

# The emergence and role of Lancaster in Mexican public education

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**Abstract:** The Lancaster mutual teaching model originated in late 18th century England and quickly spread to the American colonies after receiving positive responses in Europe. In the 1820s, renowned Spanish physician, educator, and publisher Manuel Codorniu Ferreras brought it to Mexico, making outstanding contributions to the newly independent nation in educational philosophy, system, and methods. In the mid-19th century, with the absence of a centralized institution for public education in Mexico, the Lancaster Company took on the significant responsibility of guiding the direction of national public education development. Although this function did not persist for too long due to political changes in Mexico, the educational system continued to play an important role in the Mexican education sector. The Lancaster Company and its teaching system exerted a positive and profound influence on the democratization and secularization of education in Mexico, laying important foundations for the modernization and reform of Mexican education.

**Keywords:** Mexico; public education; Lancaster system; mutual teaching model

## 1. Introduction

In the late 18th to early 19th centuries, Europe witnessed the emergence of a widely adopted mutual teaching model that later spread to the American and Asian colonies. The prominence of this model was owed to the practices and advocacy in primary education by British educators Andrew Bell and Joseph Lancaster.

The mutual education model utilized a system of students aiding one another to help schools function effectively in times of financial constraint. Under this model, teachers relied on the most capable and talented students to assist in instruction, with a particular emphasis on foundational subjects such as reading, writing, and arithmetic. Additionally, practical skills like sewing for girls were included in the curriculum. The aim of this educational model was to cultivate students not only with faith and morality but also with practical foundational knowledge, enabling them to become socially beneficial individuals with good character.

The development of this educational model in Mexico was tumultuous. Although initially introduced to Mexico by Spanish educator Manuel Codorniu Ferreras, the Lancaster Company and its model gained widespread support from local dignitaries and intellectuals. However, amidst political unrest and insufficient financial backing, such schools faced challenging times. By the 1840s, with the accumulation of the company's reputation and resources, its educational initiatives began to expand nationwide, and it was commissioned by the government to promote the mutual teaching model, providing new impetus and possibilities for the development of primary education in Mexico.

Against this backdrop, this paper aims to explore the developmental history of the Lancaster Company in Mexico and its impact on the Mexican educational

system. Through the study of the dissemination and implementation of the Lancaster education model in Mexico, we can better understand its significance and role in Mexican educational history, offering valuable insights for the continued development of the Mexican educational system.

## **2. Review of literature**

In the late 18th century, elementary education in Britain largely followed the traditions of the 16th and 17th centuries, with the Church occupying a predominant role in educational guidance and management, while education funding was commonly borne by societal forces. The societal changes brought about by the Industrial Revolution spurred new educational demands, leading to the emergence of ideas for widespread elementary education. Consequently, prompted by the Evangelical Movement, Sunday Schools and Schools of Industry began to be promoted and developed in Britain, becoming the primary educational institutions for the dissemination of elementary education at that time (Birchenough, 1914). However, in such schools, outdated teaching systems were still implemented, failing to achieve the intended goal of widespread education in terms of both resources and efficiency (Gillard, 2018). This fostered the conditions for the emergence of new educational systems.

The clergyman Andrew Bell was sent to Madras, India in 1789 to engage in religious education. The scarcity of local teaching resources and the extreme poverty of the population led him to implement an educational experiment, where students guided other students to achieve educational goals (Salmon, 1932). Based on this educational experiment, Bell began to compile manuscripts of reports on Madras educational practices upon his return to England, eventually publishing a work titled “An experiment in education, made at the male asylum of madras.” Subsequently, this teaching system began to be used in some schools in England and gradually matured (Osguthorpe and Scruggs, 1986). Joseph Lancaster, a zealous Quaker devoted to education, opened an elementary school in Southwark, his hometown in 1798, and relocated it to Borough Road in 1801. With the increasing number of students and a lack of teachers, Lancaster began to adopt a student-guided teaching method. Based on his teaching practice, Lancaster detailed this teaching system in his published works (Turner, 2015). Bell and Lancaster, facing similar problems in reforming charity schools and private schools, both independently adopted the method of student teaching students. This method, developed based on the experiences of both individuals, became known as the Bell-Lancaster system (Tschurenev, 2008).

Numerous studies in academia have confirmed that the Lancaster educational system, known for its cost-effectiveness, has made significant contributions to the development of primary education and teacher training worldwide. The Lancaster teaching system serves as the foundation of modern school setups, starting from students’ abilities, grouping them into different levels of learning groups based on their learning capacities, arranging curriculum content according to different levels, and employing various teaching methods of different difficulty levels. This approach transforms classrooms into places where student performance can be effectively

assessed and compared (Hogan, 1989). Education historian Ellwood Patterson Cubberley (2012, 1919), points out that the Lancaster teaching method played a crucial role in awakening public interest in and enthusiasm for free schools. It helped people understand the advantages of the public school system, making them willing to contribute to it. Moreover, the Lancaster schools laid important groundwork for the establishment of public school systems in various cities across the United States in the mid-19th century (Dean Webb, 2010, 2005).

In the early 19th century, Latin American countries under Spanish colonial rule struggled for independence. Upon achieving independence, one of the main challenges they faced was education, particularly the development of primary education. To address this issue, many countries introduced the Lancaster educational system and saw advancements in their national education sector through its implementation. In the 1840s, when attempts were made to establish Sunday schools in Havana, it was mandated that the Lancaster method be used. In 1849, the Governor of Cuba, the Count of Alcoy, devised a plan to establish a Lancaster school in the most central area of the outskirts of Havana, capable of accommodating 100 students, to address the lack of education among the most impoverished classes (Giner and España, 1995). During the same period, the mutual teaching system also gained popularity in South America, with Lancaster schools being established in Uruguay, Argentina, Chile, Peru, Venezuela, Colombia, Ecuador, and other places (Paz, 2017).

In Mexico, prior to the establishment of the Lancaster Company, some private teachers and free schools within convents had already begun using the mutual teaching method. However, the Lancaster Company successfully attracted the attention and support of the government and the public, driving the establishment of mutual teaching schools throughout the country. The reputation of mutual teaching and the influence of Lancaster Association members became so significant that in 1842, twenty years after the association's founding, the Mexican national government decided to entrust the entire primary education affairs of the Mexican Republic to the Lancaster Company (Estrada, 1973). The Lancaster teaching system, also known as the monitorial system, relied on advanced students to take on teaching roles and grouped students according to their progress levels. A distinctive feature of this teaching system was its use of simultaneous teaching, which not only saved teaching time but also expanded the curriculum of elementary education. Its organization of time, responsibilities, and tasks was highly rigorous, with motivation and competition viewed as the primary incentives for learning, replacing punishment. Under such a teaching system, a teacher could simultaneously instruct up to 500 students. In the context of Mexico's current education situation, the basic education system designed by Lancaster and Bell not only served to popularize education but also became an important means of teacher training (Arredondo López, 2004).

There has been little in-depth criticism of the Lancaster education system by scholars, primarily because of its relatively short period of practice in the history of education in Latin America. Scholars' negative views of Lancaster schools mainly focus on the outdated teaching methods, arguing that students merely mechanically recite knowledge imparted by teachers, and that school discipline is so strict as to be

almost militaristic. However, it must be acknowledged that this teaching system provided a fast, widespread, and cost-effective educational solution for many developing countries to meet the rapidly growing educational demands of the first half of the 19th century (Benavente, 2015).

### **3. Methodology**

Samuel Ramos (1934) said: “At the beginning of Mexico’s independence, the reality it faced was: A territorially fragmented population of heterogeneous races; a populace, poor and ignorant, indifferent like Indians, numb to a wretched life; and a small educated minority, afflicted with a sense of inferiority, exaggerating individualism and rebelling against all order and discipline.” Ramos believed that national education played a crucial role in reshaping the Mexican spirit. Through education, the Mexican people could gain self-awareness, thereby eliminating deep-seated feelings of inferiority in their national psyche, and developing a unique Mexican thought culture and philosophical speculation. José Vasconcelos similarly affirmed and emphasized the importance of national education, stating that “poverty and ignorance are the enemies of the Mexican people, and it is our responsibility to address the issue of ignorance,” and pointing out that “our educators should remember that the primary purpose of education is to cultivate individuals who can sustain themselves and have surplus energy to serve the interests of others. To truly address the education problem in our country, we must mobilize the public spirit and ignite it with a missionary-like zeal similar to spreading the gospel of faith around the world.” (Romo, 2010) In the eyes of numerous Mexican intellectuals, educators, and politicians, education is seen as the primary means to emancipate the country from its colonial shadows and cultural dependencies, thus shaping a national spirit composed of new Mexicans.

Antonio Gramsci’s theory of cultural hegemony, as proposed in his “Prison Notebooks,” provides a solid theoretical foundation for understanding the relationship between education and cultural ideological shifts. According to Gramsci’s analysis of the bourgeois and proletarian ideological issues, “hegemony” refers to the dominant mode of rule established by the bourgeoisie through means such as education and media in the cultural sphere (Alvarez Gómez, 2016). “Cultural hegemony” is not a form of cultural coercion or violence, but rather a cultural leadership, namely cultural domination and control over spiritual and moral high ground (Li, 2017). When people construct their imagination of social reality, the formation of their cognitive frameworks and sense of identity is guided by the discourse issuers. The power of discourse reinforces certain presuppositions through symbols, language, and concepts, thereby strengthening the dissemination of specific ideas or ideologies, ensuring that key concepts intended to be constructed remain firmly entrenched and expand in people’s minds, ultimately attaining a sacred and unquestionable status. Consequently, this power further naturalizes specific social objects and their behavioral patterns as inseparable parts of the real society (Brachet-Márquez, 2020). Therefore, education is a crucial factor in promoting national modernization, determining the direction of societal values and national ideology development. Schools are not only places of education but also radiating centers for

shaping social consensus and promoting national identity.

Based on this theoretical foundation, this article employs historical research methods to examine and analyze the development process of the Lancaster education system in 19th-century Mexico, exploring the role this system played in the field of public education at the outset of Mexican independence, as well as its contributions and potential promotion of educational and cultural innovation in Mexico. The historical data utilized in this study primarily comes from the historical resource databases of the National Autonomous University of Mexico, the Autonomous University of Nuevo León, and the Mexican Academy, as well as databases such as the Harvard Library's Latin America collection and the Library of Congress. Through the collection, organization, and analysis of relevant legislative documents, memoranda, and reports issued by the judiciary and the Ministry of Public Education, speeches by significant intellectuals, educators, and politicians, as well as other materials such as articles or publications related to this field, this study examines and argues around the different developmental stages of the Lancaster system, using its birth, development, and outcomes as structural divisions.

#### **4. The origin of the mutual teaching model**

The mutual teaching model, popular in Europe in the late 18th and early 19th centuries and later disseminated to the American and Asian colonies, gained renown due to the practices of British individuals Andrew Bell and Joseph Lancaster in elementary education schools and their vigorous advocacy in the educational community. However, according to the research of some scholars, this teaching model can actually be traced back to an even earlier period.

Brazilian literary historian Afraino Peixoto (1942) described the application and promotion of the mutual teaching model by Lancaster as an "ancient innovation."

The Greek writer Plutarch, who lived during the Roman era, mentioned in his works that the Greeks used mutual assistance methods in teaching; Greek historian Xenophon also mentioned that the Persians employed this teaching model. In the 16th century, Spanish printer Juan de la Cuesta described the mutual teaching model in his work published in 1588. In the 17th century, Madame de Maintenon in Paris and Lyon, along with the French priest and educator Jean-Baptiste de La Salle and some other educators, adopted this method (Giner and España, 1995). In the late 17th century, Jesuit priest Lorenzo Ortiz published "El Maestro de escribir: La Theorica y la Practica para Aprender y para Enseñar Este Vtilissimo Arte" (The writing master: Theory and practice for learning and teaching this most useful art), in which he analyzed methods of learning that students should adhere to and practice. He mentioned that in both learning and teaching this skill, teachers and students can draw useful knowledge from each other (Ortiz, 1696). In the 18th century, British Anglican priest and educator Andrew Bell operated a military orphanage near Madras at Equamore. Faced with a large number of children and few teachers, Bell saw the advantage of having older children instruct the younger ones. Andrew Bell's teaching method, whether in purpose or method, does not differ significantly from the Lancaster model; the only distinction is that Bell's guidance leaned towards moralization and was exclusively for boys with Christian beliefs. By the late 18th

century, the San Ildefonso and Balsaín schools in Spain, under the guidance of José de Anduaga, a renowned Spanish politician born in Madrid who served as the Spanish ambassador to London from 1802 to 1804, also employed mutual teaching methods (Estrada, 1973).

Therefore, it would be more accurate to say that the mutual teaching model was not so much an invention of Lancaster as it was Lancaster who successfully popularized the application of this teaching model in elementary education among people in Europe, as well as in the colonies of the Americas and Asia.

## **5. Establishment and spread of the Lancaster teaching system**

The mutual teaching model gained traction in late 18th-century Britain, closely intertwined with the historical context and societal landscape of the time. Concurrently, Europe underwent significant economic, political, social, and ideological transformations. The Industrial Revolution spurred rural depopulation as people migrated to burgeoning urban centers driven by the prosperity of the manufacturing sector. This economic diversification led to intricate social stratification and division of labor, while traditional family structures underwent reconfiguration in response to industrialization's impact. Within this milieu, educational ideologies were shaped by liberalism and utilitarianism. Adam Smith, for instance, viewed education as a means to enhance students' employability, advocating for publicly funded education to mitigate resource disparities resulting from social stratification, ensuring equal opportunities for all children and youth to contribute to future societal development. Furthermore, utilitarian principles prompted the proposition of mass education, aiming to maximize benefits for the largest number of individuals through widespread educational initiatives (Bowen, 1985). For utilitarians, the lack of education was seen as the root cause of social inequality. They recognized that the Industrial Revolution's rapid progress increased the need for skilled labor. This demanded a broader and modernized education system, as the existing British model was insufficient to meet societal needs. Schools and research institutions lacked the capacity to develop the talent required to support the nation. Thus, they opposed elitist education models based on bourgeois characteristics and stood in contrast to the views of the Anglican Church in Britain. The latter expressed concerns about the gradual access of the poor to educational resources within this model, openly criticizing the mutual teaching model as blasphemy against education by atheists (García, 2008).

Joseph Lancaster was born into a working-class family in Southwark, South London, in 1778. His passion for education was evident from an early age, prompting him to travel to Jamaica at the age of 14 to preach to the locals. In 1798, with the support of his father, Lancaster opened a free school on Borough Road in the densely populated Southwark. The aim was to provide educational services to impoverished children, ensuring that everyone had access to free basic education. For Lancaster, his entire career was dedicated to the responsibility of educating children with unique enthusiasm. He believed that no labor was too harsh and no sacrifice too burdensome for the benefit and happiness of his students. He not only expended his resources to establish schools, purchase facilities, and provide salaries

but also devoted all his energy and time to accompany students in their growth. During holidays, Lancaster would take students on excursions and practical activities in the suburbs. He often prepared bread and butter and shared tea with students, and even provided food and clothing to those from impoverished backgrounds during harsh winters (Reigart, 1916).

In the absence of financial support, Lancaster employed the mutual teaching model to ensure the functioning of the school. He enlisted the most capable and talented students to assist the few teachers in teaching and conveying instructions, enabling teachers to achieve significantly enhanced effectiveness in imparting foundational subjects such as reading, writing, and arithmetic. Regarding curriculum arrangement, the impoverished school established by Lancaster primarily focused on fundamental skills and knowledge such as reading, writing, and arithmetic, with the addition of sewing classes specifically tailored for girls. Guided by his educational philosophy, Lancaster aimed not only to provide students with proper guidance in Christian faith and morality but also to emphasize imparting them with more practical foundational knowledge, enabling them to become beneficial to society and possess good moral character in the future (Hoyos, 2009).

At the time, the British periodical “Edinburgh Review” served as a staunch advocate for Lancaster’s mutual teaching model, providing a detailed description and analysis of the teaching method. It offered affirmation and praise for Lancaster’s innovative approach throughout the teaching process. The periodical highlighted Lancaster’s incentive measures as highly effective in encouraging students to study diligently and eradicating bad habits that students may have developed in unfavorable environments. According to “Edinburgh Review,” any outstanding student had the opportunity to take away the medal previously awarded to another student, effectively replacing physical punishment with spiritual embarrassment, thereby altering the outdated reward-punishment paradigm. Lancaster believed that any form of punishment, when used repeatedly, would lose its effectiveness (Reigart, 1916).

In 1803, Lancaster published “Improvements in education, as it respects the industrious classes of the community,” which brought him positive publicity and influence, attracting numerous visitors to his school on Borough Road. Due to the outstanding educational outcomes, the elementary school, initially supported by Lancaster himself, his father, and other public donations, quickly gained the support of King George III. The king sponsored the construction of a new school building, spanning three stories, to fully reflect Lancaster’s teaching philosophy.

Moreover, in 1808, supporters of Lancaster’s teaching model established the “Society for promoting the Lancasterian system for the education of the poor,” later renamed the Royal Lancasterian Society. This establishment greatly facilitated the rapid dissemination of this teaching model not only in Britain, Scotland, and Ireland but also overseas. By 1810, approximately 90 such schools in the UK were imparting knowledge to impoverished children.

Besides the inherent advantages of the model itself, pressure from within Britain also contributed to the swift spread of this teaching model overseas. In the face of Lancaster’s achievements, the Anglican Church of England disapproved, viewing the mutual teaching model as neglecting religious education. This criticism

led Lancaster himself and the Royal Lancasterian Society to focus on expanding this model to more overseas locations.

In 1813, several young men from Sierra Leone in Africa, after studying under Lancaster in Britain, returned to their country to establish mutual teaching models. Then, in 1818, Lancaster embarked on a journey to the Americas, where he was warmly welcomed. He was even invited by Bolívar to establish elementary schools in Colombia based on the mutual teaching system. Subsequently, in 1829, Lancaster traveled to Canada and secured government subsidies to support his educational endeavors. By 1820, France boasted 1500 mutual teaching schools, Sweden had 500, and by 1831, Denmark had 3000 such schools (Giner and España, 1995). In just a short span of a decade, Lancaster's mutual teaching model spread widely across the globe and took root in local communities.

## **6. The rise and practice of the Lancaster system in Mexico**

Founded in 1808, the British and Foreign School Society emerged as a fervent advocate and proactive promoter of the Lancaster education model. The society aimed to spread awareness of this teaching approach to other countries, particularly in the Americas. Their publication, "Manual of the system of teaching reading, writing, arithmetic, and needle-work in the elementary schools of the British and foreign school society," was crafted to acquaint other countries with this educational model and offer practical guidance for its implementation (Hoyos, 2009). The manual emphasizes the importance of the mutual teaching model, highlighting that, compared to the individual capabilities of teachers, the most crucial aspect in teaching is the quality of organizational structure and teaching methods (BFSS, 1917). The latter is identified as the key factor in ensuring the smooth operation of an excellent and effective teaching process.

The introduction of the Lancaster mutual teaching model in Mexico did not transpire under the auspices of the British and Foreign School Society, nor did the Mexican government play a role. Instead, it was spearheaded by the distinguished Spanish doctor, educator, and publisher Manuel Codorniu y Ferreras. With the support and collaboration of Manuel Fernández Aguado, Agustín Buenrostro, Ignacio Rivoll, Eduardo Torreau, General José María Tornel, and Colonel Eulogio Villaurrutia, the Lancaster Company was officially established in Mexico on 22 February 1822. Its objective was to promote elementary education across Mexican society and to advocate for the application of the mutual teaching model in Mexico (Benavente, 2015). In 1825, Joseph Lancaster's daughter, Elizabeth, and her husband Richard Jones settled in Mexico with the intention of promoting the Lancaster education system in this American country. However, despite Richard Jones being appointed as the head of the Lancaster School in Jalisco State from 1827 to 1834, he did not have a significant impact on the institutional design and operation of the Lancaster education system in Mexico. In 1827, the British and Foreign School Society dispatched one of its agents, James Thomson, to Mexico for guidance. However, his practical promotion efforts were modest, primarily concentrating on managing the affairs of the association (Vera, 1999).

Following the establishment of the Lancaster Company in Mexico, its foremost



objective was to develop a manual tailored specifically to Mexican schools, drawing guidance from the manual published by the British and Foreign School Society. However, this task encountered several difficulties at the outset. Firstly, members of the Mexican Lancaster Company were not very familiar with the educational system. Secondly, there was a lack of relevant literature available in Mexico for reference. Additionally, producing accurate and high-quality translated texts required time and effort. Lastly, the lack of funds hindered the timely completion of this task. The committee responsible for the writing process relied primarily on the original British manual and notes on the mutual aid teaching model by Manuel Codorniu y Ferreras, the founder and first chairman of the Mexican Lancaster Company. They also consulted various versions of manuals printed and published in locations such as Madrid, Cadiz, and Havana for reference. Ultimately, on 30 June 1824, the Mexican version of the guidance manual was submitted for publication (Muytoy, 1999).

According to Manuel Codorniu y Ferreras (1823), the founder and chairman of the Lancaster Company in Mexico, there are mainly four types of education involved in the Lancaster schools in Mexico: Primary education, teacher education, secondary education, and adult education. Among these, primary education is the central focus of the Lancaster Company in Mexico, representing the primary arena where the mutual aid teaching model is widely implemented. Teacher education, distinct from traditional teacher training schools, primarily refers to courses offered to teachers for observing, learning, and practicing the mutual aid teaching model, resembling more closely pedagogical guidance or training programs. Secondary education mainly covers advanced subjects such as drawing, mathematics, geography, history, mythology, Latin, and French. However, during the initial decades of the company's establishment in the 1820s and 1830s, educational activities at this stage were almost nonexistent, with the company's main task being the promotion of primary education across all sectors of society. Adult education, similar to teacher education, is an educational service provided by the Lancaster Company in later stages, aimed at providing literacy education to adults. These courses are typically conducted in the evenings to avoid disrupting children's basic education during the day.

Regarding the organizational structure of the mutual aid teaching model, it is vertically segmented into four tiers: the overarching commander, instructors, supervisors, and regular students. Horizontally, it is divided into eight classes based not on the number of students but on their knowledge levels and learning abilities, sorted once to ensure students of similar levels are grouped together. Thus, the student count may fluctuate across classes. The overall commander serves as the core of the mutual aid teaching system, responsible for commanding and arranging all personnel under them to ensure the smooth operation of the teaching model. They are also responsible for appointing supervisors, implementing rewards and punishments, and administering tests, but they are not directly involved in teaching. Below the overall commander are three instructors, each responsible for reading, writing, and arithmetic courses. Their responsibilities encompass receiving directives from the overarching commander, efficiently disseminating them downwards, overseeing the learning advancement of their assigned subjects, and providing feedback to the overarching commander. Below the instructors are the supervisors or class assistants, tasked with guiding and directing students within their respective

classes through exercises, learning activities, and assessments. The lowest level comprises the regular students in each class, who complete their learning tasks daily under the guidance of their supervisors. Outstanding students have the opportunity to advance to higher-level classes or become supervisors.

In terms of schedule and curriculum, classes run from 9 a.m. to 12 p.m. and from 2:30 p.m. to 5:30 p.m., totaling six hours. Weekends vary depending on the specific circumstances, with classes typically including Christian doctrine, civic knowledge, or moral education. In practice, different classes engage in various learning tasks simultaneously due to differences in student proficiency levels.

The first session is a writing class, also known as a penmanship class. Students from the lowest-level classes practice writing individual letters in the sandbox while simultaneously practicing pronunciation. Students from the second-level classes practice writing syllables consisting of two letters on the blackboard and pronouncing them. Students in the third-level classes write syllables consisting of three letters, while those in the fourth-level classes write syllables with four letters. Fifth-level students begin practicing writing monosyllabic words, such as “mar,” “paz,” “por” in Spanish, all of which are monosyllabic complete words. Sixth-level students learn disyllabic words, while seventh-level students no longer practice word exercises on the blackboard but instead learn to write on paper. Students in the highest-level classes practice penmanship to achieve perfect writing.

As students’ proficiency levels increase, learning and practice tasks progress from easy to difficult, gradually extending from letters and syllables to vocabulary, sentences, and even reading materials. Following the writing class is an arithmetic class, with each class assigned learning tasks based on their respective proficiency levels. The curriculum starts with the formation of numbers and related basic concepts, progressing to basic operations such as addition, subtraction, multiplication, and division with smaller numbers, and eventually covering basic operations with larger numbers. In the highest-level classes, more complex operations involving fractions, percentages, and the like are introduced. Typically, few students reach this level of arithmetic proficiency, so sometimes the afternoon arithmetic class is replaced by penmanship or grammar classes.

For a long time, rewards and punishments have been integral components of education, and the Lancaster educational system is no exception. However, the Lancaster Company respects and supports the discussions and bills regarding the abolition of corporal punishment at the Cadiz Constitutional Convention. Therefore, their educational guidance manual stipulates that physical punishment cannot be included as a disciplinary measure. According to their philosophy and institutional regulations, students can improve their skills in learning and other areas by emulating or even surpassing exemplary students through personal effort. If a student becomes lazy or shows signs of negligence, they will lose their current position in the rankings. Students who talk or become distracted during class must kneel for the remainder of the session as a disciplinary measure. If these disciplinary measures fail to produce the desired results, the head commander can reprimand or punish the offender according to the severity of their transgressions. However, under no circumstances should methods such as beating or whipping, which violate principles or cause humiliation to students, be employed.

Since the establishment of the Lancaster Company in Mexico, it has garnered support and admiration from various politicians and intellectuals. In 1822, Lucas Alamán submitted a document titled “Instrucción para el Establecimiento de Escuelas, Según los Principios de la Enseñanza Mutua” (Instruction for the establishment of schools, according to the principles of mutual teaching) to the Provincial Council of Mexico. This document provided a detailed description of the teaching arrangements, classroom layout, curriculum, and advocated that the Lancaster teaching model is the fastest and most economical method to achieve mass education (Alamán, 1822). In July 1823, the renowned Mexican architect Antonio Villard Olea wrote a letter to Lucas Alamán expressing strong support for the educational plans of the Lancaster Company. He offered to lend buildings under his name that met the Lancaster Company’s strict conditions for school premises for use as locations for their elementary education schools. Lucas Alamán (1825), in a report submitted to Congress in his capacity as Minister of the Interior and Foreign Affairs, affirmed the mutual teaching model. He believed that the smooth implementation of public education required extensive financial support from the government and an adequate teaching staff. Alamán argued that the mutual teaching model could save the government considerable financial and manpower costs while achieving good results in teaching.

In 1826, the Minister of the Interior and Foreign Affairs, Sebastián Camacho, applied to the committee responsible for public education within the National Treasury for funds to support the construction of Lancaster Company elementary education schools in Mexico. That same year, Manuel Castro, Camacho’s successor who briefly held the position of Minister of the Interior and Foreign Affairs, stated in a report that the Lancaster mutual education model had achieved commendable results in Europe and in some American countries such as Argentina and Colombia. He emphasized that this teaching model could enable students to quickly grasp knowledge and develop good habits of respecting order without resorting to corporal punishment (Zermeño, 2001).

However, despite the backing of numerous prominent figures, the establishment of Lancaster schools in Mexico encountered significant challenges. In the year of its inception, the Mexican Lancaster Company received an initiative from the “El Sol” newspaper to establish the first Lancaster school in Mexico. Named “El Sol” after the newspaper, this school found its home in the halls of the old religious court building, under the guidance of Professor Andrés González Millán. In 1823, the Lancaster Company planned to establish a second school named “La Filantropía” (The Philanthropy) (Benavente, 2015). Lucas Alamán strongly supported this plan and approved the Betlemitas Convent to be provided to the Lancaster Company as the school premises. According to the plan, the school would have three classrooms, each designated for elementary education, secondary education, and teacher training. Unfortunately, due to the limited spread of the mutual education model at the time, there were very few students in the teacher training section of the school, and hardly any other states sent their teachers to Lancaster schools for training, except for two young people sent by the state of Oaxaca who brought the model back to their hometown (Estrada, 1982). In the same year, due to the Mexican government’s optimism and appreciation, the Lancaster Company received its first government

subsidy (Weinberg, 1981). However, the spread and development of Lancaster schools in Mexico did not reach its peak until the 1840s. A lack of a stable political environment and financial support precipitated the education system's most challenging period around 1830: teachers left the education industry to seek alternative livelihoods; absenteeism and dropout rates among children were frequent; school finances were in deficit; and the government's promised annual subsidy of over 2000 pesos was not fulfilled. Lucas Alamán stated in 1830 that the mutual education model had not achieved the expected results. It wasn't until the 1840s that the operational status of Lancaster schools saw significant improvement (Staples, 2005).

## **7. Lancaster company's takeover of public education in Mexico**

Since Mexico's independence, domestic political struggles have been intense, with military rebellions and national coups occurring frequently, leading to frequent changes in the national government and an inability to achieve a stable and peaceful domestic political environment for a long time. This unstable political situation is closely related to the ideological struggles between federalists and centralists.

Starting in the mid-1830s, federalists, who had long dominated Mexican politics, began to be gradually suppressed by centralists. Led by Santa Anna, the centralist government fundamentally changed the previous federal organizational structure through important constitutional documents such as the "Bases Constitucionales Expedidas por el Congreso Constituyente de 1835" and "Las Siete Leyes," ushering in a period of centralized rule dominated by conservatives.

Although liberals sought to maintain control of public education, Santa Anna's conservative and centralizing tendencies thwarted this endeavor. Upon assuming office, the Department of Interior and Foreign Affairs issued a notice on 31 July 1834, regarding public education, asserting that the Public Education General Bureau established by the liberal government blatantly contradicted the republican constitution. The reforms implemented by Farías were fraught with shortcomings, including a failure to fulfill the stated objective of imparting knowledge, morality, and enlightenment to young people; mismanagement of public education funds, which encroached upon state and private property; and the establishment of educational institutions based on criteria that disregarded justice and public convenience. Consequently, it was deemed imperative to immediately halt educational and teaching methods that undermined knowledge and virtue.

Subsequently, under Santa Anna's administration, the Department of Interior and Foreign Affairs of the Republic issued the "Provisional Plan for the Arrangement of Studies" (Plan Provisional de Arreglo de Estudios), which repealed and supplanted the previous regulations issued by the Public Education General Bureau, effectively overhauling Farías' reform plan. The most notable change was the dissolution of the Public Education General Bureau and the establishment of a temporary committee tasked with devising a new education system within a condensed timeframe (Dublán and Lozano, 1876).

Under the rule of the centralized government, although provincial committees had the right to legislate and propose measures for education, as well as to build

primary education institutions, and municipal governments had the obligation and responsibility to promote the development of public education, the ultimate authority for education legislation, school construction, and planning rested with the ruling government. However, Mexico at that time was facing internal and external crises, and the government's enthusiasm for education was hindered and diminished by other more pressing matters. The *Diario del Gobierno de la República Mexicana* (1823), mentioned that the plan to promote public education, especially to advance primary education, drafted since 1835, had remained in the discussion stage in Congress without substantial progress. Furthermore, officials noted that according to Article 26 of Part Three of the Constitution, provincial committees were responsible for initiating education legislative proposals in their respective provinces, leaving little for Congress to do. Additionally, the dire financial condition of the Republic posed significant difficulties in formulating and promoting education plans. Therefore, despite the government's belief that education was one of the key means to address the nation's backwardness, the people's ignorance, and moral decline, more pressing matters left little room for the development of public education, resulting in the important responsibility of guiding the nation's education system being at a standstill.

By the 1840s, as the Lancaster Company, which initially started mutual teaching activities in Mexico City, gradually gained reputation and resources, it expanded its educational efforts nationwide. It received support and endorsement from numerous prominent individuals within the country due to their wealth, knowledge, or social status. With a desire to establish a systematic and institutionalized education system and considering the Lancaster Company's well-established reputation and teaching organizational experience nationwide, the Mexican government, overwhelmed by domestic political struggles and foreign wars, entrusted the development of public education to the Lancaster Company. This was done to enable the widespread dissemination of elementary education knowledge through the mutual teaching model across Mexico.

On 26 October 1842, the Mexican government, under the leadership of Santa Anna as the highest ruler, issued a decree to establish the Directorate of Elementary Education and entrusted its operation to the Lancaster Company (Dublán and Lozano, 1876). In the decree, Santa Anna outlined the establishment of the Directorate of Elementary Education in the capital of the Republic and simultaneously in the capitals of all provinces, known as branches of elementary education. Considering the Lancaster Company's longstanding dedication to disseminating elementary education knowledge to underserved communities nationwide, it was decided to entrust the affairs of the Directorate of Elementary Education entirely to the company. The education branches established in the capitals of each province were also fully entrusted to the management of the Lancaster Company, and these branches operated in accordance with the internal regulations of the Mexican Lancaster Company.

Lancaster's responsibilities in the management and promotion of public education primarily include the following points: Firstly, the Lancaster Company, with the approval and protection of each province, may establish branches where deemed necessary to manage local education. Secondly, the company is responsible

for establishing normal schools based on its educational system and improving them in terms of teaching methods and management, aiming to provide education to as many people as possible in a short period. Thirdly, the company is responsible for compiling and selecting elementary education textbooks and manuals, providing them to provincial branches in appropriate quantities, and the latter are responsible for promoting and implementing these materials. Fourthly, in schools managed by the Directorate of Elementary Education and its branches, priority should be given to the teaching of reading, writing, arithmetic, and Christian doctrine, while other subjects may be expanded based on actual conditions.

In addition, each province has important responsibilities to cooperate with the Lancaster Company in promoting public education. For example, provincial governors are obligated to establish one boys' elementary school and one girls' elementary school for every 10,000 residents and, where conditions permit, establish adult education schools. All funds allocated by provinces to promote elementary education will be used for school construction. In provinces with insufficient funds, a scholarship system will be established, with each household, except for extremely impoverished families, paying 1 real per month to fill the education fund. Provincial committees are responsible for managing scholarships, ensuring timely collection of fees, and ensuring that the funds are used only for elementary education purposes. Provinces are also responsible for monitoring the obligations of parents and guardians to send eligible children or youth to school for education. Failure to do so may result in fines or imprisonment, among other measures.

Overall, Lancaster's takeover of public education in Mexico exhibits the following characteristics.

Firstly, compared to the Lancaster education system in England, the model performs slightly differently in Mexico. While the purpose of the Mexican Lancaster education system, like that of England, aims to spread elementary education, it not only targets the poor and working classes but also has a more grandiose plan. It aims to become the first step in building a modern, enlightened, and progressive society by imparting basic knowledge to everyone. In fact, the Lancaster education system in Mexico can even be seen as a catalyst for the formation of civic culture among students. Through daily learning activities, students gain in-depth understanding of principles such as individual participation, equality for all, fair competition, and serving the public interest (Vera, 1999).

Secondly, religious activities are an important part of the Lancaster education system. The regulations issued by the government stipulate that religion is included in the curriculum taught by the Lancaster Company. Furthermore, in the section regarding teacher training schools, it is specified that these schools are allowed to admit any student willing to study there and able to afford the fees. However, prospective students must possess basic knowledge of reading, writing, fundamental arithmetic, and Christian doctrine to ensure that future teachers in the public education sector have sufficient religious literacy. The emphasis on religious education during this period was largely related to the political environment of Mexico at the time, which was fraught with internal and external challenges. The U.S. invasion between 1846 and 1848 resulted in Mexico losing nearly half of its territory, while indigenous uprisings and urban proletarian revolts intensified.

Liberal individuals, weary of repression by the centralized government, repeatedly organized counterattacks in an attempt to seize power. In this context, Santa Anna had to use Christian doctrine as an important bond to foster national identity and unify the thoughts of the people.

## **8. The influence of Lancaster system on education in Mexico**

The widespread adoption and acceptance of the Lancaster mutual teaching model can be attributed to several key advantages (Giner and España, 1995).

Firstly, it is cost-effective. The primary task of teachers is no longer directly imparting knowledge to a single class through traditional teaching methods. Instead, they plan teaching processes in advance and assign tasks to supervisors to carry out the teaching tasks. Consequently, a teacher, depending on their organizational skills, can simultaneously instruct over two hundred students, thus maximizing the utilization of teaching resources and saving significant expenditure on teacher salaries.

Secondly, it has low professional qualification requirements. Becoming a supervisor guiding students in various classes does not demand excessively strict professional qualifications. Outstanding students, after receiving appropriate training from teachers, can assume this role.

Thirdly, it offers standardization and controllability. In the mutual teaching model, the content that students need to learn each day is pre-divided and arranged by teachers according to the level of difficulty. This facilitates teachers in controlling the overall curriculum and evaluating students' learning outcomes.

Fourthly, it allows for differentiated instruction. Grouping students based on proficiency levels enables tailored learning environments, preventing slower-paced students from falling behind and higher-performing students from becoming disengaged. Additionally, flexible class assignments based on individual performance cater to diverse student needs.

Lastly, it emphasizes students' individual health. The Lancaster teaching system not only encompasses teaching organization forms and methods but also regulates objective conditions such as school environment and facilities, ensuring children's physical and psychological well-being at school.

For a nascent republic without a complete and applicable national education system, the establishment of the Mexican Lancaster Company undoubtedly brought new opportunities and prospects for its educational development. The primary schools established under the joint efforts of the Mexican Republic government and the company provided an opportunity for a significant portion of the Mexican population with very low levels of education to receive basic education. To some extent, this initiative fulfilled and realized the desire for standardization and systematization of education as envisaged in the Cadiz Constitution. Francisco Larroyo (1947), highlighted the Lancaster Company's pioneering role in addressing primary education issues in Mexico and as an example of successful private initiatives in this field. Importantly, its educational content reflected progressive ideals such as religious tolerance.

In terms of outcomes, the Lancaster Company's assumption of the national

education guidance role had a positive impact. By the mid-19th century, Mexican public education institutions showed significant progress both in quantity and quality.

According to a report by the Minister of Justice and Public Education, Manuel Balanda (1824), in 1824, there were only 10 elementary education institutions in Mexico. By 1844, this number had multiplied to 1310, covering a total of 59,744 students. By 1845, the number of elementary education institutions in the republic had nearly reached 5000, with approximately 250,000 students (Zúñiga and Iñiguez, 2011). Even after the Lancaster Company had its guidance authority over national elementary education revoked by the government at the end of 1845, it continued to play a role in the education sector, focusing on promoting basic education through the mutual aid education system with minimal cost and maximum efficiency, without distinction of gender or age.

For example, in 1847, the Lancaster Company was still operating two boys' schools, each with 200 to 300 students; two girls' schools, each with 150 to 180 students; as well as one school each for male and female prisoners, and an adult night school (Lafragua, 1847). In the early 1850s, the concept and mission of promoting public education became even more important and urgent against the backdrop of political turmoil. According to government reports at the time, public education was highly regarded in all states, and despite various difficulties, the republic's education sector continued to develop actively (Lacunza, 1851).

During this period, the teaching forms and methods in Mexico underwent significant updates. The introduction and promotion of the mutual aid education model not only widened educational opportunities but also awakened a radically different approach to dealing with knowledge from the traditional, doctrinaire process. It encouraged people to use personal reasoning, judgment, and questioning rather than simply accepting authoritative voices. Teaching methods no longer adhered strictly to traditional dialogical or argumentative styles; mutual aid education broke the traditional teacher-student relationship while expanding the learning space (Staples, 1992).

Furthermore, the ancient, rigorous, and doctrinaire teaching methods commonly used during the colonial period were also revised in the 19th century. Based on the entrenched punishment-based educational concept of "la letra con sangre entra" (literally, "the letter enters with blood"), teachers often used whips, sticks, or other tools to punish undisciplined, stubborn, or poor-performing children. Painful physical torture and immense psychological pressure were the only memories these children had of school. As early as the late 18th century, educators influenced by Erasmian humanistic thought advocated for the abolition of physical punishment traditions such as whipping and beating in teaching. However, in reality, such disciplinary methods persisted in Mexican educational history for a long time (Morales, 1984). By the mid-19th century, corporal punishment gradually disappeared from teaching, transitioning from physical to mental forms of discipline (Staples, 2013).



## **9. Conclusion**

The complete takeover of primary education in the Republic by the Mexican Lancaster Company did not last long. With the overthrow of the centralized government by liberal civilian-military forces, the decree issued on 26 October 1842, entrusting public education to the company was also repealed.

On 2 December 1845, during Mexico's Second Federal Period, President Herrera, a moderate, issued a decree declaring that the Mexican Lancaster Company would no longer serve as the supreme authority for the republic's primary education (Dublán and Lozano, 1876). With the decree's promulgation, all Lancaster companies established in the capital, provincial capitals, and other regions as per the regulations of 26 October 1842, were mandated to cease their functions outlined in the earlier decree and related provisions immediately. The direct oversight of primary education was henceforth entrusted to government authorities. Additionally, the Lancaster Company and its affiliates were obligated to transfer all educational materials, including books, documents, supplies, furniture, and equipment, along with a detailed report on school status, student enrollment, and occupied premises, to public education institutions supported by government funds. While Lancaster educational institutions in the capital and other regions continued to operate under existing laws, they no longer served as the primary education guidance authority, although they retained their public functions.

Although Lancaster had its role in guiding public education revoked, the company did not fade from the stage of Mexican history. For a long time, it continued to exist solely as a private educational institution dedicated to providing primary education to children within the Republic. At the end of 1868 and the beginning of 1869, the Republic government, led by Juárez, once again negotiated with the Lancaster Company and signed an agreement aimed at reinstating cooperation with the company. This agreement tasked the company with the crucial role of providing free primary education to impoverished children, with an annual budget of 50,000 pesos (Benavente, 2015).

Undeniably, the Lancaster Company made significant contributions to Mexico's educational development in the early years of independence. Firstly, in the absence of a guiding role in public education, it filled the void and assumed the important responsibility of managing primary education. Secondly, it facilitated progress in both the quantity and quality of Mexico's primary education institutions, providing more opportunities for students to receive an education. Thirdly, the Lancaster model positively influenced students' campus life: study schedules became more structured and orderly, enabling students to concentrate better on their studies; disciplinary measures became more effective, fostering improved academic discipline through collaborative learning; and the standardization of rewards and penalties helped to raise awareness about the disadvantages of corporal punishment, creating a safer and more equitable learning environment for students.

The educational reforms during the early years of Mexican independence were tumultuous and fraught with difficulties. Numerous internal conflicts and weak responses to external invasions led to unprecedented divisions within Mexican society, greatly limiting the accessibility of education resources to the general

population. In such circumstances, the Lancaster system introduced a standardized and systematic educational model to Mexico, providing opportunities for more Mexican children and even adults to receive basic education. Especially during the political turbulence of power struggles between liberals and conservatives, the Lancaster system filled the void in the republic's public education leadership role, providing sustained stability to Mexican education for a period. However, comparing the development of the Lancaster system in Mexico with the onset of centralized authority reveals a close connection. Firstly, the chaotic political struggles and financial constraints played a role, as the takeover of public education by Lancaster allowed the new government to focus more energy on other priority matters for a time. Secondly, to some extent, the Lancaster system's strict pursuit of standards and discipline aligned with the centralizing governance ideology of Santa Anna, as a centralized government viewed nationally uniform and standardized education as a powerful means to promote order and stability (Zermeño, 2001). With the arrival of French indirect rule, the liberals' resurgence, and the Porfirio Díaz era, new political environments and theoretical trends gave birth to new educational systems and methods, causing the Lancaster educational system to gradually lose its appeal and eventually fade into history. While this system made significant contributions to the development of Mexican education during the early years of independence due to its cost-effectiveness, efficiency, and standardization, its rigid and strict educational format remains in the past.

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