HISTORICAL INVESTIGATION OF PEDAGOGICAL HUMOR IN THE LITERARY TRADITION.
FORMS OF HUMOR AND FORMS OF EDUCATION

Biographical note

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Abstract
This article develops a historical investigation of pedagogical humor in the Western literary tradition, assuming humor not as a marginal expressive phenomenon nor as a circumscribed literary genre, but as a complex epistemic device, endowed with a structural cognitive and educational function. Through a genealogical approach, the contribution analyzes the main forms of humor elaborated in classical texts, relating them to specific conceptions of knowledge, the subject and education.
The basic hypothesis is that Western literature has historically experimented, in symbolic and narrative form, with cognitive and pedagogical devices that contemporary theoretical reflection has subsequently formalized. In this perspective, humor is interpreted as a privileged mode of knowledge production through incongruity, paradox and semantic restructuring, capable of activating reflective and metacognitive learning processes.
The contribution integrates the analysis of the classics with the systematic dialogue with international research in the philosophical, linguistic, pedagogical and cognitive fields, placing *humor as a pedagogical tool* as a contemporary theoretical synthesis of a long implicit educational tradition. The article thus intends to contribute to a redefinition of humor as a founding category of theoretical pedagogy and the history of education.

Keywords
Pedagogical humor; history of education; Western literature; epistemology of humor; cognitive incongruence; metacognition

Introduction

Humor and education as an epistemological and historical problem

In the panorama of Western pedagogical reflection, humor has long occupied a marginal and ambiguous position. Although it persistently crosses the history of literature, philosophy and culture, it has rarely been recognized as a central theoretical category in educational processes. This marginalization does not derive from a real irrelevance of humor, but from its systematic conceptual simplification, which has reduced it to an emotional manifestation, rhetorical strategy or accessory motivational resource.

Such a reduction has prevented us from grasping the epistemic complexity of humor and its function in the processes of knowledge construction. In recent decades, however, international research has progressively questioned this approach, recognizing humor as having a full cognitive status. Studies from the philosophy of language, cognitive science, pragmatics and educational psychology have shown how humor operates through mechanisms of controlled incongruence, capable of producing semantic restructurings and activating advanced forms of reflective thinking (Raskin, 1985; Attardo, 1994; Giora, 2003; Martin, 2007).

In this perspective, humor can be defined as an epistemic device, that is, as a specific mode of production of knowledge that acts by discarding ordinary interpretative frameworks. Understanding a humorous utterance does not simply mean decoding a message, but implies the ability to simultaneously manage multiple levels of meaning, to recognize the fracture between expectation and fulfillment and to reflect on this fracture. This cognitive operation has obvious educational implications, as it stimulates metalinguistic skills, conceptual flexibility and metacognitive awareness.

The hypothesis that orients the present contribution is that these educational functions of humor do not constitute a recent acquisition, but have their roots in the Western literary tradition. The classical texts are not considered here as simple historical antecedents, but as epistemic laboratories, in which humor operated as a tool for the formation of thought long before its explicit theorizing.

Taking a historical perspective therefore means questioning the forms of humor in relation to the educational models that underlie them. In this

perspective, the forms of humor and the forms of education are historically co-determined: each humorous configuration corresponds to a specific conception of the subject, knowledge and learning.

The theoretical framework developed in *Humor as a pedagogical tool* makes it possible to make this historical continuity explicit, proposing a contemporary systematization of humor as an intentional educational methodology. This perspective allows us to reread the literary tradition not as a repertoire of examples, but as a genealogy of implicit educational practices that today find a theoretical formalization.

1. Humor as an epistemic and educational device

Theoretical foundations for a historical reading

The assumption of humor as an epistemic device allows us to radically reconsider the relationship between knowledge and education. Far from being a simple stylistic effect or a marginal communicative strategy, humor is configured as a privileged mode of knowledge production, based on processes of semantic dislocation and conceptual reorganization. International research has shown that these processes imply advanced forms of cognitive processing, characterized by the ability to simultaneously manage incompatible representations and to reflect on their structural deviation (Raskin, 1985; Attardo, 1994; Attardo, 2001).

In this perspective, humor cannot be understood outside of a theory of knowledge that recognizes the constitutive role of incongruity. As highlighted by Giora (2003), humorous understanding requires a violation of interpretative expectations that is not simply recorded, but actively resolved through a complex inferential process. This process activates metalinguistic and metacognitive skills, making humor a privileged field for observing the deep functioning of the human mind.

These theoretical acquisitions find significant resonance in contemporary pedagogical reflection. Jerome Bruner, in outlining a cultural conception of education, insists on the fact that authentic learning does not coincide with the passive assimilation of information, but with the ability to reorganize one's own representations of the world through moments of cognitive discontinuity (Bruner, 1996). In this framework, humor appears as a culturally regulated form of discontinuity, capable of urging the subject to renegotiate meaning, rather than to adhere to it uncritically.

The convergence between cognitive, linguistic and pedagogical studies therefore makes it possible to attribute a structural educational function to humour. Authors such as Ziv (1988) and Martin (2007) have shown how humorous experience is associated with the development of divergent thinking, cognitive flexibility and socio-relational skills. In the educational field, these dimensions are central to the training of subjects capable of dealing with complexity, ambiguity and uncertainty, constitutive characteristics of contemporary learning contexts.

It is in this framework that *Humor as a pedagogical tool* is placed as a theoretical proposal of synthesis. The work assumes humor not as an accessory or motivational resource, but as an intentional educational methodology, capable of integrating cognitive, emotional and relational dimensions. The overcoming of the dichotomy between seriousness and humor represents one of the most significant contributions of this approach, since it allows humor to be recognized as having a full epistemic status and a high-level formative function.

This recognition makes it possible to reinterpret the literary tradition in a genealogical key. The forms of humor elaborated in classical texts can be interpreted as historical anticipations of cognitive devices that contemporary theory has made explicit. The relationship between history and current events is therefore not configured as a simple retrospective analogy, but as a structural continuity between symbolic practices and theoretical conceptualizations**.**

2. Classical Antiquity

Irony, incongruity and thought formation

In classical Greek culture, education is not conceived as a linear transmission of contents, but as a process of transformation of the subject through the exercise of thought. In this context, the first forms of pedagogical humor emerge in a way intimately intertwined with philosophical practice and reflection on knowledge.

Socratic irony represents one of the most relevant matrices of this tradition. As Vlastos (1991) has shown, Socrates' irony is not a secondary rhetorical technique, but an epistemic strategy aimed at producing a destabilization of the interlocutor's certainties. Through the simulation of ignorance, Socrates induces a fracture between presumed knowledge and

actual knowledge, generating a condition of cognitive dissonance that forces the subject to reorganize his representations.

This form of implicit humor performs an eminently educational function. Learning does not take place through the accumulation of correct answers, but through the awareness of the limits and problematic nature of knowledge. In pedagogical terms, it is a form of negative education, in which the suspension of certainties constitutes the condition for the possibility of knowledge. This approach significantly anticipates modern conceptions of reflective and constructivist learning.

Aristotelian reflection helps to consolidate this perspective, inscribing incongruity within a systematic theory of knowledge. In *the Poetics*, the comic is defined as the representation of error without destructive consequences. This definition makes it possible to interpret the humorous experience as a protected learning space, in which the error can be observed, analyzed and reworked without activating sanctioning mechanisms.

As educational scholars inspired by Dewey (1933) have observed, authentic learning implies a reflection on experience that passes through the re-elaboration of error. In this perspective, Aristotelian humor can be read as an anticipated form of pedagogy of error, capable of fostering understanding through critical confrontation and not through mere correction.

Attic comedy further extends this function from the individual to the collective level. Through parody, hyperbole and symbolic deformation, comedy produces a critical distancing from dominant discourses. As Bachtin (1965) has shown, ancient comic forms create a symbolic space in which hierarchies are temporarily suspended, allowing for a critical reworking of the social order. This suspension has a profoundly educational value, since it makes visible the historical and constructed character of the norms.

3. Latin tradition and the Middle Ages

Normative stabilization of humor and educational models of measure, morality and interiority

With the transition from Greece to the Roman world, pedagogical humor underwent a decisive transformation, which should not be interpreted as an impoverishment of the device, but as its functional

recodification within a different educational model. If Greek paideia had privileged epistemic problematization and philosophical dialogue as the primary form of education of thought, Latin culture progressively oriented humor towards a regulative, moral and social function, in line with a conception of education as the formation of the citizen and the responsible subject.

In this context, humor does not lose its ability to produce cognitive waste, but is subjected to a principle of measurement and regulatory control, which delimits its use and directs its educational effects. This transformation responds to a structural need of Roman culture, which is strongly attentive to the stability of the symbolic order and the transmission of shared values. Humor thus becomes an instrument of indirect education, capable of correcting without destabilizing, of producing awareness without undermining social cohesion.

Horace represents a paradigmatic figure of this configuration. In the *Satires* and *Epistles*, humor manifests itself as a strategy of reflective distancing, oriented to unmask excesses, rigidity and illusions without resorting to the symbolic violence of direct condemnation. The famous principle of *laughing dicere verum* should not be understood as a simple stylistic expedient, but as a pedagogical conception of discourse, based on the idea that truth, in order to be internalized, must be mediated and made cognitively accessible. As Freudenburg (2001) observes, Horatian humor operates as a device of critical self-limitation, inviting the reader to recognize his or her own limits through a process of problematic identification.

This educational function of humor is explicitly systematized in Quintilian's reflection. In the *Institutio Oratoria*, humor is included within an overall training project, which aims to construct the speaker as a morally and cognitively competent subject. Quintilian recognizes humor as having an essential function in the formation of judgment, but at the same time emphasizes the need for its controlled use, based on *urbanitas* and ethical responsibility. Humour, in this perspective, becomes an educational skill, not a spontaneous talent, and must be learned as an integral part of linguistic and moral training.

From a pedagogical point of view, this approach anticipates modern conceptions of education as the development of reflective and socio-communicative skills. Education does not consist only in the acquisition of content, but in the ability to modulate language according to contexts, to

recognize incongruity without transforming it into symbolic aggression, and to use ironic distancing as a tool for understanding. In this sense, Quintilian can be considered one of the first theorists of a pedagogy of normative humor, oriented towards the formation of cognitive and moral balance.

With Seneca, pedagogical humor underwent a further transformation, progressively moving from the social to the inner level. Stoic irony is not addressed primarily to the other, but to the subject himself, and operates as an instrument of self-knowledge and reflective detachment. As Hadot (1995) and Nussbaum (1994) have shown, Stoic philosophy cannot be understood as a mere doctrinal system, but as a set of spiritual practices oriented towards the transformation of the subject. In this framework, humor takes on the function of unmasking the illusions of the ego, revealing the inconsistency of the claims of control and domination.

Seneca's humor does not produce a liberating laugh, but a form of critical awareness that passes through the recognition of human fragility. From an educational point of view, this implies a conception of training as a process of emotional and cognitive regulation, in which humor operates as a device for the downsizing of passions and restructuring the relationship with oneself. This configuration significantly anticipates contemporary theories of emotional education and metacognition, in which the ability to reflect on one's mental states is considered central.

The transition to the Middle Ages introduces a further tension in the relationship between humor and education. In a context strongly marked by religious authority and doctrinal normativity, humor does not disappear, but is relegated to liminal spaces, often perceived as ambiguous or marginal. However, it is precisely this marginality that allows the development of humorous forms endowed with a peculiar indirect educational function.

Parodic literature, goliardic texts and carnival practices elaborate a pedagogy of inversion, in which humor acts as a device for the temporary suspension of the symbolic order. As Bachtin (1965) has shown, the logic of carnival does not destroy the norm, but relativizes it, making visible its historical and contingent character. In educational terms, this produces a form of critical learning that cannot be explicitly institutionalized, but that operates through the symbolic experience of reversal.

Medieval humor, far from being a simple residue of popular comedy, therefore performs a profound pedagogical function. It educates to the complexity of the social order, showing that hierarchies and truths are not absolute, but depend on specific interpretative frameworks. This function

anticipates, in symbolic form, modern conceptions of education as a process of critical deconstruction and pluralization of points of view.

Overall, the Latin and medieval tradition contributes to stabilizing humor as a regulated educational device, capable of operating on several levels: social, moral and interior. This stabilization does not cancel the epistemic function of humor, but orients its use according to specific educational models. It is precisely this plurality of configurations that makes humor a historically central category for the understanding of training processes.

4. Modernity and the twentieth century
From normative humor to critical and metacognitive humor

Literary and philosophical modernity marks a qualitative transformation of the humorous device, which from a predominantly regulatory and moral instrument is progressively configured as a critical principle of questioning knowledge. This transformation does not consist in a simple intensification of irony or paradox, but in a profound reorganization of the cognitive and educational functions of humor, now oriented towards unmasking the aporias of systems of knowledge and educational models based on authority, linearity and the presumed transparency of reason.

In this context, modern literature takes on a decisive role as an epistemic laboratory. Cervantes' work represents a fundamental threshold: *Don Quixote* stages a form of structural humor that is not limited to producing narrative incongruity, but questions the very assumptions of knowledge and education. The tension between imagination and reality, between bookish codes and the lived world, produces a paradoxical form of learning, in which the subject is educated not through adherence to a model, but through the repeated experience of interpretative failure. As Close (2003) observes, Cervante's humor constructs an epistemology of error that makes visible the historicity of systems of meaning and the need for a critical training capable of negotiating them.

This line is radicalized in Enlightenment satire, where humor takes on an openly emancipatory function. In Swift and Voltaire, incongruity no longer operates only on the individual level, but affects the institutional structures of knowledge and education. *Gulliver's Travels* and *Candide* use narrative deformation and hyperbole to undermine pedagogical optimism and naïve faith in abstract rationality. Humor here becomes an instrument

of epistemic resistance, capable of revealing the internal contradictions of educational models based on dogmatic assumptions (Eagleton, 2009).

From a pedagogical point of view, these works anticipate a conception of education as a critical practice, in which learning does not coincide with the transmission of established truths, but with the ability to recognize and question the limits of knowledge. Humor, in this framework, plays an essential function, since it allows us to introduce the necessary distance to problematize what appears obvious or natural.

The twentieth century marks the moment in which this literary intuition finds an explicit theoretical formalization. Henri Bergson, while moving in a different philosophical horizon, contributes decisively to recognizing humor as a cognitive and social function. His analysis of the comic as a response to the rigidity of the living allows us to interpret humor as a mechanism for reactivating flexibility, opposing the processes of automatization of thought and behavior (Bergson, 1900). In educational terms, this perspective implies a conception of training as a dynamic process, oriented to counteract cognitive inertia and promote critical adaptability.

Freudian reflection introduces a further level of complexity, placing humor at the intersection of cognitive and emotional processes. In *Der Witz und seine Beziehung zum Unbewussten*, Freud interprets humor as a psychic operation that allows energy to be saved through the symbolic restructuring of conflict (Freud, 1905). Although not a pedagogical theory in the strict sense, this approach has had profound repercussions on educational psychology, showing how humor can facilitate the processing of emotionally complex content and create favorable conditions for learning.

The point of maximum theoretical density is however reached with Luigi Pirandello, whose reflection on humor represents a decisive turning point for the understanding of its epistemic and educational value. In the famous distinction between *warning of the contrary* and *feeling of the opposite*, Pirandello defines humor as a form of thought that does not stop at the perception of incongruity, but reworks it through a process of empathic and cognitive reflection. Authentic humor does not produce an immediate effect of relaxation, but induces a suspension of judgment that opens up the space for complex understanding (Pirandello, 1908).

From an educational point of view, this conception is of extraordinary importance. Pirandello's humor educates to the plurality of points of view, to the relativity of identity forms and to the awareness of the fracture between form and life. In metacognitive terms, it urges the subject to reflect on his or

her own interpretative schemes and to recognize their partiality. It is no coincidence that numerous scholars have related Pirandello's humor to contemporary theories of complexity and reflective thinking (Forabosco, 2008; Morin, 1999).

It is precisely in the twentieth century that humor definitively ceases to be considered a marginal element of education and is recognized as an epistemological category. Pedagogical theories inspired by constructivism and metacognition have progressively enhanced the role of cognitive discontinuities, ambiguity and error as formative resources. In this framework, humor appears as a privileged tool to introduce these discontinuities in a non-threatening way, favoring deep and lasting learning.

Empirical and theoretical research conducted in the field of humor studies and educational psychology have confirmed this intuition. Studies by Ziv (1988) and Martin (2007) show that humor is associated with the development of creative thinking, cognitive flexibility, and social-emotional competence. Forabosco (2008) has further highlighted how the humorous experience involves processes of cognitive restructuring that make it particularly relevant in educational contexts oriented towards critical training.

In this perspective, modernity and the twentieth century do not represent a break with tradition, but the moment in which a long implicit educational practice finds a conscious theoretical formulation. The forms of humor experimented in classical and modern literature are now recognized as specific cognitive devices, endowed with a high educational potential.

5. Contemporary perspectives
Humor, metacognition and education to complexity

In contemporary debate, humor is progressively recognized as one of the most sophisticated ways in which human thought deals with complexity, ambiguity, and incongruity. This recognition marks a paradigm shift with respect to traditional conceptions of education based on linearity, transparency of meaning and stability of cognitive categories. Humour, as an epistemic device, is now becoming a privileged place to observe and promote advanced forms of reflective learning.

In the field of **humor studies**, international research has shown how humorous experience involves high-level cognitive processes, such as metarepresentation, conceptual flexibility and the ability to manage multiple

interpretive frames. The linguistic and pragmatic theories of humor, starting from the General Theory of Verbal Humor (Attardo, 1994; Attardo, 2001), have shown that humorous comprehension requires not only linguistic skills, but also a sophisticated capacity for inference and reflection on language itself. In this sense, humor is configured as a metalinguistic practice that makes visible the mechanisms of the construction of meaning.

These acquisitions find an important convergence with contemporary theories of **metacognition**. As pointed out by Flavell (1979), metacognition is about awareness and control of one's own cognitive processes. Humor, producing a gap between expectation and interpretation, forces the subject to question his or her own mental patterns, activating a reflection on the functioning of thought. Numerous empirical studies have shown how the conscious use of humor in educational contexts can promote metacognition, improve deep understanding and increase knowledge transfer capacity (Ziv, 1988; Banas et al., 2011).

In the pedagogical field, this perspective is part of a broader reconsideration of traditional educational models. Constructivist and socio-constructivist theories have questioned the idea of learning as a linear transmission of content, emphasizing the active role of the subject in the construction of knowledge. In this framework, humor appears as a particularly effective tool for introducing cognitive discontinuities that stimulate critical re-elaboration. As Jonassen (1999) observes, meaningful learning arises from problematic situations that force the subject to restructure his or her representations. Humor, as a culturally mediated form of cognitive problem, performs a similar function, but with the advantage of reducing the anxiety associated with error and uncertainty.

The emotional dimension of humor represents a further element of educational relevance. Research in educational psychology has shown how emotions play a crucial role in learning processes, influencing attention, motivation and memory. In this context, humor can be interpreted as an emotional regulation strategy that creates a favorable learning climate, without falling into the trivialization of content. Martin (2007) points out how humor, when used competently, can foster more symmetrical and dialogic educational relationships, promoting a sense of cognitive security that facilitates exploration and intellectual risk.

A further development of contemporary reflection concerns the relationship between humor and **education to complexity**. Theories of complexity, in particular those developed by Edgar Morin, have highlighted the

need to overcome reductionist educational models, capable of dealing only with simplified portions of reality. Morin (1999) argues that the education of the future must train minds capable of thinking about uncertainty, contradiction and interdependence. In this sense, humor represents a cognitive resource of extraordinary importance, as it accustoms the subject to live with ambiguity without resorting to simplifying solutions.

Humor educates to complexity precisely because it rejects the closure of meaning. It does not offer definitive answers, but opens up spaces for questioning that urge thought to move between different levels of interpretation. This function is particularly relevant in contemporary educational contexts, characterized by a growing cultural, linguistic and symbolic plurality. Humour, as a practice of negotiating meaning, fosters the development of intercultural skills and interpretative sensitivity.

In the dialogue between humor and education, an often neglected ethical dimension also emerges. Pedagogical humor, in order to be formative, cannot be reduced to an instrument of derision or the exercise of symbolic power. Contemporary research has highlighted the need to distinguish between constructive and destructive forms of humor, emphasizing the role of educational responsibility in the use of the humorous device (Billig, 2005). In this sense, humor education becomes an integral part of ethical education, since it implies the ability to recognize the other as an interlocutor and not as an object of devaluation.

It is in this theoretical framework that *Humor as a pedagogical tool* takes on a particular value. The work does not limit itself to incorporating the acquisitions of international research, but proposes an original reworking of humor as an intentional educational methodology, capable of combining cognitive, emotional and ethical dimensions. Humor is thus removed from both playful trivialization and motivational instrumentalization, and recognized as an educational practice with a high epistemic value.

The contemporary section therefore makes it possible to close the genealogical circle opened at the beginning of the investigation. The forms of humor elaborated in the literary tradition now appear as symbolic anticipations of cognitive devices that pedagogy and contemporary human sciences have made explicit. Pedagogical humor emerges as a transversal category, capable of crossing history, theory and educational practice, and of offering adequate conceptual tools to face the educational challenges of the present.

Conclusion

Humor as a founding category of reflective pedagogy

The historical investigation developed in this contribution has shown how pedagogical humor does not constitute a marginal or accessory element in the Western literary tradition, but a structural dimension of the processes of thought formation. Along the arc that goes from classical antiquity to contemporary elaborations, humor emerges as an epistemic device capable of profoundly affecting the ways of constructing knowledge, the forms of educational relationship and the very conception of the learner.

The genealogical perspective adopted has made it possible to go beyond a descriptive or compilative reading of the history of humor, highlighting the historical co-determination between forms of humor and forms of education. The humorous configurations elaborated in the classical texts have not been interpreted as simple cultural expressions of their time, but as symbolic laboratories in which learning methods based on discontinuity, incongruity and the critical suspension of common sense have been experimented.

From Socratic irony to Pirandellian reflection, passing through Roman normative stabilization and medieval parodic function, humor has operated as a tool for problematizing knowledge, favoring a form of indirect education that is not based on the transmission of certainties, but on their crisis. In this sense, humor is configured as a pedagogy of the limit, capable of educating the subject to the awareness of the partiality of his own interpretative schemes.

The dialogue with contemporary research has further clarified how these functions do not belong exclusively to the past, but today find an explicit theoretical formalization. Studies in cognitive linguistics, pragmatics, educational psychology and humor studies have recognized humor as having a central role in conceptual restructuring processes, in the development of metacognition and in emotional regulation. Humor thus appears as a privileged resource for education to complexity, understood not as an accumulation of information, but as the ability to think about ambiguity, contradiction and uncertainty.

In this framework, *Humor as a pedagogical tool* is placed as a theoretical synthesis and a conscious methodological proposal. The work

makes explicit an implicit educational tradition, showing how humor can be taken as an intentional educational methodology, endowed with full epistemic status. Overcoming the dichotomy between seriousness and humor makes it possible to recognize the latter as having a high-level educational function, capable of integrating cognitive, emotional and ethical dimensions.

The implications of this perspective for contemporary pedagogy are significant. In increasingly complex educational contexts, marked by cultural plurality, epistemic instability and rapid social transformations, humour offers a privileged tool to promote forms of critical and reflective learning. Educating in humor, and through humor, means training subjects capable of negotiating meaning, tolerating uncertainty and exercising non-dogmatic thinking.

In conclusion, pedagogical humor can be recognized as a foundational category of reflective pedagogy, capable of bringing history, theory and educational practice into dialogue. Its enhancement does not represent a concession to lightness, but a rigorous epistemological choice, aimed at restoring complexity and depth to the processes of thought formation.

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