

Classical Echoes in Middle-earth: Pedagogical Functions of Greek and Roman Mythological Allusions in J. R. R. Tolkien's The Hobbit

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Abstract— This paper proposes a critical framework centred on the literary reception of ancient Greek and Roman traditions to advance the pedagogical study of J. R. R. Tolkien's *The Hobbit* within secondary school curricula. By challenging the assumption that only primary texts effectively introduce classical narrative structures, this framework emphasizes how Tolkien's strategic synthesis of the structural odyssean quest and the ethical relatable hero model functions as an accessible precursor to epic literature. The structural quest archetype, along with creature parallels that echo Greco-Roman bestiaries, operates as an aesthetic embellishment as well as a vital source for supporting foundational classical literacy, while the ordinary hero's moral journey promotes an approachable introduction to epic heroism. J. R. R. Tolkien's *The Hobbit* serves as a compelling case study, showcasing a masterful literary appropriation of antiquity that seamlessly integrates the demands of the Western Canon into a young adult narrative. Through this analysis, the paper highlights the potential of mythological fantasy to act as a preparatory text, empowering students to recognize the enduring lineage of narrative archetypes and engaging critical-analytic engagement with comparative mythology. This framework has the potential to inform educational practices, specifically through curriculum design that purposefully integrates *The Hobbit* as a critical scaffold for later formal study of classical reception and ancient literature, thereby cultivating a critically literate citizenry.

Keywords— Children Literature, Tolkien, Fantasy, Mythology, Pedagogy

I. INTRODUCTION

J. R. R. Tolkien's *The Hobbit* (1937) is ubiquitously recognized as a foundational work of high fantasy, the scholarly analysis of which has historically centered on its meticulous engagement with Northern European philology, particularly the Germanic and Norse mythic traditions (Shippey, 2005). The text's deliberate synthesis of Old English and Eddic poetry is critically well-established, but a significant critical lacuna persists in fully appreciating the functional presence of the Greco-Roman narrative ontology in the work's structure and character models.

This oversight is paradoxical, given Tolkien's academic history: he initially read Classics at Exeter College, Oxford, before specializing in English Language and Literature, excelling in disciplines including French, German, Latin, and Greek (Tolkien Estate, 2024; Tolkien, 1915). This background suggests that the incorporation of classical elements within his "sub-creation" (Tolkien, 1947) is not incidental but a conscious, deliberate application of epic structures familiar across the Western Canon. This article asserts that *The Hobbit* strategically employs and synthesizes the structural Odyssean quest archetype, the ethical relatable hero model, and distinct creature parallels to serve a vital pedagogical function. The resulting narrative acts as an essential canonical scaffold, making the complex narrative and thematic demands of classical epic literature accessible to the middle-grade reader.

Children's literature is understood to be pedagogically crucial for nurturing socio-moral competence and developing the critical-analytic skills necessary for twenty-first-century citizenship (Leland et al., 2013; Tunnell, 2012; Aquino, 1977). Furthermore, psychoanalytic theory, particularly the work of Bettelheim (1976), contends that fantasy and fairy tales communicate universal human problems, supporting ego development and providing therapeutic functions for children's emotional expression (Davis, 2020). Myth, as the origin of many fantasy archetypes, provides the foundational cultural narratives that shape literary understanding. However, the direct introduction of primary classical texts can be linguistically and culturally daunting for young readers. We argue that *The Hobbit* provides a necessary intermediary text, establishing the basic structural and ethical rhythm of epic storytelling in an approachable secondary world before the student is tasked with navigating the social and political worlds of Homer or Virgil.

"The Bagginses had lived in the neighborhoods of The Hill for time out of mind, and people considered them very respectable, not only because most of them were rich, but also because they never had any adventures or did anything unexpected..." (Tolkien, 1937, p. 14)

Tolkien's scholarly trajectory was fundamentally concerned with the interrelation and evolution of linguistic and literary traditions, viewing myth as the communal expression of truth synthesized through language (Tolkien Estate, 2024). His position as a professor of philology enabled a profound engagement with the genealogy of narrative, allowing him to weave together disparate mythic strains such as Northern, Celtic, and Mediterranean, into a cohesive narrative ontology. Scholarly defenses of Tolkien's literary merit (Shippey, 2005; Rosebury, 2003) have argued that he intentionally aimed to revive the medieval heroic romance, a literary mode that is structurally and thematically indebted to classical epic.

"The significance of a myth is not easily to be pinned on paper by analytical reasoning... myth is alive at once and in all its parts, and dies before it can be dissected." (Tolkien, 1947, p. 81)

By adapting the ancient formula of the journey, the test, and the return for a modern audience, Tolkien created a text where the structural elements—the linear, perilous *nostos* (journey home) and the establishment of the ordinary hero—are presented with maximal clarity. This methodological lucidity is precisely what lends *The Hobbit* its pedagogical power, allowing the reader to subconsciously internalize the core tenets of classical narrative before facing the grand complexity of the *Aeneid* or the *Odyssey* in their original form. The following analysis will dismantle the narrative into its component parts to demonstrate how this foundational literacy is achieved through the systematic echoing of antiquity.

II. THE QUEST ARCHETYPE

The structural coherence of *The Hobbit* is predicated upon its utilization of the Odyssean quest archetype, a foundational narrative ontology pervasive across the Western epic tradition. Defined by the perilous journey (*nostos*), the confrontation with the monstrous, and the eventual transformative return to the point of origin (*oikos*), this structural model lends the narrative immediate, pre-cognitive familiarity (Hanink, 2017).

"Mine is a rugged land but good for raising sons—and I myself, I know no sweeter sight on earth than a man's own native country." (Homer, ca. 800 B.C.E./1996, *Odyssey* 9.28–30)

We know that Tolkien's narrative constitutes a work of "sub-creation" (Tolkien, 1947), its success in achieving what he termed "secondary belief" relies heavily on the internal consistency of its governing laws and narrative framework, a consistency that is achieved, in part, through its fidelity to established epic rhythms. We argue that *The Hobbit* functions as a methodologically simplified analogue of classical epic, providing a crucial scaffolding mechanism wherein the intricate plot mechanisms of works like Homer's *Odyssey* are presented with structural lucidity suitable for the intermediate-grade reader (Leland et al., 2013).

The initiation of the narrative necessitates a disruption of the prevailing domestic equilibrium, a phase critically defined by the protagonist's reluctant departure from the *oikos*, the secure, settled habitat of Bag End. The Shire represents an idealization of the Roman agrarian ideal and the insulated, stable sphere of the civilized world, contrasting sharply with the chaotic, demanding frontier beyond its borders. Bilbo Baggins's initial resistance to the adventure is pedagogically vital because it grounds the concept of the "hero's call" not in predestined fate or inherent nobility, but in relatable bourgeois comfort, positioning him as an ordinary hero archetype (Mills et al., 2010). This reluctance creates the psychological distance necessary for character development and establishes the theme of growth through adversity, mirroring the initial displacement and ensuing self-discovery central to the journeys of classical figures such as Odysseus or the displaced Aeneas. By beginning with an accessible, seemingly domestic transgression, Tolkien renders the daunting emotional weight of the ancient epic's initial stages cognitively manageable for the young reader.

The central portion of *The Hobbit* is a succession of geographically and narratively segmented trials, which, from a structuralist perspective, provide clear, detachable modules of conflict that advance the *nostos* toward its intended conclusion at the Lonely Mountain. The encounters with the Trolls, the Goblins, the Wargs, and the spiders of Mirkwood function as individual perilous confrontations, each demanding a distinct application of wit, skill, or chance for survival (Bolen, 2014). This segmentation contrasts with the often-labyrinthine, politically and religiously interwoven journeys found in primary classical texts, simplifying the concept of the long, transformative trial period.

Critically, the explicit orientation of the entire journey toward the eventual return to the Shire, the goal of reclaiming home and defining oneself against the experience of the *nostos*, emphasizes the fundamental circularity of the epic narrative. This structural clarity allows students to identify and internalize the recursive pattern of departure, trial, and return, a fundamental prerequisite for analysing the full complexities of classical literature and the ongoing field of classical reception (Hardwick & Stray, 2008). The pedagogical benefit is realized when the student later recognizes this identical structural framework underpinning the lengthier and more philosophically demanding classical epics, demonstrating the enduring intellectual heritage of the ancient world.

III. THE HERO MODEL: FROM ACHILLES TO BAGGINS

The pedagogical significance of *The Hobbit* extends beyond its adherence to the structural linearity of the *nostos*; it is fundamentally located in its revisionist approach to the classical hero archetype. Ancient epic protagonists, such as Achilles and the Homeric Odysseus, are traditionally defined by physical superiority (*biē*), elevated socio-political status, and the pursuit of everlasting glory (*kleos*). In sharp contrast, Bilbo Baggins is introduced as a figure of pronounced domesticity and minor stature, a deliberate inversion that fulfils a crucial function in the apparatus of classical reception for young readers (Reckford, 1988). By engaging with a character who embodies the antithesis of the martial epic hero, Tolkien provides a pathway for students to assimilate the underlying ethical and psychological components of the heroic journey before confronting the complexities of a war-driven narrative. This process effectively lowers the entry barrier to understanding epic heroism by prioritizing internal transformation over inherent physical greatness.

"If I say he is a Burglar, a Burglar he is, or will be when the time comes. There is a lot more in him than you..." (Tolkien, 1937, p. 30)

The transformation of Bilbo from the cautious householder to the resourceful adventurer is realized through the habitual application of cunning intelligence, or *metis*, a trait that is the defining characteristic of the non-martial heroism attributed to the classical Odysseus. Most heroes of the Homeric Age are often primarily lauded for strength and bravery in battle, Odysseus is differentiated by his resourceful planning and trickery, notably in the Trojan Horse scheme and the blinding of the Cyclops Polyphemus.

Tolkien strategically mirrors this emphasis on mental acuity over brute force.

"You terrible man, foxy, ingenious, never tired of twists and tricks – so, not even here, on native soil, would you give up those wily tales that warm the cockles of your heart!" (Homer, ca. 800 B.C.E./1996, *Odyssey* 13.330–333)

Bilbo's ability to navigate peril is almost exclusively dependent upon his hobbit wit, exemplified during the pivotal encounter with the creature called Gollum in the Misty Mountains. The subsequent acquisition of the One Ring, achieved by guile and chance rather than combat, reinforces the narrative value of strategic thought. Furthermore, the systematic defeat of the Trolls through temporal deception (Bilbo's delay tactic) and the stealth required to survive Mirkwood are all triumphs of cognitive strategy over confrontation. For the middle-grade audience, this emphasis is a potent pedagogical tool: it shifts the perception of heroism from an inaccessible ideal of divine lineage and physical exceptionalism to an achievable ideal rooted in prudence, wit, and quick thinking. By demonstrating that the most critical resources for survival are intellectual, the ability to think laterally and exercise caution, *The Hobbit* introduces the *metis* component of classical heroism in a highly relatable and immediately comprehensible context (Mills et al., 2010).

Beyond intelligence, the ethical core of Bilbo's heroism centres on the concept of moral agency, the capacity to make a conscious choice that rejects the cycle of violence often inherent in traditional heroic narratives (Hanink, 2017). This feature offers a crucial comparative element against the backdrop of ancient texts, where fate and divine intervention often dictate the moral trajectory.

"A sudden understanding, a pity mixed with horror, welled up in Bilbo's heart: a glimpse of endless unmarked days without light or hope of betterment, hard stone, cold fish, sneaking and whispering." (Tolkien, 1937, p. 95)

The clearest demonstration of this ethical divergence occurs when Bilbo chooses not to kill the desperate and pathetic Gollum, an act that is overwhelmingly consequential to the entirety of the *legendarium* (Shippey, 220). In this instance, the hobbit's decision to show mercy is presented as a singular moment of personal, self-directed moral action, independent of external pressure or heroic expectation. This is an element that transforms the traditional hero's pursuit of external *kleos* (glory) into a quest for internal ethical integrity.

The pedagogical implication is significant: when students later encounter the complex moral ambiguities of figures like Achilles, whose choices are often dictated by honour codes and divine command, Bilbo's journey provides a pre-established schema for understanding heroism driven by empathy and subjective conscience. By demonstrating that true heroic development stems from the exercise of compassion and the rejection of self-centred gain, Tolkien subtly positions his work as a modern moral commentary on the often-brutal codes of conduct found in the ancient epics (Bettelheim, 1976; Davis, 2020). The hero's primary triumph is thus rendered not the acquisition of wealth or renown, but the internal transformation toward ethical responsibility.

IV. CREATURE PARALLELS: TRACING LITERARY GENEALOGY

The final component of *The Hobbit*'s pedagogical utility lies in its bestiary, which functions as a complex system of literary genealogy demonstrating the enduring and transcultural nature of mythic figures (Hardwick & Stray, 2008). Tolkien's creatures, while drawing heavily from Northern traditions, reveal deliberate adaptations and syntheses that resonate distinctly with Greco-Roman archetypes, providing explicit entry points for comparative mythology in the classroom (Stróżyński, 2025). The presence of these creatures allows students to engage with the concept of classical reception—the continuous process by which ancient themes and images are transformed and deployed in subsequent cultural contexts (Hanink, 2017).

The early encounter with the three Trolls—William, Bert, and Tom—is a powerful structural and thematic parallel to one of the most celebrated episodes in classical literature: Odysseus's confrontation with the giant Cyclops Polyphemus in *The Odyssey* (Book 9) (Reckford, 1988).

"I think are mere 'counterfeits', and hence (though here I am of course only using elements of old barbarous mythmaking...) they return to mere stone images when not in the dark." (Tolkien, 1981, Letter 153)

In both narratives, the antagonist is characterized by overwhelming physical bulk (*biē*), pronounced lack of civilized intelligence, and, most critically, a penchant for cannibalistic consumption. The Trolls' behavior such as, squabbling over the appropriate method of cooking their captured dwarves and hobbit, directly mirrors the chilling narrative function of Polyphemus, who's macabre "guest-gift" is the promise to consume Odysseus last.

The pedagogical nexus between the two texts lies in the resolution of the conflict. In both cases, the massive force of the monster is successfully countered not by martial prowess, but by the strategic application of *metis* (cunning intelligence) and temporal manipulation. Just as Odysseus uses verbal deception to introduce himself as Outis (Noman) and then incapacitates the Cyclops through drink, Bilbo and Gandalf exploit the Trolls' dim-wittedness and aversion to daylight to secure their defeat. This clear parallel demonstrates for students the consistent mythological assertion of the superiority of civilized wit over brute, primitive force. By first recognizing the familiar pattern of *metis* overcoming *biē* in the accessible context of *The Hobbit*, the middle-grade student is better equipped to critically analyse the sophisticated social and psychological dimensions of the original Homeric confrontation (Mills et al., 2010).

The defining antagonist of the narrative, the brave confrontation with the dragon Smaug, offers a final and powerful analogue to Greco-Roman mythology. Though dragons are staples of Northern mythology, often serving as hoard-guarding symbols of chaos (Shippey, 2005), Smaug's function within the narrative also carries the thematic weight of the chaotic, monstrous forces that must be vanquished to establish societal order, akin to the tasks of the Greek heroes. Smaug embodies the classical concept of excessive, antisocial accumulation, symbolizing unchecked greed and the corruption of a once-thriving kingdom (Bolen, 2014).

"His heart was filled and pierced with enchantment and with the desire of dwarves; and he gazed motionless, almost forgetting the frightful guardian." (Tolkien, 1937, p. 250)

"And Keto mingling in love with Phorkys, brought forth, as youngest-born, a terrible serpent, which in hiding-places of dark earth, guards all-golden apples, in wide bounds." (Hesiod, ca. 700 B.C.E./2017, lines 333–337)

His specific portrayal resonates with the concept of the Herculean monster, a creature whose defeat is necessary for the restoration of civilization. For example, the Lernaean Hydra, one of Heracles' most famous labours, represents a force of proliferation and unending destruction that threatens stability. Smaug, with his destructive fire and paralysing speech, similarly acts as an existential threat to the communities of Dale and Lake-town. Bilbo's confrontation, involving stealthy infiltration and psychological probing, is the necessary precursor to Smaug's ultimate defeat by Bard.



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The destruction of Smaug represents the mythological act of purging the monstrous embodiment of vice from the world, allowing for the restoration of the rightful socio-economic order—a pattern that permeates classical literature, from the defeat of Python by Apollo to the necessary labours of Heracles. Examining Smaug through this lens prepares students to analyse the complex moral economy and socio-political necessity underlying the slaying of monsters in the ancient world. The use of fantasy to demonstrate this continuity in the mythological genealogy of the monstrous is highly effective in nurturing a critically literate citizenry (Leland et al., 2013).

V. PEDAGOGICAL APPLICATIONS IN CLASSICAL LITERACY

The literary analysis presented demonstrates that *The Hobbit* is saturated with structural and thematic echoes of Greco-Roman antiquity, confirming the text's status as a critical work of classical reception (Hanink, 2017). However, the ultimate significance of this reception for a journal dedicated to education lies not in mere textual identification but in the operationalization of these findings within a learning environment. We assert that the systematic integration of *The Hobbit* into the middle-grade curriculum serves a vital pedagogical function, functioning as a preparatory scaffold that nurtures both classical literacy and critical-analytic skills necessary for twenty-first-century citizenship. The clear, simplified representation of complex epic mechanisms within Tolkien's narrative provides a cognitive bridge, easing the student's eventual transition to the primary texts of the Western Canon.

The structural and character parallels established in the preceding sections, the Odyssean *nostos* (journey home) and the metis-driven hero, are crucial tools for introducing the concept of the monomyth and the enduring nature of literary archetypes (Mills et al., 2010). For intermediate-grade students, the clarity of Bilbo's journey acts as a cognitive mapping instrument. When students later approach the chronological and episodic complexity of *The Odyssey* or *The Aeneid*, they do not encounter the structural rhythm for the first time; rather, they recognize a variation on a pattern already assimilated through a welcoming fantasy narrative.

This method supports sociomoral learning by allowing children to identify with the resilient archetypes (e.g., the trickster hero) and internalize them through the story's emotional engagement (Bolen, 2014).

Furthermore, the comparison of creatures (Trolls/Cyclops, Smaug/Hydra) facilitates an understanding of literary genealogy—how fundamental mythic concepts migrate across linguistic and cultural boundaries (Hardwick & Stray, 2008). By presenting the comparative task through a text the students find appealing, educators encourage a critical-analytic stance toward literature, moving them beyond mere appreciation and into the realm of evaluating thematic and structural relationships between diverse texts. This deliberate process enables critical thinking and enhances the aesthetic and core literacy development of the students (Fu, 2024).

To maximize the pedagogical benefits derived from Tolkien's classical echoes, we propose a modular curricular unit for middle school (Grades 6–8) centred on Classical Reception and Narrative Lineage. This unit directly addresses the need for effective teaching methodologies that "smuggle" complex literary analysis into engaging instructional materials (Burton, 1968). The module should be structured to explicitly link textual episodes from *The Hobbit* to excerpts from classical sources, thereby scaffolding the students' engagement with primary materials (Leland et al., 2013).

VI. CONCLUSION

The comprehensive analysis undertaken here systematically validates the central hypothesis that J. R. R. Tolkien's *The Hobbit* operates as a deliberate and highly effective work of classical reception, positioned strategically to fulfil a measurable pedagogical mandate for middle-grade readers (Hanink, 2017). By dissecting the narrative into its structural and thematic component parts, we have demonstrated that Tolkien's work intentionally synthesizes the profound intellectual heritage of the ancient world with the accessible, emotionally resonant framework of children's fantasy (Shippey, 2005). Consequently, the text performs a vital function in the educational sphere, bridging the gap between foundational classical literacy and the modern literature curriculum (Leland et al., 2013).

The structural parallels identified serve as the most crucial point of contribution for educational methodology. The distilled clarity of Bilbo's Odyssean *nostos* and the prioritizing of cunning (metis) over brute strength (*biē*) represent a narrative de-escalation of ancient epic's complexity, thereby providing a readily accessible cognitive scaffold for students confronting the formal narrative structures of the Western Canon's origins.

Furthermore, the creature parallels (Trolls, Smaug) function as concrete, comparative case studies, allowing students to engage practically with the concept of mythological genealogy and the enduring archetypes that migrate across cultural boundaries. The cumulative effect of these classical echoes is the creation of a preparatory literary text that encourages students to internalize the cyclical rhythm and ethical demands of epic heroism before navigating the challenging linguistic and historical context of primary ancient sources.

Ultimately, the pedagogical value of *The Hobbit* is its capacity to transform the consumption of fantasy into a foundation for rigorous critical-analytic engagement. The proposed curricular model utilizing parallel reading, where Tolkien's text is paired with excerpts from Homer and other classical sources, transmutes the perceived didactic challenge of introducing ancient literature into an engaging exercise in comparative analysis.

Future research should extend this methodological framework by applying the concept of "classical scaffolding" to other seminal texts within the high fantasy genre, specifically examining works by C. S. Lewis, Ursula K. Le Guin, and later fantasy authors influenced by Tolkien. Such studies would further map the pervasive lineage of classical archetypes in youth literature, providing educators with an expanded toolkit for developing a critically literate citizenry (Leland et al., 2013). The integration of Tolkien's carefully crafted sub-creation into the mandated study of classical reception is not simply a literary option; it is a strategic intervention that empowers students to recognize and evaluate the continuous, evolving thread of cultural narrative that links Bag End to Mount Olympus.

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