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## CHAPTER ONE

# EDUCATION AND SOCIAL ORDER

Education can be a powerful policy tool to reduce poverty and income inequality. This much is widely conceded. Yet in many countries around the world, the schools that low-income families access fail to teach children the skills they need to escape poverty. Although most countries have attained universal access to primary education, about one-third of children with four years of schooling are unable to read a simple sentence. The most common explanation for such dismal learning is that governments simply do not know how to promote skills among children. This line of thinking has spurred hundreds of expensive studies designed to identify which education policies work best to promote skills. I depart from this approach by looking at the political history of public primary education systems to determine what motivated governments to provide education to the lower classes in the first place. Were these systems set up to reduce poverty and inequality, or did they seek to accomplish a different set of goals?

Two major historical transformations that took place in the last two centuries have shaped the character of modern education systems. First, breaking with the tradition of leaving the upbringing of children entirely to parents, local communities, and churches, central governments in the nineteenth century began to intervene directly in the education of children, establishing rules about educational content, teacher training, and school inspections, and mandating children to attend state-regulated schools. Second, these state-regulated primary education systems expanded in size and eventually reached the entire population. While in the early twentieth century only a handful of countries had universal access to primary

education, today this is the norm virtually everywhere. What prompted the expansion of primary education systems, and why did states become involved in regulating them?

Much of what has been written in the last half century points to democratization, industrialization, and military competition as key factors that prompted governments to expand primary education largely to improve the literacy, numeracy, or other skills of the population. These explanations, we will see, do not adequately account for why the Western societies of Europe and the Americas led this expansion. What's more, many existing explanations either forget or ignore where education systems come from. They assume, for instance, that because education systems today have the potential to reduce income inequality, promote economic growth, or contribute to military strength, they must have become popular among policymakers for these reasons—and must have been designed to accomplish these goals. Or they assume, alternatively, that because education systems today often seek to inculcate nationalism, they must have emerged for this reason. I do something different by going back in time to examine what the long history of state-regulated primary education can tell us about the systems we have today.

Looking at history teaches us that central governments in Western societies took an interest in primary education first and foremost to secure social order within their territory. Fear of internal conflict, crime, anarchy, and the breakdown of social order, coupled with the perception that traditional policy tools such as repression, redistribution, and moral instruction by the Church were increasingly insufficient to prevent violence, led governments to develop a national primary education system. Central governments went to great lengths to place the masses in primary schools under their control out of concern that the “unruly,” “savage,” and “morally flawed” masses posed a grave danger to social order and, with that, to ruling elites’ power. The state would not survive, education reformers argued, unless it successfully transformed these so-called savages into well-behaved future citizens who would obey the state and its laws.

State-regulated primary education systems, then, emerged fundamentally as a state-building tool. State-building, understood as the process of consolidating the power of a centralized political authority commonly known as the state, is a multifaceted process that unfolded over many centuries. Wars between different rulers played a role in driving this process, leading rulers to invest in creating a centralized taxation apparatus that could be used to

finance a permanent army.<sup>1</sup> But external threats were not the only factor affecting the consolidation of central rulers, and armies were not the only mechanism by which they sought to enhance political control. Mass violence *within* the boundaries of a central ruler's territory also posed a challenge to the ruler's effort to develop a monopoly over the legitimate use of violence. While rulers deployed the army, and later, police forces, to repress the disorderly masses, internal threats also motivated them to invest in primary education systems designed to forge social order through indoctrination.

Key to this state-building endeavor was the effort to inculcate a set of moral principles that exalted the value of obedience and rejected the individual use of violence. Every aspect of primary education systems was crafted to teach children to obey existing rules and authorities, and accept the status quo. National curriculums emphasized moral education more than they emphasized skills or the cultivation of nationalist sentiment. Teacher training and certification policies focused on recruiting teachers of exemplary moral character who could model good behavior in the classroom and local community. Centralized inspection systems attempted to safeguard a general atmosphere of discipline and order in schools.

Primary education systems, then, were conceived as part of a repertoire of policy tools used by the state to consolidate its power. The ability to promote social order and prevent violence lies at the core of what defines a state and what gives it legitimacy, so much so that societies afflicted by recurring internal conflict are usually termed “failed states.” Throughout human history, those with political power have turned to three main strategies—repression, concessions, and indoctrination—to maintain and consolidate not only social order but also *the existing political order*—the status quo, so to speak, in terms of who holds political power and who is subjected to that power. Physical repression is the most obvious of these strategies: the threat or actual use of force can often persuade people to do or refrain from doing something. It is no coincidence that in premodern societies, and in many societies today, political power has often been concentrated in the hands of those who have the greatest capacity to repress others.

Concessions are another common strategy used to promote social order and acquiescence. Concessions—material, institutional, or symbolic—seek to reduce the reasons for fighting against the status quo by directly

1. Levi (1988); Tilly (1990); Dincecco (2011); Queralt (2022).

addressing the problems and injustices that prompt people to fight. An extreme form of concession entails redistributing political power—changing the status quo—but there are many other less radical concessions that can promote social order without fundamentally altering the balance of power. Redistributing economic resources to less affluent sectors of society or improving the quality of people’s lives by providing public services they value are examples of concessions that can reduce the incentives to fight, at least in the short term.

Because public education today is often highly prized by families seeking to improve their children’s job prospects, its provision is usually conceptualized as a progressive policy tool that governments use when they want to improve the lives of less affluent members of society. Indeed, one of the reasons why the United Nations advocates for education provision in post-conflict settings is to address economic grievances that, if left unaddressed, could lead to a recurrence of violence.<sup>2</sup> However, during its early stages, mass education was rarely conceived as a concession to appease rebellious sectors of society or address societal demand. In fact, many central governments made efforts to expand education *despite* their perception that parents largely objected to sending their children to school.<sup>3</sup>

The emergence of public primary education systems targeted at the masses—not secondary education or universities, which until recently were limited to elites—fits into a third type of strategy used to promote social order: indoctrination. If physical repression seeks to reduce the probability that those who fight against the established order will succeed, and concessions seek to reduce the probability of conflict by addressing the grievances that make people angry, mass education systems emerged to convince people that the status quo was actually okay, that there was no reason to rebel against it, and that accepting and respecting the status quo would elevate them morally and earn them praise from others. These systems were designed to fulfill a task that churches had been fulfilling for centuries: to mold children’s hearts and minds to make them loyal subjects—but loyalty to God was replaced by loyalty to the state, the priest became a teacher certified by the state, and the temple became a school regulated and inspected by the state.

2. UNESCO (2011), pp. 160–171.

3. Andersson and Berger (2019); Squicciarini and Voigtländer (2016); Cinnirella and Hornung (2016); Baker (2015); Tapia and Martínez-Galarraga (2018); Cvrcek and Zajicek (2019).

The idea that primary education systems in Western societies were originally designed to indoctrinate may be difficult to fathom for some readers. Today, the word “indoctrination” has a strongly negative connotation, especially in developed democracies, where it is usually reserved to describe the brainwashing that takes place in totalitarian communist or fascist regimes. But in the nineteenth and beginning of the twentieth centuries, education philosophers and reformers in the United States would routinely and openly talk about the important indoctrination goal of schools. It was only after World War I that they gradually stopped using the word to describe their own systems and started talking instead about the “socialization” function of schools.<sup>4</sup> What they meant by socialization, however, was precisely what indoctrination means according to the *Oxford American Dictionary*, which defines indoctrination as “the process of teaching a person or group to accept a set of beliefs uncritically.” This is the definition I adopt. It implies that one can indoctrinate children to believe that their ruler was chosen by God and therefore deserves absolute obedience, to believe that they belong to a superior group that should exterminate all others, or to believe that they should give all their property to their ruler. But it also implies that one can indoctrinate children to believe that poverty can be overcome through hard work, that one should only express discontent through nonviolent means, or that democracy is the best political system in the world. What makes something indoctrination is not the *content* being taught; what characterizes indoctrination is that the *process* of teaching this content leaves no room for questioning or critical thinking.<sup>5</sup>

This characterization of education as a policy tool deployed for social control will surely encounter initial resistance from those who believe that schools should give us the power and capabilities to pursue our goals and

4. The *Oxford American Dictionary* defines socialization as “the process of learning to behave in a way that is acceptable to society.” But who decides what constitutes behavior that is acceptable “to society”—is it members of society at large or only a few elites? For example, when oppressed groups who have no formal voice in politics are taught that they should not use violence to make demands, is the “acceptable behavior” that is being taught one that serves societal interests or one that serves the interests of powerful elites who benefit from the status quo?

5. For a summary of how the usage of the word “indoctrination” has changed over time in the United States, see Gatchel (1959). See also the influential speech delivered in 1932 before the Progressive Education Association by George S. Counts, Columbia University professor and former president of the American Federation of Teachers (Counts 1932). A more recent discussion of how indoctrination is defined by philosophy of education experts—supportive of how the word is used in this book—appears in Callan and Arena (2009).

dreams. I should therefore clarify at once that there is no doubt in my mind that schools *should* seek to empower us to lead autonomous lives. But the main question that this book examines is not a normative one. I am not asking what goals *should* guide the design of education policies. I am asking what goals *actually* guided the design of primary education systems. Was an interest in empowering ordinary people what usually motivated states to promote primary education for the lower classes? Historically, the answer has been no. When central governments in Western societies decided to take over and increase the provision of primary schools for the poor, in general they were not particularly interested in equipping them with the capabilities to live autonomous, prosperous lives. In fact, it was not uncommon for national elites who supported primary schooling to argue that primary schools should *refrain from* promoting social mobility. What usually brought elites together around proposals for mass education was a deep fear that their power was at risk and a conviction that they could mitigate that risk by teaching the masses what to believe and how to behave.

As a strategy for maintaining social order, indoctrinating children to accept the state's unquestioned authority had primarily long-term goals. Six-year-olds who quarreled with each other, rolled their eyes at the teacher, or spoke without permission were not themselves considered an imminent threat to society. What elites feared was the danger that these children would pose as adolescents and adults if their habits and manners were not reformed. The bet that elites made was that investing in children's moral education today would lessen the need for repression and concessions tomorrow, simply because there would be fewer episodes of social disorder to begin with.

The argument that education systems have social control goals will be familiar to some readers. However, this argument never had much influence outside of sociology, and even there, it lost ground in recent decades.<sup>6</sup> Some critics dismiss it as a "cynical" interpretation of history.<sup>7</sup> The heavier blow, however, has come from critics who claim that social con-

6. Pierre Bourdieu, Michel Foucault, and Émile Durkheim are among the most influential writers associated with social control theories of education. For a synthesis of these and other sociologists' contributions, see Nash (1990); Filloux (1993); Jasper (2005); and Van den Berg and Janoski (2005).

7. Lindert (2004), p. 99.

control theories suffer from “evidentiary failure.”<sup>8</sup> This book revives these theories by providing a wealth of evidence that social control goals were, in fact, at the heart of the rise and spread of primary education systems in Western societies. Furthermore, the book refines this class of theories by bringing back and clarifying the important role that *states* played in designing and deploying this policy tool—shedding light on *when, why, and how* states advanced social control goals through mass education.<sup>9</sup>

Why should we care about the origins of state-regulated primary education systems? Perhaps most important, because they remain deeply embedded in the character of modern education systems. The World Bank has decried that the developing world faces a “learning crisis” characterized by the failure of education systems to teach basic literacy and numeracy skills, while the OECD has warned developed countries of the need to abandon rote learning and encourage critical thinking skills. Donors have invested millions of dollars in studies that seek to identify which education policies can address the problem of limited skills acquisition among students.<sup>10</sup> Departing from this focus on the limitations of current education policies, this book offers a broader perspective that highlights the deep historical roots of modern education systems’ lackluster performance with teaching skills. It suggests that a key reason behind this phenomenon is that central governments did not create or design primary education systems with the aim of improving the basic skills of the population, much less their critical thinking skills. While the goals of education have expanded over time, and many education systems today do have the explicit goal of promoting skills, the political motivations behind education reform have changed less than we might think. Today, like in the nineteenth century, classrooms remain organized in similar ways—centered around the authority of the teacher rather than the interests of the child—with docility and obedience remaining important goals of mass schooling.

8. Boli, Ramirez, and Meyer (1985), p. 154. Interestingly, these critics rejected social control theories of education without providing any evidence against them.

9. The state is notably absent from Bourdieu’s work (Van den Berg and Janoski 2005). Foucault, despite writing extensively about the disciplinary function of schools, famously argued for the need to move away from a focus on the actions of the state (Foucault 1995). Norbert Elias’s influential book, *The Civilizing Process*, surprisingly neglects the effort that states made through primary education to teach children to self-regulate their emotions and behavior in order to reduce violence in public spaces (Elias 1994).

10. World Bank (2018).

## THE EMERGENCE AND EXPANSION OF MASS EDUCATION SYSTEMS

The history of mass education systems can teach us a lot about why these systems look the way they do today. By examining when these systems emerged, why they expanded, and what shape they took, we will be able to say something about why mass education systems became a feature of modern states and why a teacher-centered approach to education became the norm.

### EMERGENCE OF MASS EDUCATION SYSTEMS

To understand why state-regulated primary education systems emerged, we need data that enable us to track *when* central governments around the world began to intervene in primary education. Intervention often takes many different forms, including regulation, funding, and monitoring of primary education. I use two different datasets to identify the timing of various types of intervention. The first dataset covers 111 countries and includes information about the year when the central government of a sovereign country or its preceding colonial regime began to monitor primary education systems and, in particular, student enrollment. Monitoring enrollment allows governments to track the progress made in promoting primary education and can be used to inform decisions about where to fund or construct new schools. To complement this information, for a subset of thirty-three countries in Western Europe and Latin America I also collected detailed data about other forms of intervention, such as the year when central governments began to fund primary schools, regulate the curriculum and teacher certification, mandate universal provision, and establish compulsory schooling.

As a way of introducing the data, figure 1.1 shows the percentage of countries in Europe and the Americas on one hand and in the rest of the world on the other, where the central government monitored primary school enrollment from 1800 to the present. From the picture we can see that, while in 1800 no central government in the world made systematic efforts to collect information about primary school enrollment rates, all of them do so today. The figure also shows that in Europe and the Americas, central governments took an interest in monitoring primary education much earlier than in other parts of the world. Indeed, while all central governments in Europe and the Americas were already collecting information about pri-

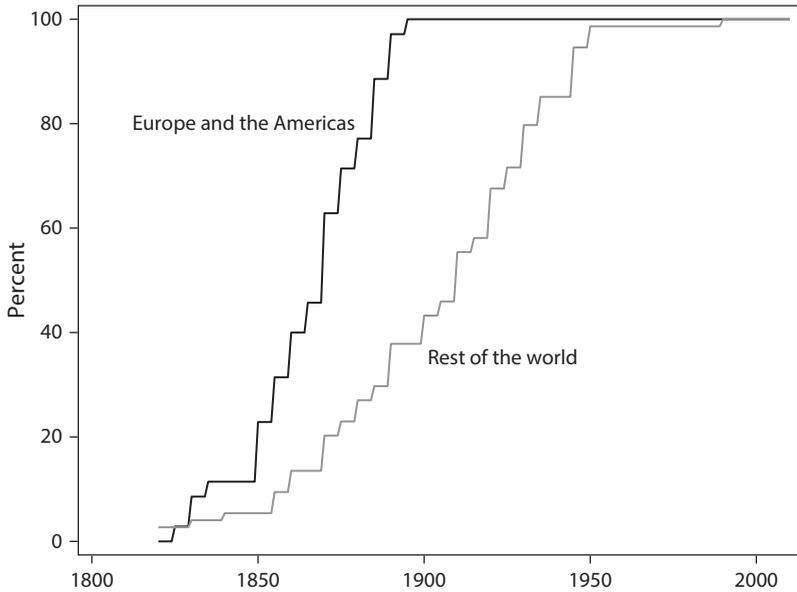


Figure 1.1. Percentage of countries in the world where the central government monitors primary school enrollment, 1820–2010. See text and footnotes for sources and methodology.

primary school enrollment before the end of the nineteenth century, it took until the mid-twentieth century for the rest of the world to catch up.

In addition to monitoring the progress made in promoting primary education, the nineteenth century saw the emergence of additional forms of central government intervention in primary education in Western societies. In figure 1.2 we can see what percentage of central governments in Europe and Latin America provided funding for primary education, imposed a national curriculum, became involved in certifying and/or directly training teachers, and passed a compulsory education law, again from 1800 to the present. The figure also shows what percentage of central governments regulated primary education in *any* of these or other ways such as monitoring enrollment, mandating local governments to provide universal access to primary education, or abolishing school fees for the poor. While in the United States and Canada most of the regulation of primary education happens at the subnational level, figure 1.2 shows that by the end of the nineteenth century, all European and Latin American countries not only monitored

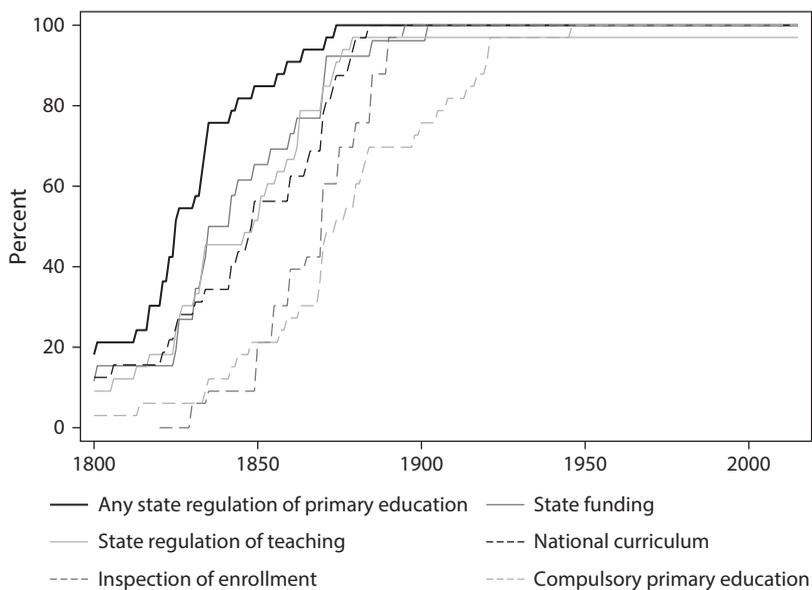


Figure 1.2. Percentage of countries in Europe and Latin America where the central government intervenes in primary education, and type of intervention, 1800–2010. See text and footnotes for sources and methodology.

enrollment in primary schools but also provided funding to promote primary education, regulated the certification and/or training of teachers, and imposed a national primary school curriculum. In fact, each of these forms of state intervention tended to precede central governments' efforts to monitor enrollment. Compulsory schooling laws were the last form of state intervention to be introduced, but by 1900, 70 percent of European and Latin American countries had a compulsory schooling law, and all did so by the 1920s.

While today we take for granted that central governments shape the education of young children in some way, figures 1.1 and 1.2 make it clear that state intervention in primary education is a relatively recent phenomenon in human history. Before states became involved, the task of educating children usually fell under the responsibility of parents and religious organizations. However, starting with a few European countries in the eighteenth century, a major transformation took place: central governments began to play an increasing role in educating children. The move toward the creation of state-regulated primary education systems was led by Europe

and the Americas during the nineteenth century, and eventually spread to the rest of the world during the twentieth century.

## EXPANSION OF MASS EDUCATION SYSTEMS

The second major educational transformation, one that accompanied the state's emerging regulatory role, was the expansion of access to primary schooling. Access to education is typically measured by enrollment rates—the total number of students enrolled in primary school as a proportion of the population ages 5–14 years or as a proportion of the school-age population. Enrollment rates are not a perfect measure, but they are the most common measure of education provision used to study the history of primary education systems because of their availability: almost all countries have collected and reported student enrollment figures for a long time.<sup>11</sup> The same cannot be said of statistics about the number of schools or the level of public spending on education, whose availability varies a lot more across countries and over time.

To examine how access to primary education changed in Western societies over time, I collected primary school enrollment statistics for forty-two countries in Europe and the Americas from 1828 to the present. Collecting enrollment statistics going far back in time was a major undertaking that involved consulting a large number of primary and secondary sources. This effort yielded a new dataset that covers a longer time period for Europe and the Americas than any other previously assembled cross-country dataset. To compare how enrollment evolved in Western societies and the rest of the world, I complement my original dataset with a dataset on enrollment compiled by economic historians Jong-Wha Lee and Hanol Lee.<sup>12</sup> The main difference between my dataset and theirs reflects the trade-offs that are involved in this type of time-consuming data collection project: While their dataset includes information from 111 countries across all regions, mine has more complete historical coverage of Western countries during the nineteenth century. For example, my dataset contains four additional decades of historical data for Austria, Germany, and Norway; two additional decades

11. A child's enrollment in school depends not only on whether there is a school nearby but also on whether families have any reason to send their children to school. Because primary schooling is compulsory everywhere, and has been for a very long time, it is reasonable to assume that any statistics that fall below universal primary enrollment are likely to be driven by limited access.

12. Lee and Lee (2016).

for Costa Rica, Ecuador, France, and Spain; and one additional decade for Argentina, Brazil, and England. On the other hand, Lee and Lee's dataset covers all regions, especially from 1900 on.<sup>13</sup> Together, both datasets enable us to examine global patterns of educational expansion over a longer period than what has been possible when relying on enrollment statistics from UNESCO or other sources.

To illustrate some basic facts about the global history of mass education, figure 1.3 depicts enrollment rates from 1820 on. The graph on the left shows the mean enrollment rate in primary, secondary, and tertiary education around the world.<sup>14</sup> The graph on the right focuses exclusively on primary school enrollment rates, comparing the world mean with the regional means of Europe and Latin America using my dataset.<sup>15</sup>

Three basic facts are worth highlighting. First, the global expansion of primary education unfolded gradually throughout roughly two centuries from the 1800s to the new millennium, a period that also saw other major transformations such as the spread of democracy, the transition of many economies from agrarian to industrial, and the rise of independent postcolonial states in Latin America, Africa, and Asia. While in the 1850s only one in ten children were enrolled in primary schools worldwide, by 1940 a majority of children had access to schooling, and today, almost all countries provide universal or near-universal primary education. Notice how gradual and steady the expansion of primary education was, unlike the spread of democratization, which occurred in waves,<sup>16</sup> or progressive taxation of wealth, which took off after World Wars I and II.<sup>17</sup>

13. Although Lee and Lee estimate enrollment rates for all 111 countries from 1820 to 2010, the vast majority of nineteenth-century rates are extrapolated. For example, only nine countries in their dataset have non-extrapolated information before 1870, compared to seventeen countries in my dataset.

14. The data for this graph come from Lee and Lee (2016).

15. The data for this graph come from my original dataset as well as Lee and Lee (2016). I measure primary school enrollment as a proportion of the population ages 5–14 years, whereas Lee and Lee measure it as a proportion of the school-age population. The population ages 5–14 years is usually larger than the school-age population; the latter ranges from ages 6–12, 6–11, 5–11, etc. Therefore, enrollment rates computed as a proportion of the population ages 5–14 years will not only be smaller than those computed as a proportion of the school-age population, but also, they are unlikely to ever reach 100 percent, even when there is universal enrollment in primary education. Enrollment rates as a proportion of the school-age population can be easier to interpret, but they are also less accurate. This is because, while most historical censuses report the number of inhabitants ages 5–14 years, the same is not true for the school-age population, which can only be estimated by making assumptions about the age distribution of the population.

16. Huntington (1991).

17. Scheve and Stasavage (2016).

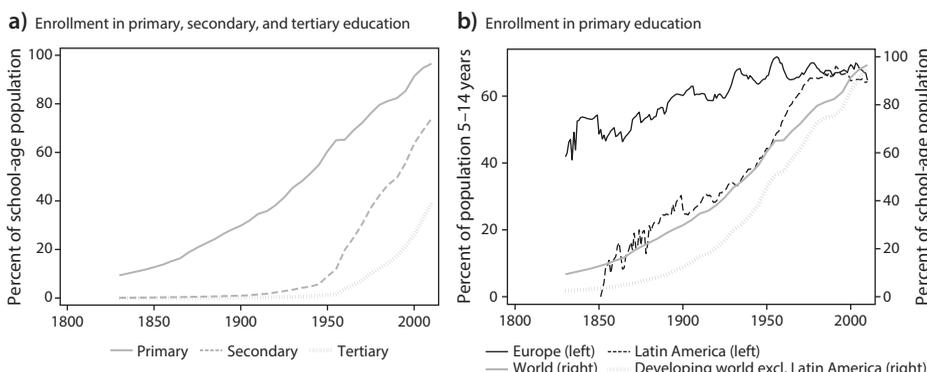


Figure 1.3. Average primary, secondary, and tertiary enrollment rates around the world, 1820–2010. Panel (a) shows average enrollment rates around the world in primary, secondary, and tertiary education institutions, as a percentage of the school-age population. Panel (b) shows average primary school enrollment rates, as a percentage of the population ages 5–14 years and as a percentage of the school-age population, around the world and in Europe, Latin America, and the rest of the developing regions. See text and footnotes for sources and methodology.

Second, primary education became widely available earlier than secondary and tertiary education. While much expansion of primary education took place during the nineteenth century, secondary and tertiary education only began to expand during the second half of the twentieth century. Up until that point, secondary and tertiary education were reserved and intended only for wealthy families; the lower classes only had access to primary education.

Third, in addition to leading the global rise of centralized education intervention and regulation, the Western societies of Europe and the Americas also led the expansion of access to primary education. Europe led the expansion of primary schooling around the world. Several European countries began to regulate and provide primary education to the lower classes already in the late eighteenth and early nineteenth centuries, before statistics became available. The leader was Prussia, which established comprehensive education regulations in 1763 and developed a worldwide reputation for having a model primary education system—all while still maintaining an absolutist regime and an agrarian economy. By around 1850, a majority of children in Europe were already enrolled in primary school, almost a century before the world reached this milestone. The United States and Canada followed Europe’s lead in the early nineteenth century and eventually

surpassed it in terms of the quantity of provision. Latin America came next: central governments began expanding primary education in the second half of the nineteenth century, several decades after independence. By the 1930s, a majority of school-age children in Latin America had access to primary school. The rest of the developing world lagged considerably behind Latin America.

### A PATTERN THAT NEEDS AN EXPLANATION

What drove the expansion of mass education in the Western world? To better understand this expansion, we can look at how primary school enrollment rates evolved *within* countries following important changes in their political, economic, or social conditions. We can ask, for instance: Were transitions to democracy, the rise of an industrial economy, or the need to wage war with other countries followed by increased provision of primary education? How did the provision of primary education change in the wake of internal conflicts that made elites fearful of a breakdown of social order? Knowing when a country's primary school enrollment rate accelerated, stalled, or declined can help us identify which factors drove the expansion of primary schooling, which ones did not, and why.

Assessing the degree to which different political, economic, and social factors drove the expansion of primary schooling in Western societies will be the task of chapter 2, but figure 1.4 previews one of the main patterns identified in that chapter and explained in the rest of the book. The graph on the left-hand side shows how primary school enrollment rates changed on average within European and Latin American countries before and after they experienced a type of internal conflict that is known to bring about considerable political instability and concerns about the state's viability: civil wars pitting the masses against the state. To contextualize the role of internal conflict relative to the role of other factors commonly proposed as triggers of educational expansion, the graph on the right shows how enrollment changed within countries before and after they became democratic.

The pattern that emerges is clear: Violent internal conflict was followed by an acceleration in primary school enrollment rates not seen after transitions to democracy—and, as we will see in chapter 2, not seen either after interstate wars or the transition to an industrial economy. Starting with enrollment rates before and after a civil war took place, we see a marked acceleration in primary school coverage after the occurrence of a civil war. In chapter 2 we will examine these empirical patterns in greater depth and see

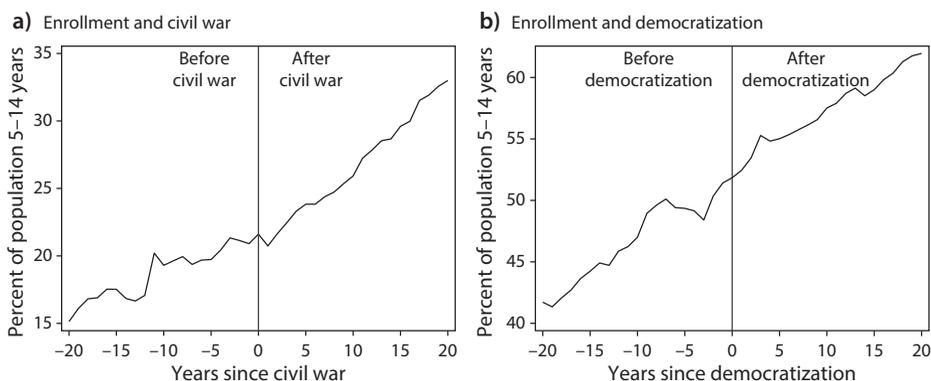


Figure 1.4. Average primary school enrollment rate before and after civil wars and democratization, 1828–2010. This figure reports average enrollment rates as a percentage of the population ages 5–14 years in the twenty years before and the twenty years after a country’s first civil war or first transition to democracy from 1828–2010, across all European and Latin American countries that experienced civil war or democratization during that period. See text and footnotes for sources and methodology.

that, indeed, civil wars that pitted one or more groups against the state led to the expansion of mass schooling in Europe and Latin America. By contrast, when we compare education patterns before and after democratization, we see that, in general, there was no acceleration; enrollment rates grew at about the same rate after democratization as they did before.<sup>18</sup>

The main point is not that civil wars *specifically* were a key driver behind the expansion of mass schooling. The occurrence of civil wars simply provides us with a straightforward way to identify situations in which central governments felt threatened by the power of mass violence to upset the status quo. But there are many other situations where governments can feel this threat, too. Throughout the book we will consider a wide range of additional types of internal conflict, from food riots and mass protests to peasant revolts and revolutions, that also prompted the expansion of mass schooling, the introduction of a new curriculum, or some other centralized education intervention expected to pacify the population. The general story that all this evidence points to is the crucial role that elites’ fears about the breakdown of social order have played in catalyzing education reform.

18. The effect of democratization on primary school enrollment rates is not the focus of this book, but I have published an in-depth study on this effect elsewhere; see Paglayan (2021).

## MASS EDUCATION AS A STATE-BUILDING TOOL

Understanding why Western states led the world in creating and expanding primary education systems requires unpacking the goals of these systems and the conditions under which they became a priority. Although primary education systems pursue multiple goals, I argue that the main goals guiding their creation and expansion were political, not economic. And while schools can pursue many political goals, from teaching a specific partisan ideology to cultivating nationalist sentiments of superiority over other countries, I show that a key goal guiding the development of primary education systems was to promote internal peace and order and, with that, preserve the political status quo and consolidate the state's authority.

Education can in principle pacify disadvantaged members of society by imparting knowledge and teaching skills to obtain better jobs, thus addressing the economic inequalities that might otherwise lead people to rebel against the status quo. I argue that this was not the main goal of primary education systems in Western societies. These systems sought to pacify the population by instilling in people the importance of behaving well and accepting their place in society. If people learned to respect rules and authority figures from a young age, education reformers reasoned, they would continue doing so when they were adults. Because children's minds were believed to be a *tabula rasa*, imprinting them with proper manners and behaviors was considered a more effective long-term strategy for promoting order than waiting until they were adults to shape their behavior with physical repression or concessions.

From today's perspective, expanding primary education may seem like a counterintuitive policy to ensure that people stay put. That is because we often have in mind a liberal conception of education—one that equips us with useful capabilities to overcome early barriers and live prosperous, empowered, autonomous lives. Moreover, primary education today is often thought of as just the first stage in a longer educational career encompassing secondary schooling and higher education. However, this is not how state-regulated primary education systems were originally envisaged or designed. In the nineteenth century, when these systems first emerged in Europe, elites were often explicit that primary education should teach people to accept their material condition and place in society, and refrain from encouraging people to develop aspirations for social mobility. Nor was primary education during these foundational stages a stepping stone to

further education. Recall that secondary schools and universities were reserved for elites until well into the twentieth century. Primary education, often called “popular instruction” or “popular education,” was the one and only type of education commonly available to the lower classes.

The idea of placing all six-year-olds in a school to teach them a common set of beliefs and behaviors as part of a strategy of social order was popularized under absolutist Prussia in the late eighteenth century. We will devote much of chapters 3 and 4 to tracing the autocratic roots of primary education in Prussia and the arguments made in favor of schooling the population, precisely because of the influence that Prussian ideas had in other countries. Indeed, the autocratic origins of these ideas did not prevent them from traveling to more democratic countries too, including the United States. Horace Mann, the U.S. politician and education reformer who in an 1848 Report to the Massachusetts State Board of Education coined the famous phrase that education can serve as “the greater equalizer,” also argued in that very same report that children should receive a moral and political education to prevent them from taking up arms or rebelling against the status quo.<sup>19</sup>

Ideas about the social control function of education may sound conservative today, but in the eighteenth and nineteenth centuries, when state-regulated primary education systems began to develop in Western societies, both conservatives *and* liberals agreed that the central goal of primary schools was to teach children obedience, discipline, and good behavior to support the stability of the state. Jean-Jacques Rousseau’s ideas about the role of education are especially telling given the influence he had on liberals. In *A Discourse on Political Economy*, published in 1758, he articulates that it is in the state’s own interest to regulate education in order to ensure that children are taught to be obedient:

Inasmuch as there are laws for adulthood, there should be laws for childhood that teach obedience to others; and inasmuch as each man’s reason is not left to be the sole judge of his duties, the education of children ought all the less to be left to their fathers’ lights and prejudices, as that education matters to the state even more than it does to the fathers.<sup>20</sup>

19. Massachusetts Board of Education, Horace Mann, National Education Association of the United States (1848), p. 12.

20. Rousseau (2019a), pp. 21–22.

Despite the widespread circulation of arguments for state-regulated primary education systems during the nineteenth century, these arguments often preceded the actual emergence of these systems by several decades. Why? Not all national elites were initially on board with the idea that educating children was a task that the state should take on. While education reformers were convinced that placing the children of the lower classes in state-controlled primary schools was a good idea, oftentimes they encountered resistance from other national elites. The main opposition to these ideas came from elites who claimed that moral education, or the task of teaching people how to behave, should fall exclusively to the parents and the Church, as had been customary for centuries. The state, these elites argued, had no role to play in the upbringing of children. Another, more pragmatic, argument that prevented proposals for state-regulated primary education from coming to fruition was that the state simply lacked sufficient resources to support such an expensive endeavor. Occasionally, some members of the elite would also express their concern that educating the masses could lead to their empowerment and would therefore destabilize the status quo. However, this concern was less common than we might expect precisely because, throughout the nineteenth century, most elites believed that the type of education they would provide to the lower classes would lead them to accept, not question, their place.<sup>21</sup>

How did proposals for state-regulated mass education gain political traction? National elites who had previously opposed or been lukewarm about the idea of placing all children in primary schools regulated by the state became more amenable to this option when their concerns about the efficacy of traditional tools to maintain social order intensified. Of course, while it is safe to assume that elites always want to maintain power and protect the status quo from which they benefit, they have not always turned to primary education to accomplish this. Historically, physical repression, concessions, and the moral education provided by the Church were considered enough to accomplish the goal of pacifying the population. But when these tools were no longer sufficient in the eyes of elites, proponents of a national primary education system designed above all to shape the moral

21. England is an exception. There, as we will see in chapter 6, the idea that education could empower individuals was much more common than in continental Europe (Martin 2023). This, I will argue, helps explain why England expanded primary education much later than the rest of Europe.

character and behavior of the masses found a window of opportunity to convince other elites to support their proposal.

One common factor leading to the intensification of concerns about the efficacy of existing tools to pacify the population was the occurrence of crises of internal order. These crises helped forge a large coalition of support for primary education proposals among national elites. Crises of internal order that interrupted a period of relative internal peace and stability led to the diagnosis that existing policy tools were insufficient to promote order and helped convince elites that they needed new policies to prevent future crises. These events increased elites' fear of losing their property, lives, and power to the masses, and often revealed the limitations of existing tools to maintain social order on their own—for instance, when police officers joined hungry rebels in protest or when rebels were willing to risk life and limb to bring about deep change.

This diagnosis in turn helped increase national elites' support for shaping the moral character of children through state-regulated primary schools designed to prevent future citizens from questioning the state or its laws. Some elites who had previously opposed the creation of a national primary education system on the grounds that moral education should be left to the Church no longer argued that the state should not educate children—they argued, instead, that in educating children, the state should use religious doctrine as the basis for teaching morality. Similarly, those who had previously argued that such a system could not be sustained by the state's fiscal revenues now turned to debating alternative ways to finance these systems. Consistently, what emerged after periods of political instability and internal conflict, especially those in which repression failed to bring a quick end to the conflict, was an effort to expand primary schooling to teach children obedience to the state.

A wide range of types of internal conflict motivated central governments to invest in the education of the masses, including mass rebellions, peasant revolts, insurrections, civil wars with popular involvement, social revolutions, and conflicts whose nature ranged from class conflict to center-periphery, secular-religious, or ethnic conflict. The commonality across the diverse types of internal conflict that motivated central governments to invest in mass education was that they were violent and included the participation of the masses, even if not all conflicts were led by them. Regardless of whether the masses were acting on their own, or were mobilized by local elites in the periphery, the Church, or some other actor, mass violence

brought together previously divided national elites to support centralized education efforts designed to protect their common state-building project.

To be sure, central governments have not always responded to internal conflict by turning their attention to mass education. Mexico, for example, had persistent internal conflict throughout the nineteenth century and a revolution at the beginning of the twentieth century, yet until the 1920s, access to primary education in Mexico lagged considerably behind the rest of Latin America. Argentina, similarly, had recurrent civil wars that lasted six decades after independence, yet it was not until 1884 that the central government began to regulate primary education. We will spend an entire chapter examining the conditions that must be in place for governments to respond to internal conflict through mass education.

Furthermore, even if central governments respond to internal conflict by expanding primary education, they might do so not necessarily because of an interest in indoctrinating children to obey the state, as the book argues, but for other reasons. First, governments might simply expand access to education to address societal demands for improvements in the standard of living. That is, perhaps the expansion of primary education in the wake of episodes of internal conflict represents a concession to angry citizens rather than an effort in social control. Second, governments might expand access to education in post-conflict settings to increase the skills of the population as part of a broader economic reconstruction strategy. Third, governments might provide education not so much to shape the moral character of future citizens but, more importantly, to promote a common language or religious identity as part of a nation-building project. We will consider each of these possibilities before concluding not only that indoctrination through primary schools was a crucial component of the repertoire of state-building tools used to promote long-term social order, but also that in the history of primary education systems, state-building goals usually preceded redistributive, economic, and nation-building goals.

To understand the emergence and expansion of state-regulated primary education systems in Western societies, we will look beyond school enrollment rates to learn how central governments in Europe and Latin America throughout the nineteenth century designed primary education systems, what goals they were hoping to achieve, and why education became subject to centralized control rather than being left to local parishes or communities as it had been in the past. We will devote several chapters to these questions. Transcripts from parliamentary debates, letters between politi-

cians, special reports commissioned by the central government, and other written materials will give us useful information about the kinds of arguments politicians made in favor of mass education.

The content of landmark national education laws will also help us understand how politicians designed primary education systems. These laws created centralized bureaucracies to regulate primary education, established a common mandatory curriculum, dictated how teachers ought to be trained and certified, and created mechanisms to monitor whether schools were doing a good job at accomplishing the state's goals for primary education. In addition to helping us picture the type of education that elites had in mind, these landmark laws can also help us understand the underlying goals of primary education systems because the shape of these systems reflected these goals.

Both the political debates surrounding the passage of national primary education laws and the content of these laws, we will see, point to the primacy of moral education goals in explaining central governments' effort to regulate and expand primary education. When debating whether the state should intervene in the education of children, the arguments that found most support among national elites were those that stressed how a failure to reform the savage and poor moral character of the masses would lead to enduring problems of anarchy, crime, political instability, and the inability to consolidate the state's power. The importance of moral education is also evident in the first national primary education law passed in each European and Latin American country. Moral education was a pervasive component of national curriculums; typically, a standalone subject was devoted to it, but regardless, moral education was a cross-cutting component of all the subjects taught and of the organization of classrooms and schools. National textbooks used to teach reading and writing taught children about the importance of behaving well and respecting authority, and teacher manuals commissioned and distributed by central governments emphasized that students should learn to sit quietly, comply with rules, and respect the teacher at all times, and that failure to do so should be followed by public humiliation and other forms of punishment. The training of teachers emphasized the development of their own moral character, too. In many countries, state-controlled Normal Schools became the only authorized teacher training institutions, but even when nonstate actors were allowed to train teachers, states usually required aspiring teachers to demonstrate proof of their moral aptitude to teach.

By contrast, the first national education laws placed little emphasis on teaching math or scientific skills, and while some countries introduced a common language of instruction—a common marker of nation-building efforts—this was not the norm. In some, like France, the state promoted a common language of instruction for primary schools from the outset as part of its state-building endeavor to enhance the central government's control over the periphery by ensuring everyone could understand the state's laws and regulations. Still, we will see that, even in France, moral education took center stage in primary schools. Moreover, in several countries, including some of the leaders in primary education provision in Europe and Latin America such as Prussia and Argentina, the moralizing role of primary education emerged several decades before the state made an effort to inculcate a national identity. What the evidence suggests is that nation-building efforts sometimes accompanied and supported state-building goals, but frequently, primary schools pursued state-building goals through moral education *before* they also began to pursue nation-building goals.

In their effort to expand primary education, central governments often took advantage of the existing educational infrastructure that had been put in place by churches. While the Catholic Church made relatively little effort to educate the masses, Protestant churches founded schools, trained teachers, and developed pedagogical methods to teach everyone how to read the Bible in their own language.<sup>22</sup> The ability to rely on this existing infrastructure gave central governments in Protestant countries like Prussia and Norway a clear advantage over Catholic countries like Spain or Italy in terms of the level of access that already existed when they began to regulate primary education.<sup>23</sup>

Despite this greater initial stock, Protestant countries within Europe did not tend to set up state-regulated primary education systems any sooner—or any later—than Catholic ones. Prussia, the birthplace of Protestantism, was among the first states to pass a national primary education law, but England, also Protestant, was among the last, and Spain and Italy passed a national primary education law decades before countries like Belgium or Finland, which had a strong Protestant influence. In other words, what re-

22. Woodberry (2012); Gallego and Woodberry (2010).

23. Even *within* Prussia, those regions that had been more exposed to the Protestant Reformation exhibited higher levels of educational attainment than those less exposed to Protestantism; see Becker and Woessman (2009).

ligious denomination predominated does not help explain who led the creation of state-regulated primary education systems.

Moreover, the relationship between the state and the Church varied considerably across countries during the foundational stages of public primary education systems, from conflictive to cooperative. In Argentina, for example, the state's intervention in mass education came into conflict with the aspirations of the Church to maintain a monopoly over moral education. In Prussia and Chile, by contrast, the central government and the Church became allies in expanding access to primary education. In yet other cases, such as France during the July Monarchy, they were neither enemies nor allies: the central government made independent efforts to promote education but, because it lacked the capacity to expand mass schooling as fast as it wanted, anti-clerical politicians made the strategic decision to allow the Church to operate its own schools while subjecting these to centralized regulation. The common thread across these cases, we will see in chapter 4, lies not in the nature of the relationship between the state and the Church, but in the fact that efforts to create a national primary education system emerged out of centralizing rulers' heightened fear of the masses.

Where religious conflict *did* leave an important mark was on the content of the national primary school curriculums that emerged during the nineteenth century, as we will see in chapter 5.<sup>24</sup> Perceptions about the breakdown of social order brought together conservative and liberal elites around proposals for state-regulated primary education to shape the moral character of future citizens. However, the two groups disagreed fervently about whether moral education should include religious teachings or whether it should be entirely secular. The balance of power between them at the time when a national curriculum was introduced played a key role in shaping the outcome of this conflict.<sup>25</sup>

24. This argument is similar to Ansell and Lindvall (2013), who argue that the Church-State conflict did not really influence the process of centralization of education but did affect whether education became secular. While their measure of secularization focuses on who controlled the daily operation of schools, I focus on the content of national curriculums.

25. The ability of the Church to influence education policy also depends on the extent to which ruling elites, whether conservative or liberal, need the Church's support to remain in power. Fragile states such as those that rule immediately after a civil war, a democratic transition, or a newly independent country, may provide concessions to the Church such as the inclusion of religious teachings in schools in exchange for the Church's cooperation in promoting primary education in this fragile setting. See Grzymala-Busse (2015, 2016).

## COMMON ARGUMENTS ABOUT MASS EDUCATION

Education systems are a heavily studied topic and this book both builds on and departs from what has been written about them by historians and social scientists. To clarify how the book's argument compares with other common explanations of the rise and spread of mass education, it is helpful to classify these explanations into two groups. The first group comprises what I will term *human capital theories* of education. These are theories that conceptualize the provision of mass education as a policy tool that seeks to improve the skills and knowledge of the population. Three main factors have been proposed as triggers for governments' decision to improve skills through mass education: *democratization*, which makes governments responsive to the demands for social mobility of the newly enfranchised masses;<sup>26</sup> *industrialization*, which increases the need for a large, skilled workforce;<sup>27</sup> and *military rivalry* with other states, which creates the need for skilled soldiers.<sup>28</sup>

The book's argument belongs within a second group of theories that I will refer to as *value-centered theories* of education. These theories conceptualize the provision of education as a policy tool that seeks to shape individual values, beliefs, attitudes, and behaviors ("values" for short). The most famous class of value-centered theories are *nation-building* theories of education, which argue that governments became engaged in mass schooling in an effort to construct a nation, using schools to promote linguistic homogeneity and emotional attachment to an imagined national community.<sup>29</sup> Social scientists have proposed four main triggers that prompted central governments to expand primary education for nation-building purposes. One is the *diffusion* of international ideas about the nation-building power of education. According to diffusion theory, governments created and expanded national primary education systems not because of domestic conditions that incentivized them to do so but because of their exposure

26. This theory is part of a more general argument that holds that transitions from autocracy to democracy, because they entail an increase in the political power of the newly enfranchised masses to make demands from elected officials, will result in more progressive redistributive policies. See Meltzer and Richard (1981); Acemoglu and Robinson (2006).

27. For a formal model of this common argument, see Bourguignon and Verdier (2000); Galor and Moav (2000, 2006). See also Gellner (1983), who stresses the importance to industrialization of having workers who could read and write in a common language.

28. Aghion et al. (2019).

29. Weber (1976); Gellner (1983); Darden and Grzymala-Busse (2006); Laitin (2007); Darden and Mylonas (2015); Ansell and Lindvall (2013); Alesina, Giuliano, and Reich (2021).

to international ideas in vogue during the nineteenth century that held that having a national primary education system to inculcate a shared national identity was a key element of successful nation-states.<sup>30</sup> Another argument is that governments invested in mass schooling because *industrialization*, and particularly the rise of factories, created the need for factory discipline and docile workers<sup>31</sup>—which presumably required imprinting in children the belief that they and their future supervisors were united by their customs, history, and nationality.<sup>32</sup> A third possibility is that *military rivalry* prompted governments to expand mass education to foster patriotism and nationalism not only among soldiers but also among all future citizens, so as to inoculate them from the territorial and sovereignty claims of foreign states.<sup>33</sup> Finally, a fourth theory holds that governments invested in primary education in response to the arrival of new *immigrants* whose assimilation into a new national identity required them to learn the national language and culture.<sup>34</sup>

It would be inaccurate to characterize these theories as arguing that primary education seeks to promote *only* skills or *only* values—and, by the same token, the argument I advance in this book does not hold that schools seek to shape values exclusively. All schools teach *some* amount of skills and *some* amount of values, and few social scientists would contest this. But social scientists are in the business of simplifying the world by identifying the most essential components of the phenomena they study. In studying primary education systems, they have come to different conclusions about what their essence is: some argue that these systems seek above all to teach knowledge and skills while others, myself included, conclude that they seek first and foremost to mold individual values, beliefs, attitudes, and behaviors.

The extent to which a theory helps explain why the Western societies of Europe and the Americas led the creation and expansion of state-regulated primary education systems is something we can only determine by looking

30. Boli, Ramirez, and Meyer (1985); Meyer et al. (1977); Meyer, Ramirez, and Soysal (1992).

31. Bowles and Gintis (1976); Gellner (1983); Mokyr (2002), pp. 120–162. The nineteenth-century economist Alfred Marshall was in favor of using education to develop in workers “a habit of responsibility, of carefulness and promptitude in handling expensive machinery,” and to instill punctuality and a strong work ethic (Marshall 1890, p. 261). In contrast, Karl Marx and later Antonio Gramsci denounced the socialization function of schools to produce a class of workers who would respect the power of capitalists.

32. Gellner (1983); Weber (1976).

33. Ramirez and Boli (1987); Darden and Mylonas (2015).

34. Tyack (1974).

at the evidence. Comparing the explanatory power of different theories will be the task of chapters 2 and 5, where I examine the extent to which each explanation is consistent with the patterns of emergence and expansion of primary education systems, and with the characteristics of these systems. Here I preview key findings that will help readers contextualize the importance of the book's argument.

Let's begin by looking at three factors that do not go far in explaining why Western societies led the global expansion of primary education: democratization, industrialization, and interstate military rivalry. Regardless of whether we focus on their human capital or value-centered versions, each of these theories makes predictions that do not align well with the general timing of the rise and spread of primary education systems, or with the characteristics of these systems in Western countries.

Consider, first, democratization theories. If it were true, as economic historian Peter Lindert has asserted in an influential book, that "the spread of democratic voting rights played a leading role in explaining . . . the rise of primary schooling,"<sup>35</sup> then we should observe that primary school enrollment rates were low before the spread of democracy and increased considerably as a result of democratization. Much effort has gone into quantifying the precise magnitude of democracy's impact on primary schooling,<sup>36</sup> but these efforts miss the bigger picture: around the world, most of the expansion of primary education took place *before* the spread of democracy.<sup>37</sup> Some autocratic regimes such as the USSR under Stalin are well known for their efforts to educate everyone, but the non-democratic roots of primary education also extend to Western Europe and the Americas. As we will see in chapter 2, in Western countries that were once non-democratic, central governments began to regulate primary education roughly one century before the arrival of democracy. Moreover, close to 70 percent of school-age children in these countries were already enrolled in primary school *before* democracy arrived there for the first time.

Was the expansion of primary education a response to the needs created by industrialization? Let's begin first with the argument that industrialization required a large, skilled workforce. A growing number of economic

35. Lindert (2004), p. 105.

36. Brown (1999); Brown and Hunter (1999); Mariscal and Sokoloff (2000); Engerman and Sokoloff (2002); Lindert (2004); Brown and Hunter (2004); Stasavage (2005); Ansell (2010); Paglayan (2021).

37. Paglayan (2021).

history studies show that the First Industrial Revolution required a few “knowledge elites” who could contribute scientific discoveries and technological innovation, and a large *unskilled* workforce—a phenomenon that has led economic historians to describe the first phase of industrialization as a “deskilling” process.<sup>38</sup> The Second Industrial Revolution did require more skilled workers, and its arrival coincided with an acceleration of primary education provision in some Western countries, but in many others it arrived too late to be able to explain the emergence and expansion of primary education systems. On average across Europe and Latin America, central governments created state-regulated primary education systems six decades before the Second Industrial Revolution, and in a majority of Western countries, most children gained access to primary schooling before the second phase of industrialization began to unfold. Moreover, as mentioned earlier, the first national curriculums that governments adopted during the nineteenth century placed considerably more emphasis on teaching moral education than on teaching math, science, or practical technical skills.

The emphasis that curriculums placed on moral education is in principle consistent with the argument that state-regulated primary education systems emerged in response to the industrial economy’s need for docile workers, but again, the timing of the emergence and expansion of these systems does not appear to align well with explanations that stress the role of industrialization. In addition, many national curriculums initially allowed instruction in multiple different languages—not the unifying language that Ernest Gellner and others had in mind when they argued that factory discipline required linguistic homogeneity. Moreover, if it were true that governments regulated and expanded primary education because industrialization created the need for a docile working class, then we should see more governmental efforts to expand primary education in industrial areas than in rural regions. Three pieces of evidence are at odds with this prediction. First, although industrialists eventually came to view mass schooling as a desirable policy, many of them initially opposed it because it conflicted with their ability to rely on child labor.<sup>39</sup> Second, as we will see in chapter 4,

38. Mitch (1999); Allen (2003); Clark (2005); Mokyr (2005); Squicciarini and Voigtländer (2015); De Pleijt (2018); Montalbo (2020).

39. The tension that existed between central governments and industrialists regarding mass education is carefully documented by Anderson (2018), who argues that governments in Europe adopted child labor laws because industrialists’ reliance on child labor hindered their efforts to improve children’s moral character through primary schooling.

in countries that led the expansion of primary education in Europe and Latin America, central governments tended to prioritize the expansion of primary education in *rural*, not urban, areas. Third, as I document in chapter 5, central governments often imposed different curriculums for rural and urban schools precisely to prevent the children of peasants from learning skills that could be useful for industry.

Military rivalry theories do not do well either when trying to explain the expansion of access to primary education in Western countries. Proponents of these theories often cite the comprehensive education regulations adopted in Prussia in 1763, immediately after the end of the Seven Years' War, and the 1880s Ferry Laws in France, adopted after the Franco-Prussian War of 1870. Yet, as we will see in chapter 4, the timing of these cases is often misunderstood. In Prussia, in fact, the king had approved similar education regulations *before* the outbreak of the war. In France, the centralization of primary education began in the 1830s and led to a rapid expansion of primary schooling such that, even *before* the Franco-Prussian War, France had already attained near universal primary education. Moreover, when we examine evidence from a larger set of countries, as I do in chapter 2, what we see is that while Western countries experienced a marked increase in primary school enrollment rates after interstate wars, this increase was merely a rebound to recover from the decline in enrollment observed during periods of war.

None of this is to say that democratization, industrialization, and military rivalry *never* explain the emergence and expansion of primary education systems. There is some evidence, for example, that democratization played an important role in driving the expansion of primary schooling in Sub-Saharan Africa.<sup>40</sup> There is also evidence that industrialization contributed to the expansion of mass education in some European and Latin American countries, even if there is no consistent pattern linking these two processes. Finally, in non-Western countries, both industrialization and interstate wars were followed by an acceleration in primary school enrollments. Still, for a consistent predictor of the emergence, expansion, and characteristics of primary education systems in Western societies, we need to look elsewhere.

Immigration waves also do not go far in explaining why governments intervened and invested in primary education. Two of the countries with the

40. Stasavage (2005).

greatest number of immigrants during the nineteenth century, the United States and Argentina, both provided high levels of primary education, yet in both cases, immigrants retained the right to send their children to schools whose language of instruction was not the national language. In the United States, for example, public schools during the nineteenth century taught not only English but also German, Dutch, Swedish, French, Polish, and Italian, depending on the composition of the local community.<sup>41</sup> Moreover, the arrival of immigrants prompted governments to adopt compulsory schooling laws especially in those states that received immigrants from countries that lacked a compulsory schooling law.<sup>42</sup> The fact that states were less interested in educating immigrant children if they or their parents had already gone to school abroad, even though, of course, the education these immigrants had received did not instill an American culture or identity, is a clear indication that inculcating a national identity was not a central goal of education intervention during the Age of Mass Migration.

That leaves us with the diffusion theory of education, which provides some helpful clues, and the argument I advance in this book builds to some extent on this theory. We will see in chapter 3 that, before the eighteenth century, the idea that the state could or should educate children was virtually inconceivable. But during the eighteenth and especially in the nineteenth century, mass education came to be conceived as a policy tool that could strengthen the state. The diffusion of this idea, I argue, was a precondition for the emergence and expansion of state-regulated primary education systems. Still, the circulation of these ideas was not enough—education reform proponents also needed to garner sufficient political support to implement these ideas.

This is where the role of crises of internal order proves helpful. Diffusion theory flatly rejects the notion that these crises promoted the rise and spread of state-regulated primary education systems.<sup>43</sup> By contrast, this book shows that national elites' fears of social disorder played a central role in giving political traction to the educational ideas that circulated during the nineteenth century, and shaped the patterns of education regulation and expansion. Heightened fears of social unrest help explain, for example, why the central governments of Chile and Argentina, despite being simultaneously

41. Tyack (1974); Fouka (2020).

42. Bandiera et al. (2019).

43. Boli, Ramirez, and Meyer et al. (1985), pp. 154–155.

exposed to European educational ideas since the early 1840s, created state-regulated primary education systems many decades apart from one another; or why the French government during the 1830s prioritized the expansion of primary education in the rural departments of southern France. These are not isolated examples. We will see that internal conflict involving mass violence against the state is a strong and consistent predictor of the expansion of primary schooling in Western countries.

The second key difference between my argument and diffusion theory lies in the types of values that each theory highlights. I emphasize schools' effort to shape moral values and principles—especially those rejecting individual violence—as part of a state-building agenda to consolidate the power of a central political authority. Primary education, I argue, sought to reduce long-term violence against the state by teaching people that killing, fighting, vandalizing, and other forms of violent behavior were wrong, and conversely, that respecting rules and authority was the right thing to do. Diffusion theory, by contrast, belongs to the class of nation-building theories of education that emphasize schools' effort to inculcate a common language and shared national identity. We will see that while some politicians believed that inculcating a national language and identity was complementary to the goal of enhancing the state's authority, many central governments pursued their moral education goals without concurrently advancing a nation-building agenda—at least until later. When state-regulated primary education systems emerged, teaching children good manners and moral principles—turning “savages” into well-behaved future citizens—was a more important educational goal than inculcating a common language or national identity.

Now that we have a fuller understanding of how other theories of mass education relate to the book's state-building argument, I will summarize some appealing characteristics of my argument.

### **THREE APPEALING CHARACTERISTICS OF THE ARGUMENT**

The state-building theory of education reform that I propose has three appealing characteristics: it explains education reform in a wide variety of contexts, it encompasses other existing explanations to provide a more general theory of education reform, and it helps explain current problems facing education systems.

*(continued...)*

As I will demonstrate in later chapters, conceptualizing education reform as a response to internal threats to the power of ruling elites helps explain education reform in a broad range of political contexts. For example, while the book's argument applies to autocracies, helping explain the puzzling non-democratic roots of primary education systems, it can also explain education expansion and reform in more democratic contexts. Similarly, the argument I propose can help explain not only the emergence and expansion of primary education reform systems during the nineteenth century but also education reform in more recent decades. Nor does the argument apply only to governments that espouse a liberal ideology or, conversely, a conservative one. Finally, the argument I propose is not restricted to any particular type of internal conflict. It applies to conflicts of varying scale and nature, including class conflict, conflict between the center and periphery, and religious or ethnic conflict.

This is not to say that every instance of internal conflict will lead to education reform, or that every instance of education reform constitutes indoctrination—far from it. An important contribution of the book is to clarify the conditions under which we should expect governments to invest in mass education to inculcate obedience, and the kinds of contexts where this is less likely to occur. This is the task of chapter 6.

Another important feature of the book's argument is that it can encompass other common explanations of educational expansion as part of a more general theory of education reform. The spread of democracy, industrialization, interstate wars, and immigration waves are all factors that social scientists have proposed as drivers of the expansion of primary education. Each of these phenomena are distinct and important in their own right, but there is also a commonality across them: they have all been frequently accompanied by considerable social disorder and instability or, at the very least, heightened concern about these issues. Democratization was often a result of social revolutions or mass mobilization, and its arrival engendered deep fear among traditional elites about how the lower classes might behave after acquiring more political rights. Industrialization and urbanization also engendered new fears among elites about the rise of labor strikes, crime, homelessness, and the spread of diseases—all of which elites interpreted as signs of the deficient morality and behavior of the working class. Immigration waves, too, have created concerns about the rise of criminal behavior and the decline of law and order. And interstate wars often

give way to internal turmoil not only among losers but also in victorious countries, where the transition from soldier to unemployed civilian can create new social divisions and conflict. In other words, processes of democratization, industrialization, immigration waves, and interstate wars often coincide with crises of internal order and periods of social and political instability. When they do, I argue, states are likely to turn to mass schooling.

Last but not least, the book's emphasis on the centrality of indoctrination goals in guiding the creation, expansion, and features of primary education systems can help us make sense of the failure of many modern education systems to reduce poverty and inequality. The World Bank calls this failure a "learning crisis," alluding to the fact that children are not learning even basic literacy and numeracy skills despite attending school regularly. The traditional explanation of the so-called learning crisis is that education policymakers do not know how to promote more learning, hence the need to produce and disseminate experimental evidence about the efficacy of different education policy interventions. This book points to a different answer. It suggests that a key reason why education systems fail to reduce poverty and inequality is because that is not what they emerged to do. Acknowledging this may be the best step forward.

## SHIFTING PARADIGMS: EDUCATION AND POWER

Once we recognize that mass education may reflect social control goals, we are urged to reconsider many influential theories that, implicitly or explicitly, conceptualize it as a policy tool that seeks to promote human capital. The paradigm shift that stems from this book helps us understand, for example, why autocracies provide a lot of mass schooling—despite modernization theory's famous prediction that education brings about democracy.<sup>44</sup> It also explains why state-regulated primary education systems emerged much earlier than the welfare state. And it offers a possible explanation for the frequent but puzzling observation that the spread of democracy has often failed to bring about higher taxes on the rich or other forms of progressive redistribution.<sup>45</sup>

44. Lipset (1960).

45. Ross (2006); Ansell and Samuels (2014); Scheve and Stasavage (2016).

But the most important implication of this reconceptualization of mass education is that it puts education back where it belongs: at the center of debates about power. It should hardly be surprising to academics, whose reputation depends so heavily on the influence of their ideas, that shaping how people think about the world can be an important source of power. And yet, some of the most influential theories of how governments consolidate their power minimize or altogether neglect the great lengths to which governments have gone to control the ideas that shape individual behavior in the political, social, and economic spheres. Consider, for example, Charles Tilly's famous theory of state formation and state-building, according to which the state derives its power from a combination of capital (taxes) and coercion (armies).<sup>46</sup> When confronted with the question of how states forged a monopoly of violence *within* their territory, Tilly argues that they relied on the army and, later, police forces.<sup>47</sup> This book shows that, beginning with Prussia under Frederick the Great, central rulers ascribed considerable importance to a third source of power: *ideological conformity*. In their quest to control the population, they made significant efforts to exert ideological power over their subjects as a means of reducing the use of violence by anyone other than the state.<sup>48</sup> The creation of state-regulated primary education systems should be understood as an internal security policy, not a social welfare or human capital policy.

A central question moving forward is whether education does, in fact, promote social order and political stability, and how its efficacy compares to other policy tools like repression and concessions. Exploring the *consequences* of education—how it shapes individual values, beliefs, attitudes, and behaviors, and what consequences it has for social order, political stability, the strength of states, the stability of autocracies and democracies, demands for economic redistribution, etc.—are important questions stemming from

46. Tilly (1990).

47. When considering the question of how monarchs secured “the acquiescence of nearly all of his subject population,” Tilly argues that “over and over, rulers *sent troops* to enforce the collection of tribute, taxes, and levies of men of materials . . . At the level of the state, . . . those oriented to control the national population (police) developed only slowly” (Tilly 1990, p. 75; emphasis mine). Only in the nineteenth century, he argues, did European states establish “bureaucratic police forces specialized in control of the civilian population. They thus freed their armies to concentrate on external conquest and international war” (p. 76).

48. While Tilly (1990) does not consider the role of ideological power, Michael Mann's influential *The Sources of Social Power* does acknowledge it but downplays its importance. In his extensive volume, he makes no mention of the state-driven transformation of primary education documented in this book (Mann 2012).

this book, albeit distinct from the book's interest in explaining what *motivates* the provision of education.

Perhaps most important, moving forward we should ask what drives governments to curb some of their zeal to indoctrinate children and instead reform education systems to teach useful knowledge and skills. Understanding this is key for anyone eager to improve the extent to which education systems equip individuals with the capabilities to lead autonomous lives.

## PLAN FOR THE BOOK

The plan for the rest of the book is as follows. Chapter 2 provides a comprehensive picture of global trends in primary schooling over the last two centuries, with a special focus on the Western societies of Europe and the Americas that led the creation and expansion of state-regulated primary education systems. Drawing on new cross-country datasets, I document a set of patterns that any theory of mass education systems needs to explain, such as the fact that these systems emerged well before the spread of democracy and reached a considerable portion of the population during non-democratic and pre-industrial periods. In line with the book's argument, the chapter shows that internal conflict was a stronger and more consistent predictor of the expansion of primary education than democratization, industrialization, or interstate wars.

After establishing this pattern, chapter 3 develops the book's main argument for why internal conflict in general creates incentives for central governments to educate the masses. The chapter begins by surveying the history of ideas about education and shows that, around the eighteenth century, social contract theorists and Pietist (Protestant) reformers converged on the idea that mass education could support state-building by inculcating obedience. It also discusses the diffusion of these ideas among statesmen and education reformers first in eighteenth-century Prussia and then in other parts of Europe and the Americas. Crucially, I note that the diffusion of ideas alone is insufficient to explain the timing of centralized education intervention. To explain this timing, I develop an argument for why and how internal conflict and fears of anarchy, crime, and social disorder gave these ideas the political traction they needed for central governments to regulate primary education and promote its expansion. The chapter concludes by outlining the main predictions of the argument, which are tested in chapters 4, 5, 7, and 8.

Chapter 4 illustrates, through four case studies, why and how internal threats to social order and political stability led central governments to regulate and promote primary education. To do so, I trace the process of adoption, examine the content, and analyze the implementation of the foundational national education laws of Prussia, France, Chile, and Argentina. The analysis draws on a large collection of historical evidence including statistical data on school construction but also parliamentary debates, special reports commissioned by central governments, state-approved school textbooks, and other primary sources, as well as existing research produced by historians. Collectively, these sources show that internal conflict heightened national elites' anxiety about the moral character of the "savage" masses and increased elite support for mass education not to promote social mobility or industrialization but as part of an effort to promote long-term social order by indoctrinating children to become obedient citizens. Where historical statistics are available, I also show that central governments' efforts to expand primary schooling focused mainly on those regions that posed the greatest threat to the state. The four cases demonstrate that internal conflict has played a key role in explaining the rise of modern primary education systems across a wide range of non-democratic regimes, conservative and liberal governments, and types of conflict spanning the long nineteenth century.

How did central governments design primary education systems, and what does this tell us about the goals of these systems? Chapter 5 shows that moral education goals pervaded the design of these systems, as evidenced by the content of the curriculum, teacher training and recruitment policies, and school inspection mechanisms. I reach this conclusion after conducting an unprecedented analysis of the content of the first national primary education laws adopted in twenty-five European and Latin American countries. The same chapter presents the two competing models for teaching moral principles that existed in the nineteenth century, each reflecting a different view about the roots of morality: the conservative model, which viewed religion as the basis of morality, and the positivist liberal model, which viewed reason and scientific laws as the ultimate source of moral principles. A key insight from this chapter is that when the balance of power tilted toward liberal politicians, the curriculum included a good dose of math and science in line with these elites' belief that this was the most effective way to teach moral values. Ironically, in these cases, the effort to moralize the masses may have inadvertently equipped ordinary people

with skills to move up the social ladder and, eventually, demand more political power.

After devoting chapters 4 and 5 to the rise and spread of state-regulated primary education systems in Europe and Latin America during the long nineteenth century, chapters 6 and 7 examine the ability of the book's argument to explain education reform in other contexts, too. Chapter 6 provides a conceptual framework for thinking about the conditions under which governments are likely to invest in mass education as an indoctrination tool to create obedient citizens. The framework posits that governments are more likely to invest in mass education when politicians (1) fear the masses, (2) believe that schools can indeed indoctrinate them, (3) expect to be in power long enough to reap the benefits of indoctrinating children, and (4) have sufficient fiscal and administrative capacity to promote education. These are, in political science jargon, the scope conditions of the argument. I illustrate the importance of these conditions through historical examples from England and Mexico, where the absence of at least one of these scope conditions helps explain why primary education provision lagged considerably behind the rest of Europe and Latin America for decades.

Chapter 7, in turn, moves away from the focus on nineteenth-century non-democracies to consider examples of democracies and recent cases where a heightened fear of mass violence led governments to invest in education for indoctrination purposes. Through examples from England, Peru, and the United States, the chapter suggests that, under certain conditions, the book can help explain education reform in a wide variety of contexts—even democratic ones. The same chapter also deploys a new global dataset on the prevalence of indoctrination in education systems to identify key differences and similarities between the education systems of democracies and autocracies from 1945 to the present.

Although the book focuses on the causes, not the consequences, of mass education, some readers may nevertheless want to know whether mass education actually succeeded in promoting social order. This is the focus of chapter 8. Instead of providing a “yes” or “no” answer, this chapter examines the factors that are likely to affect the success of education systems in accomplishing their goal. The discussion builds on the lessons from chapter 5 regarding how education systems were designed. In a nutshell, I argue that some of the national curriculums, teacher training policies, and other education policies commonly used to forge loyalty to the state, can and have

backfired. Still, as I explain in that chapter, whether mass education succeeded in promoting long-term order and stability is irrelevant for the book's argument about what *motivated* the rise and spread of these systems. What we should observe if the book's argument is correct—and what we do observe, as I show in chapter 8—is that politicians *believed* that mass schooling could produce social order, regardless of what prior evidence suggested, and regardless of whether their beliefs were later proven correct or not.

Finally, chapter 9 examines how the historical roots of primary education systems continue to shape education today, helping explain current education systems' troubling performance in promoting skills. Understanding these roots is essential for well-meaning educators and education reformers, international organizations, and anyone committed to strengthening democracy and reducing inequality.

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