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HISTORY TEACHING AS AN IDEOLOGICAL BATTLEFIELD: A STUDY ON THE PUERTO RICO AND THE UNITED STATES' RELATIONSHIP AS REPRESENTED IN THE PUERTO RICAN HISTORY TEXTBOOKS

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# Thesis abstract

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### Abstract

The focus of my study is on two history textbooks intended for the 7th grade, one retired from the Puerto Rican Department of Education (PRDE) in 2002, titled “Puerto Rico: Tierra Adentro, Mar Afuera” (Picó & Rivera, 1991) and the textbook that replaced it, “Historia y Geografía de Puerto Rico 7” (Cardona, Mafuz, Rodríguez, et al. 2002), currently in use within the PRDE. Using critical pedagogy as my theoretical lenses, I analyzed how the Puerto Rico-United States historical relationship is conceptualized within these two history textbooks, released under the administration of two different political parties. The historical events chosen for analysis match the beginning of the Puerto Rican-United States’ political relations until its current state of affairs. These events are: the United States’ invasion to Puerto Rico in 1898; the Foraker Act of 1900; the Jones Act of 1917; and the Organic Law 600 (or “Estado Libre Asociado”) in 1952, which defines today’s political relations between the two countries. I refer to the work of three historians (Alegría et al, 1988; Silvestrini & Luque de Sánchez, 1988; and Scarano, 2000) as a mirror to explore how the events are conceptualized within the analyzed textbooks and how these are conceived and written by historians.

I analyzed the selected textbooks utilizing the Norman Fairclough’s (1989, 2003) approach to critical discourse analysis. Critical discourse analysis (CDA) is the study of written and spoken texts to reveal the discursive sources of power, dominance, inequality and bias. I compared how the selected historical events are described within the work of Puerto Rican historians, versus how these are conceptualized within the textbooks selected for analysis. During the process I examined the wording used, events included, events omitted, and the nature and extent of details provided for each, among other linguistic features.

The analysis suggest that the conceptualization of the Hispanic-American War and the 54 years after US invasion to Puerto Rico correlates to the political agenda of the political parties in power at the moment of the production of each history textbook. Moreover, I aimed to explore how the conceptualization of the PR-US relations might participate in the self-destructive discourses among the Puerto Rican population, as identified by other researchers on the field of psychology and sociology.

### Keywords

Critical Discourse Analysis, Critical Theory, School Textbooks, Puerto Rico, History Teaching
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Appendice
1 INTRODUCTION

I would like to use the following story as a guide to the readers into the heart of my research:

When Alexander the Great reached India, he encountered a yogi, meditating in lotus position in front of the Indus River. The young conqueror ordered his army into a halt, dismounted his horse and asked:

-“What are you doing?”

-“I am experiencing... the nothingness!” He replied

-“What are you doing?” the yogi asked in return

“I... am CONQUERING the world!” was Alexander’s proud response. And they both laugh.

They both regard the other as an idiot. “Conquering the world? What a pointless goal” the yogi thought. “Sitting there doing nothing... what a waste of a life” thought Alexander. Ironically, they were both pursuing the same goal, each of them within the subjective values and narratives they learned to value.

Alexander grew up hearing that after humans die, we cross river Styx (separating the living from the dead) after which we would be asked if we had lived an extraordinary life. If you did, you would be welcomed into Elysium, the heaven of heroes, a place reserved for extraordinary souls. If not, you would end up in the fields of Asphodel, designated for average, ordinary souls.

From a young age, Alexander grew up listening to the stories of warriors like Achilles. He certainly heard about the bravery of Hercules, and the great deeds of heroes like Theseus, who entered the labyrinth and killed the bull-headed Minotaur. He was instructed in the epics of The Iliad, The Odyssey, and encouraged to live like these men, a life of glory and spectacular victories.
But the yogi in the other hand grew up listening to a different story. He heard also about a river separating the living from the dead, but not as a “one way trip” but rather as an endless journey we go back and forth until reaching spiritual purification. He would have grown up listening to the story of Bharat, who sought also to conquer the world. When Bharat finally reached the end of the world (thought to be Mount Meru) to be the first one hoisting his flag there, he found the banners of hundreds of kings from way before his time, each of them believing they had conquered the world first, only to find out that it had been done before. The conqueror felt insignificant, that he wasted his entire life in a pointless objective. He realized that the only unconquered world we ought to devote our lives is the profundities of our inner self.

How did the stories these two men heard influenced their behavior and understanding of the world? How do the narratives of our socio-cultural environment shape our self-perception and (along with it) the goals we pursue in life? Narratives have historically served as a tool to create meaning and a set of shared understandings within a group, in what Berger and Luckmann (1967) call a “social stock of knowledge”. The same principle applies also to history. According to British historian Tom Holt, history “is fundamentally and inescapably narrative in its basic structure” (Holt 1990, p. 10; as cited in Frost 2012, p. 437). That is narrative in its use of time, plot and causation. Time is one of the essential dimensions of history, and historians convey change or continuity over time through narrative. History, like narrative, also has “a plot”, with a beginning, a middle, and an end. Finally, Holt asserts that historians develop a narrative of causes and consequences “to answer the question of how or why some event, development or process happened”.

In this thesis I aim to explore how the narratives of four Puerto Rican history events are constructed within two different history textbooks. Although the historical events in these textbooks are the same, the social conditions of production of these texts are different. In this work, I also aim to identify the pedagogical and sociological implications on how these particular narratives are represented, comparing one text with the other. An exploration of the relationship between these narratives with the political parties under which these textbooks were produced is at the core of my research.
1.1 Research Question

The focus of my research is on two history textbooks, both approved within the Puerto Rican Department of Education (PRDE) and released under the administration of two different political parties: one in 1991, titled “Puerto Rico: Tierra Adentro, Mar Afuera” (Picó & Rivera-Izcoa), collected and currently unavailable within the PRDE; and another in 2002, titled “Historia y Geografía de Puerto Rico 7” (Cardona, Mafuz, Rodríguez, et al. 2002) currently in use within the PRDE. Using Norman Fairclough's approaches to Critical Discourse Analysis (1989, 2003) I aim to explore the following question:

“How are the Hispanic-American War and the 54 years after US invasion conceptualized within the history textbooks of the Puerto Rican Department of Education?”

The time period chosen for analysis matches the starting point of the Puerto Rican and United States’ political relationship, starting in April 1898 (with the Hispanic-American War) until the creation of today’s political relationship between the two countries, known the “Estado Libre Asociado” (or “Free Associated State”) established in 1952.

Before each analysis, I will refer to the work of three Puerto Rican historians, which are Alegría (1988), Silvestrini & Luque de Sánchez (1988), and Scarano (2000) as a mirror to explore how history is conceptualized within the analyzed history textbooks and how are these conceived and written by historians.

1.2 Positionality of the researcher

As a US Army veteran, health school teacher and inland-Puerto Rican\(^1\) creole of African dissent, the topic selected for this research relate to me in a very personal and intimate ways. Listening to Puerto Rican 9th graders state that “Puerto Ricans are lazy”; adults asserting that without the United States (US) “Puerto Ricans would die out of hunger” I have come to wonder to myself: “How did Puerto Ricans arrived to such a low perception of themselves? How might these negative self-images relate to broader social issues?” Every time Jesus Omar Rivera releases “new” information on Puerto Rican history, I realized how much ignorance regarding my own people’s past I have been harboring myself. Jesús Omar

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\(^1\) By “inland” I aim to differentiate from the large community of Puerto Ricans living outside of Puerto Rico, mostly in the US.
Rivera is a Puerto Rican public figure famous for offering empowering, usually unknown characters and facts on Puerto Rican history, aiming to promote a high cultural self-esteem. Writer of the theater play “Así nació la Nación” (This is How the Nation Born), and a book on Puerto Rican history titled “Tu Orgullo Nacional” (Your National Pride), Rivera holds a section on a local radio program and have a recurrent participation in several Puerto Rico’s TV segments. Gladfully, I am not alone in this inquietude on how Puerto Ricans arrived to a self-destructive perception of themselves. As I will briefly discuss in the “sociological implications” section of this thesis, other researchers have studied about problematic identity constructions within the Puerto Rican creole population, and how these are related to our political relation with the US. As an educator and member of the Puerto Rican community, I wish to explore how formal education might be a participating agent in this phenomenon.

How an individual perceives history is typically dependent on his/her position within it, and these positionalities tends to bring political stances with it. As a researcher, I am not an exception. I grew up in Puerto Rico, at the heart of a family with strong political sympathies towards the Puerto Rican Independence Party, or PIP. Although I did not submit myself to these, I was exposed to all sorts of anti-colonial discourses and criticism towards US presence in Puerto Rico.

In 2004, aiming for a scholarship to pay for my college studies (and to the bitter surprise of friends and family members) I enrolled into the US Army, toting 7 years of military service in that body. During that experience, I was then exposed to all sorts of pro-annexation and pro-United States discourses from Puerto Rican statehood supporters. The experience of been immersed in these two ideologically opposed environments has allowed me to observe very closely the views, hopes and desires of Puerto Rican creoles regarding the US and Puerto Rico relationship from both sides of the spectrum. Today, I hold no alliance to any Puerto Rico political parties, and any political sympathies that I may have I have endeavored to push aside. Given the negative sociological implications our current political status has, I aim to analyze if these political ideologies in Puerto Rico have influenced how history is conceptualized, as present in the PRDE textbooks.

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2 This term refers to the statehood supporters, that is: those who root for PR become the 51th state of the US.
1.3 Description and justification of my data sources

The main criteria for the textbook selection of my research are threefold. The first one is based on the fact that these have been distributed by the PRDE as approved history textbooks: one in year 1991 (Picó & Rivera-Izcoa) recollected in 2002; and another one, released in 2002 (Cardona, Mafuz, & Rodriguez) which is currently used by the PRDE. School textbooks are a central part of how history is taught and studied in the classrooms. Although history teachers can decide upon how much they rely on a textbook and urge students to read them critically, it is noteworthy that textbooks “organize social reality as knowledge and are, in practice, a primary source of knowledge in schools” (Croning, 1992, as cited in Janhunen 2012, p. 5). An analysis of what events have been excluded, which ones are included and how government approved textbooks portray these historical events can serve as an excellent source of information on what is the government sanctioned official knowledge and what are the values structuring their curriculum.

The second criterion for the textbooks selected for my research is the population they both aimed to target. Both books are intended for 7th graders, a population that holds an average age group of 12 to 13 years old. According to Erickson’s theory of psychosocial development (1950) this age corresponds to a stage in which the individuals are looking to construct and assert their individual identity, driven by questions, also known as “crises”, such as “Who am I, what can I be?”. Erickson called this stage “Identity vs. Role Confusion”. Although the DEPR provide students with “social studies” from grade 1st through High School, in accordance with Circular Letter 14-2004-2005 (p. 4), courses on Puerto Rican history are only taught for 3rd, 4th, 7th grades and for High School students, in grade 11th. Textbooks are made to order, and distributed by the PRDE, teachers are provided with only one approved textbook for the course, and previous textbooks are collected by the PRDE, making them unavailable for teachers or students anymore.

The third criterion for the selection of my data sources is the political parties that were in power when these textbooks were produced: one under the party that support the current PR-US relationship, named “Popular Democratic Party” (1991-1994) and another party that support an annexation of Puerto Rico to the US, named “New Progressive Party” (2002-2012). As I will explain in the historical contextualization of this research, the government of Puerto Rico has been alternating between these two political parties since 1952,
each of them holding their own ideas on the US-PR relations, and different aspirations on how they should be and develop. Since the Secretary of the Department of Education of Puerto Rico is a position that exists within the governor’s cabinet, every quadrennium that Puerto Rico has a change in power, so the head of the PRDE, leading to changes in educational policies, including textbooks. It is noteworthy that, when produced, these texts are made to order by the PRDE. Therefore, selecting two school textbooks that have been produced under two different political administrations within the PRDE was an important criterion for their selection.

The historical events I will be analyzing are the Hispanic-American War of 1898, in which Puerto Rico was invaded by US military forces; the Foraker Act of 1900, in which the US shifted from a military regime in Puerto Rico to a civilian one; the Jones Act of 1917, in which the US imposed US citizenship (without ballot power) on Puerto Ricans; and the creation of Organic Law 600\(^3\), or better known as “Estado Libre Asociado” in 1952. This last event is today’s political formula in which the PR-US relations are based. How these historical events are portrayed within these approved history-textbooks, produced by different political parties, is the focus of my research.

\(^3\) Also known as Public Law 81-600
2 BACKGROUND OF THE STUDY

2.1 One history, three perspectives, a single battlefield

Cultural values, political ideology and social identities do not develop in a vacuum, but rather these are historically situated and socially constructed (Berger & Luckmann, 1966). Therefore, an observation of the historical background, the interests of the social agents in the field\(^4\) and how these interact each other play a major role when analyzing discourse as in text. Norman Fairclough refers to this aspect of discourse analysis as the text’s “social conditions of production” (1989, p. 25). Therefore, in this section I aim to describe the historical context of Puerto Rico, the social agents within its political landscape, their ideologies, and how these relate to the historical events selected for analysis.

Puerto Rico is an Island archipelago located in the Caribbean Sea at approximately 80 miles west from Dominican Republic, and 50 miles east from US Virgin Islands. The massive invasion of European soldiers and explorers into the region in the 15\(^{th}\) Century triggered a long and harsh process of conquer and colonization that historians has refer as the Puerto Rico’s “Colonial Era”. The mixture between the native Taínos, the Spanish settlers, and the African men and women brought as slaves during this period, led Puerto Rico into the development of a cultural and national identity of its own, or what we refer today as the Puerto Rican creole. The persecution of political dissidents and colonial exploitation from Spain lead to violent frictions between Puerto Rican creoles and Spanish authorities, including two suppressed independence revolts. Although tensions were pacified by the “Autonomic Charter”\(^5\) of 1897, the peace negotiations did not last for long: during the Hispanic-American War of 1898 Puerto Rico was invaded by the US. Since then, Puerto Rico has been held as “a territory” of the US.

The vagueness of “a territory” as a concept that aims to define the current PR-US relationship is at the core of the Puerto Rican political debate. Although the official name of the country is the Estado Libre Asociado de Puerto Rico (literally "The Associated Free State

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\(^4\) I draw the term ‘field’ in the sense of Bourdieu’s Field Theory (1954), which refers to “a setting in which agents and their social positions are located. The position of each particular agent in the field is described as a result of the interaction between the specific rules of the field, the agent’s habitus and agent’s power through social, economic and/or cultural capital.

\(^5\) Legal pact in which Puerto Rican creoles gained political and administrative autonomy from Spain.
of Puerto Rico”), several authors have argued that this title serves to conceal the neocolonial relationship of domination that the United States’ asserts over Puerto Rico (García-Passalaqua & Rivera-Lugo, 1900; Irizarry-Mora, 2011; Collado-Schwartz, 2012). In this sense, the term neocolonialism refers to the practice of using capitalism, business globalization, and cultural imperialism as a means to control another country dispensing of military control (Nkrumah, 1965). It describes a socio-economic and political control exercised through economic, linguistic and cultural means, in which the promotion of the culture of the neo-colonist facilitates the cultural assimilation of the colonized and thus opening its national economy to the corporation of the neo-colonist. According Maldonado-Denis (1975), the PR-US relationship possess all the basic characteristics of imperialism as described in the works of Lenin and Marx: military conquest, exploitation of a cheap and abundant man-labor, dispossession of the colonized country’s raw materials by the colonizing country, and the opening of a captive market into which the imperial power pour their surplus commodities. The US exerts direct power over Puerto Rico through multiple government agencies and instruments that determine the most important aspects of the Puerto Rican creoles’ life, a distinctive characteristic of its neocolonial relationship. Since Puerto Rico lacks the exercise of legal sovereignty “its conditions for social change only happen within a framework in which allow the metropolis an intense and extensive penetration in all the aspects of the collective life of Puerto Rican creoles, as it happens in all the dependent, neocolonial societies” (Maldonado-Denis 1975, p. 22).

According to the United States Supreme Court, Puerto Rico is an “unincorporated territory that belongs to, but is not part of the United States of America” (Burnet & Marshall, 2001). Although Puerto Rican creoles are allowed to elect a governor and legislature of their own, the Article 3, section 7 of the Puerto Rico’s constitution demands these bodies to be subjected to the final dispositions of the US Congress. Moreover, the US citizens of Puerto Rico have no say as to the application of US legislation in or to Puerto Rico, are unable to vote for the national offices of President or Vice President, and have no representation in Congress by voting representatives (Torruella, 1988). However, Puerto Rican creoles are still to be subjected to the plenary powers of US Congress.

Under this political panorama, the economic situation in Puerto Rico is difficult. According the US Census (2011) 45.6 percent of Puerto Rican creoles live below the poverty line. The Puerto Rico’s average household income is one-third of those of the US, making Puerto
Rico 50 percent poorer than the poorest state in the union. According Collado-Schwartz (2012) and Irizarry-Mora (2011) the economic situation of Puerto Rico is due to its lack of political representation and power over the financial sector of its economy.

This situation has led into a series of stands toward the current US-PR’s relations, and these stands are contained in three main political parties in the country. The first I will describe is the “Partido Nuevo Progresista” (PNP) or “New Progressive Party”. This party roots for Puerto Rico to become the 51st state of the US, while condemning the current “Associated Free State” status because of its colonial nature. The most valued historical events for the PNP sympathizers are the US invasion of Puerto Rico, and the concession of US citizenship to Puerto Rican creoles. The textbook “Historia y Geografía de Puerto Rico” (Cardona, Mafuz, Rodríguez, et al., 2002) was made to order the PNP party was in government.

The second political party I will describe is the “Partido Popular Democrático” (PPD) or “Popular Democratic Party”. This party advocates for Puerto Rico’s maximum level possible of self-determination, but only within its relationship with the US. The “Associated Free State” political formula that governs today’s PR-US relations was implemented under the PPD governorship. This party is strongly opposed to the annexation of Puerto Rico to the US, asserting that doing so will be in detriment to the national and cultural identity of the Puerto Rican people, as it was the case with the annexation of Hawaii. This party simultaneously affirms that Puerto Rico is economically incapable of being an independent country, and therefore the “unión permanente” (“permanent union” one of the party’s mantras) is the passport to a better quality of life for Puerto Rican creoles. The most important historical event for the PPD is the 1952’s instauration of the “Associated Free State”, where by for the first time Puerto Ricans were allowed to utilize their own flag (previously criminalized by the US), and elect a local government on their own, with the limitations previously explained. The textbook “Puerto Rico, Tierra Adentro y Mar Afuera” (Pico & Rivera-Izcoa, 1991) was made to order while the PPD were in power.

The third political party I will describe is contained in the “Partido Independentista Puertorriqueño” (PIP) or “Puerto Rican Independence Party”. The PIP proposes for Puerto Rico to be an independent country, not bounded by its neocolonial relationship with the US, nor

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6 Mississippi, which according the US Census (2011) has a 22.6 percent
to be absorbed by the colonizer, either. Historically, leaders and pro-independence intellectuals have been persecuted, incarcerated and executed, which has led to violent encounters between Puerto Rican nationalists and the US Army, as well as Puerto Rico’s law enforcements. The pro-independence ideology of the PIP is a minority in PR today, and has never been in political power.

<table>
<thead>
<tr>
<th>Political Party</th>
<th>Political Goal</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>New Progressive Party (PNP)</strong></td>
<td>Unconditional support towards the US. Aspire PR to become the 51st state of the US</td>
</tr>
<tr>
<td><strong>Popular Democratic Party (PPD)</strong></td>
<td>Support for PR’s cultural nationalism, but opposed to PR’s political nationalism. Aspire for PR to continue its current relationship with the US</td>
</tr>
<tr>
<td><strong>Puerto Rican Independence Party (PIP)</strong></td>
<td>Supports Puerto Rican political and cultural nationalism. Aspire for PR’s separation from the US to become an independent country</td>
</tr>
</tbody>
</table>

Table 1: Political parties in Puerto Rico and their agendas

These ideologies interact with each other in a variety of contexts that seems to transcend the political debate itself. Every time a Puerto Rican athlete wins an Olympic medal, expressions of jubilation from the PPD’s sympathizers are heard, stating that “these proud moments in which our flag is being raised wouldn’t be possible if we were a state (of the US)”. In baseball world cups and every international basketball tournament, the Puerto Rico versus US games are the most attended and needless the say, the victories of Puerto Rico over the US the most celebrated. However, when a Puerto Rican soldier receives US’s recognition for his/her deeds in combat, then is the PNP’s statehood supporters the ones who celebrate the occasion, raising US flags while praising “the outstanding contribution that Puerto Ricans do for the Great American nation”, asserting that “Puerto Ricans have earned the right to annexation with the blood and sacrifices of our soldiers”. Both the pro-independence party and the PPD coincide in an opposition towards an annexation of Puerto Rico to the US and their support for the preservation of a Puerto Rican culture. However,
the biggest criticisms and threats that the PPD have received come from precisely, the pro-
independence supporters. Every time the US assert their policies that limit the Puerto Rican creoles’ opportunities to develop a national economy, the PIP pro-independence party is the one who take advantage of the occasion to criticize the other two parties, stressing that “we are in fact a colony (critic towards the PPD), that the US have no interests in making us ‘equal’ as one of its states (critic towards the PNP), and the only way to solve this problem breaking relationships with the US once and for all”.

The way these ideologies interact with each other emulates some sort of ideological battlefield in which every event, current or historical, is used as a weapon towards the ideological other, too often translating into physical violence and institutionalized persecutions. Authors in the field of sociology and psychology have argued that the current neo-colonial nature of the PR-US relations relates to this and other sociological phenomena, as it will be explored in the next section of this thesis.

2.2 Sociological Implications

The Oxford Dictionary of English defines colonialism as “the practice of acquiring political control over another country, occupying it with settlers and exploiting it economically”. However, social scientists argue that beyond its political and economic dimensions, colonialism also entails a set of psychological and sociological singularities that demand a critical and deeper understanding. According the French-Algerian psychiatrist Frantz Fanon, the enterprise of colonial rule needs of the alienation of the cultural identity of the colonized peoples to fulfill its economic purposes (1952). Fanon draws this concept of “alienation” from Marxist theory in regard of the division of labor and class struggle, as equally firm in the imperialist division of the world into poor countries and rich countries, exploiters and exploited, rulers and ruled (Caute, D. 1970). Fanon (1952) argued that beyond the unveiled acts of violence implied by military occupation, for the colonizer to ensure the stability of its colonial enterprise, the colonized must be convinced of their “essential inferiority” so they effortlessly submit to foreign rule. Schooling and the church become colonizing tools

7 http://oxforddictionaries.com/definition/english/colonialism?q=colonialism
8 Fanon was also a philosopher, revolutionary and writer whose works are influential in the fields of post-colonial studies, critical theory, and Marxism. As an intellectual, Fanon was a political radical, and an existential humanist concerning the psychopathology of colonization, and the human, social, and cultural consequences of decolonization.
in which the culture, language and historical legacies of the colonized are replaced with the colonizer’s culture, language and historical legacies. Since education is put into place not to improve the colonized quality of life, but to serve the economic interest of the colonizer, the colonized are left with a problem of lack of self-identity and a limited sense of their past. Furthermore, according Césaire (1950) the destructive impact of colonialism affects not only the colonized, but also the colonizer itself. He argued that the enterprise of colonial conquest and colonial activities are based on contempt for the native and justified by that contempt, which “dehumanizes even the most civilized man (...) who in order to ease his conscience, gets into the habit of seeing the other man as an animal, and accustoms himself to treat him like an animal” (p. 177). In his work “The Colonizer and the Colonized” (1974) Albert Memmi seems to refer to the very same psychological construct as “the mythical portrait of the colonized” (p. 123). In this chapter, Memmi argued that in the same way the bourgeoisie creates an image of the proletariat that justifies their privileged position, the colonizer creates an idealized image of themselves while attributing negative characteristics to the colonized such as laziness and lack of discipline. The continuing force of authority of the colonizer over the colonized shapes the self-perception of the colonized peoples, whose internalization of these discourses leads into self-derogating identity constructions. When the colonized has finally adopted the colonizer’s epistemic principle of their essential inferiority, it has been said that a “colonization of the mind” (Dascal, 2007) has occurred.

These observations on the psychological impact created by the European classic model of colonialism correlates to the impact that today’s US American neo-colonialism exerts over Puerto Rico. According Sancholuz (1997) the Puerto Rican creoles’ national identity of has been constructed in relation to their colonial and neocolonial relationship with the US, leading to strong feelings of inferiority in relation to the US Americans. In the same vein, Santana-Charriez (2000) found that the historical self-perception of the Puerto Rican creole have been dominated by a set of negative characteristics of themselves such as laziness, docility, dependency, and conformism. Consistent with these findings on the Puerto Rico’s psychological and socio-political landscape, there is the work of Rivera (1982), Martinez-Lahoz (2005), and Duany (2010). As an inland Puerto Rican creole, I possess plenty of personal and anecdotal observations on this phenomenon. Statements such as “si no fuera por Estados Unidos estaríamos en taparrabos, como los haitianos” (if it wasn’t for the US, we
would be wearing loincloths, like the Haitians), “los puertorriqueños no sirven pa’ na” (Puerto Ricans are good for nothing), and that “es que el puertorriqueño es vago y mantenido” (it’s because the Puerto Rican is lazy and a freeloader”), are common assertions I had listen from fellow Puerto Ricans. I wonder how the conceptualization of history of the PR-US relations might play a role in the reinforcement of such self-destructive discourses.

The Department of Education of Puerto Rico (PRDE) has historically served as an arrowhead for the dissemination of US American-superiority discourses and cultural hegemony. According Negrón de Montilla (1976), in the 1900 the US started to implement a series of policies that aimed at the deculturalization and Americanization of the Puerto Rican people in which schools were to serve as the main platform for the transmission of the US American values and culture. It was required students to sing the US national anthem every morning and to recite the “Pledge of Allegiance” to the US flag. English was imposed as the mandatory language of instruction in all grades ⁹ and pictures of the US’ “founding fathers” and flags were required to decorate the interior of the Puerto Rican classrooms. According Collazo (1998, p. 144) the practice of teaching and singing songs exalting the patriotism and virtues of US Americans became a central aspect of the Puerto Rican Department of Instruction. This process for the Americanization of the Puerto Rican people, or what has been referred to as the enterprise of “creating tropical Yankees” (Navarro, 2002), has come hand in hand with a denigration of the Puerto Rican culture and its people’s capacities. These discourses of US American superiority, along with its disparagement towards the Puerto Rico’s national heritage and its people’s capacities of self-governing, have counted with the participation of local political parties as a means to justify both the current Puerto Rico’s colonial relation with the US or the need of an annexation to the US. In this regard, it is noteworthy that the US’ of hegemonic culture over Puerto Rico have not been a sole product of US’ policy, but that it has rather counted with the collaboration of the Puerto Rican creoles themselves. Regarding this feature in which cultural hegemony is not achieved through coercion, but it rather counts with some degree of consent from the subordinate class, is what Stuart Hall (2012) has refer as oppression as a cooperative achievement. It is noteworthy that I am exploring how the PR-US relations are portrayed within the two history-textbooks selected for analysis, both produced under the government of two

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⁹ Spanish was not reestablished as the language of instruction until 1947 (Maldonado-Denis; 2000)

¹⁰ In 1900 the Puerto Rican Department of Instruction (PRDI) changed its name for the Puerto Rican Department of Education (PRDE)
political parties with different stands towards the current PR-US relations. Therefore, I am also exploring how their agendas might interfere in how the historical relationship between these two countries is being conceptualized.
3 THEORETICAL FOUNDATIONS OF THE STUDY

3.1 Critical Pedagogy and the emancipation of the self

The theoretical basis of this study is Critical Pedagogy, and to explore the origins and aims of it means to evoke the thinkers and theories of previous philosophies, and how these evolved into Critical Pedagogy as we know it today. Doing so takes us back into mid-19th century, with the theories of the Prussian economist, sociologist and journalist Karl Marx, whose writings (in collaboration with social scientist and political theorist Friedrich Engels) developed into a social theory we know today as Marxism.

The classical paradigm of Marxist theory sees education as functioning within the hegemonic social system which is organized by and serves the interest of capital, while calling for alternative modes of education that would prepare students and citizens for more progressive socialist mode of social organizations. Although Marx and Engels did not write widely about education, they developed theoretical perspectives on modern societies that have been used to highlight the social functions of education. Their concepts and methods have served to both theorize and criticize education in the reproduction of capitalist societies, and to support projects of alternative education. Since capitalism is a commodity-producing society organized around work and production, Marxism advocates for a transformation of social relations that produce a society of non-alienated labor in which individuals can aim to the full development of their human capacities.

However, according to Kellner (2003), Marx’s writings placed too much emphasis on the class struggle and on direct action, and not enough on communication and democracy, lacking a proper appreciation of the separation of powers and a system of rights, checks and balances, and democratic participation developed within bourgeois society. Therefore, Marx had an inadequate theory of education and democracy, and failed to develop an institutional theory of democracy, its constraints under capitalism, and how socialism would make possible fuller and richer democracy (p. 164). These lacunae in the classical Marxian theory would be filled by later generations of social theorists, whose work came to be known as neo-Marxism, developing more sophisticated theories of consciousness, commu-
communication, and education, including political subjectivities that strive for socialist and/or democratic social change.

In 1923, a group of social scientist and neo-Marxist theorist associated with the Germany’s Institute of Social Research, created a philosophical and social research movement known as The Frankfurt School. It was within this institute that the term “critical theory of society” was conceived, by a German philosopher and sociologist named Max Horkheimer. According to Horkheimer (1947), Critical Theory is social theory that is, first of all, broad. It treats society as a whole or in all its aspects. That breadth, together with the idea that society is more independent of the economy than traditional Marxism recognizes, means that Critical Theory must be interdisciplinary, the expertise of the first-generation of critical theorists encompassed economics, sociology, law, politics, psychology, aesthetics and philosophy. Next, Critical Theory is emancipatory. It aims at a society that is rational and free, and one which meets the needs of all. It is to that end that Critical Theory is critical. It means to reveal how contemporary capitalist society, in its economy, culture and in their interplay, deceives and dominates.

Up to this point I have explained the relationship between Marxist theory, how it developed in neo-Marxian theories and how these came together into The Frankfurt School, from which we obtain the concept of Critical Theory. But there is still a gap to be filled between Critical Theory and Critical Pedagogy. According to Popkewitz and Fendler (1999) the idea of Critical Pedagogy emerged from the work of Critical Theorists and of progressive educators against the cultural and media influences of the forces of capitalism that maintains the ideological hegemony and conditions that are important for, in fact inseparable from, the legitimacy and smooth working of capitalist economic relations. As consumers, as workers, and as winners or losers in the marketplace of employment, citizens in a capitalist society need both to know their "rightful" place in the order of things and to be reconciled to that destiny. Systems of education are among the institutions that foster and reinforce such beliefs, through the rhetoric of meritocracy, through testing, through tracking, through vocational training or college preparatory curricula, and so forth (Bowles & Gintis 1976; Apple 1979; Popkewitz 1991; as cited in Popkewitz & Fendler, 1999). From the standpoint of both Critical Theory and Critical Pedagogy, “education must hold an emancipatory purpose and acknowledge the process of schooling as a political process. A key to this perspective is the recognition of the contextual relationship that exists between cultur-
**al politics** and economic forces in society and the structure of schools” (Darder 1991, p. 74; author’s emphasis).

It is important to make the distinction between critical pedagogy and critical theory. Critical theory is concerned with epistemic adequacy of being “critical”, with discerning in recognizing faulty arguments, hasty generalizations, assertions lacking evidence, tough claims based on unreliable authority, ambiguous or obscure concepts, and so forth. In the other hand, critical pedagogy is concerned with working within educational institutions and other media to raise questions about inequalities of power, about the false myths of opportunity and merit for many students, and about the way belief systems become internalized to the point where individuals and groups abandon the very aspiration to question or change their lot in life. Popkewitz and Fendler (1999) associate with this tradition to include most strongly the work of Paulo Freire, Henry Giroux, Peter McLaren, and Ira Shor. In the language of Critical Pedagogy, a critical person is one who is empowered to seek justice, to seek emancipation. Not only is the critical person adept at recognizing injustice but for Critical Pedagogy, that person is also moved to change it. Here Critical Pedagogy wholeheartedly takes up Marx's Thesis XI on Feuerbach: "The philosophers have only interpreted the world, in various ways; the point, however, is to change it" (Marx 1845/1977, 158, as cited in Popkewitz and Fendler, 1999).

The American author and critical educator Michael Apple (1990) states that critical pedagogy must provide both a “language of critique” and a “language of possibility”. He argues that education is deeply implicated in the politics of culture and that curriculum is never simply a neutral assemblage of knowledge, somehow appearing in the texts and classrooms of a nation. It is always part of a selective tradition, someone’s selection, some group’s vision of legitimate knowledge, produced out of the cultural, political, and economic conflicts, tensions, and compromises that organize and disorganize a-people. As he puts it in The Politics of Official Knowledge (1993, p. 222) “the decision to define some group’s knowledge as the most legitimate, as official knowledge, while another groups’ knowledge hardly sees the light of day, says something extremely important about who has power in society”. Apple believes that our first task as educators is to educate ourselves concerning the social inequality and the ways we might help to enable students, teachers and others in society to understand and act to create a better world. He argues that “we need a sufficient
number of people that are convinced that the current and emerging organization of a large part of our economic, political and cultural institutions is neither equal, nor just” (Apple 1986, p. 178). These arguments are, in agreement with the standpoint of revolutionary pedagogy views of Peter McLaren (2000, p. 187), according to which “to construct sites – provisional sites – in which new structured motilities and tendential lines of forces can be made to suture identity to the larger problematic of social justice.” Furthermore, he writes in “Life in Schools” (1998) that from the perspective of critical educational theorists, the curriculum actually represents much more than a program of study, a classroom text, or a course syllabus. It represents the introduction to a particular form of life by serving in part to prepare students for dominant or subordinate positions in the society. Therefore the curriculum favors certain forms of knowledge over other and affirms the dreams, desires, and values of select groups of students over other groups, often discriminatorily on the basis of race, class, and gender. In general, critical educational theorists are concerned with how descriptions, discussions, and representations e.g. in textbooks benefit dominant groups and exclude subordinate ones and in this regard hidden curriculum is often referred. (McLaren 1998). The above described approach of critical pedagogy and revolutionary pedagogy relates to my thesis in the sense that I am aiming to explore how the political entities in power might has been utilizing their power position to thrust their partisan agendas, at the expense of the social and academic wellbeing of the Puerto Rican student population. Moreover, I aim to contribute with the Puerto Rican educational system by promoting pedagogical practices that would empower the Puerto Rican students to actively participate in the building of a better future for their own and the one of their global others.

In this thesis I intend to use textbooks as a source of information on the government’s sanctioned official knowledge to explore the relationship between politics and schools (as a cultural institution) analyzing the discourses that might be reinforcing the problematic identity constructions discussed in the section 2.2 of this research.
4 METHODOLOGICAL APPROACH

4.1 Procedure

For the realization of this research, first I read my data sources (as described in section 1.4) identifying the segments that address the historical events pertaining my research. As for the textbook “Historia y Geografía de Puerto Rico 7” (from now on, Textbook #1) these events can be found in the pages: 223, with the Hispanic American War; page 227, with the Foraker Act; page 229, with the Jones Act; and page 245, with Public Law 81-600 (which governs today’s US-PR relations). For the textbook “Puerto Rico: Tierra Adentro, Mar Afuera” (from now on, Textbook #2) the historical events chosen for analysis correspond to the pages 185, with the Hispanic American War; page 194, with the Foraker Act; page 206, with the Jones Act, and page 238, with the Public Law 81-600. I did the translation of these texts in collaboration with other two native Spanish speakers in aim to ensure quality. The original texts in Spanish can be found in the appendix of this research.

Second, I proceeded to read the work of the Puerto Rican historians Ricardo Alegría, Francisco A. Scarano, and Silvestrini & Luque de Sanchez regarding the historical events selected for analysis. These historians are highly renowned authors on Puerto Rican history, recognized by government officials and in academic circles, and their works are commonly used within universities. The first I will introduce is Ricardo Alegría, a Puerto Rican cultural anthropologist and archeologist known today as the “Father of Modern Puerto Rican Archaeology”. Alegría earned his Bachelors of Science in Archeology from the University of Puerto Rico in 1492, continued his academic education in the University of Chicago, where he earned a Masters in Anthropology and History, and continued his PhD (doctorate) in Anthropology in Harvard University, graduating in 1954. Exhibition curator and author of more than 20 books, Alegría was named the first director of the “Institute of Puerto Rican Culture” in 1955, is responsible for the creation of the "Archaeological Center of Investigation of the University of Puerto Rico"(UPR), and in 1976 opened the "Center of Advanced Studies of Puerto Rico and the Caribbean". His work consulted for this thesis is “Temas de la Historia de Puerto Rico” (Alegría et al, 1988). The second author I will introduce is Francisco Scarano, winner of the “New England Council for Latin American Studies Book Award” in 1985, and co-winner of the “Elsa Goveia Prize for Best Book in Car-
ibbean History” from the Association of Caribbean Historians, for his work published in 1982-84. Scarano earned his Bachelors of Science in History from Duke University, North Carolina in 1972, and continued a Masters in History and Philosophy in 1975, earning his PhD (doctorate) studies in Latin American History from the Columbia University in New York, graduating in 1978. With 10 published books and more than 20 academic publications, Scarano serves as an Associate Professor at the University of Wisconsin-Madison, and served as its Graduate Studies in History’s director. His work consulted for this thesis is “Puerto Rico: Cinco Siglos de Historia” (Scarano, 2000). The third book I utilized for this thesis is titled “Historia de Puerto Rico: Trayectoria de un Pueblo” (1988) which is written by the Blanca Silvestrini, and coauthored by Maria Luque de Sánchez. Blanca Silvestrini received her Ph.D. in Latin American History at the University at Albany, State University of New York, and did postgraduate work in the Department of History of Science at Harvard. A J.S.M. from Stanford University, Silvestrini is currently a professor and director of the Institute for Puerto Rican & Latino Studies at the University of Connecticut, holding more than 15 academic publications on Puerto Rican history. The coauthor her book, Maria Dolores Luque de Sanchez, is a history professor and director of the “Centro de Investigaciones Históricas” at the University of Puerto Rico in Río Piedras. Although I am utilizing the works of these renowned authors as my lenses into the Puerto Rican history, it is noteworthy that I am not unmindful that these historians themselves are not exempt from the influence of their own positionalities. However, these historians follow the academic tradition of knowledge production and practices in inquiry, including transparency and openness for criticism. However, the concern of my research is not to perform a critical discourse analysis on these historians but rather on the school textbooks selected for analysis, as described in the section 4.1 of this thesis.

Third, I proceeded to compare how the narrative of these historical events are described within the works of these Puerto Rican historians, versus how are these narratives represented within the school textbooks selected for analysis. During this process I examined the wording used, events included, events omitted, and the nature and extent of details provided for each, among other linguistic features. In the exploration on the contextualization of these historical events, I will utilize Norman Fairclough’s (2003, 1989) approach to Critical Discourse Analysis, which I will explain in the following section.
4.2 Critical Discourse Analysis

Critical discourse analysis (CDA) is a field of study which has paved the way for social scientists, linguists and researchers through the humanities to find out the hidden ideologies behind seemingly simple and plain words. Teun van Dijk (1988) has defined CDA as a field concerned with “the study and analysis of written and spoken texts to reveal the discursive sources of power, dominance, inequality and bias. It examines how these discursive sources are maintained and reproduced within specific social, political and historical contexts”. In the same vein, Norman Fairclough (1989) has defined CDA as “a discourse analysis that aims to systematically explore often opaque relationships of causality and determination between (a) discursive practices, events and texts, and (b) wider social and cultural structures, relations and processes; to investigate how such practices, events and texts arise out of and are ideologically shaped by relations of power and struggles over power; and to explore how the opacity of these relationships between discourse and society is itself a factor securing power and hegemony” (p. 132).

CDA draw its concept of “discourse” from the work of French philosopher, literary critic, and social theorist Michael Foucault. The foucauldian concept of discourse has been defined as “a system of thoughts composed of ideas, attitudes, courses of action, beliefs and practices that systematically construct the subjects and the worlds of which they speak" (Lessa 2006, as cited in Graham, 2011). According Foucault, discourses, or groups of discourses (as discursive formations) are always connected to the exercise of power. He maintains that in every society the production of discourse is at once controlled, selected, organized, and redistributed by certain numbers of procedures whose role is to ward off its dangers, to gain mastery over its chance events, to evade its ponderous, formidable materiality (1977, p. 52). Is important to note that the foucauldian concept of discourse extends itself beyond mere “representation” to include also how these discourses become the basis of actions, what he refers as “discursive practices”.

Although the origins of CDA can be found in textual and linguistic analysis, particularly Halliday’s “Systemic Functional Grammar” (1985), is has been largely nurtured by others from sociology, social theory and philosophy. According to McCarthy (1991), it grew out of the work of different disciplines of the 1960s and early 1970s, including linguistics, semiotics, psychology, anthropology, and sociology. According to Tenorio (2011) CDA is al-
so embedded within the paradigm of Critical Theory, whose critical impetus originates in The Frankfurt School. In 1937, Horkheimer urged social theory to “critique and change society and improving its understanding by integrating social sciences to show how social phenomena are interconnected, to produce knowledge that helps social actors emancipate themselves from domination through self-reflection, and to describe, explain and eradicate delusion, by revealing structures of power and ideologies behind discourse, that is, by making visible causes that are hidden”. Given the convergence of all these linguistic, non-linguistic, and social sciences approaches within CDA, Teun van Dijk (2009, p. 62) has argued that a more accurate term for this discipline would be Critical Discourse Studies (CDS) which involves critical analysis, but also critical theory, as well as critical applications. Given the fact that I intend to explore discourse in the textbooks selected for analysis, and how the agendas of the political parties involved in their production might be influencing their conceptualization of history, I found CDS to be a field highly pertinent to my thesis research. Throughout my thesis, however, I will rather refer to this field of studies as CDA, as it’s the terminology used by the Norman Fairclough.

The effects of a text are not an essential, inner or property of the text, but rather they depend on meaning and context. Therefore, the same way a natural scientist adjusts the magnification of a microscope depending on the feature studied, discourse analysts investigate text at different levels to obtain a better grasp of the social phenomena being explored. At a sentence level (high resolution) is vocabulary and grammar; beyond the sentence, are cohesive devices, discourse relations, genres and schema. Therefore, there are different approaches to discourse analysis, but for the purpose of this research I will be using is Norman Fairclough’s approach to CDA. According Tenorio (2011) Fairclough’s Dialectical-Relational approach to CDA is an essentially Marxist framework, anchored in his (1989, 1995) research on language, ideology and power, in which we can find influential terminologies such as dominance, resistance, hybridization of discursive practices, technologization of discourse and conversationalization of public discourse. Fairclough highlights the semiotic reflection of social conflict in discourses, which translates into his interest in social processes (i.e. social structures, practices and events). His approach to CDA starts from the assumption that language is an irreducible part of social life, and as such it is interconnected with all other elements of social life. Therefore, any social analysis must take language into account, since “no real understanding of the social effects of discourse is possi-
ble without looking closely at what happens when people talk or write” (Fairclough 2003, p. 3). In this thesis I aim to explore discourse, as in two history textbooks of the PRDE.

Fairclough (2003) defines texts as elements of concrete social events, which are both shaped by and in turn shape social structures, such as languages for example, and social practices, such as ‘orders of discourse’ (p. 24). Social issues can therefore be elucidated by looking for the semantic relationships between grammatical clauses and sentences, including the use of legitimation (establishing and cultivating the belief in legitimacy of a system of authority) and equivalence and difference (creating differences between objects, entities, or groups of people, as part of a process of classification). The Fairclough’s approach to CDA explores how texts ‘draw upon, incorporate, recontextualize, and dialogue with other texts. Intertextuality\(^{11}\) is used as a way to include both what is said in a text and what remains unsaid – in Fairclough’s words, “what is made explicit is always grounded in what is left implicit” (p. 17).

Fairclough’s approach to CDA includes an exploration on how events are arranged within a narrative (which may not necessarily be chronological), the provision of social agents as events (transforming them into processes) and the focalization of a story in terms of a particular point of view (2003, p. 83). He maintains that “historical narratives have a ‘referential intention’ making them open to questions about the relationship between story and actual events, questions of truth” (p. 85); in addition, that they have an ‘explanatory intention’ which can be likened to focalization – events are understood and made sense of by drawing them into a relation focusing on a particular point of view.

Some of the conceptual tools we can draw from Fairclough’s approach to CDA are:

Recontextualization: a relationship between or networks or social practices and how these are appropriated by, and relocated in the context of, another.

Nominalization: a linguistic form in which the agents of actions (verbs) are hidden; e.g. ‘change’ used as a noun (as an active agent in a clause, not human action)

Passive verbs: e.g. ‘can be made and shipped’ (doesn’t say who does the moving/shipping)

Passive adjectives: e.g. ‘mobile’ (doesn’t say who carries it)

Legitimization: validate an action or procedure by making reference to a value system (e.g. ‘we must attack them, to preserve our freedom and democracy’)

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\(^{11}\) That is, the influence and relationship between texts ‘from the past’ and ‘current texts’
Assumptions and Presuppositions: ‘What is said in a text is always said against the background of what is unsaid

Whether or not these features are used to deliberately, they mystify and hide the real agents on the context of the text. By looking at how widely such texts are distributed in the world, who reads them, etc. we can get evidence about the context and the influence of such texts. In “Language and Power” (1989, p. 25) Fairclough offers a diagram representing how the social context of texts shape the ways in which these are produced and interpreted (See figure below). An exploration of the socio-political context in which the textbooks selected for this study were produced can be found on section 2.1.

Diagram representing the relationship between the text and its social conditions of production, as in Fairclough’s “Language and Power” (1989, p. 25)
5 TEXTBOOK ANALYSES

This section is structured as follows: First, the reader will find the historical events selected for analysis as collected from the work of three Puerto Rican historians, as described in section 4 of this thesis. Then the reader will find how these events are depicted within the selected textbooks and immediately afterwards, I will proceed to analyze these utilizing the Fairclough’s approach to CDA. At the end of the discourse analysis of each historical event I will provide a comparative table summarizing my findings.

5.1 The Hispanic-American War

By 1897, avoiding an armed conflict with United States, Spain had complied with all of US demands for their colonies in the Americas: destitute Weyler, which ended concentration camps for Philippine’s rebels, conceded an autonomy act\textsuperscript{12} for Cuba, freeing Cuba for commercial relations with the US, and for Puerto Rico (Scarano, 2000; p. 620). Nonetheless, the USS Maine explosion in the Cuban harbor of La Habana triggered the armed conflict. The public opinion in the United States was already heated by the yellow press (Alegría et al., 1988; p. 202) for which the loss of a vessel with around 300 navy men died hit hard on US Americans. Spain immediately denied any responsibility for the incident, but the US government used the situation to pressure Spain even more, demanding the selling of Cuba; but Spain refused (Scarano, 2000; p. 620).

The Spanish government proposed the creation of a joint commission of engineers to investigate the accident but the US refused and sending their own engineers. These engineers claimed they were not able to arrive at a “clear conclusion” (Alegría et al. 1988, p. 204) and war hostilities started after president McKinley asked Congress for a war declaration against Spain on April 21, 189. This war is known as the Hispanic American War.

During the offensive plan, Puerto Rican separatists of the Puerto Rico’s section of the “Cuban Revolutionary Party” in New York provided the US government officials with precise and complete information on Spanish activities, maps of Puerto Rico, main routes and the location of Spanish military garrisons which facilitated the US invasion (Silvestrini &

\textsuperscript{12} Known as “Carta Autonómica”
Moreover, Puerto Rican philosopher, sociologist and intellectual Eugenio María de Hostos, in collaboration with Puerto Rican physician and political activist José Julio Henna, redacted a document to be disseminated among the Puerto Rican creoles upon the US troops’ arrival titled “Manifest to the Puerto Rican people”. Its purpose was to pour hope and optimism among the population, in the face of a war that was aimed to finish with the Spanish domination in the country. As stated in one of its lines: “This is not a foreign invader that comes to threaten us: is not a new lord that comes with the purpose of enslaving our people (…) is the great people of north America that, by their strength, their habits of morality and temperance, free in their federal institutions, have come to emancipate us. Our chains have been broken… let us rise to the dreamed heights of plentiful citizenship and construct a Free State”13 (Silvestrini 1898, p. 383).

Along with the resentment of Puerto Rican creoles towards the Spanish rule, these words came from authors holding a huge cultural and symbolic capital within Puerto Rico, which explains the generous attitude that the US troops were received during the invasion (Scarano 2000, p. 637; Silvestrini & Luque 1988, p. 383).

Interested with the USS Maine disaster, in 1976 Admiral Hyman G. Rickover and a set of experts analyzed the tragedy and concluded that the damage caused to the ship was inconsistent with an explosion from an external source. As it came out of their investigation, the explosion was most like to occur as a result of a spontaneous combustion of coal in the bunker next to the ship’s magazine. These findings are consonant with the 1988’s claims from Spain of having nothing to do with the USS Maine’s tragedy (Alegria 1988, p. 204).

**Textbook Analysis**

Regarding these historical events, the school-textbook #1, states:

Mysteriously, on February 15 1898, the USS Maine vessel exploded in the Havana Harbor causing the death of 268 of the crew. The United States accused Spain for provoking the explosion maliciously, even when Spain and an international commission sustained that it occurred because of a flaw in the ship’s design. Confronted with a North American ultimatum, on April 24 Spain declares war on United States of America (p. 222).

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13 As for his later writings, Eugenio Maria de Hostos is known today as one of the icons of the Puerto Rican independence movement.
The first word used when describing this tragedy implies there is no logical explanation for the incident. The adjective “mysteriously” leaves the reader’s mindset waiting for data that could lead to a plausible explanation. The textbook immediately afterwards state that the US accused Spain of provoking the explosion “maliciously”, which provides the reader with a “logical” explanation for the explosion. Moreover, the text utilizes the adjective “malicious” when referring to the Spanish intentions. Since there is no “benign” way of provoking such destruction, the use of the adjectives “mysterious” and “maliciously” invites the reader to think the sunk of the USS Main as an underhanded, concealed attack from Spanish. From that standpoint, the US then figure as a victim of a Spanish “mysterious” and “malicious” assault. The use of adjectives as an attempt to engage into affective, mental process rooted in a semantic set of meanings is what Norman Fairclough has refer as “evaluative statements” (2003, p. 171). It is noteworthy that by the end of the chapter, the actual nature of the USS Maine tragedy (that is: that it exploded from the inside out, and not from an external projectile) is absent from the text. The US’s political and economic interests to expand into the Caribbean are also omitted from the text, which is another piece of information that could have “redeem” Spain from such a harsh accusation. According to Norman Fairclough, texts can be looked from a representational point of view in terms of “which events are included in the representation, which ones are excluded, and which of the elements that are included are given the greatest prominence or salience” (2003 p. 136).

In the same narrative, the textbook states that “Spain declared war on the United States” on April 24 (1898). Although this thesis is not historical research, but rather discourse analysis, it is noteworthy that this information is historically inaccurate. In the light of what historians Francisco Scarano (2008) and Ricardo Alegria (1988) have researched, war was declared by the United States Congress after Spanish refusal to comply with President McKinley’s demands of granting the independence of Cuba, including an offering to buy the Spanish colony (Scarano 2000, p. 620). According to Trask (1981, p. 57) Spain did declared war on April 23th and the US on the 25th, but only after the US military hostilities began on the 21st, although not declaring war “officially” until the 25th. Portraying the event as if it was Spain that pursued the war encounter that produced the Hispanic-

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14 Although the historian David Trask is not part of the historians I have selected as a mirror into the Puerto Rican history, I am including his account on the Hispanic-American War as the stand of a US-American historian’s view on this historical event.
American War serves to recontextualize (Fairclough, 2003; p. 222) the United States’ imperialistic interest in Puerto Rico, Cuba, Guam and Philippines from a purposive invasion into a response to a foreign war declaration.

Regarding the causes of Hispanic-American war, the school Textbook #2 depicts the events as follows:

In February 1898, the USS Maine exploded while visiting La Habana harbor. The United States blamed the Spanish government for the deaths caused by the loss of the vessel (…) although the Spanish government did everything possible to avoid war, the US Congress declared it two months later (…) Regarding the Maine, an investigation conducted several years after its destruction revealed that the explosion happened because of an accident in the boilers (p. 185)

Different from the Textbook#1, the text offer no specific details on how many soldiers died in the USS Maine explosion, referring to it only as “the loss of the vessel”. An omission on the loss of human lives is present, offering no quantitative facts that could have provided the reader with a better grasp on the magnitude of the USS Maine tragedy. Also adjectives could have served as a means to describe the extent of the tragedy but, other than “the loss of the vessel”, the text writer chooses to offer none.

As opposed to the previous text, Texbook#2 state that it was the US Congress who declared war on Spain. Textbook #2 also offers further information about how the USS Main sank, confirming the Spanish version of having nothing to do with the tragedy.

Absent from both texts is the participation of Puerto Rican creoles during this historical event. The information that Puerto Ricans separatist (from Spain) in New York provided to the US officials, the redaction and distribution of the “Manifesto to the Puerto Rican people” (Alegría et al, 1988; p. 191) and the help US troops received at arrival are omitted from both texts. These omissions portray the Puerto Rican creoles as passive spectators of the actions performed by Spain and the US. Norman Fairclough refers to trend as passivation, in which “the agentive actions and capacities of social agents are omitted, accentuating them in terms of their subjection to processes, them being affected by the actions of others, and so forth” (Fairclough 2003, p. 150).
Table 2: Summary of analysis on Hispanic-American War

<table>
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<tr>
<th>CDA conceptual tool</th>
<th>Textbook #1</th>
<th>Comparison with Textbook #2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Adjective</td>
<td>Describe Spain as a “malicious” suspect</td>
<td>Declare that Spain did “everything possible” to avoid war</td>
</tr>
<tr>
<td></td>
<td>Describe the USS Maine’s explosion as a “mysterious”</td>
<td>Provides data on the actual causes of the USS Maine explosion</td>
</tr>
<tr>
<td>Omission</td>
<td>Omits that Spain had no participation in the USS Maine explosion.</td>
<td>Omits the life-loss that the USS Maine explosion implied</td>
</tr>
<tr>
<td></td>
<td>Omits that the US had previous interests to expand into the Caribbean.</td>
<td></td>
</tr>
<tr>
<td>Recontextualization</td>
<td>Asserts that the Hispanic-American War was declared by Spain</td>
<td>Asserts that the Hispanic-American War was declared by the United States</td>
</tr>
<tr>
<td>Passivation</td>
<td>Omits the Puerto Rican’s active participation in war</td>
<td>Omits the Puerto Rican’s active participation in war</td>
</tr>
</tbody>
</table>

To conclude, the omission, use of adjectives and recontextualization of the Hispanic American War as in Textbook #1 serves to place the US in a favorable moral ground in relation to Spain. The Textbook #2, in the other hand, provides the reader with data that prove the Spanish claims regarding the USS Maine destruction, and its intents to avoid war with the US.
5.2 Foraker Act

The Hispanic-American War ended with Spain surrendering control of Cuba, ceding parts of the West Indies, Guam, the Philippines and Puerto Rico to the United States, as rendered in the Peace Treaty of Paris on 1898\(^{15}\). According to Alegría (et al, 1988; p. 191), Scarano (2000, p. 637) and Silvestrini & Luque (1988; p. 382) the Puerto Rican creoles helped US troops during the invasion and received them with jubilation on arrival. Four centuries of harsh Spanish colonial rule created bitter resentments within Puerto Rican creoles, including a suppressed independence revolt known as “El Grito de Lares” (The Lares Battle cry) in 1868. With the US invasion Puerto Ricans saw a threshold for independence, while others theorized about an annexation with the United States (Silvestrini & Luque 1988, p. 383; Alegría et al 1988, p. 208; Scarano 2000, p. 637). What remained unknown for Puerto Ricans were the practical – military and economic – motivations for US expansion to the Caribbean. Instead of acquiring independence or statehood, Puerto Ricans saw how their country being ruled by a military regime in which from 1898 to 1900 Puerto Rico was ruled by US Army generals appointed by Congress (Scarano 2000, p. 639; Alegría et al 1988, p. 212).

As pointed out by Scarano (p. 646), these two years of military rule strangled the fragile economic situation of the country: the US Navy blockade during the war wrecked Puerto Rico’s international commerce, leading to numerous workers losing their jobs while the prices on essential articles skyrocketed (Scarano 2000, p. 646). The ratification of the Treaty of Paris also exacerbated the fragile economic situation of the already highly dependent Island. As a US “official possession”, now PR could not exchange their products with their traditional markets of Cuba and Spain without paying high importation tariffs. A great part of the Puerto Rican’s enthusiasm with the US invasion (from primarily tobacco and coffee farmers, along with other agriculturist of crops imposed during the Spanish era) was based on the idea that they would now be being able to place their products in North American market. Nonetheless, the US did not allow that fearing that these products would compete with their own (Scarano 2000, p. 646). The situation of being able exchange with their traditional (now “foreign”) markets nor having commercial access to US markets, left the Island in an “economic limbo” (Scarano 2000, p. 647; Silvestrini & Luque 1988, p. 356, 384-

\(^{15}\) The treaty can be found in Yale’s Law School’s website: http://avalon.law.yale.edu/19th_century/sp1898.asp
creating years hunger and surprised disenchantment towards the US colonizers. It was common to hear the people state “US is behaving like the dog of the gardener: Won’t eat, but don’t allow others to eat either”\textsuperscript{16} (Scarano 2000, p. 647).

The devaluation and change of the Puerto Rico currency to the US dollar intensified the economic crisis, allowing US-American investors to buy Puerto Rican lands at “discount prices” (Scarano 2000, p. 648; Silvestrini & Luque 1988, p. 385). Once the Puerto Rico’s currency had been devaluated, the farmers had no option but to sell their lands to the big corporations that flea from the US into Puerto Rico to expand their business. Prominent leaders and politicians such as Muñoz Rivera; Hostos and Julio Henna denounced these injustices, scarcities, distress that Puerto Ricans were experiencing to US Congress; but these were ignored (Alegria 1988, p. 220).

In August of 1899, the strike of hurricane San Ciriaco came as a \textit{coup de grâce} for Puerto Rico. Approximately 3,400 citizens died, most of them due the flood, and diseases such as dysentery and anemia spread (Scarano 2000, p. 649). The US government sent food, medicines and other supplies in generous quantities, but the poor conditions of the streets and other means of communication left by two years of military regime and abandonment made all intents humanitarian aid, from both public and private entities, very difficult. For US Americans, the tragedy put into perspective the life and living conditions of the US “new insular possession”, as it was refer to.

When reporting the status of their insular possession to the US officials, General G. Davis had to reinterpret the Puerto Rican reality according to the values, ideas, attitudes and cultural prejudices of US-American culture on that moment. In the aftermath, Puerto Rico was then considered to be a “\textit{frontier of opportunities, a new challenge for the American’s enterprise and “vitality”, a fertile ground for United States capital that, due their “superior forces”, they would bring the progress so desired to the Island} (Scarano 2000, p. 651). Under these historical conditions, on April 12, 1900 Congress passed a law switching Puerto Rico’s regime from a military rule into a colony with a civilian government. This legislation called the Public Law 56-191, and is better known, the Foraker Act.

\textsuperscript{16} The gardener’s dog, or “El perro del hortelano” is a 1618 comedy of Spanish author Lope de Vega. The expression is still of common use today.
Textbook Analysis

Regarding the motivations of the US government for the creation of the Foraker Act, which changed Puerto Rico from a US military regime to a US civilian regime, the Textbook #1 (2002) states that:

The change of sovereignty crisis was primarily defined by the obstacles our economy faced. One of them was the rise of taxes on products Puerto Rico exported to Spain and the rest of Europe, primarily coffee and sugar. After the war these products were considered foreign in Spain, and they had to pay tariffs to enter.

Another difficult circumstance occurred in August 1899. The stroke of hurricane San Ciriaco smashed the Island for 28 hours, with winds higher than 100 miles per hour. The hurricane caused substantial loses and deaths, leaving thousands of people without food and housing. Other factors, such as the blockade during the War and the change of currency caused a terribly long economic crisis (p. 227).

In the first sentence the social actors that generated the post Hispanic-American War crisis are concealed under the term “change of sovereignty”. Norman Fairclough refers to this trend as nominalization: a process in which the agents of process, the people who initiate processes or act upon other people or objects, are absent from the text (Fairclough 2003, p. 13). In this case, the “US invasion” (the action) is converted into a noun-like word (“change of sovereignty”) in which the social agents acting over others are semantically transformed into a process (p. 143).

Afterwards, the textbook proceeds to explain what the “obstacles” producing these crises were, in this particular order: 1) The high tariff now Puerto Rico had to pay for selling their products in Spain 2) The tragedy provoked by hurricane San Ciriaco, and 3) Labeled as “other factors”: a) the blockade during war, and b) the change of currency.

The order in which these events are portrayed in the narrative does not correspond to their chronological order. The US “blockage during war” that exacerbated the economic situation of the already highly dependent Island extended itself from 4 days before the official US war operations, April 21 of 1898 (Trask 1981, p. 57), lasting until the ratification of the Treaty of Paris on April 11, 1899. If these events where to be chronologically ordered, these would be: 3(a), US “blockage during war”; 3(b), “change of currency” for the US dollar; 1,
the trading difficulties with countries due the new tariffs; and 2, the strike of San Ciriaco hurricane. According to Norman Fairclough, the order in which events are represented in texts is part of the representation and recontextualization analysis (2003, p. 139). It is also noteworthy that the text refers to the US “blockage during war” and “change of currency as “other factors”, which lessens the impact of the US blockade in both the economic activities and political landscape of the Island.

Moreover, when describing the obstacles that “defined” the crises of the Puerto Rican post-war era, the only nation state mentioned in the whole narrative is Spain, whereas the United States’ military operations and economic activities are absent from the text. Norman Fairclough (2003) also refers to this practice as **backgrounding**, in which social actors are mentioned somewhere in the text, but having to be inferred in one or more places (p. 145).

By providing terms such as “change of currency” and “blockade during war” the active agents producing these crises are concealed by providing a noun-like word to an individual or entities’ actions. Norman Fairclough (2003) refers to this trend as **nominalization** (p. 143). One could ask: Who provoked this “blockade”? The same principle applies with the term “the change of currency”: Who “changed” this currency? For what currency was changed? For what purpose? The answer to these questions are absent from the text.

Regarding the motivations for the US implementation of the 1900’s Foraker Act in Puerto Rico, the textbook #2 states that:

> The demand of sugar was increasing but (...) for the sugar cane business to produce good profits, they had to find the way for the Puerto Rican sugar to enter the United States without paying taxes (...) it was necessary that congress passed a law that freed the Puerto Rican sugar from the tariffs. At the time to decide what type of government will substitute the military regime on the Island, United States took the interests of the sugar corporation’s into account (p. 194)

The only reason mentioned in Texbook#2 as a motivation for the US to shift its military regime in Puerto Rico to a civilian one, is economic interest. Although this information is historically accurate, is nonetheless limited: it completely omits the havoc of the hurricane, for which US helped sending supplies in “generous quantities”, and fail to recognize the complex political, emotional and socio-economic landscape of Puerto Rico at the time, and
addresses only the US capitalist interests. Norman Fairclough (2003, p. 136) argued that text can be looked from a representational point of view in terms of “which events are included, which ones are excluded, and which of the elements that are included are given the greatest prominence or salience”.

Table 3: Summary of Foraker Act as in analyzed textbooks

<table>
<thead>
<tr>
<th>CDA conceptual tool</th>
<th>Textbook #1</th>
<th>Comparison with Textbook #2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Nominalization</strong></td>
<td>Converting the actions of the US into processes: “the blockade during war”, “the change of sovereignty”, and “the change of currency”. Spain is the only nation-state mentioned as a social actor in the post-war crisis’ description</td>
<td>Acknowledges the US economic interests behind the 1900’s Foraker Act</td>
</tr>
<tr>
<td><strong>Order of events</strong></td>
<td>Historical events arranged in a non-chronological order that lessens the impact of the US’ actions on the Puerto Rican post-war crisis</td>
<td>Historical events are placed in chronological order</td>
</tr>
<tr>
<td><strong>Omission</strong></td>
<td>Omits the US capitalist interests behind the implementation of the 1900’s Foraker Act</td>
<td>Addresses only the US capitalist interests behind the 1900’s Foraker Act</td>
</tr>
</tbody>
</table>

To conclude, the order of events, omissions and conversion of “actions” into “processes” of Textbook #1 conceals the US’ participation in the Puerto Rican post-war crises. Textbook #2, in the other hand, depicts the US’ corporate interests behind the Foraker Act’s implementation, while omitting the havoc of the San Ciriaco hurricane and the humanitarian aid sent by the US.
5.3 Jones Act

The 1900’s Foraker Act allowed PR a civil government that made possible and economically profitable for the US corporations to expand into the Caribbean. For various reasons, to invest in Puerto Rico resonate as very lucrative for them: lands were fertile, the new regime made impressively cheap to buy them, and given the country’s economic situation, labor force was both skilled and abundant (Scarano 2000, p. 670). Huge investments were therefore poured into the Puerto Rican economy by US American corporations, constituting the most powerful agent of social change in Puerto Rico for the decades that followed. It is noteworthy that this economic corporate based growth did not translate into a better quality of life for Puerto Ricans and did not pacified the political turmoil created by the post-war period, either. The economic imperative of big corporations forced women into the exploitation of American textile industries that fle from the US looking for low wage labor force (Scarano 2000, p. 681), whereas men were economically forced into the sugar cane and tobacco fields, thought to be terminated after the years of Spanish rule. This also compromised the land for local subsistence, increasing the Puerto Rico’s dependence from the US (p. 683).

As for the political aspect, Puerto Rican creoles were not satisfied either. The governor of Puerto Rico was not to be elected by Puerto Ricans, but rather a US Americans appointed by the US president, with no definite time period. Although the Foraker Act provided space for a “House of Delegates”, which was the only political body composed by Puerto Ricans, this body was nonetheless subjected to the governor’s decisions and other US American officials, for which Puerto Rican creoles could not vote (Alegría et al, 1988; p. 213). Under these circumstances, the Puerto Rico’s political landscape experienced “a shift to the left” regarding the US-PR relations. New political parties emerged offering alternatives away from to the US colonial practices, but none of these were taken into account by US Congress (Scarano 2000, p. 725; Alegría, et al 1988, p. 213; Silvestrini & Luque 1988, p. 407). As a response, the “House of Delegates” decided to boycott the Foraker Act by vetoing all US mandates to paralyze all government functions. The reaction from Washington was much more adverse: President William Taft then sent a message to Congress affirming that the Island had experienced economic progress because of the US occupation, emphasizing that Puerto Ricans had not learned the arts of a good government yet, and that “too much power have been given” to the House of Delegates (Silvestrini & Luque 1988, p. 407;
Scarano 2000, p. 726). Consequently, the US Congress passed the Olmsted Amendment of 1909, taking away all power from the “House of Delegates” and transferring all decisions regarding Puerto Rico to the Bureau of Insulars Affairs of the US Department of War.

In 1916, the case of Puerto Rico was reopened. In the dawn of a forthcoming involvement into the WWI, the recently elected president Woodrow Wilson pointed out that all policies towards Puerto Rico and the Philippines were “intimately related to national security and the readiness of defense” (Silvestrini & Luque 1988, p. 411). In front of a high possibility of war, US Congressmen thought important to count with the support of Puerto Rican creoles that, once converted into citizens, could be drafted as US soldiers.

That presidential election of Woodrow Wilson was also followed by a set of US interventions in Latin American countries such as Mexico, Nicaragua, Haiti, Dominican Republic and Cuba (Scarano 2000, p. 737). Beyond economic interests, there was a fear that Germany would target the “weak” nations of the Caribbean, dominating them. This was unacceptable for a nation that a few years before had self-proclaimed as the “police” of the Occidental Hemisphere. Therefore, a lot of attention was given to the issues in the Caribbean and logically, the case of Puerto Rico now claimed more attention than ever before. The political instability of the region, the US interest of legitimizing their presence in the Caribbean and the German menace emphasized the military and strategic value of Puerto Rico (p. 738). Under these circumstances, the US Congress replaced the Foraker Act with a new public law, converting all Puerto Ricans into US citizens. The citizenship granted by the Jones Act, as it came to be known, was limited: Although Puerto Ricans were subjected to the US jurisdiction, but they were not allowed to vote for any the US officials appointed over them. The Article 7 of the Foraker’s Act regarding these issues is left intact in the Jones Act’s Article 5. Therefore, Puerto Rico was still subjected to an American governor selected by the US president, appointed with no definite time period. Nonetheless, the Jones Act of 1917 established a Bill of Rights for Puerto Rico, authorized the creation of a Puerto Rican Senate, and allowed a Resident Commissioner (previously appointed by the US President) to be elected by Puerto Rican creoles.

The limited kind of US citizenship imposed by virtue of Jones Act was not what the statehood supporters longed for. As former statehood leader Matienzo Cintrón pointed out: “Citizenship without governorship worth nothing. Is to demean the citizenship that has
been so emphatically bargained; is to tell the world that the American citizenship and servitude are compatible” (Scarano 2000, p. 724). The pro-independence movement, as expected, was even more reluctant to the de-nationalization of the Puerto Rican people. Nonetheless, both movements accepted that a shift away from the Jones Act and Olmstead Amendment was so much needed. According to Scarano (2000, p. 740) and Alegría (1988, p. 224), the majority of Puerto Ricans would even had agree with all Jones Act’s reforms but rejecting its US citizenship. However, doing so was not possible: the act had been redacted as an integral package that was either to be implemented in its totality, or there would be no reforms at all.

For an individual to reject the US citizenship, s/he would have to attend to a US District Court within the first 6 months of the Jones Act’s implementation to make a sworn statement. However, very few Puerto Ricans did because of the economic and legal consequences of rejecting it were too great. Those few that did were subjected to State rule, but had no rights, nor had any protection from the State (Scarano 2000, p. 741; Silvestrini & Luque 1988, p. 412; Alegría et al 1988, p. 225). The Jones Act granting American citizenship to all the inhabitants of Puerto Rico was ratified on March the 2nd of 1917, making them eligible for US military service. Two months later the US was declaring war on Germany. According Bielakowski (2013, p. 544) by the end of the WWI, 236,000 Puerto Ricans had been registered for the draft.

Textbook Analysis

Regarding the causes for the implementation of the Jones Act, the Textbook #1 state:

During the first years of the 20th century, different sectors of the Puerto Rican politics keep on struggling to amend the Foraker Act. Finally, in 1916 was presented to Congress a project conceding a new organic law for Puerto Rico. This project is known as the Jones Act. (…) Perhaps the greatest benefit granted under this act was the concession of the US American citizenship. The citizens of Puerto Rico had up to six months to reject it, or either welcome it and become one step closer to the American democracy (p. 229).

The word “finally” after declaring that different sectors of the Puerto Rican politics “struggled” to amend the Foraker Act, invites the reader to think these struggles were the causal
factor for the implementation of the Jones Act. According Scarano (2000, p. 725) and Alegría (et al 1988, p. 213), the Jones Act was rather a product of the US imperialistic and military interests of its time, particularly in front of an imminent involvement in the WWI. As Silvestrini & Luque (1988, p. 407) pointed out, US Congressmen thought it was important to count with the support of Puerto Rican creoles that, once made into US citizens, could be drafted as soldiers into the efforts of war. By omitting the historical context in which the Jones Act took place, the US motivations for its implementation are recontextualized (Fairclough 2003, p. 222) into a policy that rather aimed to serve the demands of the Puerto Rican creoles. The agency of the US Congress is therefore passivized whereas the agency of Puerto Rican creoles is activated (Fairclough 2000, p. 150). The textbook also declares that “a new organic law was presented”, but omits who actually presented it. According to Silvestrini & Luque (1988, p. 411), Alegría (et al 1988, p. 222) and Scarano (2000, p. 741) the Jones Act was presented by US Senator William Jones, and indorsed in 1917 by the US Department of War.

Norman Fairclough (2003) refers to this strategic avoidance of explicitness as strategic action, as opposed to “communicative action”. In the former, communication is oriented to achieve understanding; in the latter, its purpose is rather instrumental: is meant to be effective, to conceal, or to create an effect (p. 110). The textbook #1 also refers to the US citizenship as “perhaps the greatest benefit” granted under the Jones Act of 1917’s. Moreover, it mentions that Puerto Ricans could either reject it or welcome it to become “one step closer to the American democracy”. This approach omits the social and economic conditions of oppression under which Puerto Ricans creoles were legally obliged not to reject it (Alegría et al 1988, p. 225; Scarano 2000, p. 740). By using the term “American democracy”, the imposition of the US Citizenship on military interests is therefore justified by making reference to a value system in high regard within western societies, in this case “democracy”. Norman Fairclough (2003) refer to this trend in which polices are legitimized as things that we ‘must do’ while making reference to a value system as legitimization (p. 98). It will be remembered that the Jones Act’s citizenship was a limited citizenship: it made Puerto Rican creoles “US citizens” suitable enough for military drafting, but not to vote for the US President, their own governor nor any of the US American officials appointed over them. As discussed in section 2.1 of this thesis, the US national-electoral pro-
cess is not fully democratic due to the US government disenfranchisement of US citizens residing in Puerto Rico\textsuperscript{17}. This clause it’s in effect today.

Regarding the causes and implementation of the Jones Act of 1917, the Textbook #2 state the following:

The dissatisfaction with the little powers the Foraker Act conceded to Puerto Rico continued. Resident Commissioners in Washington argued over and over that Puerto Rico needed \textbf{more self-governing power}. One of these commissioners was Luis Muñoz Rivera, who proposed \textbf{an act} towards that goal, but it was discarded. Finally, in 1917 Congress approved a measure that was prepared by the US Department of War (…). Those who disagree (with the US citizenship) could theoretically reject it, but very few Puerto Ricans did that because they had no other legal option. To be left out without the US citizenship implied to be a foreigner in their own country, presenting difficulties even to find a job (p. 206).

Whereas the textbook #1 conceal the US Department of War’s role on the Jones Act enactment, the textbook #2 clearly acknowledges its major participation. The textbook #2 also recognizes the US Congress’ rejection to the alternatives proposed by Puerto Rican creoles, but nonetheless, mentions only one: more self-governing power. According to Scarano (2000, p. 659) and Silvestrini & Luque (1988, p. 400), from 1900 to 1912, what the Resident Commissioners in Washington were rooting was rather statehood. Muñoz Rivera’s and his political party ‘Union of Puerto Rico’ abandon the statehood agenda to start a plea for more self-governing power, and towards independence in 1913 (Scarano 2000, p. 738). It is noteworthy that the political party under which the Textbook #2 was produced does not endorse statehood, but rather subjection to the US with certain levels of autonomy. We can therefore appreciate how Textbook #2 is favoring a standpoint on history that focalizes on the characters and historical events that coincide with their political ideologies. Norman Fairclough (2003, p. 85) refers to this trend as \textbf{focalization}, in which the authors of text aim to make sense of events by drawing them into a relation which incorporates a particular point of view. In this case, the event is focalized in terms of the pleas for autonomy, 

\textsuperscript{17} For additional information, the reader can refer to Román J. (2001) "Trying to fit an Oval Shaped Island into a Square Constitution: Arguments for Puerto Rican Statehood, and Torruella, J. (1985) “The Supreme Court and Puerto Rico: The Doctrine of Separate and Unequal”.

whereas the pleas for statehood and the pleas towards independence are disregarded. One could ask “Whose focalization? Whose point of view is being favored here?”

Table 4: Summary on the Jones Act

<table>
<thead>
<tr>
<th>CDA conceptual tool</th>
<th>Textbook #1</th>
<th>Comparison with Textbook #2</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Recontextualization</strong></td>
<td>Recontextualize the US Congress’ interests to draft soldiers into the efforts of the WWI, into a policy (Jones Act) that aimed to serve the demands of the Puerto Rican creoles</td>
<td>Acknowledge that the proposals of Puerto Rican creoles in front of the US Congress were discarded</td>
</tr>
<tr>
<td><strong>Strategic Action</strong></td>
<td>Avoid explicitness on under whose agency the Jones Act’s was implementation</td>
<td>Acknowledge that the Jones Act was prepared by the US Department of War</td>
</tr>
<tr>
<td><strong>Omission</strong></td>
<td>Omits the unanimous rejection that the Jones Act’ US citizenship received by the Puerto Rican creoles</td>
<td>Mentions the unanimous rejection that the Jones Act’ US citizenship received by Puerto Rican creoles. Explains how Puerto Ricans creoles were economically obliged to accept the measure</td>
</tr>
<tr>
<td><strong>Legitimization</strong></td>
<td>Utilizes the term “democracy” to validate the US Congress’ imposition of the US citizenship over the Puerto Ricans</td>
<td></td>
</tr>
<tr>
<td><strong>Focalization</strong></td>
<td>Favors the PPD’s stand point by overlooking the Puerto Rican’s requests for independence and simultaneous petitions for statehood.</td>
<td></td>
</tr>
</tbody>
</table>
To conclude, the Textbook #1’s avoidance of explicitness, omission of critical historical events and recontextualization of the US motivations for the Jones Act’s enactment, places the US in a cooperative position regarding the Puerto Rican creoles. Textbook #2, in the other hand, provides the reader with critical events surrounding the Jones Act’s implementation, do not conceal the active agents behind its enactment and describe the fears of the Puerto Rican creoles regarding its implementation.

5.4 Organic Law-600 or Associated Free State

35 years have passed since the Jones Act’s enactment. During this period, the Puerto Rican economy have been dominated by the exportation of agricultural products from which the US’ corporations that owned the lands and its local administrators profited, but the economic conditions of the Puerto Rican population as a whole remained underdeveloped (Silvestrini & Luque 1988, p. 504; Scarano 2000, p. 685). By the 1930’s, however, protests, riots and new sentiments towards the US colonial rule emerged. The impact of the US’ Great Depression in Puerto Rico converted the Puerto Rican creoles’ long-term struggle for survival into desperation and calls for revolution (Scarano 2000, p. 785; Silvestrini & Luque 1988, p. 460). A fourth political party and a new alliance emerged, each of them presenting their proposals to the US government. This time, the new party was the “Partido Nacionalista” (PN), or Nationalist Party. Similar to the strong “Partido Liberal” (PL), the PN rooted also for the independence of Puerto Rico. However, the PN pointed out that the US’ authority was being upheld by force and therefore it openly favored the use of violence as a means to break free from colonial rule (Silvestrini & Luque 1988, p. 478; Scarano 2000, p. 795). Whereas the PL’s goal to was achieve independence through diplomatic means, the PN refused to recognize US-American authority arguing that Spain had granted autonomy to the Island and therefore (Spain) had no right to surrender Puerto Rico to the US at Paris in 1898. The pro-annexation political agenda, although once were a majority within the country, now needed of the alliance the “Socialist Worker’s Party” and the “Republican Party”, for statehood to remain strong at the polls. This alliance came to be known as the “Alianza Puertorriqueña” (Scarano 2000, p. 786). During the Great Depression, a local version of Roosevelt’s “New Deal” was created for the colony under the name of PRERA (Puerto Rico Emergency Relief Administration) but the longings and demands
of the Puerto Rican creoles for a defined political status remained unattended by the US government (Alegría et al, 1988, p. 232; Silvestrini & Luque 1988, p. 486).

By 1936, the situation could no longer be ignored. The already heated tensions between nationalists and the US figures of authority spurred when four unarmed students were killed in hands of the Insular Police\(^{18}\) during a pro-independence manifestation at the University of Puerto Rico (Scarano 2000, p. 799; Silvestrini & Luque 1988, p. 489). As a response, two young nationalists, Hiram Rosado and Elias Beauchamp, killed Colonel Riggs, the Chief of the Insular Police. The two young nationalists were executed without trial hours after their capture and, although no connection was found between these and any political parties, the leadership of the PN was arrested under the charge of seditious conspiracy, or what is “conspire to overthrow, put down, or to destroy by force the Government of the United States” (Alegria et al 1988, p. 235; Scarano 2000, p. 797). The assassination of a US officer in hands of independence supporters put into question the presence and activities of the US in Puerto Rico within the US media. Other bloody encounters between Puerto Rican creoles and the Insular Police followed, and the question of the political status of Puerto Rico could be no longer ignored.

Two months after the assassination of the US officer, the US-appointed governor of Puerto Rico, General Blanton Winship, presented a bill designed to set Puerto Rico on the road to independence. The bill was prepared by the chairman of the “Territories and Insular Affairs Committee”, senator Milliard E. Tydings, who has been intimate friends with Colonel Riggs and even urged him to accept the post (Scarano 2000; p. 800). The path towards independence presented in the Tydings Bill, as it came to be known, was intentionally detrimental for dependent economy of Puerto Rico (Alegría et al 1988, p. 236). It demanded, for example, a 25 percent annual increase in tariffs for the agricultural products sold in the US in merely a four year term, whereas the same process for the Philippines demanded a 5 percent in a 20 year period (Scarano 2000, p. 801). Leaders from all political parties in Puerto Rico condemned the measure as extremely unfair, pointing out at its injustices while claiming that the US had the moral responsibility of routing Puerto Rico in the path towards independence “without forfeiting economic justice and the social wellbeing of the Puerto Rican people” (Alegría et al 1988, p. 235; Scarano 2000, p. 802). According Silvestrini and

\(^{18}\) The *Insular Police of Porto Rico* was the US commanded law-enforcement corps created after the US invasion to PR in February 21 of 1899. In virtue of the Law #77, this quasi-military organization was converted into the civilian police force of the “Policia de Puerto Rico” on June 22 of 1956.
Luque (1988, p. 490) even within the designers of the bill themselves there were no doubt of the miseries that independence under those conditions would bring, and the purpose of the Tydings Bill itself was to make independence look as an alternative as disadvantageous as possible. Although eventually retired, the Tydings Bill of 1936 left a strong mark on the psyche of the Puerto Rican creoles who became deeply fearful of the US’ threats of withdrawal. These threats caused the division of the PL, from which its iconic figure of Luis Muñoz Marín founded a political party of its own named the “Partido Popular Democrático”, or Popular Democratic Party (Silvestrini & Luque 1988, p. 491; Scarano 2000, p. 802).

The US’ entrance into the Second World War (WWII) right after the US Great Depression in 1941 brought a new economic landscape to Puerto Rico. The need for the construction of roads and new military facilities brought massive amounts of federal monies into the Puerto Rican economy (Silvestrini & Luque 1988; p. 501; Scarano 2000, p. 825). Moreover, the investments for maintenance of military installations, the increase of soldiers in camps, and the payments made to Puerto Rican creoles drafted into service and their family members also made a drastic increase in the quantity of money available. However, once the WWII was over, the priority of the US’ foreign policy focused on the reconstruction of Europe, for which the Caribbean, and as a consequence Puerto Rico, lost importance (Silvestrini & Luque 1988, p. 502). The only wealth that was left from the economic boom of the war years was the benefits for veterans, both in monies and services, and the technical training that many young Puerto Ricans received to participate in all sorts of defense related industries. This gave Puerto Rico the opportunity for an exploration into an industrial economy, for which both the local and federal government started to guide the country in that direction.

It is noteworthy that by the end of the WWII, the colonial world was crumbling at gigantic steps and Washington did not want to look like a colonial power in the Caribbean at a moment in which the rest of the world powers were dismantling their exhausted empires in Africa (Scarano 2000, p. 829). Luis Munoz Marin, the leader of the Popular Democratic Party (PPD), conscious of the US reluctance to grant independence to the Island, launched a new political campaign in which the status of Puerto Rico would not be in issue, but rather “to work for the industrialization and economic wellbeing of the country” (Silvestrini & Luque 1988, p. 509; Scarano 2000, p. 816). The PPD then proposed to the US government an alternative in which Puerto Rico were to acquire more self-governing powers
without demanding independence, but without urging the US to negotiate an annexation either. Both the independence and statehood movements in the country condemn the idea, although it resonated as attractive for the US government who trusted that, once the PN’s leadership in jail, Muñoz Marín’s campaign, charisma and cultural capital\textsuperscript{19} would appease the Puerto Rican creoles demands for a defined political status (Scarano 2000, p. 837). Under the pressures of the international community and the idea of granting a new Tydings Bill for Puerto Rico, in 1946 the US government appointed the first Puerto Rican as governor of the country and a year later, enacted the Elective Governor’s Act, in which Puerto Ricans were allowed to elect their governor through ballot (Scarano 2000, p. 828; Silvestrini & Luque 1988, p. 510). The PPD won the 1950’s election, and its industrialization program, supported by the US government, helped to improve the economy and quality of life of the Puerto Rican creoles, particularly in the area of education and public health (Silvestrini & Luque 1988, 511: Scarano 2000, p. 849). By 1950, however, the United Nations (UN) was signing a bill requesting its former colonial powers to assist in the self-government development of their former territories. This UN right of the people “to choose their own form of government” was used by both the independence leaders and statehood movements to push for their own political agendas (Silvestrini and Luque 1988, p. 512). This led the US government to allow Puerto Ricans to draft a constitution of their own. This constitution would be held by US Congress for revision, and voted in a referendum by the Puerto Rican creoles after approval, in which they could vote for a self-governing formula known as “Associated Free State”, independence or annexation. The PPD’s “Associated Free State” political status won the referendum with 76 percent of the votes\textsuperscript{20} and Puerto Rico officially became the “Associated Free State of Puerto Rico” in July 25 of 1952 (Silvestrini & Luque 1988, p. 517; Scarano 2000, p. 873). The Associated Free State, however, did not change the status of Puerto Rico as “a territory” of the US, leaving intact the 1917’s Jones Act’s Article V, for which the US Congress had and still has ultimate control over Puerto Rico (Silvestrini & Luque 1988, p. 515). Although the US requested the case of Puerto Rico to be removed from the UN list of non-self-governing countries, a series of incongruences and Human Rights concerns forced the case to return to the UN’s forum discussion in 1960, 1970 and 1980 (Scarano 2000, p. 841). Today, the political legit-

\textsuperscript{19} Luis Muñoz Marín was son the popular Puerto Rican autonomist leader under the Spanish regime named Luis Muñoz Rivera
\textsuperscript{20} The assistance to the polls was a 66 percent of the Puerto Rican electoral population
imacy of the “Associated Free State” and its socio-economic impact is at the center of the Puerto Rico’s political debate, as explained in section 2 of this thesis.

**Textbook analysis**

Regarding the causes for the implementation of the 1952’s “Associated Free State”, the Textbook #1 state the following:

Many political changes and economic changes generated by the industrialization happened simultaneously. Thanks to a joint resolution of Puerto Rican legislators, President Truman appointed the Puerto Rican Jesus T. Piñeiro as Tugwell’s successor as governor of Puerto Rico in 1947. This action opened the way for Puerto Ricans to vote for the governor of Puerto Rico.

Congress approved the Elective Governor Act in 1947. This act proposed that Puerto Rico could elect its governor every four years, starting from the elections of 1948 (p. 245).

Congress approved in April of 1950 the Organic Law 600. This law allowed Puerto Ricans to carry a referendum to determine if they wanted to write a constitution. Its redaction implied the acknowledgment of Puerto Rico’s self-government to put an end to its colonial situation. Its second part established what type of relationship Puerto Rico and the United States would have. That is how the concept of “Associated Free State” surged. From one side, there is a liberty to solve domestic problems and from the other, we are still subjected to the decisions made by the United States’ Congress (p. 245). The “Associated Free State” proposed a republican and democratic state government. However, the creation of the “Associated Free State” did not conclude the discussion regarding the political status of the Island (p. 253).

In the first sentence, the implementation of the Associated Free State is described as a result of “political and economic changes generated by the industrialization”, summarized as: 

- **a)** the US appointment of a Puerto Rican as governor of the country in 1946, and 
- **b)** The US act allowing the Puerto Ricans to elect their own governor, in 1947. Although these are depicted as *causal factors*, the implementation of the “Associated Free State” of 1952 was rather the result of a broader political context and historical conjunctures defined by the US’ interests at the end of the World War II (Scarano 2000, p. 828; Silvestrini & Luque
1988, p. 508), the Puerto Rican creoles’ demands for independence through both pacific and violent encounters with the US authorities (Scarano 2000, p. 829; Silvestrini & Luque 1988, p. 490), and the 1950’s United Nations’ (UN) resolution to its colonial powers to assist in the development of self-govern in their former territories (Scarano 2000, p. 829, 840; Silvestrini & Luque 1988, p. 511). Instead of acknowledging the historical conjunctures that led into the implementation of the “Associated Free State”, the textbook rather attribute it to local processes dis-attached from its critical global context with phrases such as “Congress approved” and “President Truman appointed” avoiding to engage with the socio-historical context that motivated these actions. Norman Fairclough (2003) refers to this as disembedding, a trend in which “the socio-historical processes in which elements that develops in one area of social life become detached from their particular context and become available as ‘flow’ into others (p. 214). Through the 16 pages (229 to 245) that aim to depict the 35 year time-frame between the Jones Act’ implementation in 1917 to the “Associated Free State” of 1952, the demands of the Puerto Rican creoles for independence, the bloody clashes between Puerto Rican nationalists and the US figures authority, and the Second World War in its entirety are absent from the text. These omissions allow for further assumptions to emerge. When the textbook declares that the US “approved an organic law to determine if they (Puerto Ricans) wanted to write a constitution”, it is assumed that, up to that point, the US government was unaware of the Puerto Rican’s desires for self-government. The word “if” is a conditional clause (p. 87) that invites the reader to assume that the US government was ignorant about the self-governing desires of the Puerto Rican creoles. Norman Fairclough (2003, p. 57) refers to these as bridging assumptions, that is, assumptions that are necessarily liked, or ‘bridged’, to other parts of a text so the text ‘makes sense’.

It is noteworthy that in the Texbook #1 there is an acknowledgment of the problematic nature of the “Associated Free State” formula, stating that its implementation “did not conclude the discussion regarding the political status of the Island” (p. 253).

Regarding the causes for the implementation of the 1952’s “Associated Free State”, the Texbook #2 state the following:

As you will remember, since the Jones Act of 1917 Puerto Ricans were unsatisfied with the act because it hasn’t resolved the colonial status of Puerto Rico. There
were previous attempts to correct the defects of the Jones Act, but none were effective (…). In 1948 the PPD won the elections and Muñoz Marín came to be the governor. The populares\textsuperscript{21} started to struggle for an intermediate formula of self-government. That is, they proposed a new type of autonomy without disrupting the political bounds with the United States. Muñoz Marín thought that, in order to continue the program of industrialization of Puerto Rico it was necessary for the island to maintain itself associated to the United States. Finally, in 1950 Congress approved the Organic Law 600, which authorized the Puerto Ricans to elaborate their own constitution (p. 236-237).

The constitution fulfilled the expectations of a vast sector of the Puerto Rican population that for a long time have been insisting in the right for higher levels of self-government. The Constituent Assembly, however, left the door open to allow future changes in the relationship between Puerto Rico and the United States (p. 242).

Whereas the Textbook #1 depicts the implementation of the “Associated Free State” as a product of the “politic and economic changes of industrialization”, the Textbook #2 points at the agency of the PPD’s members (the “populares”) as its causal factor. After recalling the ‘defective’ nature of the Jones Act of 1917, the Textbook #2 immediately proceeds to introduce the figure of the PPD’s leader, Luis Muñoz Marín, and how his idea of autonomy “without disrupting its political bounds with the United States” led the US Congress to allow Puerto Ricans to redact their own constitution. The implementation of the “Associated Free State” is therefore focalized in terms of the agency of the PPD, while ignoring this party’s previous plea for independence, the independence pleas from the “Partido Liberal”, and the “Republican Party” and “Socialist Worker’s Party” struggles for statehood (Scarano 2000, p. 837). Norman Fairclough (2003, p. 85) refers to this as focalization, a trend in which the text aims to make sense of events by drawing them into a relation which incorporates a particular point of view. Moreover, although the Textbook #2 addresses the Second World War (p. 232) and the bloody encounters between Puerto Rican nationalists and the US authorities (p. 219) it fails to connect the impact that these historical events had on the implementation of the Associated Free State of 1952.

\textsuperscript{21} Populares is a typical term used to refer to the members and sympathizers of the PPD
The concept of “Estado Libre Asociado de Puerto Rico”, or Associated Free State of Puerto Rico, is very problematic. The constitution approved by the US on 1952 did not change the political status of the country as “a territory” of the US, a situation that is at the core of today’s Puerto Rico’s heated political debate. Although Puerto Rico was removed from the United Nation’s list of non-self-governing territories in 1953, its case has repeatedly returned to that international forum of discussion (Scarano 2000, p. 841; Silvestrini & Luque 1988, p. 515). Whereas the Textbook #1 acknowledges that the Associated Free State formula “did not concluded the discussion about the political status of the Island”, the Textbook #2 state that the Constituent Assembly “left the door open to allow future changes”. The tone of Textbook #1 carries the sense of a problem that “has not been resolved”, whereas the analogy of an “open door” of Textbook #2, in the other hand, carries a sense of freedom; the idea that if necessary, then a “door” was left “open”.

Table 5: Summary on the Associated Free State as in the analyzed textbooks

<table>
<thead>
<tr>
<th>CDA conceptual tool</th>
<th>Textbook #1</th>
<th>Comparison with Textbook #2</th>
</tr>
</thead>
<tbody>
<tr>
<td>Disembedding</td>
<td>Attributes the implementation of the Associated Free State to “the political and economic changes of industrialization”, detached from its socio-historical context.</td>
<td>Attributes the implementation of the Associated Free State to the agency of the PPD leaders, detached from its broader socio-historical context.</td>
</tr>
<tr>
<td>Bridging Assumption</td>
<td>Assumes that the US was unaware of the Puerto Ricans creoles’ desires for self-government and their contempt towards their political relation with the US</td>
<td>Acknowledge the Puerto Rican creoles’ desires for self-government and the bloody between the Puerto Rican creoles and the US’ figures of authority</td>
</tr>
<tr>
<td>Omission</td>
<td>Omits the Second World War, the role of Puerto Rican creoles in the implementation of the Associated Free State, and the bloody encounters between Puerto Rican nationalists and the US figures of authority</td>
<td>Omits the PPD’s original pleas for independence</td>
</tr>
</tbody>
</table>
To conclude, the Textbook #1’s omission of several historical events, its disembedding of the socio-historical context in which they happened, and the assumptions that arise by these omissions serves to portray the implementation of the “Associated Free State” of 1952 as a product of the US’ interests to collaborate with the desires of the Puerto Rican creoles. In the other hand, the Textbook #2 provides socio-historical context data such as the Second World War and the violent clashes between Puerto Ricans and the US figures of authorities. However, Textbook #2 fails to connect these events in relation to the “Associated Free State”, focalizing its implementation as a result of the agency of the PPD leaders.
6 CONCLUSIONS ON THE DATA ANALYSIS

My analysis on the selected textbooks shows that the conceptualization of the Hispanic American War and the 54 years after the US invasion is strongly correlated with the agenda of the political parties involved in their production. The linguistic features I identified in Textbook #1 provides the reader with a narrative in which the US’ actions that had a negative impact in the lives of the Puerto Rican creoles are consistently concealed or omitted from the text. From its questionable statement that “Spain declared war on the United States” (p. 222) to its repetitive assertion of “Congress approved” (p. 245) without engaging with the conditions of oppression that made these “approvals” necessary, the Textbook #1 shows a tendency of portraying the US’ intentions, motivations and actions only as favorable towards the Puerto Rican creoles. It is noteworthy that a great part of the PPD’s and PIP’s arguments against the annexation of Puerto Rico to the US is precisely the harmful impact that historically, the US interventions have had on Puerto Rican soil. The PNP’s political agenda, in the other hand, is for Puerto Ricans to vote for Puerto Rico to become the 51st state of the US. Therefore, I will argue that the omissions and discursive strategies of Textbook #1 could aim to ease the negative impact of the US’ past injustices and legacy of colonial exploitation for the PNP’s political gain. Its concealment of the repressive activities of the US and the violent clashes between Puerto Rican nationalists and the US figures of authority serves to recontextualize history in a manner that the US image and presence in Puerto Rico are favored. Currently, the Textbook #1 is the official history textbook for the 7th grade of the Puerto Rican Department of Education (PRDE), for which this politically-tuned narrative is informing the historical understanding of the 12 to 13 year olds that in 6 to 5 years, participating in the political decision making of the country as adults.

The linguistic features identified in Textbook #2 shows no intent of concealing the US’ military and economic interests in Puerto Rico (p. 194, p. 206) and its negative consequences. From its exposure on the actual causes of the USS Maine explosion (p. 184) to its brief account of the violent clashes between Puerto Ricans nationalists and the US figures of authority (p. 218), the Textbook #2 engages with the historical injustices of the US and its enterprise of colonial exploitation over Puerto Rico. The linguistic features identified in Textbook #2, however, offer a one-sided view of history in which the agency of the pro-annexation leaders are omitted, whereas the agencies of PPD members are openly favored
(p. 206, p. 236). It is noteworthy that the original agenda of the PPD was towards the independence of Puerto Rico (Scarano 2000, p. 802), and not for more “self-governing powers”, as stated in Textbook #2 (p. 206). This questionable assertion coincides with the political agenda of today’s PPD, urging for Puerto Rico not to be an independent country, but rather to maintain its current relationship with the US. Moreover, Textbook #2 lacks of an acknowledgement of the problematic nature of PR-US relationship, materialized in the “Associated Free State” political formula. Whereas Textbook #1 asserts that Puerto Rico is “still subjected to the decisions made by the US Congress” (p. 245) adding that the Associated Free State “did not conclude the discussion regarding the political status of the Island” (p. 253), the Textbook #2 celebrates its implementation stating that it “fulfilled the expectations of a vast sector of the Puerto Rican population” (p. 242). Instead of acknowledging the problematic nature of the “Associated Free State”, Textbook #2 limits itself to assert that the Constituent Assembly “left the door open to allow future changes” in the PR-US relations (p. 242). With these assertions, both textbooks serve the political agenda of the parties under which they were produced: Whereas the Textbook #1 coincides with the PNP’s assertion that the Associated Free State “did not conclude” the problem of Puerto Rico’s political status, the Textbook #2 celebrates it as its permanent political status, which coincides with the PPD’s political agenda.

The amount of information provided per each textbook regarding the 54 year time-frame between the US invasion to Puerto Rico in 1898 to the implementation of the Associated Free State in 1952, is also worthy of consideration. Whereas the Textbook #1 dedicates 23 pages (p. 222-245)\textsuperscript{22}, constituting an 8 percent of the whole textbook\textsuperscript{23}, the Textbook #2 dedicates 55 pages (184-238) which constitutes 19 percent of the whole text. This observation can give us a quantitative appreciation on how in the PR-US historical relation is included and/or omitted from each textbook. Absent from both textbook is the participation of the Puerto Rican creoles in the Hispanic American War, for which the only two social agents mentioned are Spain and the US. Moreover, both textbooks also fail at placing the events of Puerto Rican history within the broader global context in which they happened.

The limitations of my analysis include the fact that I am focusing on the conceptualization of four historical events, as opposed of engaging in a broader analysis including an exami-

\textsuperscript{22} Pages without text and cover pages with any information indicating new chapters were not counted.

\textsuperscript{23} Glossaries and index pages were not counted.
nation of the images, questions and activity sections of each text. It is also noteworthy that the original language of these texts is Spanish, for which how much could have been lost in translation should also be considered. My positionality as the researcher of the study is another aspect to take into consideration. As these textbooks are found to be profoundly embedded in the political context of their conception, my political views as a Puerto Rican creole myself should be addressed. During the realization of this thesis I have come to gain a great critical self-awareness regarding my political stands and positionalities. Although I hold no political alliance to any of the political parties of Puerto Rico, given the economic and sociological harm that our current “Associated Free State” harbors and the US apparent lack of interest for the annexation of Puerto Rico as an equal, I feel inclined towards the leftist spectrum of the Puerto Rican politics. As a final remark, the school textbook “Puerto Rico: Tierra Adentro, Mar Afuera” (Picó & Rivera-Izcoa, 1991), which for the purposes of this research I refer as “Textbook #2”, was the PRDE official textbook that I used when I was in the 7th grade myself.
7 HISTORY AS AN EMANCIPATORY TOOL

An observation into the analysis and conclusions of this thesis led me into a self-reflection process regarding history education, the importance of textbooks, and its relation to the Puerto Rican education. The article 26 of the Universal Declaration of Human Rights (UDHR) state that “education should be directed to the full development of the human personality and to the strengthening of respect for human rights and fundamental freedoms”. However, it is questionable that education could support the “full development of the human personality” if students are provided with a limited version of history that alienates them from their past, which obscures their ability to establish its connection to their present and consequently, to themselves. Moreover, history education has the power of engaging students with the intellectual exercise of wrestling with in-depth ideas regarding the multi-sided nature of history, how the social and geo-historical background of others influence their standpoints on history and more importantly, how does it influences the standpoints of their own. According Kempf (2006) history is neither static nor fixed. Is the subjective construction of what and how people and groups remember, adding that to teach it “is not to simply convey knowledge, but rather to go much further and construct it through the conscious and unconscious inclusion and exclusion of historical perspectives, contributions and events” (p. 131). Furthermore, Darder (1991) argued that education must hold an emancipatory purpose that allows students to engage with unexamined assumptions regarding privilege and inequality. From a critical pedagogy standpoint, education must incorporate a firm commitment to empower the powerless and to transform the existing social inequalities and injustices (McLaren, 1988). These ideas become particularly relevant in the Puerto Rican context of history-education. The historical self-perception of the Puerto Rican creoles, as identified by Santana-Charriez (2000), Rivera (1982) and Sancholuz (1997) have been dominated by a set of negative characteristics of themselves such as laziness, dependency, conformism and strong feelings of inferiority in relation to the US Americans. I will argue that these problematic identity constructions are largely fed by a poor understanding of the historical legacy of domination and power inequalities generated by Puerto Rico’s colonial past and its current neo-colonial relation to the US. According Cervetti (2001) education should aim to provide students with the critical literacies necessary to examine power inequalities within different social contexts such as socio-economic status,
race, class, gender, and sexual orientation, among others. Robinson & Robinson (2003) defined critical literacy as the ability to read texts in an active, reflective manner in order to achieve a better understanding regarding power, inequality, and injustice in human relationships. Moreover, Andreotti (forthcoming) argued that critical literacy emphasizes the need for a careful examination of different ‘root’ narratives. It exposes students to the social, cultural and historical ‘constructions’ of realities, allowing them to highlight the limits and blind edges of any system of signification. Furthermore, critical literacy serves to challenge the imbalances in power and representation, which can be illustrated in questions such as: who decides whether something is true or ideal? In whose name? For whose benefit? For the educational goal of the UDHR to become a reality in Puerto Rico, I will argue that we need a paradigm shift in the way history is both taught and conceived. The Puerto Rican Department of Education (PRDE) should therefore structure its curricula, history textbooks, and teacher education in a manner that promotes the critical literacies necessary for the deconstruction of the self-derogatory discourses that are hindering the “full development” of our citizens “human personality”.

Textbooks are an essential educational tool, and those of history education are not the exception. In the introduction of their book “Censoring History”, Hein & Seldon (2000) made an interesting remark on their significance:

> Because textbooks are carried into neighborhood schools and homes, and because, directly or indirectly, they carry the imprimatur of the state, they have enormous authority. Some ideas about the past derive from other sources, such as monuments, museums, movies, popular fiction, and family stories, yet formal education carries a special weight. Given their authoritative character, texts are particularly important ‘sites of memory’ (p. 4).

Moreover, according the United Nations Educational, Scientific, and Cultural Organization (UNESCO), in a world increasingly dominated by multimedia, the written word ensure access to the dominant culture and thus, textbooks play a key role in all societies (Brugeilles & Cromer, 2009). In countries where written documents are uncommon, the impact of textbooks is all the greater (p. 16). In the particular case of Puerto Rico, most schools are not connected to the internet, for which alternative resources for teachers are scarce. Moreover, the PRDE enforces a single-textbook approach in which the previous textbooks are
collected and made unavailable. This practice has served as a way to ensure the “political appropriateness” of history teaching for the gain of the political party in power. Therefore, I will argue that in order to overcome the one-sided and politically-tuned versions of history that I identified in this study, we would need to engage with both the textbooks, and the policies defining their use in a manner that enables a diversity of historical standpoints, and an acknowledgement of these diversities. Not doing so poses a great hindrance to the educational goal of the UDHR and perpetuates the very problematic identity constructions that motivated me to carry this thesis research.

Although I am using critical pedagogy as the theoretical lenses for my thesis, it is noteworthy that this subject is closely related to post-colonial theory. In “The Empire Writes Back” (Ashcroft, Griffiths & Tiffin, 1989) post-colonialism is defined as a field covering “all the culture affected by the imperial process from the moment of colonization to the present day” (p. 2). Post-colonial theory focuses on how colonialism impacts the way people imagine themselves and the world, while challenging for-granted assumptions regarding cultural supremacy, wealth and global inequalities. Moreover, according Andreotti (2006) post-colonial theory interrogates modes of thought and representations, as well as their effects on identities, social relations, politics and the distributions of labor and wealth in the world. Due to the Puerto Rico’s colonial past and its current neo-colonial relationship with the US, a post-colonial approach in education would provide our citizens with the conceptual tools necessary to analyze how the current power relations and wealth inequalities came to exist, and how to negotiate a better future. I will argue that a post-colonial approach to education would serve an emancipatory purpose on freeing the Puerto Rican creoles from the identified problematic identity constructions I described in chapter 2.2.

As in the story of “Alexander the Great” and “the Yogi” I shared in the introduction of this thesis, the narratives of our socio-cultural environment have the power of shaping both, the perception of ourselves and the goals we pursue in life. Under this light, an education that provides a post-colonial and critical approach to history might serve the purpose of developing in our students a broader sense of citizenship that is engaged with issues of social inequality, not only within the borders of their own countries, but also globally.
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APPENDICES

Hispanic-American War

As in Textbook #1: “Historia y Geografía de Puerto Rico 7” (Cardona, Mafuz, Rodríguez, et al, 2002)

Misteriosamente, el 15 de febrero de 1898, el acorazado Maine estalló en la Bahía de La Habana, causando la muerte de 268 de sus tripulantes. Los Estados Unidos acusaron a España de provocar maliciosamente la explosión, aun cuando España y una comisión internacional sostuvieron que se trató de un desperfecto en el diseño de la embarcación. Confrontada con un ultimátum norteamericano, el 24 de abril España le declaró la guerra a Estados Unidos (page 223).

As in Textbook #2: “Puerto Rico: Tierra Adentro, Mar Afuera” (Picó & Rivera-Izcoa, 1991)

En febrero de 1898, el barco de Guerra Maine estalló mientras visitaba la bahía de la Habana. En Estados Unidos se le echó la culpa al gobierno de España por las muertes ocurridas y por la pérdida del acorazado. Grupos estadounidenses propusieron entonces que se le declarara la guerra a España. Aunque el gobierno español hizo todo lo posible por evitar la guerra, el Congreso de Estados Unidos la declaró dos meses más tarde (page 185).

Foraker Act

As in Textbook #1: “Historia y Geografía de Puerto Rico 7” (Cardona, Mafuz, Rodríguez, et al, 2002)

La crisis del cambio de soberanía se definió principalmente por los obstáculos que enfrentó nuestra economía. Uno de estos obstáculos fue el aumento de tarifas que se pagaban por los productos que Puerto Rico exportaba a España y el resto de Europa, principalmente el café y la caña. Después de la guerra, estos productos se consideraban extranjeros en España y por lo tanto, debían pagar para entrar.

Otra difícil circunstancia ocurrió en agosto de 1899. El huracán San Ciriaco azotó la Isla durante unas 28 horas, con vientos mayores de 100 millas por hora. El huracán ocasionó pérdidas considerables en el cultivo cafetalero y dejó un saldo de 3,500 muertes. Miles de personas quedaron sin alimento y sin vivienda.
Otros factores, como el bloqueo naval impuesto por los Estados Unidos durante la guerra y el desfavorable cambio de moneda, causaron a la isla una terrible y larga crisis económica (page 227).

As in Textbook #2: “Puerto Rico: Tierra Adentro, Mar Afuera” (Picó & Rivera-Izcoa, 1991)

Para que el negocio (de la caña) produjera buenas ganancias, tenían que lograr que el azúcar entrara a EEUU sin pagar impuestos (...) era necesario que el Congreso pasara una ley que liberara el azúcar puertorriqueño del pago de tarifas. Al decidir el tipo de gobierno que substituiría el régimen militar en la Isla, EEUU tuvo en cuenta ese interés de las empresas azucareras (page 194).

Jones Act

As in Textbook #1: “Historia y Geografía de Puerto Rico 7” (Cardona, Mafuz, Rodríguez, et al, 2002)

Durante los primeros años del siglo XX distintos sectores de la política puertorriqueña siguieron luchando por enmendar la Ley Foraker. Finalmente, en 1916 se presentó al Congreso de los Estados Unidos un proyecto de ley para que se le concediera una nueva ley orgánica a Puerto Rico. Este proyecto (...) se conoce como la Ley Jones. (...) Probablemente el mayor beneficio otorgado por esta ley fue la concesión de la ciudadanía estadounidense o americana. Los ciudadanos de Puerto Rico tenían hasta seis meses para rechazarla o acogerse a ella y estar un paso más cerca de la democracia norTEAMERICANA (page 229).

As in Textbook #2: “Puerto Rico: Tierra Adentro, Mar Afuera” (Picó & Rivera-Izcoa, 1991)

En PR continuaba la insatisfacción con los pocos poderes que le concedía la Ley Foraker a la Isla. Los comisionados residentes en Washington plantearían una y otra vez que PR necesitaba mayor gobierno propio. Uno de esos comisionados fue Luís Muñoz Rivera, quien propuso un proyecto de ley (VARIOS propusieron, pq solo el PPD?) con ese fin. Pero el mismo fue descartado. Finalmente, en 1917 el congreso aprobó una propuesta que había sido preparada por el Departamento de Guerra (...) Teóricamente, las personas que no estaban de acuerdo podían rechazarla. Pero, de hecho, muy pocos lo hicieron porque no tenían ninguna otra opción legal. El quedarse sin ciudadanía implicaba ser un extranjero en su propio país y presentaba dificultades hasta para conseguir trabajo (page 206).
El congreso aprobó, en abril de 1950, la Ley Orgánica 600. Esta permitía que los puertorriqueños llevaran a cabo una consulta para determinar si querían redactar una constitución. La redacción de la constitución implicaba el reconocimiento de que Puerto Rico tendría un gobierno propio que pusiera fin a la situación colonial. La segunda parte establecía que el tipo de relación que tendrían Puerto Rico y los Estados Unidos. De esta forma, surge el concepto “Estado Libre Asociado” (ELA). Por un lado, existe la libertad para resolver los asuntos domésticos y, por el otro, seguimos sujetos a la toma de decisiones por parte del Congreso de los Estados Unidos (p. 245).

El ELA propuso un sistema de gobierno estatal republicano y democrático. Sin embargo, la creación del Estado Libre Asociado no dio por terminada la discusión del estatus de la Isla. (253)

Recordarás que desde que se aprobó la Ley Jones in 1917, los puertorriqueños quedaron insatisfechos con la misma, porque no había resuelto el estatus colonial de Puerto Rico. Posteriormente hubo varias tentativas de corregir los defectos de la Ley Jones, pero ninguna tuvo éxito (...). En 1948 el Partido Popular ganó las elecciones y Muñoz Marín fue postulado para el cargo de gobernador. Los populares empezaron a impulsar una fórmula intermedia de gobierno propio. Es decir, proponían un nuevo tipo de autonomía, que no coartara los lazos políticos con Estados Unidos. Muñoz Marín pensaba que para continuar el programa de industrialización era necesario que la isla se mantuviera asociada a Estados Unidos (...). Finalmente, en 1950 el Congreso aprobó la Ley 600, que autorizaba a los puertorriqueños a elaborar su propia constitución (page 236-237).

La constitución llenó las expectativas de un vasto sector del pueblo puertorriqueño, que por largo tiempo venía insistiendo en el derecho a un mayor grado de gobierno propio. No obstante, la Asamblea Constituyente dejó la puerta abierta para permitir futuros cambios en las relaciones entre Puerto Rico y Estados Unidos (page 242).