



## CONCLUDING REMARKS

# Why Do Finance? A Comment About Entanglements and Research in the History of Education

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Follow the money: Nancy Beadie, a noted scholar of the links between economy and education, described her way into educational historiography through this leitmotiv.<sup>1</sup> It is indeed anything but evident that money in general and the changing development of educational finance in particular have in the last years become the focus of a new generation of historians of education. Educational historiography among educationists, for a long time standing firm on the ground of a rather traditional history of ideas, simply ignored economic aspects of the development of modern education. Particularly, money as the codified means of economic exchange was not only ignored, but also even condemned as a utility that was detrimental to the moralising purposes of modern schooling and modern education.

Economic exchanges in schools and even in classrooms were a crucial part of early modern educational culture. Payment in kind for rural teachers, for instance, entailed the delivery of different products to schools or to the schoolmasters' rooms (often connected to the schoolroom). In settings where the monetary economy was stronger, the payment of school fees also took place in the classrooms. For a long time, entire fields of schooling remained highly commercialised. Money was everywhere. This was certainly the case for higher education for bourgeois middle and upper-middle class girls in Europe. As Christina de Bellaigue has put it, the "business of school-keeping", conservative in its purposes and its ideology towards the place of women in society, demanded a model of female entrepreneurship that was not compatible with the rather conservative characterisations of the education of women these schools' mistresses propagated.<sup>2</sup> It is this gap between the foundations of educational practices and institutions on the one hand, and the formative ideologies of education and schooling on the other, that may have hindered the consideration of money in educational history. In these comments to the articles of this special issue, I will delve deeper into the role of money and financial matters in education and the historiography of education.

- 1 Nancy Beadie, "Education and the Creation of Capital, or What I have Learned by Following the Money," *History of Education Quarterly* 48, no. 1 (2008).
- 2 Christina de Bellaigue, *Educating Women: Schooling and Identity in England and France 1800–1867* (Oxford: Oxford University Press, 2007).

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### The issue of money in school cultures: Two examples

In my own research, it has been evident that money played many—often inglorious—roles in the formation of school cultures in European and Latin American settings. For a particular case, namely, the research into the transcontinental diffusion and variation of the monitorial system of education in the early nineteenth century, this is quite unexpected. Monitorial schooling was strongly related to a commercial mentality, to the notions of merit, competition, and emulation, at least in its original context.<sup>3</sup> Joseph Lancaster himself wrote books in which he meticulously listed all kinds of costs to be considered in the establishment of a school of mutual teaching and working with monitors as teacher's surrogates.<sup>4</sup> One of the main networks of expansion of monitorial schooling included commercial connections and certainly a good number of port cities given their particular political cultures. Commercial groups in those cities enthusiastically adopted the English system of elementary schooling. As soon as monitorial schools were established in settings where this culture of merit, counting and money was not dominant, money rapidly developed into a problem that, some argued, should be banned from schools.

An example of this was the introduction of the monitorial system in the young republic of Grand Colombia in the 1820s. All Hispanic American republics, only with the exception of highly isolated Paraguay, introduced monitorial schools at some point after independence: this new type of schooling was perceived as a symbol of the political and cultural rupture with the former colonial power.<sup>5</sup> Colombia's governments consistently supported this model and tried to reshape elementary schooling following the organisational patterns of the English monitorial schools. A striking feature of the official model for Colombian monitorial schools was the payment of monitors, those advanced pupils in charge of teaching and supervising individual classes. In the official manual for monitorial schools from 1826, monitors received bonds for their work and—in the case of the general monitors at the top of the pyramid of these helpers—they exchanged these bonds for money at the end of the week.<sup>6</sup>

Closely following English proposals, the official version of Colombian monitorial schooling foresaw rewards for almost everyone, even for those who were not monitors: "In order to promote a more general emulation, all children who distinguished themselves for their knowledge of the lesson or for their ordered behavior in the school, have to be rewarded."<sup>7</sup> In this sense, pecuniary relations together with rewards in kind pervaded the system and were elevated to one of its more general techniques. There was even a cumulative system of rewards with bonds, which could be summed and saved.<sup>8</sup> The loss of accumulated bonds was defined—together

3 David Hamilton, *Towards a Theory of Schooling* (London, New York, Philadelphia: The Falmer Press, 1989); David Hogan, "The Market Revolution and Disciplinary Power: Joseph Lancaster and the Psychology of the Classroom System," *History of Education Quarterly* 29, no. 3 (1989).

4 Joseph Lancaster, *Outlines of a Plan for Educating Ten Thousand Poor Children, by Establishing Schools in Country Towns and Villages; And for Uniting Works of Industry with Useful Knowledge* (London: Printed and Sold at the Free School, Borough Road, 1806).

5 Marcelo Caruso and Eugenia Roldán Vera, "Pluralizing Meanings: The Monitorial System of Education in Latin America in the Early Nineteenth Century," *Paedagogica Historica* 41, no. 6 (2005).

6 *Manual de enseñanza mutua aplicado a las escuelas primarias de los niños* (Bogotá: Impreso por S. S. Fox, 1826), 86.

7 *Ibid.*, 87.

8 *Ibid.*

with detention at school after regular school time—as the “principal punishment” of these schools.<sup>9</sup> Clever and obedient pupils received more bonds, while those whose behavior had deteriorated had to give back some bonds, depending on the number and type of their offenses. Moreover, monitors were also included in this system of rewards and punishments; false information on the conduct of their classmates was the worst offense. The higher the rank of a monitor, the higher the number of bonds reclaimed.<sup>10</sup> In addition, the national decree on education of 1826, a rather controversial proposal that intended to introduce utilitarian principles in schooling, mandated paying the general monitor of order 10 per cent of the salary of the school-teacher.<sup>11</sup>

Although accounts of daily life in Colombian monitorial schools are scarce, evidence suggests that the monitorial schools in the big cities generally followed this method of monitorial education. Monitors reported any disturbances to the school-teacher, who often used corporal punishments, although the methods manual recommended punishments that affected the senses of shame and honor. The problem with such a device was the availability of money and other forms of payment beyond regulations, namely bribery. In Ricardo Carrasquilla’s report *Lo que va de ayer a hoy*, the picture of monitorial schooling was by no means positive:

Every day at nine o’clock both monitors (*tomadores*) and pupils (*tomandos*) went out to the corridor. The pupils had to bring the monitors bread for breakfast or some kind of sweets in order to prevent them from telling the teacher that they did not know the lesson well—even though they had recited it without flaw.<sup>12</sup>

According to the educationist José María Zamora, children filled their pockets with sweets for the monitors in order to escape punishments. He concluded: “That practice fed a speculation hard to accept and gave way to injustice and bribery, the consequences of which would be felt in society.”<sup>13</sup> Payment and reward, both in money and in kind, functioned as kind of invitation to classroom practices that counteracted virtually all of the moralising purposes of schooling.

The uneasiness with the presence of money in schools was not limited to the debate that followed the spread of monitorial schooling. During the latter half of the nineteenth century, when school fees were to be abolished in France (1881), Sweden (1883) and Prussia (1888), the arguments of liberal and reformist forces in the Kingdom of Bavaria showed the difficult integration of “money” in school settings.<sup>14</sup> When the Prime Minister Johann von Lutz presented arguments for the

9 Ibid., 87–88.

10 Ibid., 88. These criteria were also adopted in the revised manual of the system from 1845. See Olga Lucía Zuluaga, *Colombia: Dos modelos de su práctica pedagógica durante el siglo XIX* (Medellín: Universidad de Antioquia, 1979), 21.

11 Art. 16 in “Decreto de 3 de octubre sobre el plan de estudios,” in *Obra Educativa de Santander Vol. III*, ed. Lorenzo López (Bogotá: Fundación para la Celebración del Bicentenario, 1990), 389–90.

12 Quoted in: Luis Antonio Bohórquez Casallas, *La evolución educativa en Colombia* (Bogotá: Publicaciones Cultural Colombiana, 1956), 274.

13 Quoted in: *ibid.*, 269.

14 Peter Lindert, *Growing Public: Social Spending and Economic Growth since the Eighteenth Century*. Vol. 1 (Cambridge: Cambridge University Press, 2004), 112; Madeleine Michaëlsson, “From Tree Felling to Silver Lining: Diverse Ways of Funding Elementary Schools among Swedish Ironworking Communities, 1830–1930,” in *History of Schooling: Politics and Local Practice*, ed. Carla Aubry and Johannes Westberg (Frankfurt am Main: Peter Lang, 2012), 53; Karl Schleunes, *Schooling and Society: The Politics of Education in Prussia and Bavaria 1750–1900* (Oxford: Berg, 1989), 204.

abolition of all elementary school fees in the Parliament in 1872, he repeated a tenet that many schoolteachers had advanced: School fees, as they were collected at the time, counteracted the authority of teachers. Since children brought and handed over the school fees to the teacher, no proper rapport of authority may exist between them because the circulation of money in classrooms displayed the dependence of teachers upon the money of local contributors.<sup>15</sup> Schoolteachers viewed explicit opposition to school fees as an indirect form of critique of schoolteachers: children heard parents' complaints about school fees and "this damages the reputation and the efficacy of the teacher".<sup>16</sup>

### **The position of money in education and educational history**

As the examples from Colombia and Bavaria suggest, money evoked non-educative effects. Bribery, moral perils, the weakening of authority as the real foundation of educational rapports, and similar anxieties helped to ban money from classrooms. The establishment of modern comprehensive and compulsory school systems also helped make money "invisible". In the process of consolidating institutionalised systems of education with a varying degree of nationalisation, school fees largely disappeared—and, where they still existed, they were strongly viewed as anomalies condemned to vanish.<sup>17</sup>

Daily life in schools thus evolved without the presence of money, at least for the core activities of teaching and learning. Instead, money was primarily debated in terms of a lack of resources, as an issue of old toilets, poor teacher income, and outdated school furniture, for instance. Clearly, concomitant with the intended sacral character of schools as sites of moralisation, which was strongly advanced in the early modern period, was the banning of money from their daily operations. This adhered the popular imagery of Jesus cleansing the Temple by expelling the moneychangers; it was moreover consistent with the tendency to establishing pedagogical rapports that were somewhat secularised forms of religious and pastoral ones.<sup>18</sup> In continental European school cultures, the presence of money in pedagogical settings came to be perceived as the antithesis of a mass agency of moralisation and qualification.

This distinction between education and materialistic and worldly matters was also expressed in formulations that treated schools and education specific spaces with their own logic. Sacral connotations may have retreated in the context of a general secularisation of educational institutions during the last decades. Yet there persists an idea of schooling and education as spaces that are not completely determined by external conditions, but rather has their own intrinsic characteristic. Sociologically, this representation is expressed in such varying formulations as 'relative autonomy' (Pierre Bourdieu), 'grammar of schooling' (David Tyack and Larry Cuban), 'pedagogic discourse' (Basil Bernstein), or 'das eigentliche Pädagogische' (the truly

15 Johann Nepomuk Hollweck, *Die Schulgeldfrage: Ein Beitrag zu Ihrer Lösung* (Regensburg: Nationale Verlagsanstalt, 1899), 10.

16 A. F. Rohmeder, *Zur Frage der Schulgeldaufhebung* (Rothenburg o.d.T.: Commissionsverlag der F. J. Beck'schen Buchhandlung, 1872), 38.

17 The World Bank and UNICEF, *Abolishing School Fees in Africa. Lessons from Ethiopia, Ghana, Kenya, Malawi, and Mozambique* (Washington D.C.: IBRD/The World Bank, 2009).

18 For the German context, see Fritz Osterwalder, "Die Geburt der deutschsprachigen Pädagogik aus dem Geist des evangelischen Dogmas," *Vierteljahrsschrift für wissenschaftliche Pädagogik* 68 (1992).

pedagogical element, in a radicalised philosophical form within the German tradition, among others in Franz Fischer's work). Educational historiographies written by educationalists tend to emphasise aspects deemed closely related to this core of educational practices and institutions. These historiographies, not even taking into consideration main findings about the relationships between literacy and economic modernisation, industrial development and schooling, the expanding realm of local and national educational funding, are still reproducing the gap between the concrete foundations of educational activities and institutions and their associated ideologies.

If this diagnosis of the distant relationship of educational historians to the realm of the economy of education in general and to the topic of educational finance in particular holds true, some may seek redemption in the growing body of scholarship being proffered by scholars working in the field of the history of economics. It is indeed a tempting alternative. Economic historians and their modeling approach to historical problems are particularly well suited to the specific type of evidence—numerical—being produced in these studies. Books like *The Race between Education and Technology* and *The Chosen Few* have innovatively proposed interesting explanations for issues like the emergence of a human capital perspective or the strong bond between religious obligations and institutionalised education in Jewish communities.<sup>19</sup>

Yet I cannot help but think that many of the investigations into the links between economy and education are not interested in history as a rather open process that involves agency, expectations and (among other, economic) conditions, but instead in the sense of an additional field for validating rather quasi-mechanical economic laws in the tradition of econometrics. As is widely known, this approach, which has been highly legitimised through the ascendancy of economists and the type of empirical data that suggests exactness and prognostic value, has been vociferously criticised after the last financial crisis. Even if insights coming from a highly abstract and model-based history of economics and finance may be considered to be beyond fundamental criticism, a reversal of the shortcomings of those educational historians who ignore 'money' is evident. The reduction of educational phenomena to a mere additional field in which anthropological assumptions and already-formulated laws of economic development are 'applied' mirrors the one-sided approach of the educationalists. How should education historians approach the field of the historiography of economy and finance while avoiding the internalist approach focusing only on the genuinely 'educational' and the externalist approach of economy? Do the contributions collected in this journal issue advance analytical alternatives to these historiographical dilemmas?

### **Between externalist and internalist approaches to educational finance**

The articles of this special issue deal with the dilemmas of externalist and internalist approaches in different ways. Johannes Westberg's analysis of schoolteachers' allotted farms in nineteenth century Sweden focuses on the complementarity of monetary and non-monetary entanglements. We have become so accustomed to the

<sup>19</sup> Claudia Goldin and Lawrence F. Katz, *The Race between Education and Technology* (Cambridge: Harvard University Press, 2008); Maristella Botticini and Zvi Eckstein, *The Chosen Few: How Education Shaped Jewish History, 70–1492* (Princeton: Princeton University Press, 2012). Regarding the relationship between economic history and educational history, see Michael Sanderson, "Educational and Economic History: The Good Neighbours." *History of Education* 36, no. 4–5 (2007): 429–45.

notion of equating finance with 'money' that non-monetary resources for financing educational structures and institutions have been largely neglected. Although the variety of income sources of early modern and nineteenth century schoolteachers is a well-known feature of teachers' precarious economic and social status, the broad range of possible combinations of occupations, certainly with strong variations between urban and rural contexts as well as between different national contexts, is still a largely neglected field of research. Westberg's case study shows that as much as one fourth of the rural teachers' income could come from the various activities related to the allotted farms. In this sense, these farms facilitated the expansion of mass schooling, particularly in rather poor areas, by avoiding "unpleasant taxation" and, correspondingly, weakening possible resistance to the institutionalisation and the expansion of compulsory schooling.

For a perspective that goes beyond Sweden, at least two further entanglements are of interest here. The first is the possibility of placing the allotted farms within a wider context of agrarian or environmental history. What was the impact of these farms? Did this kind of financing expand arable lands and encroach upon forests and wetlands? One might also investigate further the kinds of non-financial resources that teachers had in contexts where demographic pressure or scarce free lands rendered allotted farms impossible.

From a more internal perspective, the question of the symbolic impact of a schoolteacher performing the work of the local population—corporal work in agriculture—is a central one. Did this result in a better integration of schoolteachers in local communities with strong egalitarian ethos? Or did the allotted farms undermine the teachers' reputation? In this sense, the links between modes of financing and the legitimacy of teachers and schools could be interrogated in further scholarship.

Samuel Edquist's piece focuses on the changing boundaries of popular education in Sweden, which he links to varying policies of the subsidisation of learning circles and initiatives in the field of popular education. His argument points at conceptual transformations of the field financed, namely, popular education. The entanglements that the author unveils affect the very core of the field. Edquist's article examines various forms of regulation (financial, organisational, practical and ideological) and convincingly discusses how state subsidies and their terms shaped the field that they purportedly only had to support. A formative function of subsidies draws borders and defines legitimate and non-legitimate practices. In analysing such processes, this article fully deploys the potentials of historically treating education finance as a formative element of educational fields of action and knowledge.

Anne Berg's work on the "popular educational sphere" in Sweden points in another direction. It contends that the notable continuity of popular education was largely an outcome of the active regulating policies promulgated by the central state. Berg's article shows how political entanglements were related to the growing interest in regulating this field (tellingly, with some developments closely associated with the crucial expansion of political franchise). The growing share of public funding for the folk high schools in general, and the closer focus on two institutions in particular, empirically informs the central thesis about stability and continuity. Yet what does this continuity mean? It is a continuity aimed at stabilisation and conformity? Did the certainty of a continuous flow of money change the inner dynamics and the programmes of those being supported? The analysis remains here only at the door of an educational historiography with an 'internalist' accent.

Focusing on the field of international academic exchange, the last two articles of this special issue consider the specific consequences of changing trends in the finance of academic initiatives. Christin Mays and Andreas Åkerlund's contribution on the American-Scandinavian Foundation advances a sound analysis of the foundation's changing financial basis—from small to bigger donors—with a chronological divide at the end of World War II. The broad documentary basis allows the meticulous reconstruction of changing trends in finance and support; yet—from a rather internalist point of view—the shift from small to bigger donors does not seem to have fundamentally affected the function of the American-Scandinavian Foundation. In this sense, money here remains only one context, one that did not have particular consequences on organisational operations.

The last detailed reconstruction of financial flows—Andreas Åkerlund's piece on the Swedish Institute (SI) since 1945—concludes quite inconclusively: “[I]t is almost impossible to reduce exchange through the SI at any given time to a single rationale”. This, in turn, complicates the article's main question, which is related to the ways money and financial matters affect educational and scholarly exchange. Beyond the basic premise that academic exchange and travelling without money is quite improbable, this question may have demanded further analyses into the inner dynamics of the institution, including decision-making and feedback, which are surely associated with but never reduced to the flow of money reconstructed in the piece.

Apart from examining the forces that shaped education during the nineteenth and twentieth centuries, the articles in this special issue raise questions of wider historiographical relevance. It might be the case that the format of journal articles limits the author's ability to delve deeper into the many facets of the development of education in their own specific terms and logic: perhaps articles do not present the researcher with enough space to further analyse differentiations and entanglements. One historiographical lesson, presented by the articles of this special issue, is perhaps that financial matters are a particularly salient topic for understanding the processes and structures that shape and change education. Finance is a dimension of educational reality that is not pervaded by specific or pedagogical logics, as we have seen; but it is a dimension that enables—if not everything—at least substantial elements and components of educational institutions and practices.

These articles also raise questions about the concepts and objects of the educational historian's research. We have grown accustomed to investigating—and accepting—the pervading effects of such things like the bourgeoisie, the state, the church, the working class, and so on, in the development of education. However, as numerous historical and theoretical analyses show, these entities are not as evident and clear-cut as has been held to believe. What these articles suggest, like many other contemporary studies, is that we should probably analyse more modest, but certainly more material aspects—like money, but also buildings, routines, paperwork etc.—in order to re-assess in practical terms the efficacy of the entities we suppose have shaped modern educational institutions. In doing this, and in taking money as an object of practices whose changing flow shows the effects of decisions, legitimacies and calculations, we may gain a stronger view of the entanglements constitutive of education.

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