of the article provides the English translation of the text, while the original quotation appears as an endnote: “Hay que decidirse por una de estas dos tareas incompatibles: o se viene al mundo para hacer política, o se viene para hacer definiciones. La definición es la idea clara, estricta, sin contradicciones, pero los actos que impone son confusos, imposibles, contradictorios”.

<sup>2</sup> “Hay dos clases de hombres: los ocupados y los preocupados; políticos e intelectuales. Pensar es ocuparse antes de ocuparse, es preocuparse de las cosas, es interponer ideas entre el desear y el ejecutar. La preocupación extrema lleva a la apraxia, que es una enfermedad. El intelectual es, en efecto, casi siempre un poco enfermo”.

<sup>3</sup> “En el progreso de los tiempos la sociedad se complica y los políticos necesitan ser cada vez más intelectuales”.

<sup>4</sup> “La reforma del concepto que se tiene vulgarmente de cultura”.

<sup>5</sup> “La política significa una acción sobre la voluntad indeterminada del pueblo, no sobre sus músculos, una educación, no una imposición. No es dar leyes, es dar ideales y por ideales no se entiende nada vago y doncellil, sino cualquier posible mejora espiritual o material”.

<sup>6</sup> “Resulta imprescindible, para alcanzar la práctica trasformadora, pasar antes por la movilización de ese cuerpo mostrenco que comprende la mayoría de la población. De ahí que necesariamente democracia signifique pedagogía. (...) Es el problema en que se debate Ortega en sus diez primeros años, de optar por una labor pedagógica, siempre fundamental para él, pero sin incidencia concreta sobre un país en crisis de régimen” (Elorza, 2002, p. 43).

<sup>7</sup> “Para nosotros es lo primero fomentar la educación de una minoría encargada de la educación política de las masas”.

<sup>8</sup> “Desde hace años he tenido que buscar un sitio fuera del edificio universitario porque los gritos habituales de los señores estudiantes, estacionados en los pasillos, hacen imposible entenderse dentro de las aulas”.

<sup>9</sup> “Para actuar sobre una masa hay que dejar de serlo, hay que ser fuerza viva, hay que ser grupo en forma”.

<sup>10</sup> “Nunca tal vez el hombre medio ha estado tan por debajo de su propio tiempo, de lo que éste demanda. Por lo mismo, nunca han abundado tanto las existencias falsificadas, fraudulentas. Casi nadie está en su quicio en su auténtico destino. El hombre al uso vive de subterfugios con que se miente a sí mismo, fingiéndose entorno un mundo muy simple y arbitrario, a pesar de que la conciencia vital le hace constar a gritos que su verdadero mundo, el que corresponde a su plena actualidad, es enormemente complejo, preciso y exigente”.

<sup>11</sup> “Hay que partir del estudiante medio y considerar como núcleo de la institución universitaria, como sus tornos o figura primaria, exclusivamente aquel cuerpo de enseñanzas que se le pueden

en absoluto rigor exigir, o lo que es igual, aquellas enseñanzas que un buen estudiante medio puede de verdad aprender”.

<sup>12</sup> “Hay que reconstruir con los pedazos dispersos – *disierta membra* – la unidad vital del hombre europeo. Es preciso lograr que cada individuo o – evitando utopismos – muchos individuos lleguen a ser, cada uno por sí, entero ese hombre. ¿Quién puede hacer esto sino la Universidad?”.

<sup>13</sup> “Yo os digo lo siguiente: la idea más difícil del mundo cuando ha sido pensada por un hombre con plena claridad puede ser expuesta de manera que la entienda el entendimiento más humilde y el alma menos cultas. (...) Porque la política democrática es algo que se hace con el pueblo, más por lo mismo, toda verdadera política democrática es, a la vez, educación y enseñanza del pueblo”.

<sup>14</sup> “Una República que despierte en todos los españoles, a un tiempo, dinamismo y disciplina llamándolos a la soberana empresa de resucitar la historia de España (...) exigiendo mucho de cada ciudadano”.

<sup>15</sup> In particular, [Giustiniani 2007a and 2014](#); and [Lasaga Medina, 2012](#), have criticized these theses.

<sup>16</sup> On this performative and political function of silence, see [Ferguson 2002, 8](#): “Silence can serve as resistance to any institution that requires verbal participation (as do virtually all). On a macroscopic political scale, states often require such participation and subsequently employ a variety of means to compel it. The state-sponsored requirement to take an oath is a particularly overt form of obligatory speech. Loyalty oaths, public recantations of heresy, self-incrimination, enforced pledges of allegiance, and require judicial affirmations all oblige certain well-circumscribed speech acts”.

<sup>17</sup> “Mientras tanto Ortega, Marías, García Gómez, Sambricio y otros han abierto en *Aula Nueva* una especie de Facultad libre de Filosofía con una serie de clases y cursillos monográficos sobre los cuales se han volcado todos los estudiantes de la Facultad, y todos los Licenciados jóvenes que andan por ahí como alma en pena”.

<sup>18</sup> “Si se quiere que las disciplinas de Humanidades vuelvan a cobrar su auténtico vigor es preciso intentar la reintegración de la ciencia en su unidad, procurando compensar por todos los medios posibles su dispersión especialista que es, por otra parte, ineludible”

<sup>19</sup> “Dijimos en un momento que la vida humana, realidad radical, tenía dos formas: la auténtica, que es la vida personal, y la pseudoforma de ella, que es la vida colectiva. Esto solo estudia la sociología. Pero esta vida colectiva – hoy lo hemos averiguado con plenitud – mana y brota de la auténtica vida personal. Y esto es, en definitiva, lo que hay que estudiar: y esta vida personal, esta vida humana es historia”.

<sup>20</sup> “Toda realidad social es uso. Pero el uso tuvo antes que ser invención del individuo y cultivo de un grupo. Si se impide la actuación de estos la sociedad morirá cuando muera el gobierno”.

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