

**Eighth International Conference on Learning and Educational Media**

**Caught in the Web**  
*or*  
**Lost in the Textbook?**

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## **Introduction**

Éric Bruillard, Bente Aamotsbakken,  
Susanne V. Knudsen and Mike Horsley

This volume gathers the major part of the contributions which have been presented during the 8<sup>th</sup> IARTEM conference on learning and educational media, held in Caen in October 2005, “Caught in the Web or lost in the Textbook?”. More than eighty participants attended the conference, coming from five continents and twenty-seven different countries. This short introduction gives an overview of the conference and volume content.

### **Keynotes and special sessions**

Three keynotes explored research questions concerning the future of textbooks and different ways of analysing their content, according to psychological or linguistic views, underlying important aspects in the study of educational resources. Pierre Mœglin presented a framework for understanding the possible place of traditional textbooks and digital resources in an evolving educational context. Alan Peacock and Ailie Cleghorn presented some theoretical perspectives on text materials for schooling and derived some implications for their design. Nadine Lucas showed how textbook analysis provided a methodological challenge in computational linguistics.

A theoretical session provided conceptual frameworks in questions around identity, family, text interpretation and informal learning. Susanne V. Knudsen discussed the concept of intersectionality, linking relationships between socio-cultural categories and identities, and their use in textbook analysis. Eva Matthes presented recent results of socio-scientific family research in Germany and examined current textbooks from this perspective. Bente Aamotsbakken discussed relations between the creation of identity and reading, exploring the importance of different models of text interpretation. Anne Kahr-Højland explored informal learning in connection with scientific museums, through the design and development of an interactive narrative facilitated by mobile phones.

A pre-conference meeting, organised by Paul Aubin, was devoted to online catalogues of textbooks, presenting several ongoing projects in France, Spain, Belgium and Canada. A French session followed, but only two contributions from this pre-conference are included in this volume. Gérard Puimatto discussed online services providing commercial contents in education referring to the perspective of the sociology of technological innovation. Hélène Collet explored key issues concerning historical documentaries: how to combine scientific rigour and adapt material for a young public, how to create an attractive object, affordable from a financial point of view and how to depict subject in representing History.

## **Workshop 1: Changing Identities in a Global World**

The papers presented in the first workshop explored the question of various identities and the changing of identities related to textbooks and learning processes. A common feature in the papers was that the awareness of questions related to identity and the creation of identity should have more focus in textbooks.

*Three papers dealt with the subject of history*, adopting different perspectives on the concept of identity related to textbooks. Stuart Foster dealt with the history of the Second World War and how the subject had been omitted in English history textbooks. The presentation concentrated on the Allied and Axis powers. Consequently, the history of people from the Empire and Commonwealth became underrepresented. The paper written by Janez Justin also discussed the ‘Missing Parts’ in textbooks. This paper dealt with linguistic utterances and implicit meanings found in Slovene history textbooks, using methodological tools grounded in discourse theories. The third paper dealing with history textbooks concentrated on prehistory and its impact on the construction of European identity. Miriam Sénécheau presented a variety of examples and drew attention to ancient Rome as a ‘melting pot of people’ and its parallels to the ‘multi-ethnicity’ of today’s Europe. This had implications for modern history textbooks in Germany, as they attempt to develop students’ abilities for democratic participation.

The paper written by Inga Balčiūnienė and Natalija Mažeikienė dealt with *religious and moral education and education in citizenship* in relation to new social identities in Lithuania. Today’s textbooks in religious education did not only concentrate on religious identity, but also aimed at creating responsible, active and intellectual citizens. However, the idea of “multi-faith” religious education is not yet realized in the textbooks.

*Two papers were about textbooks for early primary school*, i.e. the paper written by Kira Mahamud about motherhood in primary school textbooks during the Franco-period (1939-1956) and the paper written by Wendelin Sroka about the representations of ‘homeland’ and ‘family’ in Russian and Chukchi textbooks. In Kira Mahamud’s article one hypothesis proposed was that the emotionally charged phenomenon of motherhood was manipulated by the New State and the Catholic Church for ideological reasons. Wendelin Sroka showed that in the Soviet era the Soviet Union was identified as “homeland”, whereas the Chukchi textbooks had space for both the Soviet Union and the tundra as ‘homeland’. Also family patterns and their representation in the textbooks have undergone significant changes since the 1960s. Today the family is considered as the natural environment for children outside school. The Chukchi textbooks of today showed that the former Soviet boarding school system has been done away with.

The paper by Muhammad Ayaz Naseem dealt with textbooks in Urdu language and social studies and their preference for the inclusion of masculine, militaristic and nationalist narratives. The paper discussed how the educational discourse constituted a multi-layered gendered constitution of subjects where femininity is in need of

protection from the masculine and militaristic state. The paper, written by Kalplata Pandey, discussed gender related issues in Indian Textbooks. One conclusion was that Indian textbooks and curriculum are in need of a revision regarding the role of females. Furthermore, teachers are in need of guidance in classroom behaviour and interaction with students.

## **Workshop 2: Textbooks and Educational Media in the Learning Environment**

The papers presented in Workshop 2 explored the role and function of textbooks and educational media in learning environments. The papers utilised a range of different research methodologies, examined a variety of learning environments and discussed the interaction of teaching and learning materials (textbooks and educational media) and learners in the learning environment.

*Three papers examined aspects of ICT learning environments* and approached the research problem and subsequent methodologies (and data) from different perspectives. Kalmus provided an overview of research on socialisation in terms of ‘information age approaches’ to teaching and learning. In particular, Kalmus applied trends she outlined in her review of socialisation in the ‘information society’ to developments in texts and educational media. Šaparnienė used quantitative methodologies to examine student learning strategies, statistically identify a range of student strategies and linked these strategies to computer literacies. Overall, Šaparnienė found that the highest levels of computer literacy were associated with interactive learning in group contexts. Julkunen, explored a similar theme in researching what is learnt by students about cooperative and collaborative learning in WebCT online learning environments. Using an interview approach with teacher education students Julkunen examined what student teachers learned about teaching and learning approaches in their own learning in a WebCT course. The results showed that use of teaching and learning strategies and approaches such as collaborative learning in their teacher education courses, encouraged pre-service educators to utilise these approaches when they commenced teaching.

*Two papers explored reading, text and learning environments.* Göransson’s paper highlighted research where publishers improved technical texts by undertaking research on the learning environment of firefighters in training. Using a sociocultural approach Göransson was able to identify critical characteristics of learners that were used to modify and improve firefighting teaching and learning materials. Reichenberg and Axelsson investigated how teachers and pupils talk about expository texts in the classroom; and to what extent structured text talks affect teachers’ and pupils’ talk about expository texts. The researchers concluded that the different ways that teachers approach this task has a significant impact on student learning.

Horsley’s paper outlined a new research approach to examining the classroom use of teaching and learning materials, by adapting a classroom observation system to the

use of teaching and learning materials for use with video analysis. Using this methodology an examination of differences and similarities between novice and expert teachers use of teaching and learning material was developed. Rodriguez's paper overviewed research conducted on curriculum materials and teaching and learning materials in Honduras. The research identified a number of projects developing teaching and learning materials and overviewed some key recommendations based on the research. The final paper in this workshop is the paper by Gintaras Šaparnis, where he undertook a mixed method study of aspects and expressions of democracy in educational management. The study showed that expressing opinions and collegiality were seen as critical features of the more democratic educational management styles in schools.

### **Workshop 3: Quality, Evaluation and Selection**

The papers presented in Workshop 3 explored the quality, evaluation and selection of textbooks in different countries and curriculum subjects. The papers utilised various theories and research methodologies, examined by qualitative and quantitative methods to analyse quality, evaluation and selection in textbooks. All papers examined aspects of quality in textbooks.

*Two papers focused on quality* in textbooks using alternate methodologies rather than content analysis. Anthony Haynes, reflected a structuralist point of view by drawing on educational theory. He found that textbooks published for undergraduates in English Literary Studies provided four modes of learning; abstract learning, concrete learning, reflective learning and active learning. Jaakko Väisänen reported on visual texts in history textbooks, used in Finish upper secondary schools. He introduced the concept of "imagetext" or "scriptovisual text", and found that the textbooks in history seldom used visual texts as a pedagogical tool to represent historical information. On the contrary, most images were decorative and showed few interactions with the verbal text.

*Four papers concentrated on evaluation.* Anita Norlund included the students' evaluation by partly analysing interpersonal structures as the desired student behaviour in Swedish textbooks, by partly discussing the reader him- or herself. Her research raised the problem of evaluating sources of textbooks and claims that the Internet as a source where "anything may be published", or "published by anyone" provides difficulties for text constructors. Arsen Djurovic presented a quantitative survey of the popularity of history in primary and secondary schools in Serbia. Ranking the students' responses, history was placed as number six or seven out of fourteen curriculum subjects. The students' positive and negative views were discussed in the light of the change of curriculum and coming textbooks. Maria Nogova & Jana Huttova presented the process of development and testing of textbooks evaluation criteria in Slovakia. On the basis of several years' experience in creating new evaluation criteria, they identified important factors for a more objective and transparent textbook approval system. These factors included the quality of textbooks related to the education system as a whole, foreign experiences

and giving space and time for a gradual implementation of the criteria. James McCall presented practical experiences with textbook evaluation in East Africa. He highlighted the important criteria of evaluating whether or not textbooks cover the curriculum in these countries.

*Five papers explored selection of textbooks.* Zuzana Sikorova looked at the teachers' selections of textbooks in primary and secondary schools in the Czech Republic. She found that the teachers had a significant opportunity to participate in the process of selection, whereas the school head-masters primarily approved the selected textbooks, and the students' opinions of textbooks had minimal influence. However, the Ministry of Education was important in the approval process. Evaluation and selection by the Ministry of Education was highlighted by Daniel Chebutuk Rotich and Joseph Musakali. They presented changes in the processes in Kenya with the role of the ministerial textbook vetting committee. They demonstrated ministerial emphasis on technical specifications rather than the content of the textbooks. Anna Johnsson Harrie presented historical research on the Swedish state approval of civic textbooks for grammar in upper secondary school from 1974 until 1991. She found that the notion of curriculum dominated approval, but that correctness and design were also important criteria. Also the question of balance was raised in the government statements about textbooks. Ioannis Exarhos presented a current quantitative survey of teachers' preferences in primary school in Greece. He focused on the structure of science textbooks, and perceptions about science texts and science illustrations. Chaechun Gim provided an overview of the Korean textbook issuing system, split into three different categories; government-copyright textbooks, government-authorized textbooks and government-approved textbooks. He presented critical views of the government-authorized textbooks, and proposed to develop higher-quality textbooks by reducing the influence of the national government.

Finally, Jesus Rodríguez Rodríguez and Helena Zapico Barbeito described an experience of producing and adapting educational materials with and for the elderly in rural and urban contexts. Byong-Sun Kwak compared Korean and Namibia School Curriculum with focus on Textbook Provision.

#### **Workshop 4: Design of Learning Materials**

Workshop 4 did not provide same unity of themes and topics compared to the other workshops and provided very different views about textbooks and educational media, with some concern about design.

Tom Wikman, analysed the rhetoric of a civics textbook from the German Democratic Republic, and identified what he called the manipulative or persuasive textbook, showing five characteristics. He reflected on potential results should the same analysis be applied to textbooks trying to convince a reader about the benefits of democracy currently.

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Susan Bliss presented the results of two research projects giving an overview of the use of geography textbooks in schools. She raised the question of how knowledge about the world was organised and understood from different viewpoints. She considered the question, *Would the heavy geography textbook be replaced by a new, light, small, current 'textbook on a CD-ROM', promoting a diversity of global perspectives?*

To what extent are literary film adaptations useful as educational texts? Arne Engelstad advocated the complexity and advantages of transforming a work of literature into film for school use and briefly described a method for building bridges between the traditional and the modern, between literature and film.

According to Micheline Ravelonahary, everyday reality that teachers face in developing countries contributes to the result that even those books supposedly aimed at poorer countries are at best of limited use and therefore ineffective. Appealing to textbook writers to consider problems specific to developing countries, she detailed an alternative approach to textbook design.

Jonas Ruškus and Rasa Pocevičienė also gave recommendations to textbook writers. Their concern was the representation of disability and they showed that current Lithuanian textbooks contributed to the formation of negative stereotypes about disability.

In a project to develop benchmarks for resourcing teaching and learning, Mike Horsley compared national and international spending on teaching and learning materials, focusing on comparing expenditure on textbooks and Information and Communication Technologies (ICT).

Teodoras Tamošiūnas showed how information from the economic and social environment served as didactic material for students' theses.

Marie Falkegaard Slot explored the development of textual competence during students' work with multimodal learning material.

### **Some concluding remark**

The textbook and educational media research field engenders international interest and this volume provides a wide overview of current research questions. International conferences offer a significant opportunity to exchange points of view from different perspectives and different countries, keeping in mind that education reflects many cultural and contextual features.

We hope this volume, taking into account the diversity and the quality of the different contributions, constitutes a major source book for research on textbook and educational media. The following step is the next IARTEM conference in Tønsberg in 2007.

**Keynotes,**

**Theory and French sessions**



## **The Textbook and after...**

Pierre Mœglin

By way of introduction, I will start with the difficult question of the relations between educational institutions and their tools and media. This difficulty is now exacerbated by the claims of some of them that I will discuss in more detail: because they are digital, these tools claim to be “new”; and, because they are new, they claim to be able to replace pre-existing educational resources. More radically, they claim to revolutionize the institution, its functions and methods. In my opinion, a significant element of this difficulty derives from the limits of the two approaches that the treatment of the question involves.

The first approach is that of “education technologists”. I would include in this category, besides the remnants of the Behaviourist School, experts for whom pedagogical aid can be imposed externally. The main drawback of this approach is the risk of confusing three levels that have nothing to do one with one another: the individual level of user familiarisation with innovations that are imposed from outside; the scientific level of the link between theories deriving from the social sciences with other theories deriving from engineering or information technology, with the recurrent risk of contamination of the first by the second; the collective level (at which I would place my reflections), that is, of institutional decisions, political choices and social imperatives where the interface between institutions and digital techniques needs to be thought through dialectically, in very different terms from those at the individual level.

Unfortunately, it is the individual level that frequently acts as reference point, encouraging the multiplication of questionable formulae, such as: technology “making breakthroughs”, it is a “challenge”, it produces an “impact”, it needs to be “tamed” or “domesticated”. Each time, the digital educational technology seems to be shaking up an institution that doesn't expect it, but which must submit to it. I will show that this approach is in general responsible for an overestimation of the value of tools and media, in particular those which are digital.

On the other hand, we have the new sociological school of thought on education. Free from the constraints of functionalist determinism that, under the influence of Bourdieu, long reduced school to a function of reproduction, researchers associated with this school reject all reference to constraints imposed from outside, including those that transmit systems of information and communication.

It is worth noting, in this respect, that Dubet (2002), Duru-Bellat and Van Zanten (1999) or Meirieu (1987) (among others) never evoke educational tools and media as such. When they do occasionally mention them, it is only to underline their malleability. According to them, those who use them make of them what they will. In other words, these tools and media have no material substance, nor any active role

of “objectivation”, nor crystallisation, nor, *a fortiori*, of amplification of present trends wherever they are used. Just as simplistic as the previous overestimation, this underestimation of educational tools and media in general and digital tools in particular reveals an inadequate appreciation of their educational range. It is forgotten, in particular, that educational tools and media are charged with the memory of previous uses and customs, and that they are also, sometimes, the repositories of new projects of use and organisation.

Turning away from these two approaches, my hypothesis is the following: the link between educational digitalisation and institutional transformations in the educational sphere result from the fact that in their search for solutions to the crisis the sphere is experiencing, some of its actors put digital tools and media to use as part of a dual process of “re-institutionalisation” and “reindustrialisation”.

In light of this hypothesis, the initial question, that of the relations between institutions and their tools and media, becomes that of these actors, and of the reasons why they feel the need to promote such tools and media, to the detriment of any other (the digital versus the traditional textbook). The question arises also of the balance of power that they create in their favour and the projects and educational objects, as well as the institutional models and societal representations to which they apply educational digitalisation.

I will approach this question in two steps: firstly, I will consider what is institutional in educational mediatisation, by comparing the cases of textbooks and digital tools; secondly, I will look at the industrial transformation of educational institutions and the impacts of these changes, in the digital era, within the educational sphere as it relates to society at large.

### **Institutional stakes of educational mediatisation**

In this first stage of my reflections on the links between educational institutions and digitalisation, I will put forward three principles which illustrate what is institutional in educational tools and media. Institutional is to be taken here to mean both in the sense that these tools and media contribute to the institutionalisation of education and that they are, themselves institutions.

First principle, traditional and digital mediatisation is not imposed from outside the educational institution; this mediatisation is at the heart of its existence as an institution. Second principle, because of their institutional status educational tools and media are structured by the dialectic principles of all institutionalisation, that is, between that which institutes and that which is instituted. Third principle, as vectors of educational institutionalisation, educational tools and media combine with their practical usefulness the ideological function of recognition.

***First principle: at the heart of institutionalisation, mediatisation***

Professor Benhamou recently published a half page article in the journal *Le Monde* at the French-speaking Virtual Medical University, of which he is the founder and which brings together 27 of the 32 French universities of medicine. With some eloquence - “teaching digitally is to emerge from the scholastic sphere to enter into the interactive sphere” -, his plea in favour of digital pedagogy heralds a double revolution: the irruption of virtual reality into the pedagogical sphere and the advent, thanks to Internet, of the “century of pedagogy”. Taking the opposite point of view, I will argue that educational digitalisation is not external to the institution, but that on the contrary it is essentially of the same nature. The historian Rémond (2003, 10) suggests as much when he recalls that

“the history of educational institutions is thus inseparable from that of the techniques and innovations that affect the means of communication and processes of reproduction, from the monastic copyist to the photocopy”.

This close link between the history of the institution and the history of its techniques explains, according to Jeanneret (1998, 3), that

“A state of the school is defined to a large extent by these material and symbolic productions: the room, the amphitheatre, the picture, the slate, the roneograph, the slide, the exercise, the copy, the textbook.”

The textbook provides a good illustration of this relation between institutionalisation and mediatisation. I adopt the definition of Choppin (1992) of the textbook as being any work which includes instructions and recommendations to help masters and pupils. This excludes therefore, for example, abstracts and compilations of texts that, since the dawn of time although used in class (named “classics” for this reason), have no added educational value.

The idea of the modern textbook dates back to the French Revolution, and the first examples could be found at the beginning of the 19th century. The textbook is therefore exactly contemporaneous with the birth of the modern educational institution. This coincidence is not fortuitous: the textbook derives its institutional application from the way it suits the needs of projects that underpin the basic concept of the education system.

The textbook guarantees the promotion of political and ideological strategies, in combination with the organisational project, that, during the 19th century (from Guizot, minister of the July Monarchy, to Jules Ferry, minister of the 3<sup>rd</sup> Republic), gives birth to the present school system. It is a powerful bureaucratic structure; the affirmation at one and the same time of a national mission and an individual obligation; it spreads a universalistic ideology with universal application (going so far as to justify colonialism), and, in France more than elsewhere, the establishment of a system of selection which, in the name of “republican elitism” has nothing egalitarian about it but its injustice.

Why does this, national, standardized, mass educational administration find in the textbook its ideal vector? Because it is simultaneously the instrument of grammatical, linguistic, cultural and political standardisation of the territory; the tool for the normalisation of social conduct - what Elias (1973) calls “civilisation”; the translation and conversion of scientific disciplines into school programs; and, not least, the jewel of private publishing that, with print-runs of hundreds of thousands of copies, sometimes more, produce its first bestsellers and thus attains an industrial level of production.

It is not therefore by chance, that in 1833 France there should be new laws on schooling: the definition of spelling as a subject matter to teach; the realisation of the idea of a Nation; the affirmation of the central role of the school in social progress; the choice of collective, simultaneous teaching as the official method; and the multiplication of spelling books and dictation books (dictation being one of the school exercises which the textbook is best suited to).

Thus, combining the four projects that are at the origin of the modern education system - political and ideological, organisational, educational, and economic & industrial projects - the textbook contributes directly to the setting up of the modern educational institution. It creates its social legitimisation, its methods, its organisation and its relations with publishers and the market.

Is what happened during the 19<sup>th</sup> century for the traditional textbook, happening today with digital techniques?

***Second principle: institutional ambivalence of educational tools and media***

Before tackling this question it is necessary to draw the conclusions of what has just been said; as they are institutionalized and contribute to the institutionalisation of education tools and media embody the dual ambivalence that characterizes any institution: at one and the same time instituting and instituted, endowed with practical efficiency and symbolic legitimacy.

It is this that gives them a special status between, on one hand, the “ballistic” conception (which attributes excessive power to them), and, on the other, a sociological conception (that, on the contrary, denies them all power). This is what I will seek to demonstrate now.

*Dialectic of the instituting and the instituted*

As is the case with all institutions, educational tools and media are dialectically instituting and instituted. Their instituting function is demonstrated, amongst other things, through textbooks, whose power of educational recommendation derives from the close relations its authors entertained with the ministry. But textbooks also depend on what teachers and pupils do with them. Jules Ferry, and several ministers after him, advised teachers to use the textbooks, rather than become their servant. From this point on, textbooks are also instituted. This dialectic conception of institutionalisation departs from the two dominant currents in the field.

On the one hand, conventionalism, which can be seen in approaches such as the micro-oriented social interaction of Goffman, the sociology of organisations, or Habermas' Theory of Communicative Action and the new educational sociology that I evoked at the beginning. All these approaches claim their origin in rival philosophies.

This convention reduces the institution to an ephemeral crystallisation, regularly contested by its major actors (teachers, pupils, parents, policy makers, public opinion). It is as if the institution had, in itself, neither permanence nor autonomy, and as if its tools and media counted for nothing in the demand for autonomy.

In fact, the convention overlooks what the school institution owes to the textbook: it is at the same time a guide for masters, a spokesman for the central administration, an index of best educational practice, and a repository of legitimate knowledge. To this extent it has an institutional autonomy that allows it to contribute to the autonomisation of the educational institution.

On the other hand, this conception of the institution is fundamentally opposed to functionalist determinism. The latter has, from Durkheim right up to Bourdieu, through Illich and the libertarian and marxist critiques, considered the institution in general, and educational institutions in particular, to be the instrument of social control in the service of the dominant ideology. According to this school of determinism, educational tools and media are used in the service of ideological domination.

Certainly, no one contests that textbooks communicate the dominant political and philosophical ideals of the day, but why should these ideas be taken up as they are? The use of textbooks is liable to lead to unforeseen translations, diversions or interpretations. The educational uses of textbooks have also undergone considerable evolutions: from a lesson book the textbook has become a reservoir of exercises and documents that the teacher selects as he wishes. Moreover, these changes (mainly through the increase in teachers' expertise) herald the crisis that today is affecting the use of the traditional textbook.

Firstly, the textbook is rivalled by the copier, the scanner and the Web; secondly, it is also rivalled by digital resources; thirdly, the transformation of educational practices brings into question the usefulness of all textbooks, both traditional and digital. And, more fundamentally still, the resulting modifications blur the traditional borders between the school and the non-school. It is therefore the very status of the educational institution and its operations that are at stake.

#### *Between legitimisation and efficiency*

The second principle which captures the relations between the institution and its digital tools and media is that of the correspondence between the two sides of the institution, i.e. the mental one and the material one (Godelier, 1986) which are: on one hand, the symbolic and ideological dimension (because all institutions depend on the implicit or explicit recognition of their usefulness and legitimacy); on the

other hand, its concrete dimension, translated and expressed through normative systems (rules, laws and rituals that fix the rules of the game), as well as by such other devices as tools and medias: they select, consolidate and replicate certain norms and habitudes, but they also disqualify them and they invent some and put others onto the agenda. As early as 1922, the sociologist Durkheim (1997/1922, 122) evokes this division:

“A school system of whatever type is formed of two sorts of elements. There is, on the one hand, a whole set of defined and stable arrangements, of established methods, in a word, of institutions; because there are educational institutions just as there are legal, religious or political institutions. But, at the same time, inside this machine, there are ideas that challenge the system and cause it to change.”

Tools and media are ambivalent: as institutions they contribute to the stabilisation of the educational institution, but they also challenge the institution and they force it to evolve. The textbook is more than a simple tool. Because of the values that it transmits, and through the instrumentation that it offers to the master and the pupil, it highlights the professionalism of both, it testifies to their specialisation and becomes one of the factors of their social recognition. But, while the textbook officializes and consolidates, it also introduces changes, encourages innovations and facilitates reforms.

All educational resources - and not just textbooks - have this dual function. Berger (1982, 101-102), referring to programmed teaching and audiovisual technology, describes educational technology as the “vector of concepts that had preceded it in the United States - rationality, [...] productivity, efficiency”. However, educational technology plays a critical role, because in France its promoters use it against “a system wherein education was not conceived as a productive technical system [but as a cultural system]”. This brings to the third principle: the digital revolution in education doesn't exist.

***Third principle: the digital revolution in education is a myth***

The theme of the digital revolution is promoted by three questionable propositions: first, the digitalisation is supposed to be already sufficiently widespread in the education system for a threshold to have been reached; secondly, its generalisation is said to be inevitable; third, the generalisation of digitalisation is said to threaten the very existence of the institution. I shall counter the three propositions by showing that there is and will be no digital revolution in education.

Contrary to what may be said, educational digitalisation is embryonic. Without going into statistical details, I will point to just three indicators.

First, although there has been a relatively fast increase in terms of computer equipment in schools in France, and even more so in other countries, we are still far from having generalised access to digital tools and media on an international scale.

For example, the figures for Europe from Eurydice 2004 show, as far as primary schools are concerned, that, in a small minority of countries, 80% of pupils have

access to a computer (France, Netherlands, Sweden, Norway, Iceland and the United Kingdom). On the other hand, other countries (Germany and Italy, no less) fluctuate between 60% and 80%, while in the majority of countries the percentage is below 30%. This is the case notably of most Eastern European countries.

The gaps are even greater, if one considers the percentage of pupils in the 4th year of primary education using computers at least once per week. Figures for “searching for information” divide countries into four groups: a first group of more than 40%: Sweden (43%), England (47,8%), Scotland (42,3%), etc.; a second group, between 20% and 30%: France, Greece, etc.; a third group, between 10% and 20%: Germany, Italy, Netherlands, Iceland, etc.; a fourth group, with less than 10%: Norway, Bulgaria, Hungary, etc. For other activities, word processing, for example, the figures and the order are pretty much identical. We are therefore far from seeing generalised access to digital resources.

Even in the best equipped countries, and for the most usual applications, the use of computers remains patchy. In France, the present ratio is, for example, of about 20 pupils for one computer in schools, 10 in colleges and 5 in high schools. We cannot speak therefore of incorporation of technology. Would one say that writing and reading had been generalized, if groups of 20, 10 or even 5 pupils had only one pen or one textbook between them? Some exceptional situations exist, for instance in the Bouches-du-Rhône, in France, since 2003, through “Ordina 13” close to 50 000 schoolchildren each have a portable computer. Even so, there remain problems, namely the lack of teacher preparation and the proliferation of uses which stray outside the initial projects.

Second indicator, digital publications for schools count for very little compared to traditional school publishing. Certainly, the situation is not frozen in time, and the recent association of digital publishers has greatly improved the visibility of the offer. Nevertheless, the offer remains fragmented, shared between the traditional publishers with digital activities, telecommunication operators, computer companies, gaming enterprises and audiovisual producers. One of the consequences of this fragmentation is that the digital sector occupies a marginal position in school publishing. In comparison to the revenues from textbooks in France (235,6 million euros per year and 316,6 million euros if one includes para-scholastic books), revenues for educational and cultural multimedia in France do not top 10 million euros.

Academic publishing provides another example: in France, in 2000, out of revenues of about 350 million euros, the share of electronic products and services came to 3.5% (i.e. 12 million euros, of which 10 are accounted for by purchases by libraries). The disparity in the respective importance of traditional publishing and digital publishing, gives an idea of the relative unimportance of digital educational resources.

Finally, the greatest difficulty results from the fact that, today, no digital publisher has yet come up with an economic model assuring the viability of its activity in the

long run: whether it is through the sale of products by unit, subscription services, payment by act or consumption, indirect financing by advertising, no formula has proved its worth.

Third indicator, the qualitative transformation of pedagogies has been even less successful. All studies, by many other colleagues as well as myself, show, that the use of digital tools and media more often reinforce existing practices than challenge them (Deceuninck *et al.* 2003; Mœglin, 1998, 2005). One example among many others: in secondary teaching, in France, close to 1500 projects concern the new technologies of information and communication (60% in schools and 24% in colleges). However, a little under a half of these establishments (48,8%) have an Internet site, and only 26,3% use their site for their project.

It is true that these are only indicators. However, they confirm that the generalisation of digital tools and pedagogies will not be with us any time soon. Indeed the very scenario of such generalisation has little credibility.

#### *Unlikely generalisation*

Second counterproposal, which I base, notably, on analyses by Guri-Rosenblit (2003), extending the subject to all levels and technical means of teaching, whereas she herself only deals with tertiary level distance teaching: evidently the richest establishments can call on these new media most easily; if they don't use them as much as they could, since they lack neither staff nor documentary resources. There must be a simple reason: they don't really need them. On the other hand, establishments that would in fact really need new media are also the poorest and, therefore, the least able to equip themselves and to make use of these tools and media.

A similar paradox is true for students: self-teaching techniques (simulation, self-assessment, etc.) help those who already perform well. They are of less use to these than they would be to students who have neither the financial and technical means to use them.

Underprivileged establishments are also much less inclined to go in for digitalisation because, for equivalent results, digitalisation costs more than traditional resources and facilities. Secondly, digital tools and media can never be a complete substitute for traditional tools and media; in other words they force such establishments to find double funding. Thirdly, the access to digital tools and media requires staff, guardians, technical helpers and maintenance technicians: staff training and remuneration naturally increase budgets. Fourthly, whereas the function of traditional tools and medias are well-known, few people know what educational benefits can be derived from new tools and media. Certainly, the generalisation of data processing in society could encourage educators too to use computers. But many examples from history show that schools have never yielded to this type of argument, and that they take up a quite contrary and anachronistic position in relation to what is happening outside their doors.

For all these reasons one may question the thesis underlying the generalisation of digital education, and that of the de-institutionalisation of education.

*Untraceable de-institutionalisation*

It is true that a part of the libertarian movement identifies with this thesis. Illich (1971), in conformity with the ideas that he expounded from the 1960s onwards, expressed delight for example at the invention of telematics. In his opinion, it should encourage the development of “networks of knowledge” that will permit schools to be bypassed. He spoke of the “new established church”, where “the path of happiness is signalled by consumption indicators”. Internet, today, is often invested with the same hopes by opponents of the educational system in general and advocates of “home schooling”, in particular.

Taking, on the contrary, the defence of the educational institution, the altermondialist current criticizes international organisations, such as the OECD and the European community’s use of digital tools and media as a Trojan Horse, to break the monopoly and structures of the educational institution.

In fact, experience shows that, optimistic or pessimistic, these predictions have hardly any foundation. While the educational institution has, in fact, nothing to fear, as such, it has a lot to fear with regard to its own functioning. Indeed, it seems that the dominant educational model, for which the textbook has for a long time been the preferred vector for primary and secondary teaching, is exploding, decomposing or running out of steam. Another model, for which digitalisation could be the vector, is attempting to take its place (but has as yet been unable to do so). What is the model?

**Industrial transformations of the educational institution**

The use of digital tools and media must be interpreted as the reason for transformations of the educational institution, not the consequence. What is at stake is the match between new tools and media and a new way of working. More precisely, the changes in this fit, at a time when the industrial paradigm that structured the educational institution in the days of the textbook is losing its vital spark.

The question is how to convert the concepts of school work and the educational institution into the educational and organisational models required to lift the digital divide. In other words, the question concerns a new match, whose cornerstone might henceforth be digital tools and media. However, as I would also like to try to show, the coherence and viability of this mission remain as problematic as ever.

***From industrialisation in training to the industrialisation of training***

I will start from the following observation: the birth of textbooks, as cultural goods and products of the newborn publishing industry, as well as the generalisation of their use, during the 19th century, reflect the process which took over the educational institution. The process is two-fold. The first industrialisation process

concerns these industrial products: textbooks, notebooks and blackboards (industrialisation in training). The second industrialisation process concerns methods of teaching and organisation: the adoption of an industrial pedagogy and industrial rules of administration (industrialisation of training).

The manner whereby through textbooks the fit is achieved between the tool and the system is illustrated well by an aspect that I evoked briefly a little earlier, when I noted the coincidence between the birth of the textbook and the birth of the educational institution. I now come back to this aspect to indicate that at the moment of the appearance of the textbook (or shortly after), one also witnesses the adoption of an educational model of an industrial nature and, at another level, the conversion of school administrations to certain methods inspired more or less by those of industry.

Why do policy makers, between 1830 and 1850, adopt collective and simultaneous teaching, which, hitherto had only been practised in colleges, monastery schools and Protestant academies? Why do they officially prefer this teaching to the two educational models with which it is in competition: individual teaching, frequently practised in small schools, and mutual teaching, a recent import from Britain, but supported by a very active lobby?

First, individual teaching is practised in village schools, but is inspired, in fact, by the preceptor method: in turns, every pupil submits his/her work to the master; in the interval he/she is left to himself/herself, alone or in a small group. Mutual teaching also known as “school without masters” (Duveau, 1957, 47) or “co-operative teaching” is already, at the time, considered to be “industrial”: the master gives orders that are passed on by the older pupils, who transmit them to the pupils they are responsible for. Thus a single teacher addresses several hundreds of pupils at a time.

Certainly, collective and simultaneous teaching is better adapted to more complex training rather than individual teaching. Certainly, it also meets the requirements of conservatives who don't wish training to be dispensed extensively, as would be the case with mutual teaching. But if simultaneous and collective teaching wins out, it is maybe especially because it depends on the textbook. The textbook, indeed, offers to the master the possibility of combining, in class, collective work and individual work, as well as class work and home work.

How is the choice of this semi- industrial pedagogy perceived, at the time and later? The reaction of the philosopher Alain (1998/1932, 282), the figurehead of the school movement under the 3<sup>rd</sup> Republic is interesting in this respect. He comments on the difference between “school work”, serious and rigorous, according to him, and play, by which some pedagogues try abusively to motivate pupils:

“There is a marked opposition between work and play. In work there is an economy of effort and concern for the result (Taylorism). Play is the opposite: it requires prodigious effort, and has no concern for the result.”

Thus, in 1932, for the intellectual elite that Alain represents, with no industrial leanings, Taylorism appears to be the essence of teaching, that by which it is distinguished from its opposite: fun and entertainment.

Thirty years later, Illich (1971, 74-75) sees things completely differently. He depicts school as a factory:

“School sells curriculum, a bundle of goods made according to the same process and having the same structure as other merchandise. Curriculum production for most schools begins with allegedly scientific research, on whose basis educational engineers predict future demand and tools for the assembly line, within the limits set by budgets and taboos. The distributor-teacher delivers the finished product to the consumer pupil, whose reactions are carefully studied and charted to provide research data for the preparation of the next model [...] The new world church, is the knowledge industry.”

There is probably some exaggeration in this way of comparing the working of the school to that of the factory. What is expressed, however, from Alain to Illich, and which deserves to be heard is the recognition of the industrial element in the educational institution: between the mutual model, which is too industrialized, and individual teaching, which is too artisanal, the model of simultaneous and collective teaching arrives at a compromise by which the tool and the system reinforce each other mutually. The generalization of textbook, produced and reproduced industrially, are based on a pedagogy and an administration which are semi industrial and that, require the presence of the textbook, industrial product, in return. Industrialization in training goes along with industrialization of training.

I should at once specify what I mean by “industrialization of training”:

1. training is industrialized when it calls on technical resources to partially or completely replace human manpower and work time;
2. it needs capital and adopts management organization methods (such as collective and simultaneous teaching) to encourage the optimal (as large as possible) use of these technical resources;
3. it encourages a mentality which aims to bring together all human and technical means, to the output of the teaching, from a productivist perspective.

As one may see, the traditional textbook is the cornerstone of the first industrialization of teaching.

### ***The textbook, link between the three “universes” of the institution***

The textbook is also the link between the industrial universe and the other universes of the educational institution. The educational institution cannot be reduced to its industrial dimension. The sociologist Derouet (1990) shows that it is a “composite” enterprise, and that, beside the industrial universe (which trains producers and consumers industrially in the service of industry), two other “universes” are also

represented: the civic universe (that trains citizens in the service of the nation), and the domestic universe (that trains children to become adults). The textbook occupies a central place in facilitating the coexistence of these three universes: the industrial tool of mechanized training, founded on the repetition and the standardization of exercises; the spokesman of the collective body (the Nation, the Republic, the Society); and the defender of domestic morals (the love that one owes to one's teacher is, for example, of the same nature as that one owes to one's parents).

However, the overturning of the school experience, today, involves the dissociation of these three universes and it brings into question, at one stroke, the role of link played hitherto, by the textbook. No matter that the textbook has little to do with this shake-up. This shake-up affects it directly through the contestation of the school culture, linked to the disqualification of its two traditional sources of legitimacy, knowledge for itself and liberating knowledge (Lyotard, 1979), through the undermining of the institution and its actors, obliged permanently to negotiate their place and their status, in the context of the loss of the monopoly of schooling and competition through parallel circuits of socialization, through the disengagement of the state and, in France, the "devolution of educational policy", in the terms of Charlot (1994), in favour of local and transnational structures, whose influence is perceived as a threat to the public service, and through the generalization of control and assessment practices, encouraging a utilitarian and consumerist climate, which is incompatible with the ideals of disinterestedness and curiosity.

Other factors that concern the textbook more directly include its rigidity and its lack of interactivity, its standardizing effects, in contrast to the autonomisation of teachers, its incompatibility with constructivist pedagogies and, worse still, its inability to accept all the demands that are made of it, its price, which has caused more and more reaction, in the United States notably, where the average cost of textbooks has increased four times faster than the rate of inflation in the last twenty years.

Certainly, for the moment revenues of the school publishing houses have not been affected greatly by this situation. The traditional market for textbooks is sufficiently strong and the financial stakes are sufficiently great for traditional publishers to make sure of that, notably by proposing hybrid products "paper" and "on line", to fend off the digital competition. However, certain disaffection from the traditional textbook can be observed, highlighted by several studies.

Is it the case that pushed by digital technology that an informational reindustrialisation of education is taking place? This is the question underlying my last point.

### *New industrial paradigm?*

My aim is therefore to finish by identifying three major tendencies within the process of "informationalisation" of education (i.e. of its reindustrialisation through its digitization).

It is necessary to specify beforehand that these tendencies are not to be found everywhere. Indeed, their presence and effects depend on how the shake-up and transformations of the school experience affect each of the sectors and levels concerned. They vary therefore according to whether they occur within the context of primary teaching, middle school, high school, university, continuing education or popular education.

There is no move at present to contest the efficiency or utility of primary school teaching. But questions as to the educational objectives of incorporating digital resources are nevertheless being posed. The secondary level (middle and high school) is going through a serious crisis. This crisis is perceived more by teachers than the general public, which continues to trust in education. Teachers experience the crisis through the impression of belonging to a profession which has been “de-qualified”. If its immediate use is not in any doubt, tertiary education is in a deep crisis of identity. It has led to the dissociation of its components (research/training, academic training/professional training, etc.) and by major paralysis. Threatened less directly, continuing education and popular education have nevertheless been destabilized by the initial weakness of what Dubet (2002) calls their “institutional program”. This fragility results notably in the blurring of the definition of the profession of trainer and of the final purpose of this type of training.

Making allowances for their respective contexts, the three tendencies that I would like to look at are the following:

1. formulation of an educational project focused on the struggle against “illectronacy”;
2. hybridization of traditional teaching and on line activities and distance learning;
3. setting up of integrated systems of management combining functions and activities which were previously separate.

*An educational project to combat “illectronacy”?*

The first tendency concerns primary and middle school teaching, as well as some sectors of popular education. But one also sees evidence for it in the universities and in continuing education. Among others, the Honorary Senator Sérusclat (1999, 112) has described this tendency, pointing out that, just as the modern education system was constructed in the 19th century around the book and literacy, in the same way today's education must be constructed around the computer.

By teaching informational expertise, the school system would reconnect therefore with its original purpose. Simply put, the struggle against the illiteracy would be extended henceforth to the struggle against “illectronacy”. Schools would also encourage the spread of what Miège (2004) calls “communicational norms of action”.

The value of such a project is not in doubt: extending the domain of school to the necessary technical and intellectual expertise through use of the Internet and other information and communication systems, for research, work and entertainment, is, indeed, the essential condition for an intelligent use of digital resources. It is easy to accept the idea that the struggle against “illectronacy” is indeed one of the keys to culture and knowledge. Many examples show also that the presence of digital tools and media can help to reform and resocialise teenagers or adults who have dropped out of school and traditional education.

However, focussing significantly on the struggle against “illectronacy” has at least two risks for the educational system.

The first concerns the potentially counterproductive effects of generalizing the use of digital tools and media in the classroom. Of course, more and more frequently, teachers ask their pupils to surf the Web to collect information, or write texts on word processors. This can only be done however if the equipment and technical assistance is available in the establishment. But, as there is rarely sufficient equipment and technical assistance (the numbers quoted indicate this clearly), the level of home equipment and the presence of help at home play a role in determining the success or failure of the task.

However, in France, according to figures from the Médiamétrie survey 2005, less than 50% of homes are equipped with a computer (about 12 million) and less than 35% (8 700 000) have access to Internet. Besides of these, three quarters only are connected at high speed. This is why, under the pretext of reducing social and cultural inequalities, it may be that schools involuntarily contributes, on the contrary, to reinforcing inequalities.

The second risk results from the fact that, too often, training with digital tools and media amounts to instrumental training. This was not at all the case of schools’ literacy mission in the 19th century. At the time, teaching reading and writing frequently appeared to belong to a political vision and to have a progressive and emancipating goal. Today, on the other hand, it is difficult to identify the political mission and the social perspective of programs to combat “illectronacy”.

This is equally true for the educational project. Should one be indignant at the deviation from or even abandonment of educational objectives, when pupils use the digital resources of the establishment for activities which have nothing to do with their official objectives (piracy, consulting illicit sites, etc.)? Or, is the acquired expertise sufficiently useful for pupils, even though they do not correspond to any school project that the institution should tolerate them, and possibly even recognize them and value them?

In this important debate, the vast majority of teachers tend to favour the first answer, but no precise information is available. For example, it would be useful to know if pupils who use digital tools in this way, in spite of the institution, benefit positively in their academic careers.

The same problems are posed, just as pertinently, in the domain of popular education, where some structures have been reduced to the simple provision of services: they may simply offer public access to the Internet; in these cases all educational purpose has been abandoned. The question, at this stage, therefore concerns the existence and the educational range of values and societal projects underlying digitization of educational programs.

*Hybridization of educational practice*

The second tendency is less spectacular. For the reasons indicated at the start, “cyber-training” is indeed, and will long remain, the invention of technocrats. On the other hand, one expects a modest, but meaningful increase in the incorporation of online activity in traditional teaching and training. This integration occurs at all levels, but it is perhaps in universities that it takes its most original form.

Applications that, not so long ago, would have been worthy of science-fiction, seem less extraordinary today: the use of video conferencing networks, for multi-site courses, the use of collaborative software to facilitate the work of students in common and at distance, the generalization of access to the Web and scientific databases, the facility to consult databases in real time during the course, the putting on line of hundreds, sometimes of thousands, of hours of courses and exercises, the presence of self-study rooms, the multiplication of digital campuses are all important transformations of the academic landscape.

There probably is no deterministic relation between the technology and pedagogy. One may suppose however that these transformations appear in the context of a more fundamental change in how people teach and learn. These changes lead to less professorial pedagogy, with more work focussed on concrete tasks with more student autonomy. These modifications have been made necessary by the growing diversification and heterogeneity of the student body. These mutations also enable students to access educational and administrative resources wherever they may be, and even when they are on the move.

Behind these changes, we may observe several phenomena of major importance. Among others: doubts about the unity of place and time which traditionally provided a certain monopoly for the establishment, its administration and its educational structure; the development, hesitant but increasingly common in Europe of the credit system “European Credit Transfer and Accumulation System”; the increased use of modular structures in curricula and the possibility offered (in principle) to students to plan an academic career via several establishments, possibly in different countries (even though the reality is somewhat different in practice); modularity that may go so far as offering “customized” teaching.

Certainly, it would be wrong to exaggerate the impact of all this. However, these moves are already discernible, and their development is facilitated by the use of digital media. That is why it is urgent to consider the risks and limitations of this tendency. Here are three, more or less at random, from my own research.

First, several studies show that teaching which was not designed to be modular, but put on line nevertheless, are very difficult for students or teachers to use. The banking “vision” that underpins a number of these initiatives negates much of their educational relevance.

Secondly, the “googlelisation” of teaching and research leads to students adopting doubtful and inefficient practices: they produce decontextualised information which is fragmentary and with no larger perspective. The problem is that Google is becoming the primary mediator of knowledge for students.

Thirdly, the “open” market style of presenting education, wherein students as customers are supposed to define their own academic career path is not viable (technically), or acceptable (pedagogically). More than ever before mediators are necessary, as “brokers of information”.

*Administrative temptation: the integrated system*

The third tendency concerns the setting up, essentially in secondary and tertiary teaching establishments as well as in certain sectors of continuing education, of integrated management structures. These structures are integrated because they allow the establishment or every member of the educational community to access, in a common digital space, all possible functions: educational, administrative, financial, documentary, communicational, etc. The implantation of educational platforms (since the mid 1990s), digital campuses (since the end of the 1990s), digital satchels (since 2000) and digital work spaces (since 2002) all speak to this desire to put onto the network activities and functions that had previously been separate.

This third tendency is not therefore incompatible with the first two and may even complement them. This has been suggested by Kaplan and Pouts-Lajus (2004, 15): they explain that the virtual spaces offered to teachers and learners are the missing link between the technical offer and its users. According to them, users need their different computer tools to be bundled, organized and harmonized in “a single access point for the set of tools, content and digital services connected to [their] activity”.

So, for example, digital work spaces provide access simultaneously to practical school services (bulletins, schedules, notebooks), to educational services, to documentary services (including some personal spaces, with devices for automatic ordering of documents) and to information services, including forums, messenger services and shared spaces for documents. Quite apart from teachers and pupils, a large number of actors are connected to these virtual spaces, such as librarian-documentalists, administrators, parents, local authorities, representatives of the general public and economic actors.

Even though these integrated systems have only just started to take off, it is striking that their originality doesn't come from the novelty of the functions proposed (most already existed before digital work spaces). What is new, however, is the bundling

of these functions in one single space. Indeed, the informational reorganization of school life is to be performed, among others, by: the unbundling and the de-hierarchisation of functions (which means the educational function losing its primacy) and the creation of an educational community, within which teachers are but one component among others; the establishment of procedures for assessment and follow-up, almost in real time; flexible management and an almost industrial use of resources (educational, logistics, etc.) and of flows (students).

Rather than taking stock of achievements that are at present too embryonic, I will point to three obstacles which could prove to be stumbling blocks.

First, the development of the new management systems stems from the wishes of the ministries, which, is in line with the politics of decentralization and regionalisation of the education system in France. On the other hand, actors at the grassroots have expressed little or no demand for it (Chaptal, 2003).

Secondly, in France as abroad, the digital work spaces tend to reinforce the productivist orientation of education. In the words of the experts quoted above, Kaplan and Pouts-Lajus (2004, p.37), the aims of projects relate explicitly to “the modernization of educational practices and the improvement of global performances in the education system”. The compromise between the three universes (industrial, civic and domestic), that make up the education sphere could be threatened by the first.

Third, it is surprising to see such integrated systems develop in establishments, whereas, in industry, the influence of “Knowledge Management” and large systems is tending to be abandoned.

## **Conclusion**

Three points will sum up my argument and underline its possible interest.

First, I hope to have shown that it is not true that digital resources are replacing or will replace the traditional textbook. On the other hand, it is true that an educational paradigm change is in progress and that it is leading to contention as to the central role of the traditional textbook. However, nothing suggests that digital resources are going to occupy this central role.

Secondly, the situation is still fluid and this is also because the digitization of certain educational resources doesn't imply an automatic reinforcement of the educational institution. On the contrary, the use of certain information and communication devices, such as the Web and search engines, encourages the descolarisation of school. On the other hand, however, the appeal of the theme of “lifelong education” encourages a process of schooling of society.

Third, the fact that the die has not been cast revives this old principle: the greater society's demand for education, the more difficulty the school system has to preserve its monopoly.

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**What do we believe are the issues  
with text-based and other learning materials?  
Are we caught in the web or lost in the textbook?**

Alan Peacock and Ailie Cleghorn

*From the Eskimos of the past...who were very intelligent, who had good perception, who had good memory; this has been going on for a long time among the Eskimo, from our ancestors. And today, they are like our books, those kinds of people. The ones very intelligent, the ones with good memories, the ones who are very perceptive, because they are like books to the Eskimos; you can hunt whales, you can hunt today because of this.*  
(Attungana, 1986, 18-20)

This quote from an Inuit living in northern Canada raises these questions: What is a text? Whose text? Whose knowledge? We begin with this because we are going to ask you to step back and examine some of our taken-for-granted beliefs about texts, about who they serve, about how they help young people to learn, about what is learned indirectly from them.

The theme of this year's conference – *caught in the web or lost in the textbook* – suggests an *either-or* dichotomy, with a hint that there may be no way out. Most of us in the Western world feel inextricably caught in the web, while many in the still developing countries (the majority world) are lost and confused by the textbook, if they have one at all. In this presentation we hope to throw some light on the latter situation in particular, focusing on why certain problems persist and what some ways out might be. In doing so, our remarks will be developed from the contributions to our book, *Missing the Meaning*, as well as from other sources.

Textbooks and other materials are undeniably important for learners as well as for teachers, but a word of caution is needed if we are to look to them for too many solutions to educational problems. For instance, we often hear, 'if only' there were better resources (textbooks, writing materials) especially in developing country classrooms, then the quality of instruction would improve, more young people would stay in school, the aims of Education for All (Dakar 2000) would be realized, and literacy rates would approach 100% worldwide. The hypothetical equation looks something like this: Education (with plentiful text materials)  $\Rightarrow$  development  $\Rightarrow$  progress  $\Rightarrow$  equality of educational opportunity  $\Rightarrow$  peace  $\Rightarrow$  a kind of salvation. So the equation comes down to the belief (or is it a myth?), that if there were more and better textbooks, all sorts of problems would go away. To digress a bit further, this sounds like the 'literacy myth' as described by Harvey Graff (1979), David Olson (1990), Brian Street (2001) and others: If everyone were literate, crime rates would fall, poverty would cease to exist, men and women would be empowered, and the world's problems would go away. If only it were so.

## **Links to the main conference topics**

Let us take a brief look at the main topics of this conference as they appear on the conference website, for they point to some of the questions that have guided our joint research over the last 10 or so years on the use (and abuse) of text materials in the teaching of primary science. The questions they raise are linked to the following section on theoretical perspectives on schooling and text materials.

1. Changing identities in a global world
  - Whose identity are we talking about?
  - How is the global world conceived?
  - How should diversity (ethnic, social, gender, other) be addressed in text materials?
2. Changes in the learning environment
  - In what ways and where are learning environments changing?
  - How can we explore and take advantage of the ‘new’ computerized and multi-modal (visual, oral) forms of text?
  - What is happening to young people’s reading, writing and listening skills?
  - What about visual forms of literacy? Do we teach that directly?
3. Improvement of textbooks
  - How may we better evaluate, select and market text materials in our efforts to counter the constraints on improvement?
  - Can we generalize about improving textbooks and educational media, even in a globalizing world?
  - What about the misuse and under-use of much existing text material?
4. Design
  - How can text materials be designed for the subject disciplines so that there are better links with the tenets of sustainable development – economic, social, political, and environmental?
  - Textbooks for whom, for what subject, written by whom and for what purpose?

## **Theoretical perspectives on the world of schooling and text materials**

Wolff-Michael Roth (2004) takes a *critical perspective* when he speaks about children and their teachers not in deficit terms, but as ‘navigating worlds’, indicating one way in which a globalised world may be conceived.

*These worlds are texts.... The question ...is not how we can fix children, texts or teachers, but how we can support the efforts of human beings in expanding their worlds so that they have greater room for manoeuvring, more possibilities for action, and ever-expanding opportunities for continuously becoming whatever they choose to be. (p 264)*

*What we need is a better world, and students and teachers who use and produce language and texts ought to be an integral part of making and remaking the world that we really want. (p. 265)*

Elizabeth McEneaney (2004) also takes a critical view in noting the manifest and latent function of *official* learning materials.

*Officially sanctioned learning materials...serve as the authoritative and central source of expertise in a classroom (as in the “teacher-proof” curriculum), or they may be intended as a complement to expertise that already resides ... in the teacher or in the students or both. (p. 14)*

*...the learning materials widely used in schools much more often than not have served to socialize children into starkly unequal social hierarchies.... For most of the twentieth century in European and North American mass education systems...students learned from approved curricular materials that people of colour as well as white women had no serious place in the world of science. (p. 14)*

Janet Donin (2004) draws on the theory of *situated cognition*, reminding us that the social and cultural context of teaching and learning is critical to the way we think about and use text materials.

*While written texts or transcriptions of oral texts might exist outside of a particular context, how they are processed is definitely situation-dependent.... Whether or not a text is meaningful or deficient will depend on the nature of the activities in which it is embedded and on the characteristics of the actors in the situation. (p. 44)*

In other words, the learning environment- what we will later call the teacher-learner-text (T-L-T) relationship - has to be understood if text is to be developed and used effectively.

A *sociolinguistic perspective* adds to our understanding of the complex dilemmas involved in the development of text materials that are accessible to learners whose main (home) language is different than the school’s instructional language. Remember, about 700 million of the world’s children are learning via English – as their second language (Crystal, 1997). This situation is exacerbated when little or no attention is given at school to the principles of second language teaching and learning, a situation that is common in some still developing countries where teacher education may be minimal and economic conditions prevent the training and hiring of language specialists. In a search for ways to address the difficulties (such as cognitive load) that second language learners have, Marissa Rollnick (2004) asks the following question with particular reference to science:

*does oversimplification of science texts exclude learners from further participation in the study of science or does it open doors? (p. 105)*

Here we might also ask, what does it mean to oversimplify? Since all subjects involve learning the discourse of the field, then surely all learners would be helped if text developers paid close attention to the distinction between science (academic) discourse and everyday discourse, by, for example, defining 'ordinary' English words like *solution*, *dilute*, *dissolve*.

In Rollnick's work we see threads to the theory of situated cognition as well as to the critical perspective. Drawing from the work of Gee (1996), Young (1971) and others she notes:

*Use of language is embodied in contexts that carry with them social mores and ways in which language is used. (p. 107)*

*misguided authors or teachers particularly in mathematics and science ...feel that the language in such books should be difficult for them to preserve their status of custodians of a difficult subject. This allows them to attract only the upper end of the ability spectrum. (p.117)*

At the same time, Macdonald (1990) has shown that (non-specialist) teachers' own attempts at simplifying texts often introduce ambiguities and opaqueness, rather than removing these.

### **Change in learning environments and text design**

Murphy and Holleran (2004) address the topic of change in learning environments. They ask if virtual environments lead to virtual learning. Reminding us of the myths mentioned earlier (the text resources myth, the literacy myth) they observe that:

*...many teachers, parents, administrators, and politicians believe that computers and virtual environments will solve what ails American schools. (p. 135)*

These authors also remind us that it was Dewey, writing in 1913, who warned of the dangers of *near* experiences; actual experience was for Dewey preferable to *reading* about objects and knowledge.

Murphy and Holleran have explored how and what students learn when exposed to different types of text. In a carefully controlled study they found no difference in achievement between students exposed to the same content in a conventional textbook and a computerized version of the same material. They concluded that the same (traditional) principles apply to both modes of learning, including:

- Subject matter should be presented in line with the desired outcome – application of a principle, change in attitude, development of a skill.
- Subject matter must be in accord with students' development, prior experience, prior knowledge.

In contrast to the suggestions of Murphy and Holleran, however, Gunter Kress (2003) argues that new theories of meaning are needed to understand new textual forms and new forms of literacy. He speaks of *synaesthesia*, the ability to represent

meanings through the senses, an ability that has been suppressed with the dominance of written language in the Western world. Kress advocates moving away from conventional theories that focus on text use and critique towards theories that allow for re-conceptualising meaning. For instance, Kress' notion of *design* aims at transforming resources, such as curricula, from tools of cultural reproduction to curricula purposely designed to express the interests of individuals, thereby providing them with an opportunity for changing their social futures (p. 161). In this we see a hint of Roth's position that in this global world, solutions might well be found in the local.

Kress further maintains that audio, visual and gestural modes of representation are displacing the central position of written language (i.e. textbooks). For Kress, the ability of new textual forms to be multi-modal and to incorporate several modes of communication is not merely beneficial but necessary to meet the literacy needs of multicultural societies (p. 181). He notes that gesture is often mistakenly considered to be a mere translation of spoken language, when in fact the extensive use of body positioning, gestures, facial expressions and eye movement provides additional, perhaps subconscious, meaning. Is Kress thus suggesting that we have gone (or should go) full circle, back to modes of oral communication, to oral texts?

The point of all this may be evident in the following excerpt from a lesson on soil erosion taught in a grade 8 class in a rural school in Western Kenya. There were no desks, chairs, chalkboard, textbooks or writing materials. The lesson was taught by a young woman, a member of the local community, who was in 'wait training' – untrained, and waiting for a space in teachers college. Elsewhere (Cleghorn, 2003) I have characterized this lesson as an example of an 'alternative text', but it might be more accurate to indicate that it fits with Kress' vision of an oral/gestural/visual text.

This is a view of the classroom where the lesson took place.



This was the view from the classroom.

The lesson was taught mainly in Luo, the local language, with code-switching back and forth to English. Words that appear in bold italics were spoken in English. Note that many of the words spoken in English are the key terms and phrases that often appear on the all-English multiple choice, end of primary examinations (another text issue).

T: If there is nowhere where we can **grow our crops** there is nothing we can eat. **And we need what?** We need food. If there is no food can we be alive?

SS: (chorus) Nooooo!

Later.....

T: ...Rain is also like that. When it is raining **pururu** (Swahili for heavily), it carries **humus**, it carries **clay** and it carries **sand**. So what are we remaining with?

SS: Subsoil

T: Subsoil which is not good to our plants.

Later.....

T: ... When it is raining what happens?

S: Water runs off.

T: Water runs. Have you observed that water? (**gesturing to the outside**) What does it carry?

SS: **Soil**

T: The sand which it is carrying, where did it come from?

S: It has come from up.

T: Which means when it is raining water runs on the ground and carries the topsoil.

**T:** This is what shows us what soil erosion is. **Erosion is when the rain or the wind carries the soil.** When water takes our soil away, wind takes our soil away. That is soil erosion. **Ok now**, why do you think that soil erosion takes place?...

Later, summing up....

T: Where the grass has got finished and the place has remained with only soil, we call it **bare land** (**again gesturing to the eroded field outside the classroom**).

Although perhaps not a fair comparison, the following illustration from a grade 8 environmental science book used in Zimbabwe begs the question: given the local knowledge that the students and teacher had of soil erosion and the teacher's use of code switching and gestures, would such a written text have improved on this lesson? What would the text have added? Could it possibly have been enough on its own?

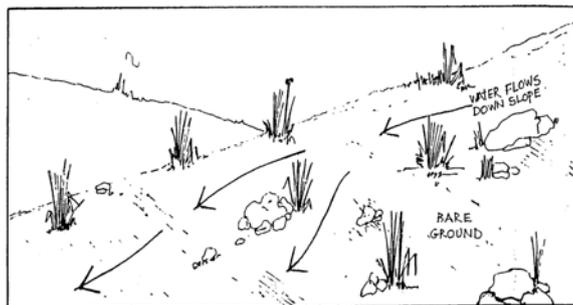


Figure 1. Textbook illustration of soil erosion

## Elementary science text materials

We now need to look at specific examples of text, to put flesh on the above theoretical skeletons. Here we have taken examples from the teaching of elementary science, as this provides an excellent lens for illuminating some of the more general problems relating to the design, content and classroom use of text materials. We first need to consider what teachers are trying to do when they teach science to younger children, and the potential role of text within this.

One can ask: What are such pupil texts (rather than teachers' books) for? Firstly, they are for telling; providing facts, explaining concepts, giving instructions. Secondly, they are for asking; prompting enquiry, setting problems, requiring data analysis, predictions, analysis, or conclusions. Third, they are for coaching; mediating, revising, practice testing, working examples. Finally, they can be for motivating; getting children excited about something they might then experience first-hand.

Science teaching embodies the teaching of facts and concepts, often prescribed by a national curriculum; it increasingly demands that learners are engaged in 'hands-on' enquiry and practical investigation, both inside and outside the classroom; and it is increasingly assessed using standard tests, so that teaching also concentrates on revision and practice testing. Text material has been developed over many years to support all these functions, in a wide range of forms, including teachers' guides, pupil workbooks, revision and test books, worksheets, games, practical kits, comic books and newspapers, video, CD-ROM and on-line software. The way in which these are used in the classroom depends crucially, however, on the nature of the learning environment created by the teacher. We have characterised this in terms of the Teacher-Learner-Text triangle (figure 2).

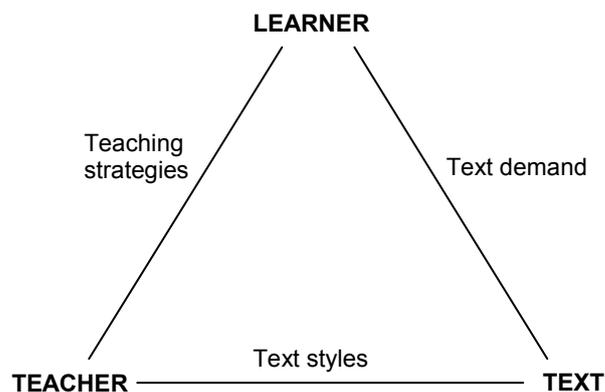


Figure 2. The T-L-T Triangle

The T-L-T triangle illustrates the three key relationships in a classroom, and the aspect of text use that each implies. For example, the Teacher-Text relationship is governed by the teacher's knowledge of different text styles, their availability, and the consequent choices it is possible to make. The Learner-Text relationship, on the other hand, is dominated by the 'match' between the demands made by a text and the capacity of the learner to manage this level of demand.

The major shift in the learning environment for elementary science in recent years has been in the Teacher-Learner dimension, i.e. that of teaching strategies. There has been a global move towards less dependence on teachers using a text to 'tell' students, and a concomitant expectation that children will engage in practical group enquiry, often supported by social constructivist theories of learning (e.g. Driver, Steff & Gayle etc). At the same time, web-based material and ICT facilities in classrooms have given pupils themselves (in theory, if not in practice) access to a huge range of potentially useful science text. Hence the teacher's 'knowledge-based' text can now be potentially replaced by the pupil's activity-based text- what we will call 'pupils' books'- or by on-line interactive materials. The main concern in our research has been the ways in which this shift has proved successful, and where it has hit problems: for example, if the texts pupils encounter are not matched to their needs, the Learner-Text relationship may break down. Ironically, if one browses the library of a UK primary school, the science shelves are still likely to be dominated by 'telling' texts; a high street bookshop's shelves will be dominated by 'coaching' texts; whilst the shelves of teacher trainers, trainees and advisers will emphasise 'asking' texts.

To consider this 'trilemma', we therefore need to examine what research has to say about the difficulties children experience with pupils' 'text books' in their various forms. The difficulties are many, resulting in an excessive demand or cognitive load for the learner. This is due to problems that in nature are:

- *Conceptual*, affecting access to the meaning of abstract science ideas
- *Linguistic*, affecting understanding of vocabulary, terminology, complex sentences
- *Visual*, requiring visual literacy skills to de-code photographs, diagrams, symbols, charts or icons
- *Format/design*, requiring familiarity with new forms of layout and associated verbal-visual links
- *Message*, understanding whose 'voice' is speaking.

Thus whilst language difficulty or 'readability' of text has been most often focused on in the past, we have identified the above five main dimensions of science texts that can cause difficulty for learners. Collectively, they contribute to the Cognitive Demand of the text material in question (Sweller, 1994; Leahy *et al.*, 2004). The conceptual difficulty of a piece of science text depends on the number and nature of concepts introduced in a given section; is there more than one? Are they abstract concepts? Linguistic difficulty is too complex to discuss fully here, but in science text, it is likely to be increased by such things as new vocabulary, technical

terminology and complexity of sentences. For example, Macdonald (1990) demonstrated how African learners in their fourth year in school not only had to begin learning in English instead of vernacular, but also were confronted with science books in which up to 60% of vocabulary had not appeared in the English scheme they had been using in the previous three years.

Visual literacy has been much overlooked in textbook research until recently, yet in science materials it can play a key part in determining accessibility. We have shown (Peacock, 1995; Gates, 2004) how the common assumption that visuals aid understanding of written text is often not the case, and can often lead to misconceptions. Symbols, scale, cross-sectional diagrams and superfluity may also be important distractors; for example, we have identified at least ten different uses for arrows in elementary science text, the use of which is rarely explained to readers.

All of these become particularly important in relation to the format or design of the page layout in materials for children; for example, the illustration shows how the page layout may not follow sequentially from top to bottom as with narrative text; and the link between visuals and text may not be clearly made. However, some formats (such as comic book format) have been shown to create few problems even for children learning in a second language, since they are already familiar with comics from outside the science classroom (Peacock, 1994). Yet even in the most prestigious texts, things can go badly wrong, as the examples indicate. These may originate from the fact that the illustrators used are not themselves scientists; they may also find their way to publication through weaknesses in proof-reading. Either way, it implies the need for less fragmentation of the process by which texts are commissioned, written, illustrated, designed, printed and published. At the same time, and perhaps as a consequence of the above, some writers of web-based materials have carried out their own research into what maximises children's learning on screen, and have developed materials accordingly.

The 'message' in a text is very dependent on whose 'voice' seems to be speaking. If for example, the pupil's text gives an instruction (*'Take a walk outside your classroom...write down the names of 10 animals that you see moving...'*) a pupil may see this as being in conflict with the voice of his or her teacher. Equally, texts that imply a particular cultural stance can be out of step with the ethos of the classroom, and could therefore induce counter-productive attitudes in some if not all learners.

Each of these dimensions makes a cognitive demand on the learner, adding up to a cognitive load that may make it difficult for a child to process the text. Such texts have been called 'inconsiderate'; the first example above is such a text, as it makes high demands in all five dimensions. However, as we have indicated, learning from text is situated and highly context dependent, therefore the demand is determined not only by the text but by the learners and their learning environment; a text may be accessible to one group but not to another. 'Considerate' text attempts to minimise some or all of the demands, to make it more likely that learners can process it independently, as in the example from Zimbabwe.

## Culture and text difference

Text materials differ from one cultural context to another. They differ according to such matters as: precedent (things are done a certain way because they have always been that way; international pressures (results on international test of achievements such as the TIMMS); the need for approval (political messages); commercial pressures, and the extent to which teachers are actually involved in their production.

Table 1 shows how Japanese and American elementary science textbooks differ.

**Table 1:** Comparison of elementary science textbooks from USA and Japan

<i>Mean of 2 examples from each country</i>	USA	Japan
Size	2kg, 500 pages	0.4kg, 100 pages
Content	Wide ranging	10 topics only
<i>Electricity unit:</i>		
Pages	18	14
Sentences	205	14
Activities	4	4
Photos	23	24
Illustrations	7	20

This comparison of elementary science textbooks from USA and Japan gives us an illustration of how and why texts differ. The table (Lewis, 2004) indicates that textbooks from the USA are considerably larger, have more topics, more verbal text, the same amount of photographs, but fewer illustrations. Lewis explains this in terms of five main differences, such as the impact of precedent; national and international pressures resulting from their relative positions in IEA and TIMSS surveys; the need for a broad consensus about content (e.g. across all the states in the US); commercial pressures within US publishing (Japanese text is published by the ministry of education), and teacher involvement in textbook development, which is greater in Japan. The outcome is that the Japanese text is focused on pupils doing science, using illustrations/information to obtain information with which they can solve science problems; whereas the US texts are more concerned to provide comprehensive coverage of facts and concepts that may be tested, as well as too look attractive (which explains the high proportion of what the Japanese might consider 'superfluous' photographs).

In the same way, for example, elementary science materials in Anglophone Africa have been strongly influenced by curriculum projects such as the African Primary Science Programme (APSP) in the 1970s, which was heavily UK/US dominated; South Africa has a wide range of materials because of the heavy involvement of NGOs supporting (black) education prior to the end of apartheid; whilst in Brunei Darussalam they have to show how each item relates to the Surahs of the Qu'ran. The impact of this is likely to be that within any cultural context, the room for

manoeuvre in terms of change in text design is probably limited to a greater or lesser extent at any given time, for the major publishing players.

### **Web design of elementary science materials**

Web design however is global and therefore the constraints may be quite different. A quick trawl through entries in directories of science education websites does however indicate that, with notable exceptions, what is available has taken little account of the difficulties encountered by younger children that we have described. Too often, these sites are either too wordy, non-interactive, packed with facts, uninteresting or simply games that do not teach anything. In spite of this, it appears that teachers spend a lot of time encouraging pupils to use websites as authoritative sources (Barba, 2004).

However, some authors have set out to apply what is known about how children learn to web-based resources; for example, the science games for children developed at Cambridge University by *Engineering Interact* (<http://www.engineeringinteract.org/>). These deliberately set out to prevent users simply 'clicking through' by devising story-based games that allows science to be investigated, using the facts provided, but which cannot be completed without applying ideas. One notable difference in this programme is that the complex format often noted in printed science text is replaced by the sequenced arrival of items on screen, so that the problem of 'navigation' is removed, enabling the organisation and conceptual density of the text to be more easily dealt with. Research has also indicated (Barba 2004) that the organisational patterns most accessible to pupils in science web pages are those that use question-answer approaches, sequencing or attribution (the listing of characteristics to define concepts). Some criteria apply both to print and web page design; for example, the alignment, layout, linking and repetition of items in page or screen. However, it is still apparent that many web pages are badly designed and inconsiderate of the (young) audience's needs.

Finally, some sites have developed that set out to reach a wide range of countries, such as *Science Across the World* (<http://www.scienceacross.org>) but as yet there has been little evaluation of the use of these by children internationally.

### **Using existing materials effectively**

The lessons in the above for teachers are as follows:

- Know the range of materials currently available at the level of your children. Our research has shown that most newly-qualified teachers in England, for example, are only familiar with a few of these, and have received little or no training in their use with children.
- Analyse the materials for the demand they are likely to make on your children. We have developed a simple tool for this, the Index of Text Demand (ITD) which we are currently trialling in the UK and Canada.

- Choose considerate text that your pupils will be able to process with minimal teacher intervention.
- Teach them how to ‘navigate’ the page (see below).

‘Teaching the page’ is a technique devised by Walpole (2004) and involves a diagnostic interview with individual pupils. The pupil’s responses to questions such as, *What is that? Why is it there? How could you use it? What tells you...? Where can you see...?* Allow the teacher to assist the learner in using what is provided by the text more effectively.

### **Conclusion: Implications for the design of text material**

The starting point for all our research has been to interrogate the actual role of text in practice, in order to make the lives of teachers and learners easier. This means finding or designing effective, accurate, user-friendly, culturally ‘considerate’ text material, in particular for children whose mother tongue is not that of the text itself. We therefore make the following recommendations that we hope commissioning editors, authors, illustrators, designers, advisers, teachers and trainers will at least consider in relation to their roles.

- Publishers of school texts in particular need to understand the concept of ‘considerate’ text, and apply these in the design or choice of text for use by children. As can be seen, this does not imply creating texts that cost more to produce, but it does mean applying the principles of design discussed above.
- These include limited use of new concepts, terminology and complex sentences; consistent page layout and explicated use of symbols; visual simplicity and consistency; unambiguous captioning/tagging of visuals; sequencing; and sparing use of tables/frames.
- Web designers need to provide carefully developed interfaces or navigational devices such as sequencing, which contain instructional devices that prevent simple ‘clicking through’ to reach the end.
- Teachers need to be more involved in text design and writing, from the same culture and in the same language as those of the pupil audience. Currently, it tends to be first- world authors that design and write texts in their own first language, aimed at third-world children, for whom the text is in their second or third language. Some publishers do translate their texts (e.g. Macmillan’s Primary Science scheme for Tanzania) but this is still the exception.
- Publishers and web designers need to use illustrators that have an understanding of the concepts they are illustrating. There is still some resistance to this, apparently on cost grounds; and publishers appear reluctant to have this subject researched. It is, however, a key to increasing the comprehensibility of text and avoiding misleading images.
- Independent authors and designers have an important part to play in leading big publishers into new forms of mass-market text. Within the larger commercial publishing houses, format and design priorities are still largely determined by

marketing concerns, in terms of 'appeal' on the shelf. Where governments and non-profit making organisations such as NGOs are concerned however, design innovation is possible; and the Spider's Place materials **illustrated above** indicate that this can be done successfully.

We end with this, as we began: What is a text? Whose text? Whose knowledge?

This sign was found in a public park in the second largest city of a southern African country. There was no such sign in the local language. Riding horses is not a frequent activity amongst impoverished black Africans.



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## **Textbooks as a research challenge in computational linguistics**

Nadine Lucas

Textbooks are easy to characterize intuitively, although the huge variety of textbooks makes it difficult to give all-encompassing definitions (Johnsen, 1993; Mikk, 2000; Bruillard, 2005). They are difficult to handle as a research object for discourse analysts and even more difficult to parse by computer means.

As they are devised to fulfil pedagogical needs, textbooks often rely on illustrations as well as text proper. Thus, the relationship between illustration and text has to be accounted for (Peraya & Nyssen, 1995; Reinwein, 1998). Being directed towards pupils and eliciting actual responses, textbooks also challenge text linguistics. The study of the various means for establishing relations with the readers cannot be postponed, although problems arising from the text itself are deemed difficult enough.

First, we try to characterize textbooks, notwithstanding differences according to the matter taught, by comparing them to research books and to novels. We briefly hint to a theoretical frame addressing the problem as a whole, and then shift to disposition as reflecting organization of contents. We then introduce common characteristics of explanatory texts and of didactic texts. Ways of navigation in the textbook are underlined, allowing us to stress relations between text, illustration and pedagogical material as such (questions and solutions, or further reading). We will finally open some perspectives for computer parsing of this particular type of books.

### **Textbooks compared with other books**

Textbooks raise the problem of genre in discourse analysis. By comparing textbooks across languages with other types of books such as academic books, popular scientific books and novels, a well-circumscribed group emerges. Although specific linguistic clues, embedded in lexicon or grammar, were used at some stage, they will be ignored here for the sake of clarity.

Textbooks at university undergraduate level were first studied in Japanese; later comparisons were made in two languages, French and English (Lucas *et al.*, 1993). The rule of thumb was to use second editions (to avoid *errata*), but no judgment on quality was expressed as such. The corpus covers various disciplines, mainly oceanography, mathematics, linguistics, but also geography, biology, physics and electronics. It also integrates on-line textbooks (<http://www.connectext.com/>). This small collection of some thirty textbooks was compared to research books in the same fields and also to popular science books when available. Textbooks all show the same peculiarities, as compared with other types of books.

The methodological frame for discourse analysis is based on two main complementary theories, exposition or *chinjutsu* according to Yamada and communication through text according to Jakobson. Exposition requires a distinction between the topic or theme and its development (Yamada, 1936). In written discourse contrasted elements should help co-construction of meaning. Yamada, himself a teacher, was interested in a perception and pays full attention to form ratios in language. The topic is short and has to be completed by the development. Yamada mainly studied agreement in syntax with regularly contrasted pairs or triplets. His model relies both on time and spatial disposition in a given frame.

Jakobson built a more complex system, known as enunciation – utterance, taking into account both people and contents (Jakobson, 1960, 1971). His theory includes variation of “shifters” along reference axes (time, place and protagonists). In an obvious over simplification, Jakobson is more interested in the concentric circles of discourse in situation than in the fitting together of puzzle parts of text in any given frame. He also imagines grammar of discourse as linked with time and spatial disposition, but cares more for symmetry (or anti-symmetry) than Yamada does.

### ***Disposition***

By studying textbooks across disciplines and across languages we get a better overall view of the genre called didactic. Rhetorical distinctions prove valuable to compare textbooks with other informative texts, such as articles in science magazines (Moirand, 1999). The most striking differences in text organisation are reflected in the mapping out of their elements, in other words discourse disposition is reflected in layout.

When comparing books, the text constituents are to be seen from above, or top-down, so peripheral parts such as preface, chapters and lists are the units we start with. Textbooks are divided in many chapters and surrounded by small annexes. Splitting in a large number of units is the rule, and a course may be split in a number of volumes. Lists play an important role in textbooks. Glossaries, tables or lists of symbols convey important lexical notions, while other reminders are provided (chronological tables, conjugation tables etc...) according to the matter taught. This is obviously different from fiction books. It is even different from academic books, because in textbooks there are sequences of lists, or sequences of supplementary material, while in research peripheral material is kept to a minimum; one bibliography list and one index is the rule. Wealth of navigation tools on the other hand, is shared with some popular science books and guides.

When getting into the text body, special chapters, for instance introduction and conclusion can be isolated because they are short and not subdivided. In ordinary chapters, subdivision is going on and a large number of subunits are found. Announcement (in introduction) regularly occurs. Recapitulation is a common feature in textbooks. This function is often stressed: a special section at the end of chapters is set apart, or a special chapter at the end of a part or of a book is set apart, with this explicit objective. Distant co-reference links are underlined.

Then when delving into the chapters, special layout components are conspicuous, such as figures, plates, tables, lists. In textbooks, illustration is pregnant, but this is not distinctive against popular science books. Exercises are often provided. Interaction with the reader is necessary, as it is in novels. Reading fiction is a recreational activity arousing interest and involvement and textbooks authors rely on some literary tricks to favour implication from the reader. Finally, and although this is not a compulsory feature in every textbook, exercises are a typical constituent of textbooks. Exercises may be seen as the canonical form of explicit interaction in textbooks, but different means may be used, such as outright questions (with or without answers), pedagogical hints in imperative mood (e.g. *compare with chapter 2; see also...*), or lists of important items to be memorised.

Science books do not show such devices, and of course, novels do not explicitly ask intellectual efforts from the reader. In fiction, moreover, the book is seldom chunked in short parts and sections.

Disposition in textbooks is very regular. It reflects very well the many differences that distinguish a textbook from a research book or from an affordable science book or a guide. Three examples are sketched to show common structure (n° 6, 24 and 16 in corpus list).

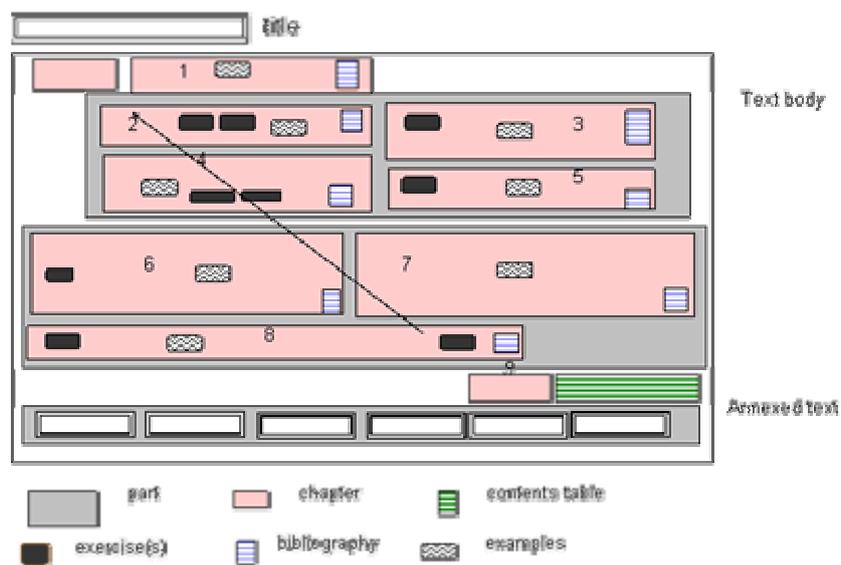


Figure 1. Disposition in *Initiation à la linguistique (Introduction to linguistics)*

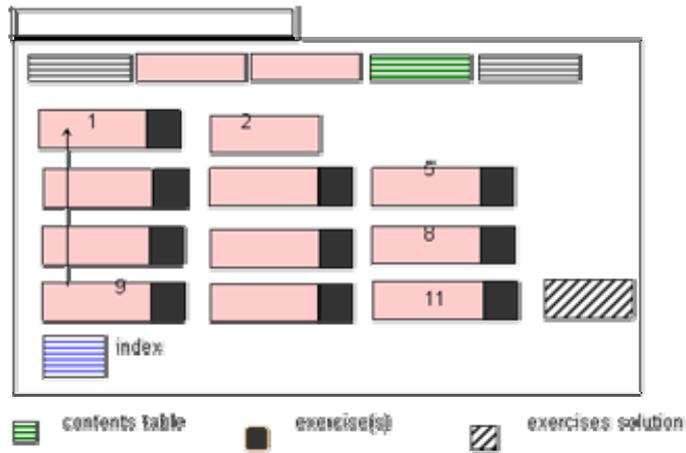


Figure 2. Disposition in Kairo giron kiso (Basic electronics)

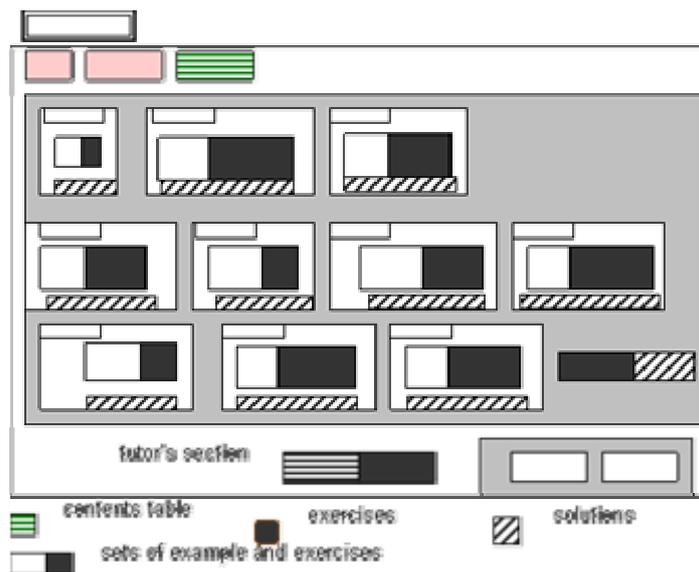


Figure 3. Disposition in A Refresher in basic maths

### Textbooks at the core of the didactic genre

Textbooks are divided and subdivided many times. Text is accompanied by illustration, and interaction with the reader is arranged. Main characteristics of textbooks are discussed below.

### ***Explanatory texts***

Textbooks are expository texts (Jones, 1977), but this is also the case for academic science books as well as for popular science. Exposition in a more technical sense according to Yamada can be opposed to argumentation and explanation in that exposition requires explicit stress on what is to be discussed, while argumentation requires minimal framing. Explanation requires extra determination. As a means of comparison of structure within the sentence boundary, a sentence such as 1) would be expository, while 2) would be argumentative and 3) explanative.

1. *Of the various types of regulations considered, the easiest to enforce would be a minimum legal landing size, checks being carried out at ports or processing factories.*
2. *Scallop legislation in the Isle of Man has a complicated history.*
3. *With an animal such as the queen, with a rapid early growth rate and a short life span (and therefore a high mortality), the best fishing strategy appears to be the one at present applied, namely to fish the stock hard while they are there and before they die from other causes such as heavy predation from starfish.*

Textbooks are generally based on the explanation scheme. Explanatory texts are characterised by a relatively detailed statement (definition of the topic to be explained) and a long well constructed development. This long development is recursively embedded, that is to say a part is subdivided in chapters themselves subdivided in a number of sections each dealing with a specific subtopic. Some of these sections are further subdivided. The hierarchy of headings gives a good insight of the overall structure of the text. Contents tables tend to be detailed in textbooks for that reason.

Besides knowledge (hard facts or notions), a textbook also conveys methods and technical guidance. Among the many pedagogical means used to convey knowledge and know-how, comparison through quasi-duplication is very common. For instance, in a biology book (4 in corpus list), two photographs are shown side by side for the same phenomenon. One is plain, the other is marked by arrows. High lightening is repeated through chapters.

### ***Involvement and practise***

Moreover, textbooks constitute a link between teacher and pupil, but also between class and author. This complex communicational status can be studied in Jakobson's theoretical frame. Explanation is either repeated or reformulated in a different way. In the canonical textbook, exercises are provided on the same topic than the chapter, with a solved exercise then a new one (or a series) without solution. In that respect, the chapter structure fits with both theoretical models. In Yamada's view, a chapter ending with some incomplete form (with a question or unsolved problem) signals that the main discourse at book level is not yet concluded. In Jakobson's model,

renewal of interaction is seen with the same protagonists (the author via the proposed problem and the reader who is to solve it).

Dislocation of some parts or elements plays an important role. Typically, the solutions to problems have to be found at some distant place or guessed. This is a kind of suspense, favouring involvement, like in some works of fiction.

A very important characteristic of textbooks is that illustration and examples are carefully introduced, and that text progression is coupled with illustration (Mayer, 1997; Sadoski & Paivio, 2001). There is constant reinforcement between the two systems. This does not mean that constant bijection holds between a given text span and an individual illustration, but rather that distribution and order in each set are complementary. Text and illustration should be thought as two modalities for the same message. Illustration should be taken in a broad sense, because in some disciplines textual material may be used as illustration. Text excerpts in history, examples in linguistics are typical illustrative material, distinguished by layout. In mathematics or physics, formulae are half way between text and illustration. Systematic reinforcement of the two systems is not found in research books or articles, where comment is often skipped if illustration is self-explaining or conversely illustration is skipped when deemed redundant with text (sometimes there is a mention *data not shown*).

### ***Two levels of reading***

A third characteristic is that textbooks provide two coherent levels of reading (at least). Didactic texts need to be devised for reading and browsing. Ordinary chronological reading should be possible, but also “navigation” should be possible for rehearsing special topics. This entails special disposition, such as each part should be independent, yet obviously fitting in the whole and providing a sense of progression in learning. A very clear organisation is needed. Most textbooks provide double entry. The extensive use of lists, used as a quick way to navigate in the book, has already been mentioned, along with the habit of providing recapitulation sections, fulfilling the need to measure progress. The expository structure allows announcement of the contents inside the chapters for special reference on a given topic. Some chapters begin with warnings, or reminders, about the notions that should be mastered before further study.

**Long-term memory and global structure** Pedagogical needs are driving the disposition and layout of textbooks, but language dependent discourse laws also apply. Since it would be difficult to understand what is of primary importance and what is secondary, if patterns were merely repeated for all ranks in a hierarchy, saliency principles help keep the global structure in mind.

Thus, exercises, when generally present, are missing at some point. On figure 1, chapter 7 has no exercise, which is congruent with expository structure in French, marked near the end (by absence of a feature the reader has been used to), whereas on figure 2 chapter 2 has no exercise, which again is congruent with expository

structure in Japanese, where the thematic segment should be incomplete. The exercises segments thus play a discursive function that can be played by segments with a different content. In example 3, the tutor's section gives extra exercises and test without solutions. In this book, solutions behave as a mark for saliency, they are noticeably absent at one point. In other examples, this role is devoted to elements of recapitulation or more general reflection on the matter taught.

The overall expository structure is also reminded in the last chapters, which are linked to the beginning by far-flung co-reference links, either on illustration or text, and often both. Links are represented on the figures by arrows. In parallel, the end (last chapter, sometimes the appendix) is signalled by mood, re-enacting personal communication through direct address, injunction, encouraging remarks, humour.

**Rhythm and local structure** When studying disposition in more detail, position of exercises and illustration inside chapter and sections appear to be very important. Heritage principles govern disposition in subordinated segments, so that unity in organisation prevails. Local salience is created through rhythm and break of rhythm. Rhythm stems from repeated patterns. Usually, one set of text constituents is constant and one set undergoes variations.

Among many possible strategies, example 1 illustrates a wide variety of exercises, at different places and ranks throughout the chapters. One is found in each chapter (with one exception in chapter 7 already commented) but the last chapter before conclusion begins and ends with problems. This is an unusual position, and the choice is commented in the text — telling the student he is now able to solve problems by himself, and even to ask himself questions without being guided. Example 2 illustrates the choice of regularity in position and form of exercises in each chapter (except the second one). The local variation in form is to be seen in titles and illustrations, with chapter 9 being an exception. In example 3, built on the list principle, all chapters provide sets of subunits consisting of one example plus exercises, and all end with solutions. This uniformity in sequence is broken only when an achievement test is provided at the end of the student's section, with no example, a set of problems and their solutions, followed by ratings and assorted comments.

In textbooks without exercises, rhythm is created through repetitive patterns playing the same function of constants and variables. One has to find the odd element in a series. As an example, in a geography book (2 in list), chapters are introduced by a portrait of a leader, except the first one, which gives the status of saliency mark to the portrait. The last portrait breaks local uniformity rules: it depicts an imaginary character, metaphorically related to the content of this chapter, the future of the region.

The guidance function, on the other hand, is played in many instances by insertion of reflection passages usually stressing difficult points and finally the need for autonomy.

### *Some differences between textbooks*

Self-contained books or differentiated books are two ways of enacting interaction with readers supposed to share a classroom situation. Some textbooks provide exercises and their solutions, so students can use them independently (examples cited are of that type). Others provide solutions in a separate part (teacher's book), thus the role of the teacher as a mediator is stressed. Complete divergence appears when solutions are in a separate volume available at special conditions (20-21 in list). In the latter type, the role of the teacher as authority is stressed. These orientations are reflected in the overall disposition of the book.

Electronic textbooks and paper books are also somewhat different. In electronic books, pedagogical strategies are emerging and still evolving. Illustration tends to be richer and bigger in size (see *Mathworld* 30 in corpus list). As for co-reference, links are provided for navigation, but a click can bring the student to the next section or to a very distant one: the overall disposition of the book is somehow lost. Consequently, one benefit of carefully laid classic textbooks, training memory and favouring long-range links over short ones, might be more difficult to obtain with electronic books. But site maps can provide extra means to visualise hierarchy of topics (see *Global problems* 28 in corpus list).

Other books with similar structure are found. Most popular science books share the same principles than textbooks, they provide explanations, they use illustration, stress saliency and local order, but few fall in the didactic category, unless they provide training (31 in list is one of these). Self-help guides are didactic and very close to textbooks.

Since we studied textbooks at university level, the complexity of structure is higher than in school or college books. The network of reference is elaborate. Textbooks prepare students for the task of reading academic literature that is even more elaborate and elliptic.

### **Method problems in computational linguistics**

Scale problems are very important in computational linguistics. An overwhelming majority of computational studies at text level rely on lexicon only. The layout of documents is discarded. Consequently, differences between research books and textbooks within a given domain will not appear. Interest is focussed on text alone, and relation between illustration and text proper is not accounted for (Feiner & McKeown, 1990 are an exception). Last, most semantic analyses are conducted at sentence level (see for example Prince, 1999 on explanations).

Work is in progress in our laboratory to try and overcome these limitations, following the stylistics track (Karlgrén, 2000, 2003). Electronic textbooks were used for preliminary tests to assess technical difficulties. In order to conduct computational parsing of such books, new tools have been elaborated. A special document template description (DTD) is defined for textbooks, allowing for

illustration in a broad sense. The main difficulty in the technical field is to allow for complex hierarchies, that is not-recursive hierarchies. This is necessary to handle different “grains”, mainly to account for relative autonomy of chapters or sections within a book, while keeping track of overall progression, which is computed at a higher grain.

The correct retrieval of text structure is the first task. Then the retrieval of special textual objects (e.g. blocks of exercises or contents table) has to be achieved. Human readers are guided by meaning, while computer handling is blind and uses layout differences and similarities to start from. The yet tentative overall algorithm takes advantage of stylistic constraints, backed by the hypothesis that in didactic books the two theoretical models we used do converge.

However, these models do not converge at all levels of segmentation. Interpretation of indices (or accuracy of interpretation) depends on the choice of unit. Consider for example the fact that the collection of books on physics (10-14 in corpus list) is sequentially ordered in a series, with the training part at the end, exactly like chapters in a book. This is a structural similarity that is hard to detect through usual computation techniques. Textual objects are considered relevant if they can be handled as ordered elements in series and can be compared with the same metrics, with relative measure units.

As mentioned earlier, positions of text marks vary according to language and culture, but also according to complexity of the book (related to grade) and to personal style of authors. Further research is to be conducted to order variables and for instance to find whether detection of personal style or detection of collective style should be conducted first.

## **Conclusion**

Textbooks are representative of the didactic genre, which cross languages and epochs. This genre is based on explanation but also aims at active implication from the reader. It implies a very careful organisation and layout, in order to guide the reader and provide room for interaction. Exercises are the canonical form of interaction.

Due to the many constraints of clear explanation and sufficiently detailed information on each topic, textbooks share many common features. Clear segmentation allows parallel progression between illustration discourse and text discourse. Overall progression through the book is marked by explicit checkpoints.

Although textbooks are highly constrained, they still differ widely according to matter and grade, not to mention culture. Thus, they stand as an exciting research challenge in computational linguistics, where only some bases have been tentatively established.

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# **Intersectionality - A Theoretical Inspiration in the Analysis of Minority Cultures and Identities in Textbooks**

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In recent years the concept of intersectionality has emerged in feminist studies in the Nordic countries. Intersectionality implies more than gender research, more than studying differences between women and men, and more than diversities within women's groups or within men's groups. Intersectionality tries to catch the relationships between socio-cultural categories and identities. Ethnicity is combined with gender to reflect the complexity of intersectionality between national, new national background and womanhood/manhood: What happens when for example the Norwegian, Norwegian-Turkish and female categories and identities intertwine? How do the male category and masculine identities emerge with Iraqi and Norwegian categories and identities? Intersectionality focuses on diverse and marginalized positions. Gender, race, ethnicity, disability, sexuality, class and nationality are categories that may enhance the complexity of intersectionality, and point towards identities in transition.

This article presents approaches to intersectionality in theoretical debates and in using the concepts in the analysis of minority cultures and identities. The debate about additive and transversal intersectionality is presented, and is expanded with the complexity of intersectionality. Connected to the concept of intersectionality is the question of power, inspired by Michel Foucault. Power is introduced as procedures of exclusion and inclusion. The use of intersectionality in textbook analysis is presented in the light of textbooks being special or specialized; and normalization, homogenization and classification are introduced as concepts to encircle the "conditions" of textbooks in handling complexity. To illustrate possible uses of intersectionality in textbook analysis, the Sámi in Norwegian textbooks are drawn attention to. One Norwegian textbook is chosen, because the textbook presents various representations of categories, identities and power in function.

## **The concept of intersectionality**

Intersectionality may be defined as a theory to analyse how social and cultural categories intertwine. The relationships between gender, race, ethnicity, disability, sexuality, class and nationality are examined. The word intersection means that one line cuts through another line, and can be used about streets crossing each other. From the very beginning intersectionality was introduced as intersection in the American sense of the word to denote ways in which people of colour cross gender (Crenshaw, 1989). American researchers criticized the gender-based research for producing diversity in gender but homogenized race. In feminist studies women and

men were analysed as different and heterogeneous across and within the female and male categories. However, when it came to the question of race, the race-based critics argued that women and men were all white and all of the same Western race (Crenshaw, *op.cit.*; McCall, 2005). In the American concept of intersectionality the focus was on race and gender. Since the studies concentrated on the poor and marginalized coloured population, the class dimension was often implied in the theoretical reflections and analysis (Crenshaw, 1995). Disability and sexualities have also been integrated in the theory of intersectionality (Meyer, 2002; Lykke, 2005).

The concept of intersectionality occurred as an interplay between Black Feminism, feminist theory and post-colonial theory in the late 1990ies and the beginning of the third millenium. However, the reflection of interaction between several categories may be followed in feminist theories from the 1970ies like feminism and socialism, post-colonial feminism, queer-feminism (Lykke, *op.cit.*; Yuval-Davis, 2005).<sup>1</sup> These theories concentrate like intersectionality on socio-cultural power orders. The theory of intersection is focusing on how power can be constructed through amalgamation of male/female, black/white, Turkish/Norwegian, hetero-/homosexual etc. For example, the theory inspires to examine, how the intersection of becoming a female single living teacher of colour in Norway may influence the position in the periphery of university power.<sup>2</sup> Intersectionality is used to analyse the production of power and processes between gender, race, ethnicity etc., and is involved with analysing social and cultural hierarchies within different discourses and institutions (Yuval-Davis, *op.cit.*; Lykke, *op.cit.*). Rather than looking at the majority culture, the theory of intersection reflects the minority culture:

The concept can be a useful analytical tool in tracing how certain people seem to get positioned as not only different but also troublesome and, in some instances, marginalized. (Staunæs, 2003a, 101)

Intersectionality points towards the critical view on becoming “the other” in a normative setting within a general Western culture or more locally within a schoolyard in Copenhagen, Denmark in the year 1999/2000. In her analysis of students in secondary school, Dorthe Staunæs presents Wahid in 9<sup>th</sup> grade with bright red pants, bracelets and bleached hair. She is introduced to Wahid by other students who look at him as different from them (Staunæs, 2003b). Wahid is the vehicle of “otherness” in a local context and situation where he becomes troublesome to the “normal” students. The concept “troublesome” refers to people who makes it problematic to construct normalization, and who do not fit into the conception of for example a friendly Danish schoolyard or a peaceful nation and society. Such students or people are marginalized by the majority culture.

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<sup>1</sup> The concept of queer refers to theory of sexualities, troubling the heterosexuality. Queer may be translated with awry, strange and suspicious (Knudsen, 2004a).

<sup>2</sup> The example is given with references to theory and analytical examples by Hooks 2003, Mørck 1998, Søndergaard 1996, Collins *et al.* 2000.

The theory of intersectionality stresses complexity. However, not all categories are necessarily mentioned. Whether gender, race, ethnicity, sexuality, class, disability, nationality or other categories are integrated differ, and what is important and to whom is an ongoing discussion between researchers (Borgström, 2005; Yuval-Davis, *op.cit.*; Mc Call, *op.cit.*). Most of the researchers are aware of gender, race and/or ethnicity. Afro-American feminist researchers stress the race and gender categories and identities, thus using them to emphasize sexism and racism involved in American societies (Crenshaw, *op.cit.*; Mc Call, *op.cit.*). In the Nordic countries gender and ethnicity have been included in the concept of intersectionality (Mørck, 2003; Staunæs, *op.cit.*; Haavind 2003). Especially among feminist researchers in America, the intersection of queer sexuality and disability has been stressed. In the book *Extraordinary Bodies*, the intersection of disability, gender and sexuality is used to focus on the marginalized female disabled bodies (Thomson, 1997). So far intersectionality has been used to reflect the constructions of gender, ethnicity and sexuality in the Nordic countries. Disability is still rare in the theory of intersectionality, and class is an even more invisible category in today's Nordic use of intersection.

### **Additive and transversal intersectionality**

When the concept of intersectionality was introduced as a matter of blindness in feminist theory, the blindness was reflected in theories of race and ethnicity to open up for diverse entrances to race, ethnicity and gender. It was not enough to present a theory to incorporate diversity among people of colour. The theory had to adopt the diversity among women of colour. However, the avant-garde to introduce and use intersectionality were first of all interested in the ways race and racially discrimination interacted with gender:

In an earlier article, I used the concept of intersectionality to denote the various ways in which race and gender interact to shape the multiple dimensions of black women's employment experiences. (Crenshaw, *op.cit.*, 358).

Theories of race, ethnicity and gender gradually added theories of sexuality, disability etc. However, rather than discussing the variations of categories, the ongoing debate is how to use intersectionality in a wider sense than additive:

Additive intersectionality means that both the subject formations based on gender, race, ethnicity, sexuality, etc., and the orders of power that create them, are analysed as separated structures and limited units which do interact, but not intra-act. (Lykke, *op.cit.*, 9, my translation).

The additive perspective is turned into a problem, because any category may be considered as the most significant one. Using the metaphor of the cross-road the ethnicity may be chosen in favour of gender as the one road chosen, while the other road is left behind (Lykke, *op.cit.*; Yuval-Davis, *op.cit.*). Another problem is that the categories may be treated as "competing intersectionality", where categories are

valued in a hierarchy as was the case in the 1970ies debate on whether class was more significant than gender (Lykke, *op.cit.*, 10, my translation). Furthermore, categories may be reflected as pearls on a string without taking the mutual processes in of the construction of categories and identities seriously.

The word “inter-action” may be associated with assembling separated categories (Lykke, *op.cit.* with reference to Barad, 2003). The categories could be seen as overlapping but they did not create “transversal perspective” (Yuval-Davis, 1997, 130). Instead “intra-section” has been suggested as a catchword to be aware of how the categories intertwine, pervade and transform each other (Lykke, *op.cit.*). With transversal perspective the theory of intersectionality inspires to raise questions like these: “How is ethnicity gendered and how are masculinity and femininity ethnicized and racialized?” (Mørch and Staunæs, 2003).

The additive and transversal perspectives on intersectionality may also be interpreted as the taken point of view. In my view the additive perspective stresses the socio-cultural categories and thus emphasizes the repression of black women, Turkish women in Norway etc. as different from white women, white Norwegian women etc. The socio-cultural category of gender is added to the socio-cultural categories of race and ethnicity. The categories are connected to something “out there” in the society or in the nation. But when it comes to identities, they are connected to individuals, groups and collective narratives telling how we represent and construct our selves. Identities deal with positions that the individuals may be placed inside, interpreted as belonging to and negotiated with (Hall, 1990; Gergen 1991; Søndergaard, *op.cit.*). For example, a Turkish woman in the capital of Norway may negotiate transverse ways of making “turkishness”, “mothering”, “citizenness” and “nationality”. The different use of additive and transversal intersectionality may be seen as a matter of operating with categories or identities as analytical tools, or connected to the disciplinary and academic background of the researchers. Mainly, the focus on social and cultural categories is adduced by sociologists, whereas the awareness of identities is presented by psychologists and anthropologists (Mc Call, *op.cit.*). In order to make the field of the different uses of intersectionality a bit more complex, many researchers inspired by intersectionality are working interdisciplinary.

The interdisciplinarity in using the concept of intersectionality may be read in most of the theoretical reflections and the feminist research done in the Nordic countries. Furthermore, the influence of the post-structuralism of the 1990ies is remarkable among the adoption of the concept of intersectionality in the Nordic countries. The influence of post-structuralism in reflecting transversal perspectives on intersectionality is approached in different ways. First of all the theory of intersectionality is introduced to deconstruct and destabilize the universalism of gender and ethnicity. Gender and ethnicity may be interpreted as constructed categories and positions, but they may never be taken for granted as categories (Knudsen, 2005; Stormhøj, 2006). In post-structuralism categories and binaries like woman/man, black/white, Turkish/Norwegian etc. are to be deconstructed and

destabilized. Secondly post-structuralism does not operate with manifest and immanent levels. This is a theory that belongs to structuralism, where the theory operates with analysing in-depth and reducing meaning to a-historical concepts like nature versus culture, and femininity versus masculinity (Knudsen, 2002). In the theory of intersectionality it is difficult to distinguish the levels of analyses. Categories, subject formations, positions and identities are mixed together in most of the theory presented.

In my view the relationships between socio-cultural categories and identities open up to a transversal perspective. Rather than making hierarchies of categories and identities, intersectionality, as the concept is being used in the Nordic countries, takes the different perspectives connected to power in discourses into consideration, power in specific contexts and situations, and power in processes (Søndergaard, 2005; Staunæs 2003b, *op.cit.*). Thirdly the concept of intersectionality has turned towards the transversal perspective as a matter of troubling gender, sexuality, ethnicity, disability, nationality etc. The great influence from Judith Butler's concept "gender trouble" in the Nordic countries should not be underestimated (Butler, 1990). When gender makes trouble, the heterosexuality is problematised, and vice versa. Similarly it may be claimed with ethnicity: When ethnicity makes trouble, gender and heterosexuality are problematised.

### **The complexity of intersectionality**

To catch the complexity implied in intersectionality, the American sociologist Leslie Mc Call operates with three approaches: the anticategorical complexity, the intracategorical complexity and the intercategory complexity (Mc Call, *op.cit.*). She defines intersectionality as "the relationships among multiple dimensions and modalities of social relations and subject formations" (*op.cit.*, 1771). The anticategorical complexity is connected to feminist post-structuralism and deconstruction. This complexity "rejects" or destabilizes race, class, sexuality and gender.<sup>3</sup> Constructions and deconstructions of categories is a matter of language:

The primary philosophical consequence of this approach has been to render the use of categories suspect because they have no foundation in reality: language (in the broader social or discursive sense) creates categorical reality rather than the other way around. (*op.cit.*, 1777).

According to Mc Call this approach analyses power and knowledge with mechanisms of exclusion and inclusion. The anticategorical complexity may operate

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<sup>3</sup> Mc Call writes that the anticategorical complexity "rejects categories" (Mc Call, *op.cit.*, 1773). I understand post-structuralism with deconstruction as a matter of destabilizing categories.

with several genders, sexes, sexualities and multiracialism to avoid fixed and normative structures and subjects.<sup>4</sup>

The intracategorical complexity is connected to feminists of colour, and Mc Call places this approach between the anticategorical and intercategory approaches. The intracategorical approach is adopted to examine crossing categories and identities, and may focus “on particular social groups at neglected points of intersection” (*op.cit.*, 1774 with reference to Dill, 2002, 5). The researchers are critical to the general use of categories, but use categories in-depth studies: “... critical of broad and sweeping acts of categorization rather than as critical of categorization per se.” (*op.cit.*, 1779). This approach is connected to the very beginning of using the concept of intersectionality, and Kimberlé Crenshaw is in a note positioned as one of the spokeswomen:

Crenshaw writes for example, “Recognizing that identity politics takes place at the site of where categories intersect thus seems more fruitful than challenging the possibility of talking about categories at all” (*op.cit.*, 1779, note 12 with references to Crenshaw, 1991, 337).

Crenshaw uses for example violence towards women of colour as an intersection of racism and sexism. According to Mc Call, the approach is oriented towards qualitative analysis of social location.<sup>5</sup>

Mc Call places her own research in the intercategory complexity. This approach builds on quantitative rather than qualitative methods, where the two other approaches are qualitatively oriented. The intercategory complexity uses categories “strategically”, and may be named “the categorical approach” (*op.cit.*, 1773, 1784). The approach studies structural relationships in many social groups, and not within single groups or single categories:

The categorical approach focuses on the complexity of relationships among multiple social groups within and across analytical categories and not on complexities within single social groups, single categories, or both. The subject is multi-group, and the method is systematically comparative. (*op.cit.*, 1786).

With the intracategorical or categorical complexity Mc Call seems to open for a closer connection between quantitative and qualitative analyses. As she points out: If gender is analysed, one can compare two groups only. If the categories of working, middle and upper classes are connected to gender, there will be six groups to analyse. With race another two groups are incorporated, and twelve groups are to be compared. If ethnicity is added with “Cubans, Mexicans, and Puerto Ricans”, the

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<sup>4</sup> Researchers come from sociology, psychology, anthropology, pedagogy, literature and media. Many of the researchers are working interdisciplinary.

<sup>5</sup> According to Mc Call the researchers mainly come from social science and anthropology, but as I see it, the researchers may also have their background in cultural studies, social psychology and pedagogy.

comparison would rise to multi-group studies, and would be of such dimensions that the analysis has to exclude other categories “such as gender or class” (*op.cit.*, 1786).

### **Power: exclusion and inclusion**

The focus on power in theory of intersectionality may be connected to mechanisms of exclusion and inclusion in the Foucauldian sense of power (McCall, *op.cit.*; Lykke, *op.cit.*). Power is not only a matter of suppression. Rather power may be defined as productive and positive (Flyvbjerg, 1992/2003; Heede, 2000). Closely related to power is the commitment to knowledge and truth. In every discourse there are arguments and negotiations about knowledge and truth. However, in Michel Foucault’s use of the concept ‘discourse’, the orders of power are in the foreground rather than the subjects. Power functions in discourses and in networks between discourses, as well as power and power relations are always in progress (Foucault, 1980). The Foucauldian use of the concept of power and power relations involves both exclusion and inclusion. With the concepts of exclusion and inclusion power may be analysed as continually moving. Rather than viewing exclusion barely as a matter of suppression, exclusion involves discourses of opposition and productive power with negotiations about the meaning of gender, race, ethnicity etc. In the educational discourse the negotiation about for instance definitions of knowledge is an ongoing process with procedures of ex- and including gender, race, ethnicity etc. However, rather than concentrating on what power may contain, the inspirations from Foucault turns towards how power procedures function in the educational discourse.

In his inaugural lecture “L’ordre du Discours” (The order of discourses), Foucault presents procedures of exclusion, internal procedures and a “third group of procedures” (Foucault, 1999, 22, my translation). The procedures of exclusion classify and arrange the production of discourses. Foucault finds the most obvious procedure of exclusion in prohibition. Prohibition is an interaction of things that should be and should not be talked about. In his study of the History of sexuality for example, Foucault shows the ways other sexualities than the heterosexuality are excluded from the language, marginalized in writings and brought into language (Foucault, 1978). Foucault’s study of exclusion of sexualities may for example lead to an analysis of how homosexuality is treated in a Danish schoolyard with Wahid as mentioned earlier, or it may inspire discussions on how textbooks exclude other family forms and sexualities than the nuclear family in a heterosexual discourse (Knudsen, 2006, in print). Other procedures of exclusion mentioned by Foucault are the contrasts between sense and madness, and true versus false. The exclusion of madness in the educational discourse and textbooks may be questioned: In what ways are the educational discourse and textbooks oriented towards the healthy, unproblematic and sensible life rather than towards the problems of living? When it comes to the aspect of truth, the textbooks may be seen in the light of stressing “the will to pursue knowledge” intertwined with “the will to pursue truth” (Foucault, *op.cit.*, 11-12, my translation). Without doubt, the truth is in the foreground of what

the educational discourses in textbooks and other educational settings make available for the students. But how is the truth made available? How does the truth exclude for example awareness of gender, race, ethnicity etc.?

The internal procedures and Foucault's third groups may be regarded as procedures of inclusion. Among the many principles mentioned under these procedures, the thinning seems to be useful in the perspective of the theory of intersectionality. Thinning concentrates on how internal procedures include narratives that are told over and over again, and in the process of telling thin out information similar to trees in a wood that are cut down to strengthen the remaining trees. Similarly, in textbooks the information is reduced to strengthen the message to the students. In History textbooks for example the same story about kings and wars strengthen the inclusion of fighting males, while motherhood, weak masculinity and anti-militarism are excluded. It is also important to have the principle of control through the disciplines in mind while analysing textbooks and intersectionality – whether defined as curriculum subjects in a school-context or as branches related to professions. The disciplines as curriculum subjects define core topics, methods used, argumentations, definitions and techniques. In for example mother-tongue, the national category may be seen as included to control or to avoid the awareness of class, race and disability.

So far the approaches to intersectionality have mostly been used in qualitative field studies. The theoretical inspiration has developed the complexity of analyses from observations, interviews and questionnaires. Violence against women of colour has been observed in battered women's shelters (Crenshaw, *op.cit.*). Marginalized masculinities and ethnicities have been examined in classrooms and schoolyards (Mørch, *op.cit.*; Staunæs, *op.cit.*). However, I believe these approaches will be useful in textbook research. Although there will be a focus on the qualitative textbook analyses in the following, I think the quantitative comparative approach may be a valuable inspiration to an increasing awareness of textbooks' marginalization of minority cultures. With the qualitative approaches I am inspired to use as well additive as transversal intersectionality, and to take inspirations from both the anticategorical and intracategorical complexity as defined by Mc Call.

### **Textbooks and intersectionality**

Textbooks contain special and specialized texts. They are special because of the educational discourse in which they are weaved. Researchers in the field of textbooks have labelled texts in textbooks as "primary educational" if they were written with the purpose of teaching and learning in school; whereas "secondary educational texts" have other purposes than teaching and learning, but contribute to textbooks in order to be used in schools (Skyum-Nielsen, 1995, 172). However, both the primary and secondary educational texts have been exposed to selection, and the secondary texts have changed contexts. The processes of selections and changing contexts result in specialized texts; texts that are transformed into a special sort of school language, often closely connected to the National Curriculum and adapted to

different age groups. Furthermore, the textbooks are divided into curriculum subjects, thus being specialized in mother-tongue, foreign languages, natural science and environmental studies, social studies etc.

Inscribed in textbooks are the model-student or the “pupilness” category (Staunæs, 2003a, 104). Pupilness may be characterized by a rather neutral presentation with a third person narrator. The neutral presentation concentrates on creating the educational texts with “techniques of normalization, homogenization and classification” (Nassem, 2006, 2). I see normalization as a case of intertwining for example nationality and pupilness, and may be followed by inclusion of the middle class, white race and healthy child. On the other hand this kind of presentation excludes other classes but one, other races but the white and disabled children. When normalization incorporates a showing of enlightenment and truth telling, they are often unspoken or written between the lines. However, the power of enlightenment and truth are constructions that imply hierarchies where nationality and pupilness may be at stake at the expense of gender, race, ethnicity etc. The categories may also be told in an implicit hierarchy with nationality in the first row, then pupilness, followed by gender etc. Also in the case of homogenization the pupilness is inscribed in the textbooks. The pupilness may be told as a matter of for example neutrality of race, ethnicity and nationality. However, as feminist researchers have pointed out, the gender neutrality points towards the male gender as the genderless gender, whereas mentioning gender is similar to stress the female gender (Ronkainen, 2001; Knudsen, 2004b). The same awareness may be raised to race, ethnicity, sexuality and nationality. For example the raceless race means white people, and the sexless sexuality implies heterosexuality.

If gender is mentioned as an issue, the classification comes into focus as a matter of two genders; male and female. This classification means that the two genders are considered opposite. The textbooks would then typically operate with “girlness” and femininity in contrast to “boyness” and masculinity.<sup>6</sup> When equality between female and male, Turkish-Norwegian and Norwegian is stressed, the textbooks choose to connect classification with either homogenization – we are all the same – or heterogenization – we are different, but the differences are the natural way of joining the friendly Nordic welfare states. The critical point is that both homo- and heterogenization exclude the diversities within and across for example gender and ethnicity, and fail to catch the socio-cultural changes of today post-modern societies. Nationality, pupilness, gender, race, ethnicity and sexuality are categories in transition, and identity may not be spoken of in singular. In the post-modern societies, the concept of identity is unsteady, inconsistent and seems to live in the plural as identities (Hall, *op.cit.*; Gergen, *op.cit.*). As Nina Lykke writes, the raise of intersectionality belongs to today's development of social and cultural changes, and incorporates changing identities:

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<sup>6</sup> The words “girlness” and “boyness” are my constructions in gendering “pupilness”.

More precisely I am of the opinion that the concept of intersectionality belongs to how people of today identify and negotiate their positions in relation to categories as gender, ethnicity, race etc. What does this mean? As a part of the actual intra-playing global and local, social, economical, technological and cultural changes, the discursive and institutional foundations of forming identities and the creation of subjects, once seen as quite stable, are falling apart. (Lykke, *op.cit*, 14, my translation).

Textbooks may of course have difficulties in handling the complexity of intersectionality and the constant changes within categories and identities. Firstly textbooks are too “small” in the sense that they have to reduce the narratives into a few stories. But with the awareness of power and power relations according to the Foucauldian definitions, we may be aware of procedures of ex- and inclusion. Secondly textbooks are a-historical when it comes to cover the present time.

### **The Sámi in Norwegian textbooks**

Historically the Sámi are nomads and considered an ethnic minority in the Northern part of Norway, Sweden, Finland; and the Kola Peninsula in Russia. They are accepted as the aboriginals in the Nordic countries. In Norway they are included in political economy and general politics. They also have their own regional parliament (“sameting”) which handles administration and political questions of Sámi importance. In the Norwegian textbooks the Sámi are explicitly mentioned as Sámi education constitutes a specific chapter in the Norwegian National Curriculum of 1997.

In *Samfunnskunnskap 9* (Social studies, 9<sup>th</sup> grade), the Sámi are presented in one chapter out of five as “The Sámi – a people of four countries” (Blom *et al.*, 1998). In another Social studies textbook, also 9<sup>th</sup> grade, the Sámi are described as an ethnic group crossing countries, and the Norwegian ambivalence towards the Sámi is discussed (Mikkelsen *et al.*, 1998). The Sámi are present in textbooks for the subject curriculum Social studies and nature and environmental studies in 4<sup>th</sup> grade and the curriculum subject Social studies in 6<sup>th</sup> grade (Hebæk *et al.*, 1999; Båslund *et al.*, 1998). The History of the Sámi is told in textbooks 8<sup>th</sup> and 10<sup>th</sup> grades (Lund, 1997; Lund and Indresøvd, 1999). In religion and life philosophies, the Sámi are discussed in relation to Christianity, animism and racism (Gilje and Gjefsen, 1997; Holth *et al.*, 1998). To move a little deeper into the use of intersectionality in analysing the Sámi in a Norwegian textbook, I have chosen *Fra Saga til CD* (From Saga to CD, Jensen and Lien, 1998).

*Fra Saga til CD* is written for Norwegian for the 9<sup>th</sup> grade, and is an introduction to literary History in six chapters. The last chapter is about the Sámi people and culture. The chapter is arranged in sections with the following succession: the settlement, the history, the colonization of the Sámi land, religion and finally the Sámi literature and some Sámi authors. The content of this chapter is presented in similar ways as the contents of Social studies, geography, History and Christian

studies with religion and life philosophies contrasting the subject matter in Norwegian literature. In the textbook the Sámi is created in an interdisciplinary context that opens up for several socio-cultural categories and identities. In the presentation of the Norwegian literature and literary History, the history of independence in building the Norwegian nation is central. The Norwegian authors' political commitment is also mentioned. However, the main focus is on the literary History and the biographies of the authors.

The arrangement of the Sámi seems to create an inclusion in the exclusion. They are included as the last part of the book, and this signals that they are different than the Norwegians. The Sámi are so different that it is necessary that they are discussed from more perspectives than the Norwegians, and in an interdisciplinary concept that excludes them from the canonized literature. The Sámi have 'only' their oral stories, folk tales and "joik" in addition to "some Sámi authors" (*op.cit.*, 226, my translation).

Looking at the students' tasks, the textbook is an enlightening project. The Norwegian students have to figure out, where the Sámi have their territories and what yearly income they may have. The pupilness is constructed as an ignorance of the Sámi, the Sámi land and the Sámi History. This construction points toward the Norwegian pupilness. At the same time there is a project of morals in the pupilness, offering a bad conscience to the Norwegians who for ages have colonized, persecuted and forbidden the traditions of the Sámi people. The bad conscience is in my interpretation underscored by the headings "Colonization of Sámi land", "Compulsive Christianity" and a story about the ways "The missionaries conceived all joik as heathen, banned the joik, and punished those who "joiked". At least two identities are at stake in the pupilness, namely the identity of education in the enlightenment project and the ethnic Norwegian identity in the project of morality.

The story that is told about the Sámi in the textbook is mainly connected to Norway and the Norwegian. Although the textbook shows how the Sámi cross borders from "the North of Norway, Sweden, Finland and the Northwest of Russia", they return to the Norwegian position (*op.cit.*, 252, my translation). The story is about the Norwegian Sámi in Norway. The text concentrates on what the Sámi have been called in Norway, the Norwegians meeting the Sámi, the Norwegians colonizing the Sámi land, the Christianity of the Sámi in Norway and the NRK Sámi Radio.<sup>7</sup> The national perspective makes the "we" and "the other". Although the colonization of the Sámi land is explicitly explained, there is an unobtrusive exclusion of the Sámi with the "we" referring to Norwegians while the story about "the other" refers to the Sámi. The text focuses on Norwegian identity, and the Sámi is presented with an implicit understanding of "Norwegianness" which is intertwined with the school subject Norwegian.<sup>8</sup>

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<sup>7</sup> NRK is Norway's state radio.

<sup>8</sup> "Norwegianness" is my construction.

The textbook presents three positions of ethnicity.<sup>9</sup> Firstly and in the beginning of the chapter about the Sámi, the textbook informs about the connection between the Sámi, the people of nature and the indigenous people. The first position makes the Sámi a homogeneous people, where they are all the same and “one people” as the text says (*op.cit.*, 252). The homogeneity is emphasized through narratives about the Sámi having their own life rhythm, their own music and language. The Sámi’s own and special lifestyle is mentioned as a matter of fighting for human rights. According to the textbook, the Sámi insist on their roots as a people of nature and as indigenous people as if they live in “some timeless zone of the primitive, unchanging past”.<sup>10</sup>

The second position may be named the Norwegians in the Sámi, and is the construction of the dominant “we” and the oppressed “other” included in the project of morality about the colonization and compulsive Christianity. The Sámi is placed ‘to look upon themselves’ from the position of otherness. In this way, the other and otherness are critically inscribed in the Sámi identity. The “Norwegian authority” started “the colonization of Sámi land” and “disrupted a great part of the Sámi culture and religion” (*op.cit.*, 254, my translation). Several texts in the chapter are constructing how the Sámi were forced to forget their language and culture in the school in such ways that “our tracks were erased.” (*op.cit.*, 255, my translation). The erasure is written in protest and from a critical point of view. At the same time the erasure bears witness about the normalization of the Sámi, and thereby inscribes the Norwegian normalization in the Sámi.

The third position is presented as the nomad. The Sámi negotiate about the creolisation or the intermingling of the Sámi-Norwegian. About Sámi fairy tales the textbook states that “Sámi *fairy tales* are built up around the same pattern as all other fairy tales. What differs from other fairy tales you perhaps have grown up with, is that there are more reindeer, wolves and bears in the Sámi fairy tales.” (*op.cit.*, 258, my translation). The italics of the fairy tales in the first sentence express in my interpretation the amalgamation of ethnicities, and at the same time points to the heterogeneity with a mixture of the Sámi and the Norwegian. In addition the Sámi are moving as nomads between centre and periphery in the Norwegian society, where they have no roots, but routes.

During the three positions ethnicities are explained in ways that shift between descriptive and critical presentations. The three positions show ambivalence towards the Sámi. On one hand the texts show solidarity with the people of nature and the indigenous people, and also with the primitive and the homogenization. The description expresses the solidarity. On the other hand the critical presentations of the colonization of Sámi land, the Sámi religion, language and joik may be read as both a confrontation with the sins of the past and as a description about how the

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<sup>9</sup> In the presentation of three forms of ethnicity I am inspired by Hall, *op.cit.*

<sup>10</sup> Hall, *op.cit.*, 231. The quotation is from his writing about the Africaine in the Carribean cultural identities.

Sámi are integrated in the Norwegian community of today. The ambivalence in commuting between description and critical presentations may point towards a concealed wish to assimilate the Sámi and the Norwegian.

The two-gender model is presented in the texts about the Sámi. The two genders are illustrated by a photo of an adult female in a traditional Sámi costume (“karasjokdrakt”) and an adult male wearing Sámi tunic and trousers (“tanadrakt”). The two genders carry the Sámi flag: he waves the flag, while she holds it. The traditional genders are classified through the texts with the male as the hunter and the warrior, and the female as milking the reindeer, joining weddings and taking care of the children. In the presentation of female and male genders as opposite, the traditional tales of the people of nature and the indigenous people are underscored as heterosexuality.

The presented disability in the textbook’s information of the Sámi is a short walk. There are no fat Sámi, no limping Sámi, no blind Sámi, no Sámi in a wheel chair. The Sámi have no extraordinary bodies. In the normalization of the Sámi, the disabilities are made invisible and excluded. In the texts and illustrations, the Sámi are constructed with a healthy identity, with functional and fit bodies. In that sense they are all the same; and the homogenization is intertwined with the first position of ethnicity. The Sámi are even more normal than the Norwegians in this textbook. The Norwegians are now and then portrayed in caricatures of fatness, as animals and bald-headed. I interpret the lack of disability by the Sámi as connected to the project of morality excusing the colonization and persecution. With the inclusion of the Sámi ability, the story is reduced to the telling of only one identity; the healthy one.

The Sámi make their living by raising reindeer, hunting and fishing. So they did in the past, and still do at the present. They belong to the working class. Although this textbook stresses the working life of the Sámi male and female, the class background is not mentioned as such. The situation is reverse in the five chapters about the Norwegians in literature and culture. Several Norwegian authors are constructed as coming from a hard working background, and the writings and paintings are oriented towards poor people and hard working farmers and fishermen. By comparing the construction of the excluded class background of the Sámi and the included class background of the Norwegian, the Sámi is by nature connected to the working class. The essence of the Sámi is the working class, and this is their class identity, whereas the Norwegians have shown ways of struggling towards positions as authors and artists.

## **Conclusions**

The concept of intersectionality and the analysis of interacting socio-cultural categories, and identities have the aim to increase more democracy and equality without doing them mainstreamed and new-normalizing. Intersectionality may be used to analyse changes, variations and processes. The focus is on the minority cultures or the marginalized, the troublesome and the extraordinary. This focus may,

however, tell us very much about normalization, and what and how the 'normal' is constructed as the seamless centre.

In textbook research, intersectionality may be used to deconstruct normalization, homogenization and classification. Intersectionality may make us aware of the complexity, and the ways textbooks reduce, exclude and include categories and identities: curriculum subject or interdisciplinarity, pupilness, nationality, ethnicity, gender, sexuality, dis/ability and class.

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# **Central Scientific Views of the Present Situation of the Family and their Reflection in Schoolbooks for Civics in Germany**

Eva Matthes

## **Controversies and results of the current socio-scientific family research in Germany – some spot-lights**

An important milestone in the discussion was Ulrich Beck's thesis of the individualisation and thus of the pluralization of ways of living; he presented it for the first time in detail in his book *Risikogesellschaft. Auf dem Weg in eine andere Moderne* [*High Risk Society. On the Way to a Different Modern Age*] in 1986:

By the end of the sixties, family, marriage, and job – as a bunch of aims in life, situations in life, and biographies – had still an extensively binding nature. Meanwhile, options and constrictions of choice have opened up in all points of reference. It is no longer clear whether a person marries, when he or she marries, whether people live together unmarried, whether they get married but don't live together, whether a child is born or raised within a family or not, whether with the person with whom one lives together or with the person whom one loves and who lives together with another one, whether before the professional career or after it or in the midst of it [...]. Subsequently, it becomes more and more difficult to apply ideas to facts. The uniformity and the persistence of the ideas – family, marriage, parenthood, mother, father etc. – conceals and covers the *growing diversity* of situations and positions which hide behind them (163f.).

According to Beck, the decisive reason for that situation lies in the legally codified and socially more and more prevailing equality of women. The results are enormous:

Without a distinction between the roles of women and of men, there is no traditional nuclear family“; some sentences further, it says as follows: „In the course of the factual equalization of men and women, the foundations of the family [...] have come into question (ibid.).

Statements like that have induced Rosemarie Nave-Herz to point to the fact that this argumentation restricts the idea of the family to a specific family model which was predominant at a limited time; according to her, this is an unnecessary reduction (1994, 4). The same conceptual narrowness becomes obvious if one takes note of the book-title of Elisabeth Beck-Gernsheim: *Was kommt nach der Familie? Einblicke in neue Lebensformen* [*What Comes After the Family? Insights into New Ways of Life*] (2000). She gives the following reasons for her title:

It is no capriciousness or academic hair-splitting if one talks about “family” in singular or about “families” in plural, and if one gives up the idea of the family and

replaces it underhand with conceptions like ‚familial ways of life‘ or briefly ‚ways of life‘. Rather, a factional dispute becomes visible, a question which is fought for bitterly and continuously: Shall we cling to the traditional family model – that unity of father-mother-child, legitimized by the registry office and bound together all their life –, shall we regard that type as the normal, adequate model? Shall all the other patterns be regarded as incomplete and divergent, as deficient and dysfunctional in comparison? (2000, 16f.)

In this context, Beck-Gernsheim then offers the conception of the “post-familial family” (17). Opposite to that, Rosemarie Nave-Herz advocates the thesis that one spares oneself all linguistic distortions by using a broader – nonetheless criteria-related – definition of the family which does justice to historical changes, and that – by doing so – one does not fall victim to the danger of attributing an almost invariable status to the bourgeois nuclear family with its fixed traditional role models, or rather of equalizing its decline with the decline of the family in general – and thereupon with the decline of successful relationships between the generations – (cp. Nave-Herz, 1994, 4f.; Mühlfeld, 2004, 34). Therefore, the primary interest of Nave-Herz lies in “the changes of the familial everyday life and of the relationships within the family” (1994, 18). How does she define the “family”? She declares the following items constitutive for a “family”:

1. the biological and social double nature owing to the acceptance of the function of reproduction and at least of the function of socialization, beside others which vary culturally; 2. a specific relationship of cooperation and solidarity; [...]; 3. the differentiation of generations (5).

With regard to the latter, she emphasizes:

In this respect, only the distinction between the generations (i.e. the relationship between parents respectively mother or father and children) may here be chosen as the essential criterion and not the differentiation of the sexes, i.e. the subsystem of the married couple; because at all times and in all cultures, there were (and there are) also families which were never based on the subsystem of a marriage or whose subsystem of marriage ceased to exist during the biography of the family, because of the loss of one of the roles as a result of death, of separation or of divorce. Hence, single mothers and fathers as well as unmarried life-term relationships with children constitute family systems as well (5f.).

There lies a problem in this definition by Nave-Herz because she ignores the “erosion of the bio-social double nature of the family”, as Rüdiger Peuckert puts it very bluntly (2004, 33). As examples, he mentions continuation or patchwork families, adoptive families and heterological insemination families (33f.). Even if the term “erosion” seems to be somehow exaggerated, particular types of family – not least adoptive families – are excluded by Nave-Herz’ definition. Therefore the educationalist Hildegard Macha formulates: “Whenever adults care for children and educate them continuously and their responsibility is state-approved, they make up a family” (Macha, 1997, 19).

Let us come back to Ulrich Beck once more. In his book *Risikogesellschaft [High-Risk Society]* he also talks about an “exemption with regard to the family” (188):

On the axis of time, the biographical family ties get perforated by the changing life chapters, and thus they are abolished. From exchangeable family relationships, the independence of the individual male and female biography inside and outside of the family becomes apparent (188).

Beck talks about a “biographical plurality of ways of life” (189). This statement is implicitly sustained by Nave-Herz in so far as she “points to the chronological changes of life and family cycles” (1994, 15) which result in an increase of “very different life and household patterns *without children*, because the lifetime grows longer and the period of family life grows shorter in consequence of the decreasing number of children per family” (18). But according to Nave-Herz, the evident increase of life patterns without children faces a vast stability of the pattern of the nuclear family though this type has severely changed within – with regard to the relation of the sexes as well as with regard to the relation of the generations; but for her, this does not actually mean a change of the original form. She makes its stability clear pointing to the fact that – in the nineties – about 85% of all children lived together with their own parents (cp. 13f.) – according to the PISA research about 75% in 2000 (cp. Baumert/Schümer, 2001, 334). Besides, other family types – like single parents, for example – are no new phenomena, according to Nave-Herz; of course she concedes that the reasons differed widely from today and that their social acceptance has increased to a large extent (1994, 12). It is also disputed that the pressure of decision-making on the individual has increased which is accompanied by challenges for the finding of one’s identity.

The social-historical family research points explicitly to the “variety of historical family types” (cp. e.g. Mitterauer, 1980; Gestrich, 1999; 2003). Mitterauer writes for example:

Even in the central zone of the family, in the group of the parents and the children, these relationships are much more complex in the historical dimension than it seems to the social scientist [in my opinion, one should differentiate that much stronger; E.M.] today. Especially in rural areas, there was a much higher rate of remarriage of widows and widowers, due to the high mortality figures and the economic necessity to remarry. Hence, stepmothers, stepfathers, stepbrothers, and stepsisters were very common. If a widower or a widow had already taken charge of children of his deceased partner in his or her first marriage, it could turn out that children were neither related by blood to their parents nor to some of their brothers and sisters (1980, 31)

– so Peuckert’s so-called “erosion of the bio-social double nature of the family” is no new phenomenon, too!

In the passage just quoted, Mitterauer points already to the high death-rate; this is one of the reasons why he – like many other historians – talks about the “myth of the pre-industrial extended family”. Life expectancy was much shorter than today; infant and juvenile mortality was distinctly higher, besides many children left their

parental household much earlier. A family with three generations was the exception; families were extended by domestic servants who also lived in “the entire house”, whether they were related to the housemother or to the housefather or not (cp. e.g. Mitterauer, 1980, 38ff.; Gestrich, 1999, 63ff.). In my opinion, it can therefore be concluded that the inner structure of “the entire house”, the existing blood and not blood relationships, and the role allocations were very heterogeneous: In the course of the industrialization, the nuclear family with father, mother and some (increasingly less) children and a polarization of the role allocations for both parents developed into the dominant model; it experienced its most extensive, but nonetheless very short supremacy at the end of the fifties and at the beginning of the sixties of the 20th century – at least in West Germany. This achieved standardization was again exposed to a transformation in the last decades which is *mainly* due to changes in the relations between the sexes and between the generations within the family – here I would agree to Nave-Herz. But it is also important – as Peuckert points to very insistently – to consider the changes of family relationships, e.g. in continuation families, though this is no new phenomenon, too, as we have heard – in pre-industrial times mainly due to the high mortality, nowadays due to separation and divorce, of course. “Single-parent-families” are recognized as family systems by the latest social scientific research – cp. Nave-Herz’ definition of the family which was quoted above –, though most of the “single-parents” regard that period as a transitory phase which should lead to a new partnership and which comes to that not so rarely (cp. Peuckert, 2004, 201ff.). In this context, Nave-Herz even talks about the “statistic marginality of the single-parent-family” (1994, 92); she does not mean it pejoratively, but she wants to emphasize the unbroken dominance of the nuclear family, consisting of father, mother and one or two children.

The educationalist Volker Ladenthin bundles the results of the historical family research to the following statement which may sound very provocatively to many people: Today, a “trend towards the family” could be identified because “at no other time of the bequeathed history [...] children have stayed so long with their own family” (2004, 4f.). Hans Bertram comes to a similar result: He talks about a “familization of the growing-up of children in our society”: On the one hand, “the percentage of children growing up with both parents is higher or at least as high as on average in this [the 20th; E.M.] century”; and on the other hand, “the number of children who are housed outside the family, i.e. in nurseries or in other institutions”, has decreased (Bertram, 1995, 20). Ladenthin concludes: “Hence, the historical look back might help to de-ideologize the idea of the “family” and to show that our ideal of the family has never existed, at least not in the past” (5).

Some scientists point to the fact that the family consisting of several generations – implored as the prevailing pattern of the past – is also a phenomenon of the present. Hans Bertram has coined the term of the “multi-local family consisting of several generations”:

Increasingly longer lifetimes and an increasing mobility lead to the fact that family members spend only the smaller part of their life together, living in the same

household. The greater part of the lives of parents and children occurs multi-locally in different places without breaking off the relationships between the generations (Bertram, 1995, 15).

The educationalist Eckart Liebau writes:

Without a doubt, in the course of the social modernization the family has clearly changed. The first and most important condition is the striking lengthening of life-expectations. This leads to a family with three generations getting normal for the first time in history and even a family with four generations no longer being an exception (Liebau, 1996, 14).

Only some pages further, he explains: “Naturally, these three or even four generations live only very seldom all together. But although the family members live in different places, that does not change their membership” (21) – but in my opinion, the conception of the family is here expanded in a way that it runs the risk to become less clear, in contrast to the definitions by Nave-Herz and Macha. But the trend of Liebau’s argumentation is still interesting:

The social modernization and the enormous lengthening of life-expectations which is combined with it, do not at all only lead to an individualization [as the probably most prominent German representatives Beck and Beck-Gernsheim would put it; E. M.], but they lead at the same time to new family structures in families with three, four or even five generations (1997, 19).

Trutz von Trotha expresses it more cautiously:

Families consisting of several generations will probably become more important if one considers the relationships between single mothers or fathers and their parents or one of them [...]. Yet, the distinction of the households is mostly maintained so that one can talk about a “supplementary family” consisting of several generations (1990, 453).

**The examination of current schoolbooks for social studies which I have conducted until now shows the following problems/deficits/reductions with regard to the socio-scientific views I have outlined.**

***A clear definition of the conception of the “family” on which the following elaborations are based is missing***

In the schoolbook for social studies *Mensch und Politik [People and Politics]*, Hannover 2004, the following two pictures are shown under the heading “Family life”: a family consisting of three generations without father and grandfather and a homosexual couple. The children can only be confused by that as: a homosexual couple *without* children is no family – unless one extends the conception of the family so far that it becomes totally unclear and cannot serve as a category of description any longer. Why there isn’t shown a homosexual couple *with* children? In the schoolbook *Zur Sache Sozialkunde [To the Point: Social Studies]*, Berlin 2001, a plurality of quantitatively equal family types is suggested: “Today, there is a

great variety of family types: married and unmarried couples with children, single parents and families which are newly formed by remarriage” (30f.). Then follows a sentence which may not be easy to understand for schoolchildren: “Nevertheless, the old ideal of the nuclear family still exists”. It might be concluded from this sentence that a development towards the extended family has been described before... After that, a passage from the book by Elisabeth Beck-Gernsheim which I mentioned above, *What Comes After the Family? Insights into New Ways of Life*, is quoted – a statement which is everything else than undisputed; it deals with “Continuation Marriages and Congenialities”. Suggestions to reflect critically upon the heading, for example, are missing. The conclusion runs as follows – and it is not very satisfactory as it does not lead to clarity of thought –:

The family is still the most important basic form of social life. But the conception of the family is exposed to great changes and presents itself less and less homogeneous. Considering the high numbers of divorces and of exchanges of partners, new family types are increasing. Today, many children and juveniles are already members of two families (31)

– with that the criterion that a common household is part of the conception of the family is given up tacitly; besides, an a-historical understanding is offered again. *Sozialkunde 1, Schulbuch für Sachsen-Anhalt [Social Studies 1, Schoolbook for Sachsen-Anhalt]*, Hannover 2001, assumes that family members belong to the same household; it says:

Each family organizes its family life differently. In some families, the father and the mother have a job and share the domestic work. Single and working mothers master their job, their household, and the upbringing of their children all alone because a father does only exist once a month. Family is changing (8).

It is suggested once again that the numbers of couple-parents and of single parents are nearly the same. On the contrary, the authors of *Mitgestalten [Taking Part]*, Troisdorf 2003, write: “The predominant form of living together is the nuclear family. Normally, it is consisting of the wife, the man, and the adolescent, not yet independent children” (13f.); the use of the definite article is certainly irritating in this context. Then we read: “As the whole society changes and develops, the same happens to the family. More “new forms of living together” develop and become established beside the traditional family type” (*ibid.*) – suggesting by the use of the term „traditional“ that there was a long-lasting form which existed for generations and ignoring once again the results of the historical family research. This is pursued by a very blunt formulation: “Mainly due to the fall in the birth-rate and the rise of the divorce-rate, it is expected that the family will disband soon” – here starts a sudden gossip about a crisis which is not at all socio-scientificly covered and which had to be thought through with all consequences: What does the prediction of the disbanding of the family mean respectively how do the authors interpret it? That no more children will be born or that they will no longer be educated? Or both? That the whole society is threatened by destruction? But in the next sentence, the text says – reassuringly? –: “The family is the most consistent form of living together. It

is very important for the development and for the life of human beings and is regarded as a basic value of our society” (*ibid.*). What are pupils expected to take home from such an ambivalent depiction? To put one’s trust in the teachers that they will fix it, would be too short-sighted – not least with regard to such a complex and emotionally charged topic like the family today.

***The fact that there is no distinction between the plurality of family types and the plurality of ways of life without children leads to a distorted perception***

In the schoolbook *Demokratie heute, Politik und Wirtschaft. Realschule Hessen [Democracy Today, Politics, and Economy. Junior High School Hesse]*, Hannover 2004, we read:

In the last decades, there were changes within the field of the family in Germany which can be described by the following keywords. In our society, less and less children grow up. More and more married couples remain childless. Children live only in about one in four households. The number of single-person households has strongly increased, especially because more and more people want to live as singles voluntarily (30)

– a statement, by the way, which does not stand up to empirical data in *that* form (cp. Peuckert, 2004, 57ff.). Further in the schoolbook text, it says:

Compared to former times, distinctly fewer children belong to large families today. More and more families are breaking up. In 1960, not even one in ten couples divorced, but nowadays the number is higher than one in three. The number of single-parents has more than doubled in the last thirty years. Nine of ten single-parents are women. The number of illegitimate children is increasing. The proportion of illegitimate long-term relationships is also rising strongly (*ibid.*).

In the schoolbook *Mitgestalten, Ausgabe Sachsen, Lehr- und Arbeitsbuch für Sozialkunde an beruflichen Schulen [Taking Part, Edition for Saxony, Text- and Schoolbook for Social Studies at Vocational Schools]*, 2003, the following varieties are subsumed under the heading “The new ways of life” – which are not at all only “new” as I have shown with regard to the relevant literature: “Modernized families”: two-income family; weekend-family; family with house husband; family with childminder; “New parents”: single mothers; single fathers; homosexual couples with child(ren); childless persons: singles; childless marriage or partnership; weekend relationship; gay and lesbian partnership; “patchwork ways of life”: step-families or continuation families; open communes and relationships“ – from this depiction – especially without exact figures and thus suggesting that the proportions are alike – results a very colourful picture of the social life in Germany which has very little in common with the social reality, not even in German cities.

***The schoolbooks still present the myth of the pre-industrial extended family (consisting of several generations)***

Two examples for that: In *Sozialkunde 1 [Social Studies 1], Klasse 8 [8th Form]*, Hannover, 2001, *Schulbuch für Sachsen-Anhalt [Schoolbook for Saxony-Anhalt]*, it says:

The family life depends on the social conditions. In former times, people mostly lived in extended families in rural areas [...] The technical progress and the industrial development had effects on the family [...] The extended family in which several generations had lived together turned into the nuclear family. It consists only of parents and their children [...]. The relationships between many grandparents and their children and grandchildren are different today. Many children see their grandparents only seldom because they live far away from them. Today, the nuclear family has become normal. Everything is aligned with the nuclear family (15).

In *Demokratie heute 7. Politik und Wirtschaft. Hessen Realschule [Democracy Today, Politics, and Economy. Junior High School Hesse]*, Hannover 2004, we read under the heading “The most important facts – very briefly”:

Since the industrialization the family has changed: In former times, the extended family was prevalent: parents, numerous children, grandparents, and unmarried relatives lived and worked together in the same household. Today, the small family (nuclear family) is prevailing. It consists of two generations: parents and children [sic!] (34).

Among the current schoolbooks which I have examined until now, the textbook *Mensch und Politik [People and Politics], 7./8. Schuljahr [7th/8th form]*, Hannover 2004, is the only one which gives the pupils at least a chance to qualify the myth of the pre-industrial extended family and its disbanding. Under the heading “The extended family is still alive – it is as well as never before”, they print an interview with the educationalist Jutta Ecarius who asserts that the extended family has only been “usual” since the 20th century: “Today, most of the grandparents can watch their grandchildren growing up. In former times, this was prevented by high infant mortality and low life expectancy” (26). But as this schoolbook also lacks a definition of its conception of the “family” which forms the basis for the explanations, the pupils depend decisively on the help of the teachers. Those must inform them for instance about the fact that some scientists don’t define the family as a group of relatives who live together in one household, but as a multi-local community. If one wants to regard the schoolbook – according to the emancipatory didactics – as an independent medium for pupils, one can only be dissatisfied with schoolbooks like that.

## **Conclusion**

With regard to their central statements about the family, the current German schoolbooks for civics which I have examined show a noticeable affinity to *those* socio-scientific interpretations which are presented in the most popular scientific terms and which influence the public discourse most of all. Less spectacular

sociological and – in particular – historical perspectives on the family receive only very poor attention in schoolbooks. To stress it more distinctly: The schoolbooks offer more “rhetoric about families” than differentiated results of family research (cp. Lüscher, 1997). With that, schoolbooks do not contribute to an objectification of the discourse about the family. Peculiar elementarized approaches by the authors of schoolbooks which are founded on a differentiated scientific base are searched for in vain. In my opinion the authors should stress the specific functions of the actual family, especially its task of substantial and continuing socialization and in this context the specific developments, challenges and problems within the families, their chances and dangers for the identities of men and women, fathers and mothers and not at last children.

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# The ‘Personal Exhibition’ as an educational tool in a semi-formal learning setting

Anne Kahr-Højland

## Introduction

This year a new educational reform is being introduced in Danish upper secondary schools. The reform calls for new ways of teaching and so new learning materials are highly demanded. At the same time, science is experiencing a crisis in Denmark, as elsewhere; since young people are choosing the humanities instead of science, the demands on how best to communicate science are intensified.

The present article is related to my on-going Ph.D. project “*Science in semi-formal learning settings – the Personal Exhibition at the Experimentarium*”. The project is closely related to both the new reform and the crisis of science, and consists of two parts - firstly, the design and development of a so-called ‘Personal Exhibition’ (an interactive narrative facilitated by mobile phones) at the Science Centre Experimentarium in Copenhagen; secondly, the investigation of the learning impacts of this Personal Exhibition. The Personal Exhibition is being developed as an educational tool for students from upper secondary schools. The challenge consists in creating learning materials which are educational whilst at the same time taking account of young people’s interests.

As new kinds of educational tools and learning materials are being developed and evaluated for new contexts such as the Experimentarium, the need for precise definitions is getting increasingly urgent. Therefore, the present article will focus on the special kind of learning situation maintained at the Experimentarium which seeks to combine the act of playing and the act of learning – practice which has been commonly referred to, in the educational debate, as *informal learning*.

The Experimentarium, which will serve as an example throughout the article, is a ‘Science Centre’, defined as being a kind of museum made up of interactive exhibits demonstrating scientific and technical topics. In the present article I will argue for the use of the new term “semi-formal learning settings”, since the context of the Experimentarium sets a new frame for students’ learning. I will end the article by pointing out how Augmented Reality supported by mobile technologies may afford learning processes within semi-formal learning settings.

The following section seeks to elucidate the theoretical basis of the special kind of learning setting at the Experimentarium.

## Semi-formal learning settings

### *Informal learning – does such a thing exist?*

Since the concept of informal learning first occurred in the 1950s, it has been used in various definitions by educational researchers from all over the world; in particular the term has been most widely used in, among other countries, the UK, the USA and Australia (Dierking and Falk, 1998; Orfinger, 1998; Smith, 1999; Rennie, 2001; Rennie, 2003; Conner, 2005; Falk, Dierking *et al.* 2005). Coomb (1974) popularized the term ‘Informal learning’ in numerous reports concerning international development. He used the distinction between formal, non-formal and informal learning, stating that formal learning was linked with schools and other kinds of institutionalized education, non-formal was linked to community groups and other organizations, whereas informal learning covered all other forms of learning such as during conversations, the act of playing, reading for pleasure etc. (Coombs and Ahmed, 1974).

### *Encircling a definition*

Rather than contributing to the on-going discussion of what is the exact definition of the term of informal learning, I will start up another by asking: does it make any sense at all to talk about either informal or non-formal learning? In recent years the focus on the concept of informal learning has increased (Castell and Jenson; Dierking and Falk, 1998; Gardner, 2004). Though the rapidly growing body of research suggests a common perspective, one will find that definitions of the term ‘informal learning’ vary to a significant extent.

For example, one finds various definitions from, “*a lifelong process where by individuals acquire (...) skills and knowledge from daily experience*” (Conner, 1997-2005); to a type of learning that is “*not formally organized into a programme or curriculum*” (Dale and Bell 1999), to simply “*self-directed learning*” (Smith, 1999). Hence Michael Eraut, who has contributed to the ‘informal’ discussion, pleads for the use of the term non-formal instead of informal as the term ‘informal’ is associated with an extremely widespread set of situations concerning human behaviour, discourse, clothing etc. (Eraut, 2000).

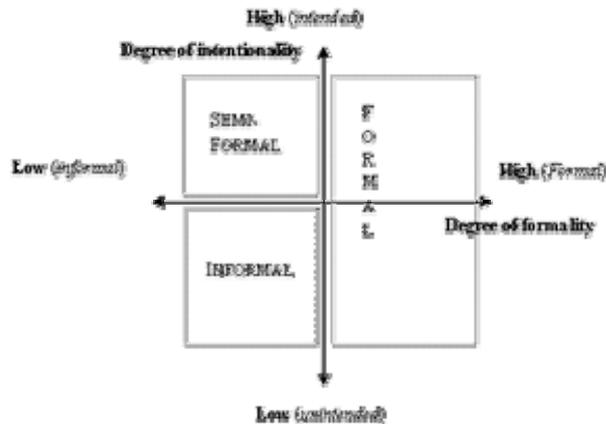
### *Learning is learning*

Taking account of the perspectives on learning presented above, I will argue that it is unhelpful to talk about such a phenomenon as informal learning, as learning *is* learning: cognitive and affective processes which are strictly individual and personal. It does not help to define this process as either formal or informal: one knows what one knows. But when we are concerned about the process by which learning happens, it is essential also to consider the setting or context in which it takes place (Roth *et al.*, 1999).

In other words, what does make sense is the consideration of the cultural setting, the environment surrounding and supporting the process of learning – what I will name

the *learning setting*. The setting for learning may be either *formalized* by being part of a curriculum-based learning programme, or the setting for learning may be more or less *informal*. But as all kinds of experiences may lead to individual learning, all places outside school could, in principal, be categorized as potential informal learning settings.

So how does this distinction apply to settings such as a family visit to a place like the Experimentarium? Are science centres to be considered similar to ‘informal’ amusement parks in general? Obviously not, as the Experimentarium – contrary to amusement parks like Tivoli – is thoroughly and consciously presenting information of a special kind (in this case science) in a special way (in this case by means of structured interactive exhibits). The ideas to be learned have been sorted out thoroughly and embedded in a design supporting the communication of that specific information. The intention is to maximise the possibility that individual learners will acquire this knowledge, and maybe, as a result of negotiation and reflection, embed the information as enduring learning. The learning achieved in this way is not curriculum based, and is not to be evaluated after the visit. Thus, this setting places the Experimentarium somewhere in between school (formal) and amusement parks (informal) – in what I will categorize as *semi-formal learning settings*. I propose the following model reflecting three different types of learning settings.



**Figure 1.** Formal, informal and semi-formal learning settings represented graphically

The model takes into consideration the parameters of *intentionality* (is the learning occurring with or without intention?) and the degree of *formality* (understood as school/curriculum based learning). *Formal learning settings* determine what happens both intentionally as well as unexpectedly within the framework of a teacher-led, curriculum based education; *informal learning settings* determine what occurs unexpectedly outside the classroom (during conversations, in the playground, walks in the forest etc.) whereas the *semi-formal learning setting* covers the upper

left quadrant in the model, indicating learning that happens intentionally but outside the formal learning environment of school and/or curriculum based education.

### **The Experimentarium as an example of semi-formal settings for learning**

I categorize the Experimentarium as semi-formal due to its structured presentation of scientific ideas with learning in mind. Even if the Experimentarium does not officially confess to having a theoretical basis, it does, however, declare within its foundational policy that the concept of the science centre is grounded on the idea that experience and the act of playing being constituent for the act of learning. Thus, exhibitions based on free-choice interactive exhibits as they are seen at the Experimentarium as in other science centres all over the world, places themselves in direct continuation of the theory of John Dewey, who stated that the process of learning is inseparable from action and experience (Dewey, 1938). Similarly, the concept of hand-on exhibits holds an implicitly confession to what the American psychologist Mihalyi Csikszentmihalyi (1997) has defined as the concept of *flow*<sup>11</sup>.

#### ***Mihalyi Csikszentmihalyi: the cruciality of intrinsic motivation***

Claiming that the act of playing is essential for the act of learning, Csikszentmihalyi outlines a psychological model illustrating the most conducive settings for enhancing the process of learning. The core of the theory is that we learn through the act of playing. If people are bored, or if they are challenged beyond their skills, they do not learn anything. Therefore the boredom of a child should be considered a warning signal, suggesting that the development of the child is being put at risk (Csikszentmihalyi and Hermanson, 1995; Csikszentmihalyi, 1997). With human evolution as launch pad, Csikszentmihalyi argues that traditional teaching in school, with children calmly sitting on chairs the whole day, is not conducive to the process of learning. Throughout the evolution of man, the human being has developed through activity and movement. Learning through the act of playing and having fun is considered an essential part of the human nature (Csikszentmihalyi, 1997; Knoop 2002).

Csikszentmihalyi draws a crucial distinction between *intrinsic* and *extrinsic* motivation. Apparently we have an inner motivation, an eagerness to learn, incorporated in our nervous system. The only reason why the human being has developed to a significant extent, is curiosity – an intrinsic motivation built in our

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<sup>11</sup> As there is no such thing as an official theoretical strategy or framework for designing new exhibits at the Experimentarium, the exhibits are the result of the individual designer's personal interpretation of the main purpose of the institution, which is: to communicate science with the aim of encouraging young people to take an interest in the subject of science. The two concepts considered essential for the entire place are: the act of playing and the act of learning. Thus, the theoretical foundation presented here is my proposal for a theoretical grounding of the science centre.

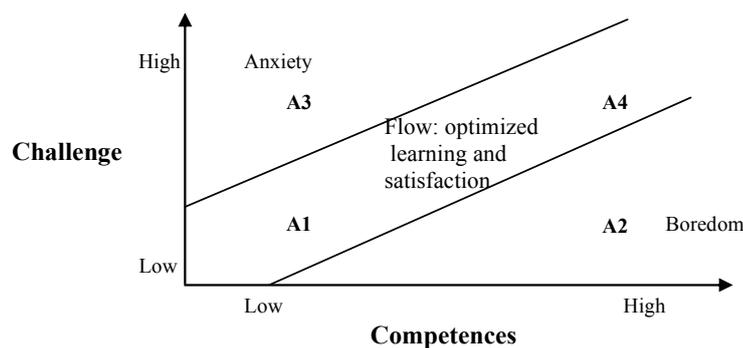
nature, providing an eagerness to learn, to progress. Generally we will be motivated both intrinsically and extrinsically in what we do; as an example we (ideally speaking) go to work because of both the extrinsic motivation (in this case to earn money) and because of the intrinsic motivation (because we find a pleasure in doing what we do at work).

**The concept of flow**

To prompt the learning processes, therefore, it will be necessary to encourage the intrinsic motivation of the learner. The learner has to be fully engaged. In this context, Csikszentmihalyi introduces the concept of *flow*. The flow experience is a common experimental state – it is described as

*“a state of mind that is spontaneous, almost automatic, like the flow of a strong current”* (Csikszentmihalyi and Hermanson, 1995)

The concept of flow is illustrated in the model below (the model is my version of the flow-model presented by Csikszentmihalyi in 1975 (Csikszentmihalyi, 1997)).



**Figure 2.** The flow experience

The model expresses how the flow condition occurs when the challenges of the learner and the learner’s skills are balanced (condition A1 and A4 in the model). Boredom occurs as a result of under-stimulation, whereas challenges that surpass the skills of the learner will place the learner in a position of anxiety.

Csikszentmihalyi states that *flow* occurs

*“when goals are clear, feedback is unambiguous, challenges and skills are well matched, then all of one’s mind and body become completely involved in the activity”* (Csikszentmihalyi and Hermanson, 1995).

Csikszentmihalyi and Hermanson argue that museums should stimulate intrinsic motivation in order to help the audience at museums learn. They suggest that museums have to get their audience “on the hook” and afterwards hold them by establishing advantageous conditions for flow, meaning that the museums have to

present information in a way that provides intrinsic rewards (*ibid.* p. 72). In this respect they are supported by Roberts (Roberts, 1993), who in her theoretical work on museum communication states that the importance of the affective as well as the cognitive domain may have been underestimated.

### ***A critical perspective on the act of playing as a tool for learning***

Critics state that games and entertainment cannot be successfully combined with technical education, as the act of playing will leave no room for the process of negotiating new knowledge into enduring learning. Thus, according to Karnezis, Gadamer has stated that the concept of play (*Spiel*) is defined by something that has its own order and structure to which the actor who plays the game is given over. Once the game is running, it will be the game that plays; the actors just following the rules of the game (Wind, 1976; Karnezis, 1987).

In the case of the Experimentarium, this means that there might be a risk of the visitor being seduced by the act of playing. Once the visitor is playing, (s)he will not reflect on what (s)he is experiencing. Therefore, in the context of semi-formal learning as defined above, I will plead for the necessity of the establishment of *room for reflection* (Bang, 1997). What is meant by *room for reflection* is not a room in a physical sense, rather it is the possibility of negotiating (new) knowledge with oneself or with others. It is a process of reflection prompted by another person or object, and offers an opportunity for bringing the perception of an experience from a state of *tacit knowledge*<sup>12</sup> to a state of *explicit knowledge* (Polanyi, 1962).

The process of reflection itself may either occur as an inner, personal process of negotiation, or it may happen in the frame of what Ann Brown has defined as a *community of learners* (Bransford, Brown *et al.*, 2000).

Obviously, there are many possible ways of urging the establishment of a room for reflection. In the following, I will comment on one of them; the use of Augmented Reality in semi-formal learning settings.

### **Augmented Reality as a learning remedy in semi-formal learning settings**

In order to afford both the flow-experience and the reflective processes I will plead for the potential of a combined use of *interactivity*, *narration* and *virtuality* in semi-formal learning settings – these elements may be joined in what I call *Augmented Reality With an Educational Aim*.

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<sup>12</sup> The concept of *tacit knowledge* was introduced by Michael Polanyi, who among other things made a distinction between *tacit knowledge* and *articulated knowledge*. Tacit knowledge is a kind of knowledge that the learner is not conscious about; for instance, when reading a text, words and linguistic rules function as tacit knowledge, hence the intention of the reader is being focused on the meaning of the text. Only when tacit knowledge is made explicit through language can it be a focus for reflection.

### ***Interactivity***

Bearing the theory about flow experiences as well as Dewey's theory of experience and learning in mind, the interactive exhibits – hands-on exhibits – should be kept at the core at the Experimentarium as well as in other semi-formal learning settings, as action and experience are crucial as regards both the engagement and the intrinsic motivation of the audience in semi-formal learning settings.

Having enduring learning as the ultimate aim, though, it will be necessary to urge the reflective processes; this is why I suggest that interactive exhibits would benefit from being organized according to the structure of a *narrative*.

### ***Narration***

When I plead for using the narrative in semi-formal learning settings it is among other things due to the fact that the narrative has shown to promote and enhance the learning potential in museums (Roberts 1993). Thus, a massive body of research data from the cognitive science has elucidated the fact that the narrative is affording reflective processes in the human being (Labov and Waletzky, 1967, 1997; Bruner, 1986; Kahr-Højland, 2005).

So, the combination of interactivity and narration in semi-formal learning settings may satisfy the demands on both experience and reflection.

### ***Virtuality***

As regards the virtual dimension, it serves to give the visitor a unique and personal experience. Bringing in remembrance the importance of getting the visitor 'on the hook' (Csikszentmihalyi and Hermanson, 1995) the idea is to create an experience affording both the processes of flow and reflection whilst at the same time seeming *relevant* for the visitor. By adding a virtual dimension to a physical exhibition one opens for the possibility of creating several different virtual layers – and thereby several different narratives – to one and the same physical setting. In other words, different visitors, in principle, may have different experiences at the same time in the same physical room.

The virtual dimension may best be described through an example: In 2005 Stephen Dow, Jay David Bolter and their colleagues implemented a virtual add-on to the Oakland Cemeteries (Dow, Lee *et al.*, 2005). When people visited the cemetery they had the possibility of being guided from one grave stone to the other by means of a PDA with head phones connected to it. During the trip around the cemetery the dead were brought back to life through voices of actors who dramatized the lives of the dead. In this way the history of the dead along with the history of the US were revealed for the visitors and in this way an extra dimension were added to the experience at the grave yard. The stories that were told were determined of where the visitor was situated in the cemetery. The Oakland-experience was in other words determined by both the physical setting and the PDAs.

It is this kind of Augmented Reality in combination with interactive exhibits I propose as learning remedy in science centres and other kinds of semi-formal learning settings.

In the last part of this article I will briefly comment on The Personal Exhibition – an example of this new type of Augmented Reality – as well as the perspectives of using the mobile phone in this respect.

### **The Personal Exhibition as an example of Augmented Reality in a semi-formal learning setting**

The Personal Exhibition (which will open at the Experimentarium in the autumn 2006) seeks to combine the already existing interactive exhibits with the narrative and the virtual dimension in an Augmented Reality with an educational aim, similar to the one described above.

In the Personal Exhibition people will be guided through the exhibition by means of their own mobile phones. The exhibition functions like this: When the visitor arrives at the Experimentarium (s)he will get the opportunity of signing up for the Personal Exhibition by using the mobile phone. From this point the visitor will be led through the exhibition at the Experimentarium, guided by a voice in his/her ear. The voice will lead him/her into a narrative where the visitor himself will take up the main part. Similar to a computer game, the narrative consists of three different levels which the visitor can run through. The Personal Exhibition thus combines the interactive exhibits, the narrative and computer games, that is the virtual dimension.

The medium combining the parts in this Augmented Reality is the user's own mobile phone.

#### ***The mobile phone as the central medium***

One of the main reasons why the mobile phone is chosen as the technical device for this Augmented Reality is that it benefits from at least two things; firstly, its properties as a handheld computer, secondly, it benefits from being a well-known medium for the visitors in general.

As regards the first perspective, concerning the mobile as a handheld computer, the mobile phone is usually classified as new or digital media. What characterizes this type of media is that they are all based on computer technology.

Many of us are not aware of our own considerable use of computers in our daily lives. When using the vacuum cleaner, the sewing machine, the camera or the toaster only few of us are conscious about using a computer, because we think of ourselves as doing the task, not as using the computer embodied in the artefact (Norman, 1989). Similarly, only few of us are aware of carrying a hand held computer in our pocket, a fully functional computer appearing in the shape of a mobile phone. As Marc Prensky puts it today's high-end cell phones "(...) *have the computing power of a mid-1990's PC (...) even the simplest voice-only phones have more complex and*

*powerful chips than the 1969 on-board computer that landed a spaceship on the moon*" (Prensky, 2004).

At the same time the mobile is benefiting from being an extremely popular medium. Today most of the visitors at science centres are in possession of mobile phones. The mobile phones as tools play a significant role in most people's daily life which means that people in general are very familiar with the mobile as a medium. Thus, the mobile represents a hand held computer capable of organizing a narrative, an interactive game play, and at the same time the mobile benefits from being well-known by its users.

In continuation of the critical approach to learning mentioned earlier, one might ask if there is a risk of the mobile 'disturbing' the hands-on experience in a way that the active part is pushed to the rear; is the mobile phone in this way preventing the occurrence of the flow experience?

#### ***The mobile as a digital showcase***

As clarified initially, this article is primarily theoretical driven; as long as the mobile facilitated exhibition have not been implemented at the Experimentarium, the answer to the question concerning the role of the mobile will have to be a theoretical one. When I do not think that the mobile phone will have a too seductive role in the exhibition it is because the mobile is an example of a long-lasting technology, a tool we use without reflection – with the use of Donald Norman's term the mobile has turned into a *transparent media*. The mobile has become so familiar to us that we are no longer conscious of our own use of it. This is what Paul Dourish calls the receding of the medium:

*"The most successful technologies are those that recede into the background as we use them, becoming an unannounced feature of the world in which we act"* (Dourish, 2001)

Today, it may seem unlikely that the mobile should recede in this way, but Alison Griffith draws attention to the fact that the display cases when first introduced as a new medium for presenting objects in museums, were exposed to massive criticism as the display cases seemed to steal of the attention from the objects they were supposed to highlight (Griffith, 2003). Inspired by Griffith's review, the use of the mobile as a facilitator for an Augmented Reality in semi-formal learning settings may be considered a kind of 'digital display case', meaning that the mobile initially will be facing the same problems as the display case did when it was first introduced. The digital media account for a new way of highlighting information, the challenge for the mobile is to become as transparent as the – now un-conspicuous – display case.

I therefore see the mobile as an obvious medium for introducing Augmented Realities with educational aims at science centres and other semi-formal learning settings.

## Concluding remarks

This theoretical article focuses on learning in semi-formal learning settings, which are defined in contrast to formal or informal settings. It takes as its context the Experimentarium as an example of a semi-formal setting for learning, and considers among others Csikszentmihalyi's work on the importance of intrinsic motivation and the concept of flow.

In order to satisfy the demands on both experience and reflection the article presents Augmented Reality – combining interactivity, narration and virtuality - as an advantageous way of organising semi-formal learning settings.

The article closes with the suggestion that the mobile phone might work as a successful means when introducing Augmented Reality in semi-formal learning settings.

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# **The relation between the model reader/-s and the authentic reader/-s. The possibilities for identification when reading curricular texts**

Bente Aamotsbakken

## **Youth identities of today**

In today's educational system young people live in various contexts socially and culturally characterized by a variety of expressions (Drotner, 1995). More frequently than before youth are expressing themselves through pictures and music and through their bodies. More young people are visiting the theatres and spend time dancing, singing and playing music. This is closely linked to the development of electronic media and a global media culture. The changes towards more aesthetic ways of expression must also be seen in connection with the displacement towards a new type of socialization characterized by a narcissistic subject culture (Ziehe, 1989).<sup>1</sup> Ziehe describes the narcissistic psyche as imprinted with imagination and pictures. It is not accompanied by linguistic logic, but appears closer to the pictorial language of dreams and the experience of one's own body. It is therefore more easily expressed through music and dance performance. These observations should lead to the conclusion that text culture in the classroom ought to deal with means and tools of drama teaching methods.

The young student of today's educational system is not only supposed to stage him- or herself, but is simultaneously challenged as a contemplating, reflecting individual. The student faces great demands when it comes to creating a space in a society no longer characterized by industry, but by post-industrial trends. In a society like this former links to local communities and family ties are on the edge of disappearing (Giddens, 1996). The individual is responsible for the development of her own identity or identities in interaction with free relationships with friends and other groups. According to Ziehe, the liberation today is marked by a tendency towards acceptance and equalization of any phenomenon. Consequently, the individual is forced to be in a constant process of growing awareness, in which different choices of what to do and who to be are the characteristics. In addition this process demands a continuous reflection on part of the individual.

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<sup>1</sup> The narcissistic subject culture described by Thomas Ziehe can be compared with views shared by Allan Bloom in the book *The Closing of the American Mind* (1987). Bloom describes students' opinions and values as being characterized by a simple form of relativism; i.e. every individual has the right to develop his or her own existence and way of living based on an individual opinion of what is regarded as essential and valuable. Even though Bloom's aspects are related to an American context, it is reasonable to assume that they have a transfer value to many Western societies.

### **The challenge for textbooks and educational media**

Based on reflections like this we must ask what is demanded of textbooks and educational media in the encounter with young individuals in our classrooms. In Norway we have, over the last decade, experienced a lively debate on the representations of classical texts on the curriculum. In mass media voices condemning the representations of classical texts have attracted a lot of attention, and an oversimplified view on the preferences for modern texts, fictional or non-fictional, has been exaggerated. The classical texts were regarded as destructive when it came to “the pleasure of the text”, so to speak (Barthes, 1975 [1973]). We are facing a new curricular reform in Norway from the year 2006, and the compulsory reading and study of classical texts have been removed. In spite of this change, it is to be expected that the classical literature of fiction and non-fiction will still be given attention in the classrooms. The challenge of these texts from ancient epochs lies in the ability to communicate and mediate these texts to the students. Classical texts like essays, novels, poems and short stories are mostly texts subject to continued interpretation. Consequently, the interpretations of the past place themselves as layers on top of contemporary interpretations and readings and become integrated in them. This is a view represented by the reception aesthetician Hans Robert Jauss (1997 [1991]).

All texts, fictional and non-fictional, included in textbooks cannot be viewed qua text, but only in an educational context. Consequently, the reading roles and attitudes differ from the corresponding roles and attitudes belonging to voluntary reading or any reading, in your leisure time. Reading in school is special because the student is faced with demands and claims to learn and develop himself through reading and interpretation. Texts that in some way or another correspond with biographical narratives similar to the student's own are most likely to gain response. On the other hand, texts that arouse fantasy and imaginations may also be attractive.

The Norwegian philosopher Hans Skjervheim has an anthropological view that is interesting regarding possibilities for identification and the creation of identity related to textbooks and texts used in an educational context (Skjervheim, 1964, 1996). Skjervheim postulated that the individual always experiences himself or herself in accordance with the way he or she appears. The individual is born with the ability to create his or her own identity, partly due to the fact that he or she inherits and simultaneously creates his or her own identity by interpreting culture and traditions. The interpretation does not take place in a vacuum, but Skjervheim regards it as a free and independent process. The interpretation has, of course, a starting point, but cannot be related to extra-contextual factors. It is freedom, not fact, according to Skjervheim. This view is rather demanding when it comes to the textbook genres and their connection with the possibilities for identification for young students. Positivistically oriented textbooks have in my opinion neglected such reflections.

The creation of identity, singular and plural, is a process with more or less awareness on the part of the student. The reading and the interpreting texts in a school context add to this process, but the student is normally much more focused on establishing various identities outside of the educational context. According to Ziehe, this process is constant, but the awareness and the attention differ. It is consequently worth while looking into opinions on how identity is created and how dependently or independently this is taking place. Such investigations should be connected to the study of texts used in a school context because textual interpretation is an essential activity in the process towards a mature identity.

In a school context it is interesting to examine the identity creating functional texts, an identity in transition from childhood and youth to adult life. The imagination and the creativity are also stimulated by reading, writing and other activities related to texts. In this context the fictional texts are of even greater significance than the short factual texts. This is due to the fact that fictional texts are often quite extensive, these are texts that you return to for interpretation, for discussion, i.e. they are texts that keep your mind busy. This is not to the same degree the case when it comes to for instance newspaper articles, internet texts or illustrated texts. In school there is still room for the interpretation of texts, the examination of various other textual aspects and their multiple structures. Therefore the selection of texts for school use is essential. The central texts in the school (the school canon) have many consequences for later literary preferences, both written and oral proficiency as well as their connection with alternative cultural expressions. We also have to take into account that it is our encounter with school texts that creates our relationship with text cultures. The school texts are supposed to form a common basis for the public. That is why we can claim that the school canon is the most important of all canons. In the shaping of a student's identity these are probably the texts that are of the highest importance.

According to Charles Taylor a modern understanding of identity implies that the individual cannot be an 'isolated self' (Taylor, 1998). The identity in his perspective is created in interaction with other individuals, and the process towards the shaping of identity of young students is marked by inter-linguistic activities. In educational contexts these activities often have to do with reading and interpretation of texts, a process characterized by mutual interest and cooperation. Taylor stresses the idea of identity as being something inward, individual and authentic, but at the same time the idea is connected to the ideal of interaction among individuals and respect for other human beings. In other words his ethics implies a criticism of extreme individualism. This perspective therefore creates a sharp contrast to the modern culture of self-realization as described, among others, by Allan Bloom. Related to the situation among students today we may add that the ideal of mutual respect and understanding should imply that textbooks and anthologies for school use offers a balanced representation of texts; i.e. texts that are constructive for the identity of both males and females. In this context it is relevant to offer some reflections on the process of identity creation as there are views that differ in this respect.

In relation to views represented by Charles Taylor it is worth while to looking into the connection to reflections of Seyla Benhabib. She has discussed Taylor's view on this issue and has modified and developed it (Benhabib, 1992, 1997).<sup>2</sup> Seyla Benhabib sees the 'self' as situated, which means that the autonomous and reflecting subject always activates itself in an inter-subjective context. The 'self' is created in interaction with others and the surrounding society. An 'ego' or an 'I' always relates to a 'we'.<sup>3</sup> Benhabib's theoretical theses are to a certain extent answering the question of the significance of human experience in universal ethics. She especially stresses the importance of experiences of being vulnerable due to gender, class or race. Here we might add the factor of age; the pupils at different school levels are too often experience a lack of understanding and consequently meaningful readings and interpretation of texts. Texts chosen for the pupils with no regard to their preferences or wishes are of no avail when it comes to the constitution of identity. Then the texts may be 'closed'<sup>4</sup> and consequently of no further learning potential or pleasure.

This view on identity, which has its basis in communicative ethics, is highly relevant for pupils and students. School as an educational institution forms an important framework and a place for identity-constructing activities. Within this framework the individual continually relates to various activities. Such an important activity may be the study of literary texts with questions about fictional characters and problems of identity. In this light literary texts for school use are communicating two messages. In relationship to the ethical view of Taylor and Benhabib it is possible to claim that an identity can be created through the reading of literary texts, linked to both identity and other aspects of living a meaningful life. Benhabib, however, has criticized Taylor for having quite extensively linked his understanding of identity to norms and values. Benhabib is of the opinion that there is a division

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<sup>2</sup> The views represented by Charles Taylor and Seyla Benhabib have been more thoroughly discussed by my colleague, Solveig Østrem, who has published scientific articles based on their theories. Østrem has inspired me to read and deal with the views in Taylor's and Benhabib's work.

<sup>3</sup> Sheila Benhabib sees Taylor's ideas as compatible with the new-hegelian insight of the situating of the 'self'. She also relates to Michel Foucault's view on "the construction of the self" (Benhabib, 1997).

<sup>4</sup> Here the term 'closed texts' is related to Umberto Eco's distinction between open and closed texts; the latter being texts with no further potential for interpretation. To a great extent Eco's term 'closed texts' are applied to texts belonging to genres of popular culture, like novels or films created just for amusement and relaxation. On the other hand the polar term, 'open texts' is used for texts challenging its readers with a spectre of explicit and implicit codes, intertextuality and a complicated structure; i.e. they are texts open for interpretation (Eco, 1979).

In this context I have therefore to a certain extent misused or displaced the meaning of the term 'closed' as I have used it connected with texts that are of dubious value when it comes to the construction of identity for your people. In this respect such texts can be experienced as closed by the pupils, and on the other hand the same texts can form an obstacle to intellectual development.

line between identity and way of living. In her essay “The Sources of the ego in feminist theory” Benhabib discusses the radical constructionism related to post-structural feminism (Benhabib, 1997).

### **Reading roles and textual positions**

Over the years I have been occupied with the study of various reader-response theories linked to reception-aesthetics and pure reception theories. A common feature sensed in different contributions to this field of research lies in my opinion in the awareness of the gap between the possibilities for reading embedded in the text qua text and the authentic reading process performed in a school context. This gap or interval is one of creation and imagination, something to be filled with various interpretative activities, or on the contrary, to be neglected and ignored if the school texts are without any further attraction. It is in this gap, which is on one hand connected with temporal factors and on the other hand related to the production of meaning, that an “extra” text is created. This is a text created within the student’s mind, nourished by his imagination and accompanied by his various experiences with other texts or expressions of art, expressions that I commented on above. The interval should be given attention by teachers and producers of textbooks and other educational media. I just want to mention Stanley Fish’s text “Is there a text in this classroom?”, because I see this extreme wording as precise and relevant when it comes to student’s interpretations or ‘extra texts’ (Fish, 1980).

According to Wolfgang Iser there is always an implied reader in a text, and for textbooks this instance must be seen as double (Iser, 1972). The relation between the so-called implied reader and the authentic reader is always of importance, but in connection with textbooks, this relation is a complicated one. This is due to the fact that the student has to respond to the text in the textbook as text and simultaneously to the textual frame, i.e. the textbook concept, with its extra-textual tools, such as exercises, didactical questions etc. The student is in a way forced to have a double focus when reading and interpreting. This fact may add positively to the creation of the extra text, but it could easily have the opposite result. The text could, in Eco’s term, ‘collapse’. According to Iser, a paradigm consisting of textual opposites could be of interest. According to Wolfgang Iser claims that texts incorporated in textbooks have like any other texts two poles, the artistic and the aesthetic (Iser, 1976). The aesthetic pole is linked to the reading process and the realization of the text by the reader, whereas the artistic pole refers to the creation of the text. Here it is relevant to refer to Umberto Eco’s term ‘model reader’ since this reader is a result of a conscious plan by the author of the text.

Wolfgang Iser underlines that reading is only connected with pleasure and awareness when it is active and creative. In other words, the challenges of the aesthetic pole are vital. Thus the “unwritten” parts of the text will stimulate the reader’s creative mind. The unwritten parts are the same as referred to above as an “extra” text or at least a contribution in this respect. Besides, the written text in many ways limits the extra text. On the other hand, the expectations to the text may

not always be complied with. The reading process can be characterized as a kaleidoscope of perspectives, pre-intentions and recollections. The process may of course be blocked, and, according to Roman Ingarden, this may be the result of indignation or surprise during the reading (Ingarden, 1973, 1989). In a school context it is essential that the blocking is used creatively and extensively because when the reading process comes to a halt, the reader has the opportunity to establish his or her own references, fill in holes discovered in the text and make inferences. The creation of the extra text will therefore reflect the disposition of the reader and add to his or her sense of reality. The process of reading and interpretation, will in creating the extra text, at the same time create a reality different from the reader's own. Paradoxically the reader must therefore find hidden personal qualities in order to perceive a reality beyond his own reality. In a way the reader must forget about his or her own world to be able to participate in the alternative and adventurous reality offered in the text.

The ability to benefit from the reading process in this way differs from individual to individual. According to Northrop Frye all texts contain elements of escapism as a result of illusions created by the reader (Frye, 1957). But, if reading only should create illusions, the reader is victimized and cheated on. It is through the reading process that the temporary nature of the illusions becomes apparent. The reader consequently alternates between entering into an illusion and observing it from the outside so to speak. The ability to alternate between these two roles or positions is a decisive factor of the creation of identity. The aptitude to absorb the unknown and unfamiliar is often referred to as 'identification', which in Iser's terminology, is similar to the reader's identification with the text he is reading. This is of course a view on identification that is rather reductive and restrictive. In my view identification has to do with the creation of different aspects of identity, and in the process of reading the identity is developed and nourished through the text read, but also through other accompanying impacts from the surroundings.

### **Reading and identity**

All texts, independent of their incorporation in textbooks or other textual surroundings, consist of ideas developed by somebody else. By reading the reader enters into a position in which reflection and development may take place. The reader in a way takes charge of both the ideas and the reflection, and in this way the distinction subject-object is reduced, a distinction always to be found in all observation and cognition. This is what makes the process of reading so unique in gaining new knowledge. On the other hand, it is also the reason for a misjudgement, i.e. that the world incorporated in texts is analogue to identification. Referring to Poulet, Iser underlines that the 'I' in a text, is not the personal 'I' (Poulet, 1969). In this context 'I' should also like to draw attention to a statement by Roland Barthes, who stresses that the 'I' of a text is just a 'paper-I' (Barthes, 1989).

All readers, inside or outside of a school context, have certain expectations towards a text. Not always are these expectations fulfilled. If most of the expectations,

however, are met with, the reader probably will perceive the didactical and intentional perspectives of the text. What is perceived through the reading of the text enters into the memory and may later emerge and be transferred to a different context. In this way unpredictable associations may occur. The reader may establish connections between the past, the present and the future. On the other hand, the text may block the reading from time to time. This blocking may occur due to indignation or surprise caused by the text. The blocking must however, be overcome if the reading is to continue. Fictional texts are often characterized by unexpected turns and restructuring, and they may therefore cause frustration and broken expectations. Even the simple story may contain possibilities for blocking. This is due to the fact that no story can be told absolute exhaustively. If the current reading is interrupted, the reader is however, given the opportunity to establish his own connections and to cover the holes left by the text. The so-called holes in the text (*Leerstellen*) have certain implications on the process of expectation and retrospection. The holes may be filled in various ways, and consequently no reading can realize or exhaust the complete potential of the text. The reader is filling in the holes or the spaces in his own way and has to yield to the full contents of the text. In traditional texts the process is almost unconscious, but in modern and post-modern texts this turns out differently. For instance, fragmented texts are demanding because the reader constantly tries to create connections between the various fragments. For students in the secondary school or higher education the process linked to the extra text is harder to deal with than ordinary or traditional texts.

Reading is normally characterized by a dialectical structure, and the need to decode it gives us the opportunity to formulate our own decoding capacity. In other words the reader is confronted with aspects of his existence that were previously concealed and unconscious. Thus reading makes the reader capable of formulating the unformulated. In ancient Alexandria the word 'studium' had the implication of effort and eagerness to learn. It is in my opinion the extra text created through the reading process that can strengthen the concept of 'studium' under optimal conditions. Interpretation implies efforts connected with decoding and coping with the readability of the text. Today the attention is linked to the rhetorical expression 'sensus spiritualis' more than 'sensus litteralis'. The principle of 'sensus spiritualis' implies a reading concentrated on creating a relevant textual meaning for the contemporary and future readers. The principle does indeed imply further allegorical interpretation, not an interpretation searching for the literal meaning of the text. An interpretation based on the principle of 'sensus spiritualis' makes all texts dependent on a context, which in turn makes it evident that the interpretation always relates to other texts. Hans Robert Jauss' statement implying that interpretations of the past place themselves as layers on top of the contemporary interpretation makes me want to add that reading and interpretation thus must be seen as a process pointing both backwards and forwards. This means that in the student's reading process both identification and the vivid construction of the extra text contribute to the creation of an identity. Traces from the past, traditions and conventions, are necessary in an inter-play with the expressions of today's youth culture. I would once more like to

draw attention to Skjervheim's conviction that the individual is free in the sense that his or her identity is constructed based on heritage and interpretation.

I have only touched Umberto Eco's model reader as a term, but the two main types of model readers are in my opinion too imprecise categories regarding student as readers. Johan L. Tønnesson is a scholar who has worked on Eco's concept of the model reader (Tønnesson, 2004). According to Tønnesson, a text offers a great number of model readers. In my view Tønnesson's attempt is interesting, but rather theoretical and not easy to use. Instead of dealing with the model reader in text interpretation, I think it is more fascinating to reflect on the extra text created during the process of reading and interpretation. The text is consequently a product which in turn can be related to Eco's term model reader due to the fact that the extra text is the mixture of codes integrated in the text and the codes originating from contemporary cultural expressions. According to Eco, the reader is simultaneously given new competence based on his or her existing competence when reading the text. If this basic competence is too limited, the text will collapse. Consequently, both the original text and the extra text which is created are dependent on a balance of codes which can be decoded and these codes bring new knowledge and competence. Eco's distinction between open and closed texts is of course linked to this balance, but most texts in an educational context are mixtures of open and closed texts. Purely open texts are hardly seen in textbooks, and this is also the case in the closed texts of the popular culture. Texts revealing a mixture of open and closed are in other words typically educational texts. Earlier my suggestion was to be aware of the double nature of these texts, and the double claim on the student is to deal with both the text itself and the contextual elements of the textbook. The creation of the extra text may therefore be seen as related to a double filtration. Thus it is the extra text that deserves attention both theoretically and practically when we occupy ourselves with students' reading process and its impact on the creation of identity.

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## **Les catalogues rétrospectifs de manuels scolaires sur internet, indispensables outils de recherche pour les historiens**

Paul Aubin

Le manuel scolaire risque, d'ici quelques années, d'être complètement chamboulé suite à l'apparition des nouvelles technologies qui se retrouvent coiffées sous le vocable « internet ». Or la même révolution technologique qui charbarde complètement la production des nouveaux outils pédagogiques a aussi des effets significatifs sur l'analyse des anciens manuels scolaires. Un certain nombre de pays ont mis sur pied des groupes de recherche sur l'histoire de leurs livres d'école et ces derniers nous offrent le résultat de leurs recherches, toujours en développement, par le truchement de sites web.

Une vingtaine de centres de recherche localisés dans une douzaine de pays, essentiellement d'Europe de l'ouest et des Amériques, nous donnent accès à leurs catalogues, que ce soit des collections nationales (site offrant une vue d'ensemble de la production d'un territoire donné), des collections thématiques ou des collections locales (site décrivant le contenu d'une bibliothèque spécifique). Même lorsqu'ils ont une portée limitée - telle collection ou tel thème -, ces sites permettent aux chercheurs étrangers de savoir ce qui se fait ailleurs et surtout d'entrevoir des liens jusque là insoupçonnés entre pays parfois de langues étrangères.

Les quelques textes qui suivent s'inscrivent illustrent ce phénomène.

### **La banque Emmanuelle (Alain Choppin)**

Interrogeable en ligne sur le site de l'Institut national de recherche pédagogique, la banque de données Emmanuelle vise à recenser l'intégralité des manuels scolaires publiés en France depuis la Révolution, quels que soient la discipline et le niveau d'enseignement.

Il ne s'agit pas d'un instrument bibliographique classique, mais d'un outil de recherche qui vise à l'exhaustivité : chaque notice réfère non à une édition particulière, mais à l'ensemble des éditions - souvent nombreuses - d'un même ouvrage décrites dans les bibliographies et/ou présentes dans les principales collections nationales. Il s'agit donc d'une approche synthétique, quasi « biographique », de l'objet manuel qui s'inscrit dans une problématique scientifique très ouverte : chaque notice intègre une série d'informations qui offrent à l'utilisateur une multiplicité d'accès qui n'entrent pas dans les usages du catalogage (la discipline scolaire, la filière et le niveau d'enseignement, la durée de vie éditoriale, etc.).

A ce jour, 30 000 notices sont accessibles sur internet (soit environ 100 000 éditions différentes), ce qui correspond à la production des manuels scolaires de langues anciennes (latin et grec), de langues vivantes (allemand, anglais, espagnol et italien), d'histoire et de géographie sur plus de deux siècles. La production de cette banque s'inscrit dans un programme plus vaste qui traite notamment de l'histoire de la réglementation et de la production, mais aussi de l'histoire des maisons d'édition scolaires et de l'historiographie des manuels.

Le programme Emmanuelle est l'initiative la plus ancienne, mais depuis le début des années 1990, plusieurs projets d'ampleur nationale, voire internationale ont vu le jour, se référant, explicitement le plus souvent, au modèle français. Les initiatives les plus récentes concernent la production brésilienne, avec le programme *Livres*, coordonné par l'Université de Saõ Paulo, et la production italienne, avec le programme *Edisco*, coordonné par l'Université de Macerata. Un recensement partiel des collections uruguayennes (Musée pédagogique de Montevideo) est également accessible sur cédérom. Enfin, un projet de banque de données paneuropéenne (interrogation *multiopac*), dont l'origine remonte à 2001, est actuellement en cours de réalisation à l'Université de Turin.

Outre les bibliographies ou catalogues de fonds spécialisés accessibles à ce jour sur internet, les chercheurs disposent principalement de trois types de sources :

- les catalogues en ligne des grandes bibliothèques nationales, universitaires ou interuniversitaires qui, lorsqu'elles procèdent à l'indexation de leurs collections, confondent souvent contenu intellectuel et type de documents : le descripteur *textbook*, qui ne devrait concerner que les documents qui traitent des manuels, recense de fait nombre de manuels ;
- les catalogues ou bibliographies spécialisés imprimés, dont la mise en ligne pourrait être envisagée (c'est le cas des riches collections du Georg-Eckert Institut, par exemple) ;
- les bibliographies, limitées à un domaine ou une période donnés, mais visant souvent à l'exhaustivité, qui figurent en annexe des productions universitaires, masters, PhD ou thèses. A titre indicatif, nous avons ainsi pu « repérer » plus de deux cents publications particulièrement significatives émanant de quarante-cinq pays, mais il y en a bien davantage.

### **An initiative for the integration of European and Latin American schoolbook databases. Manes research centre and patre-manes network (Kira Mahamud)**

**MANES Research Centre** (<http://www.uned.es/manesvirtual/portalmanes.html>)

MANES stands for *MANuales EScolares* (School Textbooks). The project was born in 1992 at the National Distance University (UNED) in Madrid, with a dual group of objectives:

- a) Instrumental objectives, on the one hand: to compile and classify Spanish schoolbooks from the 19<sup>th</sup> and 20<sup>th</sup> centuries, as well as other type of relevant documents: legislation concerning school textbooks, academic programmes.
- b) Research objectives, on the other hand: to examine, study and analyse school textbooks from various angles and from a historical perspective.

It was inspired by the French programme EMMANUELLE, whose Director is Alain Choppin, and its creation was partly possible thanks to an agreement with the latter. During the 1990's various universities from Spain (Murcia, Valladolid, Complutense de Madrid), Portugal, France (Tours) and Latin America (1996) (19 Universities) joined the project. This was a sign of MANES' initial success and growth. Together with the database, a *special collection* of school textbooks was deposited in the Central Library of the National Distance University. However, the turning point for the MANES project took place in the year 2001, when the web page for the Research Centre was created.

Some sections of the home page are referred to as "live pages" because they are continuously being updated:

- a) Schoolbooks Database. It currently contains about 17.000 entries
- b) On line libraries: Photographed schoolbooks.
- c) Bibliography: All publications on school textbooks (books, articles, book chapters), which can be consulted by country.
- d) Books published within the MANES collection.
- e) Thematic expositions: Essays and studies on various topics related to schoolbooks.

#### ***PATRE-MANES network***

In 2004 eight members of the MANES Research Centre: Spain (Madrid), Portugal (Lisboa), Belgium (Leuven and Gent) and Latin America (Argentina, México, Colombia) elaborated the PATRE- MANES project. PATRE stands for *PATRimonio Escolar* (School Heritage). With financial aid from the ALFA programme (Academic Education in Latin American), a cooperation program between the European Union and Latin America for higher education, the network was created. The main objectives of this network are

- a) Constructing a common on line database
- b) Creating on line libraries
- c) Promoting comparative studies

The MANES Research Centre has grown and expanded in various directions. On line databases prove to be an essential tool and aid in the research on school textbooks. Together with the creation of such a large database, MANES and now the PATRE - MANES network, has propelled and promoted research on school textbooks.

## **Le catalogage et la mise en valeur des fonds de manuels scolaires à l'institut national de recherche pédagogique (Philippe Marcerou)**

Depuis quelques années, l'Institut national de recherche pédagogique (INRP) a pris l'habitude de considérer que les collections de documents et d'objets qu'il conserve dans sa bibliothèque, située à Lyon, et au Musée national de l'éducation, situé à Rouen, constituent un ensemble documentaire homogène.

### *La deuxième collection française de manuels scolaires*

La bibliothèque de l'INRP rassemble et conserve un fonds de manuels scolaires que l'on peut estimer à plus de 80000 unités : cette collection est complétée par les 70000 manuels que possède le Musée national de l'éducation à Rouen. Au total, on peut estimer que ces 150000 exemplaires correspondent à plus de 100000 titres différents. Ces collections couvrent l'ensemble des disciplines d'enseignement et l'ensemble des niveaux de l'enseignement primaire et secondaire depuis la Révolution française, tandis que le niveau universitaire y est peu présent.

La richesse des collections s'explique par l'histoire du Musée pédagogique, fondé en 1879, et celle des organismes qui lui ont succédé jusqu'à ce jour. En effet, aux collections initiales constituées empiriquement par Ferdinand Buisson et par les premiers responsables du Musée pédagogique, sont venus s'ajouter progressivement des dons et surtout, à partir de 1926, les volumes issus du dépôt légal des éditeurs. Le fait que le dépôt légal constitue le cœur des collections de manuels et qu'il soit complété par des dons réguliers permet de conclure que la collection de manuels scolaires conservée à l'INRP est très large, même si elle demeure moins complète que celle de la Bibliothèque nationale de France.

### *Signalement et catalogage des fonds de manuels scolaires*

Le travail réalisé par le Service d'histoire de l'éducation au travers de la base bibliographique et signalétique EMMANUELLE est connu et reconnu au plan international. Depuis 25 ans, les publications et le travail de bibliographie réalisés par le Service d'histoire de l'éducation, notamment sous la direction d'Alain Choppin, ont abouti à la constitution d'une base considérable : pour un nombre désormais important de disciplines, la base EMMANUELLE recense à présent l'ensemble des éditions de manuels scolaires qui ont existé et les localise dans différentes bibliothèques et centres documentaires (bibliothèque de l'INRP, Musée national de l'éducation, Bibliothèque nationale de France, etc.).

Le travail de catalogage des fonds documentaires du musée et de la bibliothèque se place en creux et en complément de la base EMMANUELLE. En effet, il vise à recenser, pour toutes les disciplines, toutes les éditions disponibles dans les fonds documentaires de la bibliothèque et du musée. Pour ce qui concerne la bibliothèque, il s'attache à respecter les normes internationales de catalogage telles qu'elles découlent du format d'échange UNIMARC.

Il est paradoxal de noter que, jusqu'en 2004, les manuels scolaires étaient globalement peu présents dans les catalogues informatiques de la bibliothèque (moins de 5 000 notices) et du Musée national de l'éducation (20 000 notices) ; de surcroît, les notices bibliographiques de manuels scolaires étaient peu nombreuses et parfois lacunaires. A partir de 2004, l'INRP a donc décidé de mener à son terme le catalogage des manuels scolaires qu'il possède. Pour cela, par la passation d'un marché public (420 000), il s'est attaché une société de services spécialisée qui réalise les notices, sous le contrôle et l'encadrement des équipes de bibliothécaires et de documentalistes en place. A ce jour, à la bibliothèque de l'INRP, 48 177 manuels ont été catalogués en 14 mois : la fin du chantier est prévue pour le dernier trimestre de 2006. Le catalogage des manuels scolaires du musée débutera, quant à lui, le 17 novembre 2005 et se terminera au premier trimestre de 2007. Depuis le mois de juillet 2005, les notices créées et, plus généralement, les catalogues de la bibliothèque et du Musée national de l'éducation sont pleinement accessibles en ligne (site [www.inrp.fr](http://www.inrp.fr) <<http://www.inrp.fr>> et, pour la bibliothèque, site du système universitaire de documentation : [www.sudoc.abes.fr](http://www.sudoc.abes.fr) <<http://www.sudoc.abes.fr>>).

Le programme de catalogage s'accompagne d'un programme de restauration des manuels scolaires anciens de la bibliothèque : sur près de 2000 documents à traiter, 500 l'ont été en un an et demi.

#### ***Numérisation des fonds de manuels scolaires***

A partir de 2007, l'INRP se lancera dans la numérisation des principaux textes qui jalonnent l'histoire des manuels scolaires et envisagera ainsi de constituer progressivement une anthologie des manuels d'enseignement des différentes disciplines. Au préalable, un groupe de travail, dont il serait souhaitable qu'il soit international, aura opéré une sélection des manuels scolaires à numériser.

A l'horizon de 2010, l'objectif est d'avoir numérisé par ce biais 1 000 manuels scolaires en mode image. Les textes de ces manuels numérisés seront accessibles sur le site de l'INRP. Ce travail constituera la base d'une coopération avec la Bibliothèque nationale de France (site [GALLICA](http://www.gallica.fr)) et celle d'un projet européen inclus dans le cadre du programme E-CONTENT, par lequel plusieurs structures documentaires nationales s'associeront pour la constitution d'une base de documentation numérisée en éducation.

#### **MANSCOL, Manuels scolaires québécois (Paul Aubin)**

L'édition de manuels scolaires au Québec débute en 1765 avec nos tout débuts dans l'imprimerie. S'alimentant d'abord à l'étranger - principalement France et Angleterre dont des textes sont réimprimés au Québec avec plus ou moins de modifications -, l'industrie génère très tôt une production locale tout en continuant à intégrer un bon nombre de productions d'ailleurs.

Le catalogue MANSOL (<http://www.bibl.ulaval.ca/ress/manscol/>) vise à recenser, décrire et classer l'ensemble de la production québécoise, y compris les apports étrangers reproduits au Québec. Le site offre présentement un corpus de 20 000 références, éditions princeps et réimpressions confondues. Cette masse documentaire est accessible selon les voies traditionnelles de la recherche bibliographique : auteur, titre, éditeur, année, une localisation pour chaque document. Comme il s'agit de manuels scolaires, on a jouté deux voies d'accès propres au sujet : les disciplines et les dates d'approbation.

Enfin, le site a été conçu comme un centre de documentation virtuelle pour favoriser l'histoire du manuel. Au catalogue qui en est l'assise, on ajoute plusieurs différents volets qui permettent d'amorcer une analyse des références : dictionnaires d'auteurs et d'éditeur, historiographie, bibliographie, sources manuscrites et imprimées, législation, programmes, questionnaires d'examens.

Enfin, on y retrouve un bottin international des chercheurs intéressés à l'histoire du manuel de même que les adresses de sites internet produits dans une douzaine de pays et qui ont été conçus dans la même optique : présenter ce qui se fait dans chaque pays dans ce secteur de la recherche, avant, espérons-le, qu'on en arrive à produire des instruments de recherche croisés englobant plusieurs pays : la nature même du produit analysé - le manuel scolaire - s'y prête car on retrouve souvent les mêmes manuels, plus ou moins modifiés, dans plusieurs pays.

# **Online services providing commercial contents in education. Which digital space for mediatized communication in school?**

Gérard Puimatto

For a few years, political objectives of ICT generalization at school have resulted in a lot of public initiatives. The logic of experimentation gives way to quasi-industrialists deployments, involving a group of actors, among whom educational establishment, local authority and national education system, both in its central and decentralized services.

Digital resources occupy a specific place in this device, between the freedom of choice usually conferred to the actors and the definition of large span policies. The institutional, individual and leading actors are challenged, with significant differences, to work out new methods around the use of digital on line resources.

## **Networking school, at the heart of initiatives**

The educational digital network therefore settles at the crossroads of the concerns of users and actors of editorial and territorial development. For users, the fields of use prevail, with in particular pedagogy, school life, documentation and organization; for development's actors, on the other hand, network appears as a traditional technical organization in layers, which can be briefly described by the three levels: *infrastructure*, *infostructure* and *services* provided to users. For the actors of the educational communities<sup>1</sup>, it is as many reticular dimensions which can develop, in a *reticularity of use* gradually becoming essential to all.

This concept of *reticularity of use* comes from sociology of the innovation; it fits in particular in an approach of the sociotechnical frames of reference, and especially in the framework of use founding the practice of the users (Flichy, 2003).

The various parts of the regulation/recommendation, associated to the purchasing rules of public institutions and to the previous operating modes in educational planning and development lead to segmentation of public initiative. Simply, but not exclusively, it can be described in four fields: equipments, networks, digital working environments<sup>2</sup> and contents. From the point of view of the constitution of

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1 In France, educative communities are defined by orientation law for education (1989). It includes teachers, pupils and students, administrative and technical staff and families, all considered as educational actors.

2 Digital working environments are known in France under the acronym ENT (*espace numérique de travail*), defined by a directive schema published by ministry of education SDET (Educnet, 2002). ENT is a set of on line services, providing access to the most

information spaces and mediatized school communication areas, it is then a double glance which one must develop: the one related to each elementary project in one of the section considered, appreciated according to traditional criteria of effectiveness and response to the needs; but also a more distanced glance, relating to the whole digital space of education which is constituted.

### **Informational and documentary contexts**

On line editorial services contents thus constitute one of the components of digital spaces of education in construction; they cannot be apprehended separately without also considering this global approach. But they are also a component of an environment of informational and documentary resources in deep transformation; a change from a shortage logic to one of plenty; evolution of a documentary intern organization founded on the fundamental bases (analytical and systematic indexing) to the "anorganisation" of Internet, brilliantly compensated by the power of full text tools. New informational and documentary context are therefore coming to disturb the traditional school modes.

But this context switch does not only affect School: it also strikes head on the publishing sector. If the schoolbook remains for a while protected by the public funds allotted to it, Internet is a powerful factor of development of an important public publication. Those initiatives come encroaching on traditional areas of commercial edition, publishing directly a lot of resources. It is also the vector of a new edition with educational purpose, which can be described as collateral, for the major actors of television, radio, press, music and software editors, etc. Internet allows them to develop marginal activity, without claiming to have main educational economic viability.

### **First initiatives in France: ENS, CNS, KNE**

It is in this context that since 2002 on line editorial services for education have developed. The ministry of education first launched the ENEE program (European digital educational area), inaugurated in 2003 under the name of *espace numérique des savoirs*. ENS, designed to concern 1.500 schools and establishments, aimed at offering them a set of "basic" resources, with adapted rights, negotiated and purchased by the ministry.

The on line editorial services resulting from ENS experimentation were constituted, under the vigorous impulse of the ministry, in trade association<sup>3</sup> CNS (*digital channel of the knowledge*). The group brings together about 35 editorial companies (25 members of group, 10 with a distribution agreement); it meets the requests of the

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information systems of school and educative system (marks, attendance, following of courses and studies, school life, etc.)

<sup>3</sup> In French, GIE (*groupement d'intérêts économiques*), legal form for consortium (trade association)

ministry, but also the needs of local authorities developing specific initiatives like Ordina13 or Landes Interactives<sup>4</sup>. In the same time, the *digital Kiosk of education* (KNE) is constituted around the editors of the *Lagardere group* and their partners. The KNE is strongly attached to the historical current of the group edition, in particular of its components in school edition and reference books (dictionaries, encyclopaedia, atlas, etc.).

For the whole of the first initiatives, either the public initiative ENS or the process of leading sphere CNS or KNE, construction is not as much related to a response to a need for use or to an economic logic. It is less based on the structuring of a market than to a step of pluri-institutional construction, first implying the ministry itself then the local authorities.

### **Evolutions and characteristic tendencies**

Beyond the simple description of the works undertaken by the protagonists, some specificity emerges. They are closely related to the very nature of on line editorial services, particularly to the technical and media possibilities offered as well as to the associated editorial and economic processes.

*First specificity*, the media and granular diversification of the resources suggested: the first offer mostly came from previous productions (off line multimedia titles, elements of web sites and of digital books), catalogues are now gradually growing in quantity and in quality with wider range of items: development of the offer of granular resources, generally in the form of graphic animations of a few minutes maximum illustrating among others experimental approaches in sciences; sets integrating the components of handbooks, class resources and documents for the pupil ; new approaches of encyclopaedias integrating external functions of links, actualization, offer of topical files, etc.

The federation of editors constitutes the *second specificity* of the process. Whereas the titles multimedia were traditionally to be bought without taking knowledge and according to non comparable bases between the editors (definitions very different from products, non homogeneous user licences for school uses, modes of tariffing), the setting in bouquets imposes to set aligned on a single mode of marketing. All the on line digital products and resources must be proposed in the shape of an annual subscription according to the number of pupils, and this constitutes a considerable evolution compared to previous commercial practices.

The *third specificity*, the weak documentary organization of the offers, catalogues of the bouquets being more conceived like compilations of commercial catalogues of the editors, without common documentary structuring. There is thus no coherence in terms of contents and response to the needs, and not either of transverse diagram of

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<sup>4</sup> Ordina 13 is an initiative of Bouches-du-Rhône county; Landes Interactive is an initiative of Landes county; both provide to all the pupils of third and fourth class of secondary school a laptop.

indexing making it possible for the users to identify the resources which are necessary for them. The publication of French profile for the learning object model LOM FR is presented like a response to this need, but it remains conceived above all to describe objects of e-learning, which does not correspond directly to the diagram and the diversity of the leading resources offered on line.

Generally, these three characteristics fit more in a process of market structuring by the offer and an organization strongly marked by multi institutional interventions. The constitution and the evolution of on line contents editorial services are subjected to multiple stakes - economic, institutional and organisational - in which the needs for the users and the organization of the establishments weigh little. The approaches of documentary policy, in particular, which aim at structuring the resources environment and its modes of exploitation on the scale of the establishment, are not in the least facilitated by an offer which is organized more on the title than on the contents.

In this context, the direct diffusion of the leading on line bouquets remains marginal, both from the commercial point of view and from that of the uses. Confrontation with the products into single-user and local area network does not reveal in an obvious way a determining advantage; passing from the purchase of informational property to the acquisition of services is slowed down by the rules and practices of management; technical incidents and difficulties, even if they tend to reduce strongly, also constitute an important obstacle to programming activities one might not be able to achieve. The bouquets of on line contents are mainly diffused in specific devices such as ENS or attributions of the local authorities in appropriations assigned in support to wide range operations.

### **The question of added values**

The editorial on line services make a profound change of the economic models, while passing from the sale by unit to a logic of subscription opening annual rights of use and tarified according to the number of pupils. Within a framework thus renewed, the editorial added values are, at least partially, modified. Traditionally positioned in particular in the recognition of a label, guaranteeing quality of the publications and fidelity with a followed and clearly posted leading line, they also settle in the constitution of a transmission and processing chain from the author to the user; such a chain implies in particular the links of manufacturing, promotion, diffusion, after sale service, and so on. Added values finally reside in the capacity to offer a support to the work of the authors, an accompaniment of their activity which makes it possible to reach with a recognized quality.

With the digital on line bouquets, the editor is not any more the central actor of the chain of the author to the user; the promoter of the bouquet occupies a determining place, like last link before the user. If they are regroupings of editors jealous of their prerogatives, the bouquets are not less for the users strongly identified actors, whose name and recognition are related to the quality of the rendered services, in particular

out of technical matter, but also of contents matter. The distribution of the responsibilities between author, editors and the bouquet's provider are not clearly perceptible by the users; the fame and the image of the bouquet are essential in the choices. A significant part of the editorial added value, that of the label, is transferred for the user on a technical provider receiving benefits who does not control the main components of them.

In such a scheme, the determining added values leave the traditional distribution and can be apprehended in two registers, more like fields of potential development than like existing reality today:

- Added values "relative", i.e. added by one of the editorial chain links, for example the benefit of the functionalities of the network related to the transfer or establishment of a title on Internet or the benefit dependent on the bouquet and its own services (search, bookmarks, notes, hybrid document composition, etc.).
- Using values, near as economist concept, this corresponds, in the sociology of the technological innovation, to the framework of use, component which joins the functional framework to constitute the sociotechnical framework of reference. In this approach, the sociotechnical adequacy of the framework to a need for use which creates a new added value, sufficient to justify the purchase.

In both cases, it is the specificity of the on line support which makes it possible to release from the new elements. The case of the CNS initiative is on this edifying point, the efforts devoted for two years aiming at homogenizing the offer and the step of the editors, but being occupied that little semantic coherence of the offer and its response to the needs for the users. The catalogue proposed more aims at allowing the choice of a product than the identification of resources meeting the needs within these titles; it seems more commercial than documentary. The required added value is on the one hand differential by the passage to on line; on the other hand it's limited to the functional framework of each product; in both cases, it is less positioned on the scale of the bouquet.

### **On line editorial services and the development of digital mediatized educational communication**

On line evolutions of schoolbooks, titles, informational resources, services of school support or granular resources... One can wonder in what their availability makes it possible to develop a mediatized educational communication, or more precisely in what the services of contents contribute to work out a space of mediatized school communication.

In the current situation, for example, subscribing to several services of the CNS is often being - when they exist - at the head of many personal services of storage (personal notes, bookmarks, documents, etc), without having the possibility to pass

easily from one to another. Each service is conceived as an environment of closed use, the opening being limited in the best case to use external bonds to integrate new contents. Consequently, the services of on line contents are limited by their design of aggregates of services, without real integration beyond the only process of user's identification. The latter is strongly forced by the limitations of its design: sometimes, identification of computer rather than of the user; directories specific to the bouquets, allowing management of the users, rights and groups only within the bouquet itself, with limited possibilities<sup>5</sup>.

The use of on line editorial contents bouquets, from the point of view of mediatized educational communication, can be conceived only insofar as the contents, the users and the services evolve in the same environment; such an environment must correspond to the successful integration of an adapted functional framework and a framework of use corresponding to expectations. The study of current services shows that it is not true: if one uses more than a unique service<sup>6</sup>, the construction of sociotechnic coherence<sup>7</sup>, is at best left to the care of the user within the framework of his local area network or working station. It is in particular the case for the basic functions of communication (asynchronous or instantaneous transport; forums), functions of personal work (personal space of documents keeping, bookmarks and notes) and services related to workgroups.

#### ***Which policy for digital contents?***

This situation, however, is not a set one. Different actors are working on its evolution. The various editors and bouquets providers try to approach the ENT initiatives or the organizations deploying networks on a large scale, in particular to share processes of identification. Certain local authorities plan to reverse the process while launching invitations to bid towards editors, allowing them to integrate a territorial unique process of identification<sup>8</sup>. The ministerial authorities work on the development of specifications for directories access, in the long term allowing the unification of the various processes of identification.

The current situation still clearly let appear a divergence of approach between the point of view of the editor and that of the user. For the first, the scheme is organized around three objects: the resource, the bouquet and the functional space; for the second, it is the use which constitutes the elementary object: the functional framework of digital space constitutes the intermediate level, whereas the macro

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<sup>5</sup> The management of the groups, in particular, is not seen in a transverse way. It makes it possible to the system to define openings of rights (group of users having the right to such or such resource), but does not authorize the constitution of working groups sharing personal documents or selected resources, if not within one of the services if planned so.

<sup>6</sup> The level of relevance is that of the service and not that of the bouquet, the latter not bringing common services transverse accessible to the users.

<sup>7</sup> In reference to the work of Patrice Flichy on the processes of innovation technological (Flichy, 2003)

<sup>8</sup> The Region Provence-Alpes-Côte d'Azur is committed in the design of such a device.

level is more apprehended as the space of resource open to the establishment, according to its choices and of the territorial policies.

In their current state of development, the services of on line editorial contents only constitute one very small share of the use of resources, even compared to the only digital resources. There is a matter of particular situations, whether pilot or experimental initiatives. This situation is not in itself abnormal, taking into account the reorganization of the sector which was necessary for their installation. However, this reorganization applied before all the relations between editors and the offers of titles; the conceptual evolutions of the document (in particular its granularity) are slow, and the definition of services according to the users needs progresses but slowly.

The current situation of the on line editorial services is thus overall unfavourable, with a weak diffusion and a design only slowly evolving to a real taking into account of the situations of use. For all that, the evolution of the economic organization, and in particular the homogenisation of the approaches of the actors, must be greeted and constitute a significant stage.

The bouquets on line of editorial resources, at this stage, cannot claim to replace a multi-media offer off line, itself in strong crisis. Their design does not enable them either to claim to constitute informational and full documentary environments. They position on the other hand as complements although badly known to existing documentary offer, between the traditional funds of the school documentation centres (CDI), the off line multimedia titles (including local area network products) and Internet. But neither their design nor the current methods of their uses make it possible to consider the ways of constitution of coherent school documentary environments, including local documentary funds, digital bouquets, and public Internet, in the logic of development of documentary policies in educational establishments.

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## Stakes and prospects of historical popularization books for children regarded as educational media

Hélène Collet

Telling History to children for an educational purpose is not new. It has always been a subject of education and teaching, especially for sons of emperors, kings and noble people, who were destined to exert power at different levels. To do that, they had to have knowledge of the past.

At any time, entire chapters in History were romanticized or forgotten, and others were favoured and embellished. Hagiographical literature has great resonance, especially in the end of the 19<sup>th</sup> century when schooling was developing and the struggle against illiteracy had already spreading out. We witness the diffusion of a type of literature which is fictional and documentary at the same time, intended for children as well as adults, for pupils as well as parents, with a supervising exerted by non-religious as well as religious authorities: the approval comments appear as an epigraph to each book, like did Mégard, a publisher situated in Rouen, and his *Bibliothèque morale de la jeunesse* (Moral library for children).

While schooling is developing, publishers are specializing. Thus a differentiation is gradually made between fiction, textbook and informative book. The latter could be described as our current historical documentary. Fictional and informative books are often hagiographical. The 19<sup>th</sup> century is also the golden age for publishers specialized in children literature (Hetzel, Mame, Mégard...) and for magazines for children.

Telling History to children today originates in the context of the 1970's. History, as an early-learning activity, becomes again a fully-taught subject in the syllabi. In the area of adult literature, famous collections are launched: *Les Grandes Biographies* (The Great Biographies) published by Fayard and written by famous historians; *Les Trente journées qui ont fait la France* (The Thirty Days that made France) by Gallimard – it was re-opened in October 2005 under Mona Ozouf's aegis. For children, the collection *La vie privée des hommes* (The Private Life of Men) by Hachette is introduced in every family and in schools.

History is also told to children through different supports such as television (*C'est pas sorcier*! You don't have to be a genius), the Internet, magazines (*Arkéo*, *Normandie Junior*), through different genres such as comic strips, historical novel, romanticized history... However, the topic of this paper is restricted to informative books intended for children. This one falls under the following criteria: a book which comes under the 1949 Law about publications intended for children and of which the author makes it clear that the content is likely to popularize History. It is the unique goal of the object asserted by the publisher who refers to children as

readers. For greater convenience, we shall call “historical documentaries” this kind of books. Textbooks which fall exclusively under teaching syllabi, extracurricular books strictly speaking – that’s to say books which follow syllabi, in complement with textbooks, magazines with historical design - even if they are very close of our subject - publications such as *Bibliothèque du Travail* (Library of work) are thus excluded since it comes from a precise approach even if it is also close to our subject.

### **How to define a historical documentary?**

It is possible to draw up a kind of typology of the different objectives characterizing a historical documentary. First, it must inform: about an era, a topic, a character, an event, etc. for a better understanding. It makes it possible to find an answer to a question. It also helps with self education and with becoming aware of the world. It has very important aesthetic and artistic aspects: it is a beautiful item, most of the time in large size, hardback, with a four-colour printing and with glazed paper. It enables us to entertain ourselves and to become enthusiastic about History. “Because we must not be mistaken, the first function of History has always been to entertain us. Most people read History in order to relax and dream” (Dubey 2000, 150).

Historical documentaries take part in the education and training of citizens. The knowledge of our past, close or distant, the past of our country, our continent in order to put us back in our immediate or domestic context helps to the construction of identity by the comprehension of the past and a projection in the future. Reading historical documentaries must as well allow asking new questions and arousing curiosity.

Finally, the historical documentary helps to learn differently than with a textbook. The textbook is a reference book shared by the pupil and the teacher, designed for the class, an instrument of educational methods following a precise syllabus. The historical documentary is optional. It can be read to provide for a need or to deepen knowledge... According to Michel Barré (1983), the textbook is a pedagogical nonsense, an anti-library which doesn’t encourage reading something else. That’s why he prefers using documentaries. This excessive opinion is to be put in perspective in the context of the 1980’s when textbooks were criticized. However, he doesn’t mean the documentary as a proper textbook. It would be misrepresenting the other functions which characterize it. The documentary is thus not a school book in the first meaning of the word, but this does not exclude its use within the classroom or a school library.

The role of a historical documentary is thus to be a medium, to make History an object close to everyday life, easy to understand, where human beings are authors and actors at the same time. It is a link between those who make History and the non-specialists. It tends to make it familiar, less dramatic, and helps to tame it or even to make up with it.

From this attempt to define the term “historical documentary”, we can draw three issues out, which will be approached in terms of stakes:

- intellectual: combining scientific rigour and adaptation to a young public
- formal: creating an attractive object but affordable from a financial point of view
- editorial: depicting, choosing subjects, representing History.

### **Intellectual stakes: combining scientific rigour and adaptation to a young public**

The scientific quality of historical documentaries content is, first of all, characterized by the presence of scientific authors. For a long time, authors of this kind of books had been scholars, devotees, teachers, librarians. For a few years, we have attended the arrival of academics, specialists among these authors. The precursors were scientists of the so-called “hard sciences” who were the first to be interested in science popularization for children. Moreover, the hackneyed aspect of History when writing for children had great resonance and didn’t produce much prestige. Besides, numerous publishers do not introduce the authors on the cover, which goes to show that it was not selling. Nowadays, we can take as an example Pascal Picq, co-author of *Lucy et son temps (Lucy and her times)* with Nicole Verrechia (Picq et Verrechia, 1996). There is a discrepancy between the way his impressive résumé is presented and the spirit of the collection (use of humour and of advertising processes). The collection *Autrement junior, série Histoire* (Differently junior. Series History) presents a scientific committee made up with historians. Let’s not forget that the presence of a scientific committee is the characteristic of a scientific magazine. Thus, the publisher’s aim is really to offer a series with a high-levelled intellectual scientific quality.

The scientificity is also proved by the treatment of new topics of academic study which we find now adapted for a young public. Thus nowadays, new themes are introduced such as the art of cooking and the order of dishes, heraldry, or even the Early Middle Ages.

Finally, the introduction of historical methods is spreading out. History is not self-made: it requires scientific methods set up by men in order to know the past and how we know it. As an example, we can cite Fiorelli’s works. He undertook excavations in Pompeii and created the method of “pouring-moulding” the cavities which were dug after the decomposition of corpses of people who died under lava flows (*Pompéi, vie et destruction d’une cité romaine / Pompei: the day a city was buried*, 1999, 29). Another book is quite emblematic of this evolution: *L’Egypte, tout ce qu’on sait et comment on le sait* (Egypt: everything we know and how we know it) (2003). Several chapters are devoted to the discovery of Egyptian sites, as well as to the different methods permitting to date, analyse, compare, detail and present the different aspects of everyday life in the Ancient Egypt, from dating with carbon-14 to paleozoology, including epigraphy and paleobotany.

Through these different elements (authors, new topics of study, introduction of research methods), History proves to be affordable for a young public, without renouncing to the scientific and intellectual rigour that characterizes it.

### **Formal stakes: presenting attractive objects**

Formal stakes are considerable for publishers: they have to make an object which combine scientific rigour and attractiveness in order to sell to children, but also to parents. Pierre Marchand, who had been in charge of the child section for Gallimard for years, then for Hachette for a few months before his death in 2002, said: “A book must be attractive, but it must not be expensive”. However, historical as well as scientific documentaries intended for children are very expensive: large size, four-colour printing, hardback, glazed paper, numerous illustrations and so on. Co-publishing is one of the solutions to this material and financial problem. Pierre Marchand managed “a masterstroke” in the beginning of the 1990’s by taking the English publisher Dorling Kindersley on as a partner for their collections translated into French and published by Gallimard: I mean *Les yeux de la découverte* (*Eyewitness Guides* by Dorling Kindersley). At the time, it was an editorial revolution that was to be copied afterwards. The documentary item was renewed in its form where, for the first time, illustration had the place of honour in a overexposed way, especially with the almost excessive use of photomontage (where a detail is cut from the whole picture) and which was highlighted by printing technical processes, worthy of the biggest art publishers. The success of such an enterprise was immediate and today, the collection is still alive with 95 titles in the publisher’s catalogue.

However the attraction for this collection, beautiful as it was, raises problems of reading and of access to information. We can quote as an example the introduction page of *Lumières de la Grèce (Ancient Greece)* by Anne Pearson (1992, 7). There we can find illustrations, photographs of objects, of the Acropolis and a small chronological table. If we look into the photo of the object whose caption is “Sea Horse”, further information are given: “On the bezel of this ring appears a sea horse whose tail looks like a dolphin’s”. The informative degree of this ring and its caption is nearly nothing. What do we learn about the Ancient Greek civilisation through this example? Nothing. It’s the same for the next picture (a pottery in the shape of a donkey’s head): “here is a two-handled cup in the shape of a donkey’s head”. Outside the fact that the items represented in these two examples are clearly out of their context (Which date? Era? Place? Where are the represented objects? Information we learn with some difficulty at the end of the book in the photographic credits), the caption doesn’t offer any valuable information. We could caricature a little by saying the author wanted to fill in a blank in the double page by inserting this kind of pictures, particularly with this kind of captions. When we refer to the paratext of the book, we can better understand some of the layouts: these are the collections of the British Museum. The book is then more of a museography kind than of the highlighting of History and its popularization. It is used for giving to see

objects and it cultivates a very aesthetic presentation which has other advantages. Several of my librarians colleagues and myself have witnessed the difficulties for the public (most of them pupils) to take information, and it is almost impossible for them to even find any information in this kind of documents, which requires not only help in terms of reading, but also the presence of other historical documentaries in order to undertake real and efficient documentary researches.

There are other examples of more didactic pictures. We can mention *Alésia* (Adam, 1984, 58) in Casterman's Series *Les jours de l'Histoire* (*Events of Yesterday* by Silver Burdett Press): a reproduction of a wooden-carved stele is drawn with clear lines in the comic strips way in order to make the reading easier and immediately intelligible (the scene represents Gauls having meal with finely worked furnishings).



**Figure 1.** High left: De la Martinière, p.29; high right: Gründ, p.18; low left: Gallimard, p.18

Other illustrations see their representation changing over the years and depending on the publishers. For instance, there is this Roman comb which is in the National Museum of Rome. It was studied by three different publishers (1990, Gallimard in *Rome la conquérante*, p.18 (*Ancient Rome*, Dorling Kindersley); 1998, De La Martinière jeunesse in *Vivre comme...les romains*, p.29 (*Step into the Roman Empire*, Lorenz Books); 2001, Gründ in *Comment on vivait à Rome*, p.18 (*Ancient Rome*, Smart Apple Media)): it is a sculpted ivory comb with the inscription "Modestina Vale" engraved on it - which means "Modestina farewell" in Latin. It is presented full-faced or in profile, in different sizes –none of the three publishers indicates its exact size. In Gallimard's edition, it is indicated that we can read "Modestina Farewell" on it. However, the inscription is really written in Latin which is not told to us. It is thus not legible. De La Martinière doesn't take any risk in the

matter and only indicates that “this ivory comb has its owner’s name”. Finally, Gründ are the most rigorous in the caption: “this ivory comb is engraved: “Modestina Vale” (Modestina Farewell)”. Gründ introduces the item exactly as it appears to us, and mentions that it is written in Latin and translates the words. Examples like this are manifold and are dealt with in a different way according to the publishers and the dates of edition

These few examples show the variety of supports which can be used, among others –drawings, especially in collections intended for a younger public. Each picture must be adapted to its public and particularly must respect a material and intellectual rigour, because “a good popularization means to ennoble the spirit of other people” as is said by Labarthe.

### **Editorial stakes: representing History**

To represent History, publishers resort to diverse tricks, especially formal ones. The first element which can captivate the reader is the collection. There are numerous series titles which play on the identification of children or on an invitation to take part in an extraordinary adventure. We can find for example *Des enfants font l’histoire* by Casterman (*Living in another time* by Silver Burdett Press; *La vie des enfants* by Le Sorbier (*Peoples of the past* by Millbrook Press); *Explorons...* by Rouge&Or (Let’s explore); *Explorateur 3D* by Hachette (3-dimensional explorer) and many more. Other publishers rather play on the looks and the “giving to see”. It is the case for Gallimard with *Les yeux de la découverte* or *Les yeux de l’histoire* (*Be an eyewitness to...* by Dorling Kindersley); Fleurus with *Voir l’histoire* (See History) or Mango with *Regard d’aujourd’hui* (The eyes of today). As well, the back cover is a reader catcher with invitations to take part in adventures of the past and to make exciting discoveries. Of course, the aim is to seduce children, but also their parents who chose the documentaries for them most of the time.

Another way to gain the young public’s attention through their parents is also to propose methodological guides just as in textbooks in diverse collections (*Voir l’histoire* by Fleurus; *Le grand livre de l’histoire* by Hachette or in the Larousse series, *Encyclopédie des jeunes*). These guides are completed by index, glossaries, and tables of contents, which are more or less extensive.

Other publishers play on fashionable graphics. If we consider the cover of *Sur les traces des...fondateurs de Rome* (On the trail of...Rome’s founders) (Castejon, 2001), we can see that everything is done to attract the young reader seeking for History: the main colour is dark; in the foreground, a character is drawn in an offensive way, in an almost “gothic” style in the shape of comic strips. We see a wolf drinking water from a not much appealing river. We get involved in the conquest of Rome from the cover. This kind of graphics is attractive for teenagers. We can add that this series which is presented as a historical series by the publishers, introduces in fact founding texts from eras when the action takes place, with some informative pages in-between. Therefore, I tend to qualify them as fiction more than

as documentary information since the latter is not at all prevailing –but this doesn't take away the interest in reading those texts.

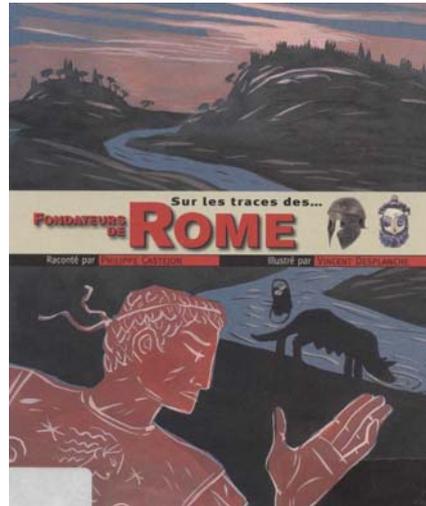


Figure 2. Cover of *On the trail of...Rome's founders*

Other tricks: play activities. Games, wings, transparent pages, extendable pages, strips, flapped units are legion in historical documentaries. It is interesting to note that the publishers use these tricks in books, especially in books which we usually call “beautiful books”, intended for adults (Gründ, Arthaud or Gallimard for instance). Among the “fashionable” activities, we find direct links between books and the Internet (Series *Big Bang* by Gallimard) or the presence of CD-ROMs sold with the documentaries (series *Voir l'histoire* by Fleurus). The book on itself doesn't sell anymore and in the middle of so many collections, the book which presents a complementarity (not always checked) with another reading support has maybe better chances to be sold. On the contrary, CD-ROMs publishers complete their electronic support with complete books. It is the case for *L'émerillon : enquête à la cour d'Aliénor d'Aquitaine* (The Merlin: investigation at the court of Eleanor of Aquitaine)(Favreau, 2005), a game in which we have to investigate in the Middle-Ages and it is completed by an illustrated 160-paged encyclopaedia about Middle-Ages History.

But what we can also observe, in parallel to these tricks, is the coming-back of the more or less narrative text, less fragmented than before- what caused problems for reading and finding information as we said before – with a tendency to the “docu-fiction” (which is developing on TV with films like *L'Odyssée de l'espèce / A species odyssey*) by some publishers. This kind of presentation has been in existence for already several years in the series *Archimède* (Archimedes) by L'École des Loisirs. The topic of each volume is dealt with in the form of a well illustrated linear text. However, we must read the content carefully to decide if we treat it as a

documentary book or as fiction, because sometimes textual “parasites” can mislead us as for the informative content. Still by the same publisher, the series *Belle vie* (Beautiful life) (created in 2004), a collection of biographies, introduces in the form of paperback books, the ambitions and struggles of the treated character and his role in History, the whole thing decorated with a coloured notebook. The documentary series *Par quatre chemins*<sup>1</sup> (created in 2005 by Gallimard) intends to multiply the approaches and points of view. On a topic, we can find in turns a child’s narration (who tells the story of his family, its context) and a documentary narration in the form of a double-page which put the topic back in History. In parallel, the publisher created, last year, a fiction series in the form of a diary: each narrator tells the events of his or her time at his or her life pace, but at the same time he or she keeps the liberty of making-up (it is a fiction collection). A small documentary file can be found at the end of the volume to put the story back in History.

Another type of narration is to be analysed: the kind that uses humour as in the series *Docudéments*<sup>2</sup> by Gallimard or *Regard d’aujourd’hui* by Mango. With Mango, humour is treated in a way that can cause a problem of reference for the reader (a representation of Jesus Christ as Che Guevara for example).

Of course, these three issues interpenetrate and must be taken as a whole. But the analyse tries to distinguish them and separate them from the others in order to highlight them better.

### Which History?

While studying historical documentaries, we can see that a few stereotypes still have a pronounced presence. For example, the cover of *Charlemagne* (Bührer-Thierry, 1996) represents the emperor with a beard whereas historians proved years ago that he wasn’t bearded. Antoine Auger, in his *Charlemagne et son temps* (Charlemagne and his times; Auger 2001, cov.) prefers playing on the nuances of red and on graphics so that the reader doesn’t see if Charlemagne has got a beard or not : the artist played on the pronounced stereotype and the true appearance of the character at the same time.

Another kind of stereotype: inserting contemporary representations in a given era. In *Les Gaulois* (The Gauls) (Lescarret 2001, 7), we see on page 7 a family scene where people are drinking barley beer in front of their village. A young woman is hanging back on the left, waiting, without a doubt, for serving the other masculine characters. A dog is standing near its master. This scene borders on a caricature of a modern family who spend their holiday in a village-club (whereas the text denounces on page 6 the stereotypes about the Gauls which flourished in the texts of that time).

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<sup>1</sup> Literally it means “By four ways”, but it’s a pun with the expression « ne pas y aller par quatre chemins » which means “to come straight to the point”.

<sup>2</sup> Literally “Documad”, it’s a play on words with *document* and *dément* which means mad in French.

There is a discrepancy between the dog and the status it was given at that time. For Gauls it was not a pet as it is considered today or at the time by rich Roman families. It was bred to be eaten and its skin was then polished and used as a “carpet” in their huts.

We also need to note a certain lack of creativity in the content as well as in the form. Indeed, *Les yeux de la découverte* as soon as it was first published was copied by many other publishers. As the fragmented presentation caused reading difficulties, some of them worked on the structure of information, especially those who don't resort to European co-publishing (the economical reasons are numerous) and who favour French authors.

The chosen topics show an over-representativeness of certain era such as: Ancient Egypt, Ancient Greece, Rome, and the “Late” Middle-Ages. This can be explained among other things by the presence of these same topics in textbooks in the first years in high school. We should wait for more titles about the 19<sup>th</sup> or 20<sup>th</sup> centuries (except for the wars which are a little dealt with) and especially the 5<sup>th</sup> Republic.

Other topics are only treated on the occasion of commemorations: the 200<sup>th</sup> Anniversary of the French Revolution was the occasion for numerous publications on the subject, intended for adults as well as children. Ever since, the numbers of titles about the same topic has been less than 10.

We come to taboo subjects. The participation of the French Government under the Vichy Regime is never really acknowledged or denounced. We find it in *Le débarquement (D-Day and the invasion of Normandy)* (Kemp 1994, 32): the author denounces the active collaboration of the French government in the transportation of Jews to concentration camps. Coincidence or not, this series has had only this title in the publisher's catalogue. It was published again in 2004 on the occasion of the 60<sup>th</sup> Anniversary of D-Day in the series *Les Yeux de la découverte*. Likewise, no historical documentary deals with the Algerian War in a complete way. Besides the fact that it is recent History, that a great number of people who participated to these events are still alive, that there is an almost national taboo on certain acts of violence committed during this troubled period and that the records have not been largely released yet, there is also a real self-censure on the subject from the publishers. That's what Dominique Gausson, the creator of the series *Regard d'aujourd'hui* in Mango confided to me in April 2002.

However among the latest publications, new reflections on new topics start to appear: extra-European History is appearing (Ancient China, Indians...) even if entire continents are still neglected (Australia, Poles, and African areas). A real creation is coming into being among minor publishers as Le Sorbier or Mango. Periods which were less dealt with till now (because more unknown) are appearing: the Early Middle-Ages for example. But also new approaches: heraldry is dealt with by Nathan, techniques by Le Sorbier. A series – today it has disappeared- fitted in with the new methods of historical research: *Des objets font l'histoire* by Casterman (*History through objects* by Puffin Books): an object – representative of its era or of

a mentality- was presented in its historical context with its consequences. The themes could go from the colt, the jeans, glasses to the pill and condoms and through the stamp and the amphora. Actually, the book is a multi-faceted medium, an object of communication, as well as narration and reflection in the area of Information. The historical documentary intended for children is an object adapted to its time (caught in the web), interactive, as well as an object which requires selectivity and analyse (lost in a textbook).

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## **Workshop 1**

### **Changing Identities in a Global World**



# **The British Empire and Commonwealth in World War II: Selection and Omission in English History Textbooks**

Stuart Foster

On a scale unprecedented in human history the Second World War was a truly global event. More than 60 nations representing 1.7 billion people or three quarters of the world's population were consumed by the conflict. Military actions raged in Asia, Africa, Europe, and on the world's major oceans. The war engaged citizens from Argentina to India, Australia to Iran, and Thailand to Kenya. Understandably, therefore, the war typically stands as a landmark episode in history education throughout the world. In England its inclusion in the history curriculum is assured and the presence of the Second World War in history textbooks guaranteed.

Significantly, however, despite the global sweep of the World War II, analysis of textbooks commonly used in England suggests that schoolbooks devote almost exclusive attention to the "principal" Allied and Axis powers. Although some justification can be made for primary focus on these nations, the widespread absence from textbooks of other countries, cultures, and ethnic groups determines that history students will learn about the war from a disturbingly limited and narrow perspective. Absent from their understanding the war will be any knowledge of the contributions of other nations and any sensitivity to the accomplishments, actions, and complex perspectives of peoples from other diverse cultural and national backgrounds.

To explore these issues more fully this study is broadly divided into four parts. First, four contemporary history textbooks routinely used in history classrooms in England are analysed. Second, based on the findings of relevant historical scholarship, attention is drawn to the experiences of colonial peoples during World War II. Third, the study illuminates and explains the reasons for the apparent gulf between the historical record and the information contained in history textbooks. Finally some broader suggestions for ensuring the emergence of a more inclusive history education are offered.

## **Portrayal of peoples from the Empire and Commonwealth in history textbooks**

Following a wide-ranging review of secondary history textbooks currently available on the market in England four representative textbooks were selected for analysis:

- Ferriby, David & McCabe, Jim. 2002. *Modern World History*. Oxford: Heinemann.

- McAleavy, Tom. 2004. *Modern World History*. Cambridge: Cambridge University Press.
- Todd, Allan. 2001. *The Modern World*. Oxford: Oxford University Press.
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Drawing on the author's previous research studies (e.g., Nicholls and Foster, 2005; Foster and Nicholls, 2005; Foster, 1999) and methodological considerations raised by other scholars in the field of textbook research (e.g., Foster and Crawford, in press; Schissler and Soysal, 2005; Crawford, 2000; Hein and Selden, 2000; Pingel, 1999; Apple and Christian-Smith, 1991) textbooks in this study principally were analysed using story line, content and pictorial analysis. Guiding research questions used for these analyses focused on several overreaching and interrelated issues. For the purposes of this paper, however, attention is concentrated on analysing: How, in what way, and to what extent are the experiences of peoples from the Empire and Commonwealth portrayed in textbook narratives and photographic representations?

For the most part history textbooks ignore the contributions and experiences of peoples from the Empire and Commonwealth during the Second World War. Despite the fact that Britain drew on the resources and support from all reaches of the Empire, typically reference is made solely to "British forces", "British victories", and "British troops". Where reference is broadened to include military activities with other nations, the term "the Allies" frequently is employed. Abundantly clear, however, is that "the Allies" refers to US, British, and less frequently, Soviet collaboration and rarely includes the scores of other nations involved in the global conflict. Accordingly, Ferriby and McCabe make no mention of any nations beyond these three allied powers and their principal adversaries: Japan, Italy, and Germany. Similarly, except for one fleeting reference to Canadian involvement in the D-Day landings, McAleavy's text completely ignores the contributions of peoples from the Empire, Commonwealth, or indeed any other part of the world. Allan Todd's, *The Modern World*, is also parsimonious in its attention to the contributions of other nations and peoples. According to Todd, the war in Western Europe is a British and US affair; Italian and German troops are defeated in North Africa by the British; and despite a single reference to Australian troops and "British an imperial forces," success in the Pacific largely occurs as the result of American military strength. Furthermore, although reference is made to Japanese conquests in Burma, Singapore, Malaya, and the impending threat to "the important British colony of India," (Todd, 2001, 165) no mention is made to the significant number of troops from Africa, India, New Zealand, Australia, and other nations who gave their lives ensuring the eventual defeat of the Japanese army.

If narrative portrayals of people from the Empire and Commonwealth are rarely included in textbooks, visual representations prove little better. Significantly, analysis of photographic portrayals contained in the four textbooks revealed that out of a total of 86 photographic representations in the textbooks, not one image portrays a person of colour from the Empire and Commonwealth.

Overall, therefore, narrative and photographic analysis of the four textbooks demonstrates that representations of people from the Empire and the Commonwealth are woefully limited. In some textbooks they remain entirely absent; in others they often appear without context or explanation. Based on an analysis of relevant historical scholarship, the next section focuses on the experiences of colonial peoples during World War II. In so doing it raises serious questions about the apparent gulf between contemporary history textbooks and the historical record.

### **The British Empire during World War II: The Historical Record**

Not enough space exists to document the scope and scale of the contributions of the many millions of colonial troops who fought with the Allies during World War II. Brief mention, for example, of the 200,000 New Zealanders, the 500,000 Australians and the half a million Canadians cannot sufficiently do justice to the vital contributions that these countries made in each of the three major theatres of war: Europe, North Africa, and the Pacific. Indeed, even the slightly more extensive attention to the contributions of India and many African nations featured in the next few paragraphs only offers a small indication of the experiences of peoples of colour from the Empire and Commonwealth.

Whether willing or unwilling the contributions made by the peoples of the British Empire and Commonwealth proved very significant in the war effort. For example, the commencement of active war on the African continent soon swelled the number of regiments in both East and West Africa. In response to demands for personnel in East Africa and by the emerging threat of being surrounded by potentially hostile Vichy French territory in the second half of 1940, West African forces expanded to four times their pre-war size (Perry, 1988). In East Africa defence forces were established in Uganda, Tanganyika, Nyasaland and Kenya. Following Italian entry into the war in 1940, African forces were instrumental in the occupation of Italian East Africa and further expanded operations to include active serve in Somaliland, Madagascar, Mauritius, Seychelles and the Middle East (Perry, 1988). With the defeat of the Axis powers on the African continent in 1942 imperial authorities re-evaluated their prejudiced and traditional position of using African soldiers only on African soil. The expedience of war caused a radical shift in strategic thinking (Killingray and Rathbone, 1986) which resulted in African troops being deployed to Ceylon and then to Burma in order to fight the Japanese. African troops also fought in the Mediterranean campaign and in the Allied advance through Italy from 1943-1945. In all more than 160,000 Africans were sent abroad to fight.

When war broke out in Europe in September 1939 fewer than 200,000 personnel served in the Indian army. Soldiers were largely drawn from agricultural communities and the army remained an “unmodernised force” (Perry, 1988). By the war’s end, however, more 2.5 million men and women were in service and the Indian army and the Royal Indian Navy had made a significant contribution to the combined Allied victory (Perry, 1988, 117).

Prior to the breathtaking advance of the Japanese army in 1942, Indian troops committed to overseas service principally acted in supporting roles in Egypt, Malaya, Iraq, the Persian Gulf, and Burma. After 1942 however India became deeply involved in the war as the nation's orientation shifted to India's eastern front. Initially Indian troops shared in Allied setbacks in Malaya and Burma and, when Singapore fell in February 1942, tens of thousands of Indian troops were captured by the Japanese. By 1943, however, Indian troops served under Mountbatten's ultimately successful South East Asia Command and "in early 1944 the Seventh Division's heroic stance at Kohima broke the force of the Japanese advance on Assam, and thereafter they shared in General Slim's triumphant return to Burma" (Spear, 1979, 216). After defeating the Japanese, Indian forces were the first Allied troops in Thailand, Indo-China, and the western islands of the Dutch East Indies (Perry, 1988).

India's contribution to the defeat of Japanese forces in the east additionally was matched by military service to the west. Indian troops shared in the impressive defeat of Italian and German forces in North Africa and vigorously participated in campaigns in Iraq, Syria, and the Persian Gulf. Furthermore, Indian involvement in Italy increased the size of British participation in the area by fifty percent.

Significantly despite common dissatisfaction with continued British rule in India, Indian military personnel typically served with commitment and distinction. As historian Percival Spear noted, "Though the Indian heart was not in the war, the Indian war record is nevertheless impressive... [and] the army itself had a distinguished record" (Spear, 1976, 215). As a measure of their bravery Indian service personnel received 4,000 awards for gallantry and 31 Victoria Crosses.<sup>1</sup> In total an estimated 36,000 Indian troops were killed or reported missing in action during World War II, with a further 65,000 wounded. Little doubt remains that India's military contribution to the war was particularly important at a time when British resources were stretched to their limit. Indeed historian F. W. Perry concluded that "without the Indian Army Britain would have been quite unable to meet her many commitments in the Middle East and Far East" (Perry, 1998, 120).

Despite the impressive involvement of colonial troops in World War II textbooks typically remain silent on the exploitation of colonial people, the endemic racism experienced by many, and the personal and gripping stories of individuals who sacrificed their lives for the Allied cause. Both in Britain and in the Empire little doubt exists that the Second World War was fought in a climate of "stark racial prejudice" (Somerville 1998, xviii). The unapologetic discrimination of people of colour in both civilian and military life was an uncomfortable and ubiquitous feature of the war years (Fryer, 1984). "Black men were not even permitted to lie alongside the white corpses of their fellow men," historian Christopher Somerville noted, and "some were issued with spears and clubs, rather than rifles and grenades" (Somerville, 1998, xviii). Colonial troops routinely received inferior rations, lower

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<sup>1</sup> [www.bbc.co.uk/history/wwtwo/colonies](http://www.bbc.co.uk/history/wwtwo/colonies)

pay, and discriminatory treatment. Furthermore it proved almost impossible for black troops to advance in rank and status. Significantly, no professionally trained black officer was established in the British army and, as one Kenyan soldier complained, “an African’s rank was meaningless to British soldiers.” (Sherwood and Spafford, 1999, 23).

Although the experiences of colonial peoples are often omitted from textbooks their histories unquestionably have significance for British schoolchildren for many reasons, of which three stand out. First, the end of the war marked a significant shift in the power and prestige of the British Empire. With the emergence USSR and USA Britain’s place in the modern world was re-examined and recast. Similarly Britain’s relationship with the peoples of the Commonwealth had to be given sensitive and thoughtful consideration. Secondly, as the nations of Africa, India and the Caribbean enjoyed increasing independence new opportunities and challenges emerged. Today, these nations account for a significant proportion of the world’s population and as such appreciating their histories and experiences forms a vital aspect of understanding the contemporary world. Third, post war emigration from the colonies to the United Kingdom offered a new dimension to the continued interaction between different peoples of the Commonwealth and Empire. Thus, an informed and richer understanding of the historical experiences of immigrants to Britain allows for a more thoughtful appreciation of Britain’s modern multicultural society (see Visram, 1994).

Given these reasons and given the extensive contribution that people from the colonies made to war effort the question arises: why are their histories so often ignored or underrepresented in history textbooks?

### **Why are the histories of people from the Empire and Commonwealth so often ignored or underrepresented in history textbooks?**

First and foremost school history in England is heavily influenced by prescribed curriculum content. The contemporary history curriculum, however, does not represent a collection of value free, objective, and neutral knowledge. Rather the history curriculum has emerged as a result of generations of competing ideological, educational, and sociological influences. A powerful force in determining the history curriculum in England has been the weight of tradition. As many academics have demonstrated for more than a 100 years history teaching in England has had a distinctively Anglo centric, nationalistic and conservative flavour (Marsden, 2001; Dickinson, 2000; Sylvester, 1994; Chancellor, 1970). Influenced by what Grosvenor (1997) refers to as “the discourse of Empire” this “great tradition” of history teaching has ensured that generations of schoolchildren in England typically have been exposed to the transmission of a limited national heritage (Sylvester, 1994). To understand why this should be one only has to look at the fierce ideological battles

that were fought over the history national curriculum during the late 1980s in which forces from the New Right proved highly influential (Crawford, 1996).

The narrowness of the history national curriculum also is reflected in national assessment and examination provisions. Analysis of recent GCSE, AS and A2 history papers, for example, testify to the limited attention given to histories of ethnic groups and to the repeated focus on certain topics (e.g. Nazi Germany and World War II).

The inability of alternative versions of the past to penetrate mainstream narratives is also exacerbated by number of other factors. In particular as curriculum time for history is increasingly squeezed by the claims of other subject areas, educators and textbook authors often argue the difficulty of covering what is perceived to be “additional” subject matter. Moreover the lack of readily available educational resources on subjects beyond the mainstream, inadequate preparation on teacher education programmes (Siraj-Blatchford, 1993), and the failures of OFSTED and QCA<sup>2</sup> to ensure that schools devote serious attention to issues of ethnic, cultural, and religious diversity all contribute to inadequate representations of the past in history classrooms (Sherwood, 1998).

### **Looking to the Future: Some recommendations for more inclusive history education**

Insufficient space is available here to detail the many educational changes required to make history education more inclusive. Nevertheless, three interrelated areas warrant close attention. First, it is important for all politicians, policy makers, educators and textbook authors to appreciate that identity, race, and nationhood are social constructions and that these constructions need to be re-cast as we enter the first decades of the twenty-first century. As has been argued, British identity traditionally has been shaped by adherence to a version of history which sees the achievements of white males as pre-eminent. Largely ignored are the stories, experiences, and achievements of people of colour. But as many critics have argued, since Roman times British history has been forged by the experiences of a complex mix of peoples from all over the world (Grosvenor, 1997; Visram, 1994; Fryer, 1989). To leave out their stories is to offer an “incomplete understanding of British society and its development, its values and its culture” (Visram, 1997, 57). Above all, the experiences of people of colour should not remain outside what has been regarded as mainstream history. Rather their stories should be intertwined, braided, and integrated into the rich and dynamic fabric of British and world history.

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<sup>2</sup> OFSTED (Office for Standards in Education) is the government agency that inspects schools to ensure that the standards and policies of QCA are enforced. The QCA is the Qualification and Curriculum Authority. This is the government body that oversees the operation and assessment of the National Curriculum.

Second, and inexorably related to the point raised above, history educators and textbook writers must consider their application of curriculum content and avoid the damaging effects of “mentioning” in which limited and ad hoc elements of the history and culture of minority groups are included without altering the central Anglo-centric story line. The third issue of importance is the need to ensure that relevant scholarship on the experiences of people of colour penetrates the educational system.

Addressing and implementing these three recommendations poses a difficult challenge. In terms of understanding the Second World War it will require greater attention to the histories of ethnic groups within Britain and to peoples from the Empire, Commonwealth and beyond. Broader than this it will involve a reconceptualization of British identity, critical consideration of curriculum, pedagogy and instructional resources and a fierce commitment on the part of policy makers, the education establishment and, above all, teachers. If history education can go some way to embracing these three recommendations it will undoubtedly result in students having a more inclusive, more responsible, more exciting, and more worthwhile appreciation of our shared history.

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# **History Textbooks Discourse on Identities and Borders: How to Investigate into the Missing Parts**

Janez Justin

## **Introduction**

History textbooks have often been investigated on the assumption that they communicate to students disturbing ideas about nations and territories. However, in history textbook production there is increasingly more expert and social control over final products. Therefore, any attempt to overtly communicate to students ideas that are incoherent with widely accepted standards of political correctness would soon get detected and socially sanctioned. As a result, 'incorrect' ideas about the past of a nation, its identity or territory get communicated covertly, i.e. implicitly. What forms of implicit communication can we think of?

First, there are single expressions that can do the job. One can think of such rhetorical figures as presupposition, implication, understatement, insinuation, paralipsis, parataxis, ellipsis, metaphor, metonymy etc.

But the idea that almost any single linguistic utterance conveys more cognitive content than it explicitly expresses is a more general one. Theories of linguistic communication labelled as pragmatic distinguish between sentence meaning and broader utterance meaning. When interpreting an utterance an interpreter does not only decode word meaning and sentence meaning. He/she also makes inferences about those aspects of utterance meaning that result from the fact that a sentence was used in a particular situation and with a certain communicative intention which may not be fully expressed.

Among various kinds of linguistic utterances that serve as means of knowledge transmission there is one kind that occupies a central place: assertions. An assertion can be viewed as consisting of different sorts of assumptions. Some of the assumptions are explicitly expressed; i.e. they are contained in what people actually tell each other. Other assumptions are implicitly conveyed, or implicated, i.e. they result from the activity in which people get other people to think something (Grice, 1975; Sperber & Wilson, 1998).

Finally, it is not only when interpreting single utterances that a reader discovers implicit meanings. Such meanings may result from his/her interpretation of sets of utterances, i.e. of the way they relate to each other. The style that textbook authors use can be more or less elliptic. All texts are semantically incomplete. Whenever an interpreter notices gaps in a text surface structure, i.e. observes that text meaning is incomplete, this is for him/her a strong signal that there is additional meaning to be inferred.

Discourse analysis that aims at reconstructing implicitly communicated meanings has a long tradition. One of the first examples of such analysis can be found in *Quintilian's Institutiones Oratoriae* where he gave a description of the main motives for the use of what he called *insinuatio*. According to the Roman writer, the motive for conveying certain meanings in the form of insinuation lies either

- in a speaker's lack of certainty about what he would like to communicate to a hearer
- or in a speaker's conviction that overt communication of a certain content would be inappropriate (*Institutiones Oratoriae*, IX, 2)

A contemporary French linguist Catherine Kerbrat-Orecchioni also described possible motives speakers might have for using implicit forms of communication. One of them is in speaker's intention to outplay a moral, political or legal censorship (Kerbrat-Orecchioni, 1986, 277). This could be taken as a reference to instances of implicit communication in history textbooks that are aimed at outplaying the norms of political correctness.

However, I shall not be dealing here only with inappropriate implicit messages that history textbooks might communicate to students. A textbook discourse can produce cognitive effects on students beyond message (explicit or implicit), just by directing them to specific background representations they have to entertain in order to reconstruct what is missing in the surface structure of that discourse.

Is it really necessary that textbook research pays so much attention to theoretical debates? The debate of which I am going to present a small fragment can help us see that textbooks produce on students at least one kind of cognitive effect that traditional textbook research has never accounted for. So let me discuss for a moment the way one of the pragmatic theories of communication approaches the inference process in which interpreters reconstruct implicit meanings. I believe that the theory I have in mind – the so-called relevance theory – can make a great contribution to the type of textbook research that focuses on 'collateral' cognitive and epistemic effects textbooks can produce on students.

### **A relevance-theoretical account of inferences triggered by gaps in didactic text surface structure**

Relevance theory created by Sperber and Wilson in 1980s gives us a pretty clear picture of how a reader who interprets semantically incomplete discourse fills in the gaps. In order to reconstruct what is missing in a text surface structure, he/she has to base his/her inferences on certain background assumptions he/she accesses in his/her long-term memory. But just how does he/she manage to access the right background assumption? Part of the answer is in the following: He/she accesses and uses the background assumption he/she has reason to believe to be the assumption the speaker/writer has implicated in his utterance act.

The question remains as to what criterion an interpreter employs in doing so. Before trying to answer the question we must get a clearer view of the role background assumptions are supposed to play in inference process. Let us consider an example taken from a Slovene history textbook, more precisely, from a chapter that deals with one of the First World War battlefields, the one in Soča (It. – Isonzo) valley where the Austrian army was facing the Italian army.

/1/ The Slovene and Croatian regiments in the Austrian army were the bravest. In eleven offensives the Italian army that was twice as big could not break through the front line. (Nesovic & Prunk, 1996, 16)

The two sentences are juxtaposed without being connected with argumentative or any other sort of connective. In rhetoric such juxtaposition of two sentences is called parataxis. The content of the fragment is somewhat odd. First, a small fraction of the Austrian army is attributed an outstanding courage. Then we learn about weak performance of the Italian army that was trying to break through the Austrian lines. What seems to be missing is a clear statement how the two sentences are to be connected. What was the reason for the Italian army's failure? The text does not explicitly mention any but there is no doubt what most students would regard as a reason.

They would intuitively recognize in /1/ the implicature that it must be the courage of the Slovene and Croatian regiments that was the reason for the Italian army's failure. However, more than intuition is needed to explain how they would recognize such an implicature. Let me put it this way: In his/her search for the implicated meaning an interpreter would activate the following background assumption:

/2/ If an army is composed of some brave regiments the opposite army can not break through its lines even if twice as big.

More precisely, an interpreter would make the following assumption: The author had access to the assumption /2/ and used it in the production of the fragment as he/she assumed that the assumption /2/ is also part of the background knowledge the interpreter has and thus the author and the interpreter share. What the interpreter has to do now - according to the authors of relevance theory - is some deductive reasoning. He/she uses the selected background assumption as a premise for some conclusion.

After having retrieved the assumption /2/ from his/her memory the interpreter is in fact supposed to draw his/her conclusion from two premises:

/3/ Premise 1: If an army is composed of some brave regiments the opposite army can not break through its lines even if twice as big.

Premise 2: The Austrian army was composed of some brave Slovene and Croatian regiments.

Conclusion 1: The courage of the Slovene and Croatian regiments caused the Italian army's failure.

Premise 1 is derived from a background representation which is easily accessible in our culture. The representation of heroic fighting leading to a triumph over a stronger enemy is broadly distributed in it.

As the authors of relevance theory might argue, this is an oversimplified version of the process going on in an interpreter's mind. They pay attention to the fact that implicatures may be characterized by some degree of indeterminacy, i.e., premises and conclusions may be strongly or weakly implicated. An interpreter may be only weakly encouraged to use a background assumption as the implicated assumption (Sperber & Wilson, 1986, 109). Besides, he/she may not use exactly the same assumption a speaker (an author) implicated in his/her utterance. He/she only tries to come as close to it as possible. Sperber and Wilson know that in communication there is no duplication of thoughts but only a possible increase in mutuality of different individuals' cognitive environments (Sperber and Wilson, 1986, 200).

Let us have a closer look at example /1/. There is no context linking the second statement to the first one. An interpreter can only construct such a context by selecting an adequate background assumption or a set of background assumptions. How does he/she do that? What makes him/her believe that the assumption formulated in premise 1 is the most adequate background assumption he/she can use in order to link the second statement to the first one, and to recover the implicit meaning of the second statement?

Classical versions of pragmatic theory pay little if any attention to the question just raised. The context is generally seen as something given and known by both the author and the interpreter of a statement, and knowledge of the context is considered as the interpreter's point of departure. According to relevance theory knowledge of the context is something resulting from inferential interpretation of utterances. What Sperber and Wilson consider as given is not the context but relevance of what is communicated (Sperber and Wilson, 1986, 142). More precisely, they claim that utterances communicate to interpreters the presumption of their optimal relevance (Sperber and Wilson, 1986, 162).

One of the crucial points relevance theory made in this framework is in the following: When interpreting semantically incomplete utterances interpreters are going to select the background assumptions that can produce the strongest possible effect in their cognitive environment, requiring at the same time from interpreters the least possible effort. What determines the degree of relevance of a background assumption is the ratio between the effort that processing of an assumption would require from an interpreter, and the effect that processing has on an interpreter's cognitive environment.

An additional question emerges: When can be a cognitive effect considered as strong? According to Sperber and Wilson it can be considered as such if new information resulting from inference process modifies or improves importantly assumptions an interpreter entertained so far, and improves significantly his/her representations of the world. There would be strong effect if a conclusion causes an

old assumption to be abandoned or if it strengthens an old assumption by providing new evidence for it (Sperber and Wilson, 1986, 109).

Let us now return to /1/. I said that in order for an interpreter to use premise 1 in his/her interpretation of /1/, he /she must have access to an adequate background assumption. The latter becomes - together with the interpreter's assumption that the speaker has a share in it – the cognitive basis for the interpreter's production of premise 1.

Suppose the interpreter is someone who has good knowledge of Slovene language but no knowledge of what Slovenes think of themselves in terms of courage. Could he/she produce premise 1 after having read /1/? The authors of relevance theory would give a negative answer to this question. Premise 1 can not be used by the interpreter if he/she has no access to the set of assumptions containing the assumption from which premise 1 is derived.

### **An impasse in relevance-theoretical account**

No matter what potential relevance theory might have for textbook research – or more precisely, for explaining how students interpret semantically incomplete textbook discourse – it still has some deficiencies. First of all, what relevance theory is focused on are implicit meanings or implicatures. They are sensed to be the implicit part of a linguistic message structure. Relevance theory almost completely overlooks an interesting aspect of the reasoning process triggered by such semantically incomplete text surface structures as /1/. Namely, the implicated premise 1 is just a means an interpreter uses to inferentially reconstruct the author's implicit message. It is not part of the message. The author did not transmit this premise to students. It is only true that the latter access a background representation and produce this premise in view of getting a coherent message. This, however, does not diminish the importance of premise 1. Its representational content defines the perspective in which interpreters are to view the author's second statement in /1/ ('the Italian army could not break through the front line') as well as to look for the connection between the first and the second statement. This is something relevance theory has not accounted for.

There is another weak point in the relevance-theoretical account. When interpreting a semantically incomplete text interpreters are supposed to make inferences that, according to Sperber and Wilson, are of deductive nature. A question arises as to that nature.

Deduction is a 'water-tight' construction; the conclusion is necessary if the premises are true. Now, let us consider once more premise 1: 'If an army is composed of some brave regiments the opposite army can not break through its lines even if twice as big.' Its meaning is by no means as categorical as the meaning of premise 3 in:

/4/ Premise 3: All men are mortal.

Premise 4: Socrates is a man.

Conclusion 2: Socrates is mortal.

Premise 3 is as categorical as possible whereas premise 1 implicitly introduces a continuum of possible meanings, something like: The braver the regiments are, the harder it is for the opposite army to break through the front line. Above I have formulated conclusion 1 in the way in which Sperber and Wilson would formulate it: 'The courage of the Slovene and Croatian regiments caused the Italian army's failure.' Due to the continuum introduced in premise 1 the formulation of the conclusion is much too categorical (according to Sperber and Wilson, conclusions inherit uncertainty from premises). In fact, the conjecture-like nature of conclusion 1 would be better reflected in 'It must be the courage of the Slovene and Croatian regiments that caused the Italian army's failure.' The epistemic modal verb in 'it must be' does not really express necessity but rather uncertainty.

Would it not be more reasonable to assume that due to such uncertainty interpretation of fragments like /1/ takes form of something different from deduction, something that could be described as tentative, conjecture-like or hypothesis-like cognitive activity?

### **Abduction instead of deduction**

C. S. Peirce has provided us with the concept of abduction which I believe gives a much better description of the cognitive activity in question than the concept of deduction used in relevance theory. For Peirce, abduction is, along with induction and deduction, one of the three modes of reasoning or inferring. In his work abduction is often associated with making a hypothesis or conjecture. He wrote that abduction "is, after all, nothing but guessing" (Peirce, 7.219). Abduction is motivated "by the feeling that a theory is needed to explain the surprising facts" (Peirce, 7.220). He also wrote that "abduction seeks a theory" (Peirce, 7.218). Here is an example of abductive inference:

Suppose I enter a room and there find a number of bags, containing different kinds of beans. On the table, there is a handful of white beans; and, after some searching, I find one of the bags contains white beans only. I at once infer as a probability, or as a fair guess, that this handful was taken out of that bag... (Peirce, 2.623)

Sperber's and Wilson's discussion of deductive reasoning is similar to that of logicians. Namely, it refers to relations between logical propositions. Peirce's account of deduction, induction and abduction is about a different kind of relations, those established between components of actions or processes. He does not speak of premises and conclusions but of cases, rules and results. One might find in that some sort of logic of explanation of causal (or quasi-causal) phenomena. Here is how Peirce conceived of three types of inferences: If a general rule and a case are given, we deduce a result. If a case (or several cases) and a result are given, we induce a general rule. If a rule and a result are given, we can infer – abduce – a case. But if only a result is given then we can abduce a rule as well as a case. Considering this last possibility, Peirce wrote that »very curious circumstances ... would be explained by the supposition that it was the case of a certain general rule« (Peirce, 2.623 – 2.625).

Let us assume that what the gap in /1/ triggers in an interpreter is abductive and not deductive reasoning. Can we reconstruct that reasoning? A result can be found in the second statement in /1/: 'In eleven offensives the Italian army that was twice as big could not break through the front line.' A rule may be recognized in the background assumption that students access while interpreting /1/: 'If an army is composed of some brave regiments the opposite army can not break through its lines even if twice as big.' The abductive reasoning about what caused the Italian army's failure to break through the Austrian lines leads to establishing a case. Here is the whole scheme:

/5/ Result: In eleven offensives the Italian army that was twice as big as the Austrian army could not break through the front line.

Inference to a rule: If an army is composed of some brave regiments the opposite army can not break through its lines even if twice as big.

Inference to a case (to a cause): It must be the courage of the Slovene and Croatian regiments that prevented the Italian army to break through the front line.

The brave Slovene and Croatian regiments' stopping the Italian army is thought to be a case of a general rule. This fits well with what Peirce said about abduction. In abduction, he said, we depart from a result and infer to a rule and a case or to a case of a general rule.

A student making such an abduction could be regarded as not just using a background representation as a support for an inference to a case. He/she should rather be seen as having been induced by /1/ to (temporarily) appropriate a perspective established by that background representation. The condition for the fragment /1/ (or its author) to exert that power - to so act upon a student - is in that the latter has to have access to a background representation that fits with the incomplete context the text proposes, and has reason to assume that the author has access to the same background representation, expecting him/her (i.e. the student) to have access to it too, etc.

How important this is becomes clear if we consider an alternative or perhaps complete abduction that example /1/ might also trigger in a student. It is quite probable that nearly all users of the history textbook from which example /1/ is taken have access to a stereotypical background representation of Italian soldiers as 'lacking courage'. (The question of the role such stereotypes have in nationalistic ideologies exceeds the limits of this paper.) The following abduction might also fill in the gap in example /1/:

/6/ Result: In eleven offensives the Italian army that was twice as big as the Austrian army could not break through the front line.

First inference to a rule: If an army is composed of soldiers who lack courage it can not break through a front line even if twice as big as the opposite army.

Second inference to a rule: In battlefields Italian soldiers (as a rule) lack courage.

Inference to a case: It must be the Italian soldiers' lack of courage that prevented the Italian army from breaking through the front line.

Are the two abductions connected? The first inference to a rule in /6/ is different from inference to the rule in /5/ in that it involves an inversion of perspectives. Instead of taking courage as a way to victory /6/ takes lack of courage to be a way to defeat. As a matter of fact, /1/ can be sensed to encourage an interpreter to combine both perspectives. First, an outstanding courage is explicitly attributed to a small fraction of one army and presented as a possible cause for the opposite army's failure. This makes it natural for an interpreter to activate a background representation in which lack of courage is attributed to the opposite army. The two attributions can be seen as complementary.

To say that almost every Slovene student has easy access to the representation of Italian soldiers as 'lacking courage' does not entail that he/she believes this to be the case. Rather, he/she should be regarded as representing others to represent Italian soldiers in this way. That is, a reader who makes the second inference to a rule in /6/ part of his interpretation of /6/ does not need to entertain any specific propositional attitude (such as belief) to the object-proposition.

Perhaps this brief survey of a textual fragment from a history textbook provides us an illustration of the 'mind-management' students are exposed to when interpreting semantically incomplete textbook discourse. It may also suggest – somewhat paradoxically – that norms of political correctness affecting the textbook discourse surface structure sometimes worsen the situation. It is hard for a student to fight the ideas contained in implicit parts of messages and even harder for him to fight those contained in background representations he is induced to activate while interpreting semantically incomplete textbook discourse.

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# **Citizenship and moral education in religious education textbooks**

Inga Balčiūnienė and Natalija Mažeikienė

## **Introduction**

In recent years an ongoing debate has taken place in articles on the issue of education, namely religious education, concerning interconnection between religious, moral and citizenship education (e.g. Jackson, 2004; Gearon, 2004). There is a close link between these fields of education, since each of them covers issues related to national, religious, ethnical and cultural identity. The main question with which the paper deals is how religious education can contribute to enhancing understanding on citizenship and educating democratic, participative and responsible citizens.

Recently the emergence of new social identities, social and intellectual plurality has influenced the concept of citizenship which displays tension between different types of global, local, national (nation-state) and cultural citizenship. “The notion of citizenship has been undergoing dramatic transformation through trans-national initiatives in global and local citizenship. While feminist, environmentalist, human rights and other movements have been advocating new types of global citizenship; many local forms of cultural citizenship have been advanced to make claims about public rights and responsibilities based on the public recognition of difference. In such cases, citizenship calls upon loyalties that are not exclusively defined by national citizenship” (Chidester, 2004, 31). Since we face the fact that many citizens have local and global ties and commitments beyond those to the nation-state, the idea that citizenship is only to do with rights and responsibilities granted and expected by the nation-state needs should be revised (Jackson, 2004).

As the concept of citizenship is changing, the role of religious education changes as well: the joint forces of secularization, plurality and globalization have made this association of Christian, moral and civic education no longer fulfilling the current educational needs (Jackson, 2004a). In Europe religious education traditionally is equated with the Christian (namely - Catholic) religion. The Christian faith is considered as the basis of morality and citizenship. Since the tension between Christian orientated religious education and new forms of citizenship is emerging, the role of religious education should be re-discussed and re-thought. Critical and reflective approaches to religious education could have a valuable contribution to citizenship education. Revised religious education could play an important role in civic education, especially in terms of understanding various aspects of social and cultural plurality.

Some authors are critical of religious education as a basis for a socially cohesive civic education in secular and plural society (e.g. Hargreaves, 1994). The problem, according to David Hargreaves, is “how to find some social cement to ensure that people with different moral, religious, and ethical values as well as social, cultural and linguistic traditions can live together with a degree of harmony” (Hargreaves, 1994, p. 31).

In Lithuania the concept of citizenship was defined after Lithuania regained its independence, some 15 years ago. The content of education for citizenship was based on solidification of nation-state political and moral values. However, the impact of globalization processes in all areas of social and economic life has become evident in Lithuania. Since Lithuania's accession to the European Union social, economic and cultural exchanges have become more intensive, emigration and immigration flows have increased, consequently social and cultural plurality in the state is also increasing. Accordingly citizenship, religious and moral education requires deeper reflection on new identities, cultural and social plurality. Following the assumption that religious, moral and citizenship education should be closely related, a new discussion has arisen in Lithuania on what religious, moral and civic values should be developed in religious, citizenship and moral education to meet new challenges. The authors of this paper have attempted to find an answer to the questions: What type of citizenship, what civic and moral values does religious education develop in Lithuania? Could religious education in Lithuania contribute to citizenship and moral education? The answer to these questions is provided by content analysis of Lithuanian textbooks on religious education (grades 5-10) and by giving recommendations for improving religious education so that it could help to develop different forms of citizenship and meet current educational needs in Lithuania.

### **Content analysis of Lithuanian religious education textbooks: identification of citizenship and morality dimensions**

In Lithuanian basic schools religious education is realized by teaching the subject ‘Faith’ for grades 5-10. This subject is based on the values and doctrine of the Christian Catholic faith. Teachers are confirmed and accredited by the catechetical centre of the Catholic Church. It is an elective subject. The parents of students have an opportunity to choose from either the Christian Catholic Faith or Ethics. The subjects are similar because both have elements of religious and moral education.

Textbooks of religious education (‘Faith’) have been chosen for the analysis. After content analysis of 6 textbooks for grades 5-10 several dimensions of citizenship and morality have been found. These dimensions are presented here according to the frequency of their occurrence in the textbooks (see Figure 1).

The first dimension of citizenship found in religious education textbooks is *national identity*. The issues of national identity are revealed as a direct or indirect idea of the topic. As a direct element it is found in narrations of important Lithuanian historical

events, in discussions and stories about national, traditional customs and holidays, Lithuanian symbols and their symbolic meanings, legends, pagan rituals and pagan deities. Students are introduced to the establishment and development of Lithuanian parishes, dioceses and monasteries, the activities of bishops, Lithuanian clergy, and monks. They also learn about worship rituals and worship customs practiced in Lithuania and are acquainted with other religions, which are practised in Lithuania.

As an indirect element it is revealed through stories about some political or social situations in Lithuania, stories by Lithuanian writers, and poems. It is developed through different references to national, cultural and historic values, pieces of art, linguistic characteristics of the national language, references to celebrities, and places of interest. Illustrations in the textbooks also reveal ethnical motifs and elements.

Historical figures and modern celebrities are often mentioned. Analysis of the national history, development of the state, analysis of the national anthem, and stories by the state leaders about our parents, ancestors are found in practical tasks. The features of our national character are discussed. Students are encouraged to identify themselves as citizens of Lithuania, having their own culture, symbols, history, legends, and traditions.

*Discussion skills*, reasoning and argumentation abilities, an ability to summarize are one more dimension of citizenship that is found in the textbooks through content analysis. There is even one separate topic aimed at the formation and development of discussion skills. It describes the concept of discussion and teaches the principles of discussion; specific steps, features and rules of discussion are given. Students are trained through practical tasks (e.g., to hold a debate on a given topic, a debate between creationists and evolutionists). An ability to discuss, give arguments and reason are constantly developed through practical tasks.

The third dimension is *Responsibility*. It is developed through teachings, stories, and practical tasks. Students not only get knowledge, but they are also educated through attitudes and skills. The categories found in the textbooks are: responsibility for the environment (the texts disclose the importance of clean environment, students are taught how to keep it clean, what to do in order to protect and save it for other generations), responsibility for their own and other people's health and life, responsible thinking about their own future, responsibility for a neighbour, responsible to help and care about a neighbour, responsibility and respect for their parents, responsibility in a family (it is described as an ability and duty to understand and satisfy another person's needs), responsible preparation for family life, responsibility for their own decisions, behaviour and actions and a responsible use of freedom.

*Tolerance* is the fourth dimension found in the textbooks. The texts illustrate gender equality (equal status and worth, equal moral standards). Men and women are described as complementing each other, as both are created in the image of God. Students are encouraged to be tolerant towards people with different views, different

opinions or different sexual orientations. The ideas of stratum equality, racial, national, lingual, cultural equality, and religious tolerance are often found in the stories. A positive attitude towards Judaism and Jews is exclusively stressed. Jews are described as people who have contributed to Lithuanian cultural and economic life. Disabled people are described as being of the same importance as any other person in society.

*Communication and group work abilities* are developed in the textbooks through the stories that tell how to act in group work, how to take care of others, and how to help each other in co-operative work. The importance of socialization, communication in social relations is stressed. A human being is presented as a member of society. The techniques of communication are revealed. Communication skills are also developed through practical tasks.

*Individuation* is one more dimension of citizenship. Stories reveal what a person's individuality is. An ability to be an autonomous person who is able to think, solve his/her problems, and make reasonable decisions is to be developed. An ability to choose right goals and means in decision making as well as the importance of individuality is stressed – an ability to resist pressure of other people, to resist popular actions. Students are encouraged to be determined. Individuation is also developed through practical tasks (e.g., self analysis).

The importance and the use of *social activity* are found in the stories of the textbooks. The idea to help the socially excluded and disadvantaged, the poor and the sick and engage in charity work is developed. Social activities are encouraged through practical tasks (e.g., task to visit shelters, to do some charity work).

*Self-discipline* is an ability to control negative emotions, to think before saying or doing something, an ability to think about the consequences of actions. Self-discipline is developed through stories, particular advice how to train (develop) strong will and through the practical tasks. Personal development is very important.

One of the most important ideas of the topic (*discussion abilities*) is referred to as *an ability to compromise*. While developing discussion abilities much attention is paid to the ability to find an agreement, to reconcile.

*Honesty* occurs as an indirect element of the topic but as an important part of the story. Honesty is expressed as telling the truth. As a direct idea of the topic it is also developed in the stories. Honest behaviour with other people and with oneself is taught through knowledge, attitudes and practical tasks.

*Superiority of Christianity* is expressed through four thematic elements. First – a Pagan religion and Christianity. A Pagan religion is described as based on fear, obscurity, and sacrificial bribery. Second, the Christian religion is described as related to positive feelings and values: love, trust, and hope. Third - Christianity and other religions. Christianity is presented as having more coherent and consistent ideology. Fourth - Christianity and superstition. Belief in magic, spiritualism,

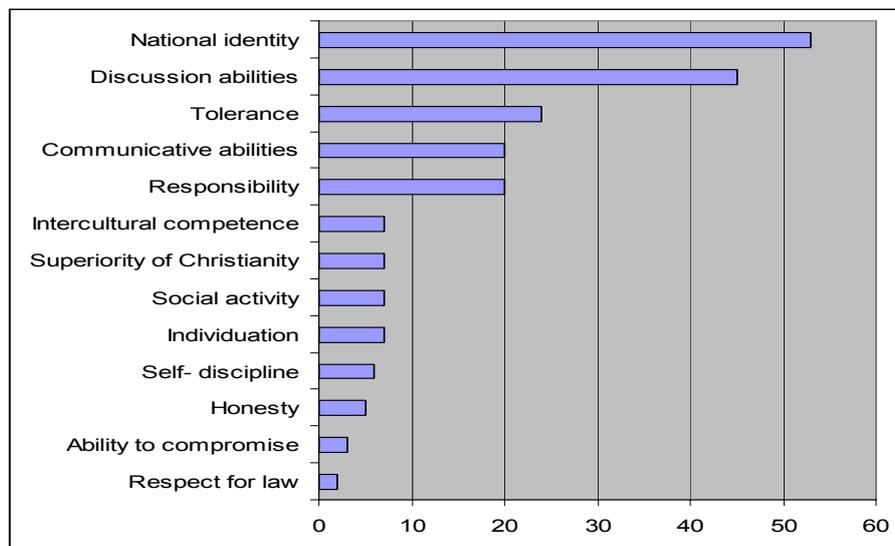
horoscopes is described as harming the body and soul, leading to crime, madness and suicide.

*Intercultural competence* is developed through the description of world festivals and traditions. The history of Lithuania and the world, Lithuanian historical figures and the figures of the world are compared. Events from world history are described. Architectural buildings of the world are presented. References to solidarity, help for deprived, poor nations, are given. This category is expressed in a very weak form.

*Respect for law* comes as an indirect idea. The meaning and the necessity of the law is discussed.

### Citizenship and morality dimensions: frequency of occurrence

It can be seen from Figure 1 that national identity, as a dimension, is most often expressed in the content of religious education textbooks. Apart from national identity, discussion and argumentation skills, tolerance, communication skills and responsibility are expressed more often in textbooks than other dimensions. Intercultural competence, superiority of the Christian religious identity, social activities, individuation, self-discipline, and honesty are sometimes expressed. An ability to compromise and respect for law are very rarely expressed.



**Figure 1.** Frequency of occurrence of citizenship and morality dimensions in religious education textbooks

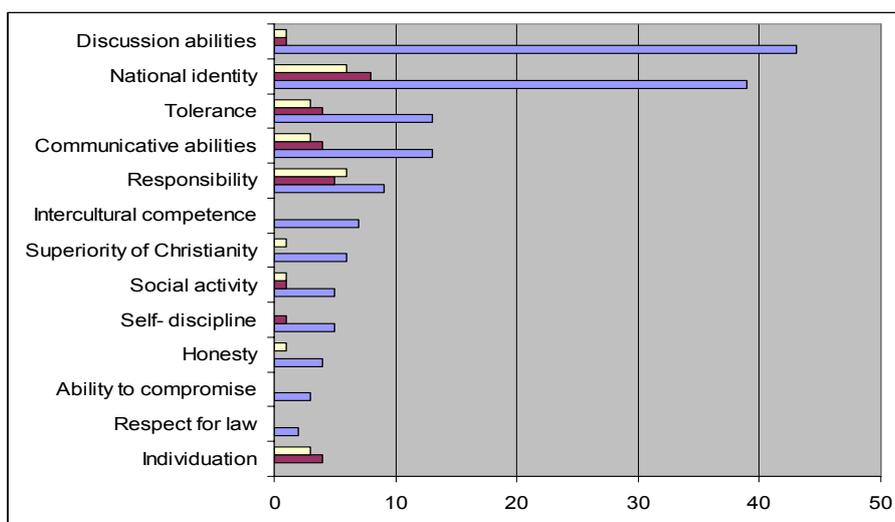
### Dimensions of citizenship and morality: intensity of expression

Taking into account that the discussed dimensions are not always expressed apparently and do not coincide with the main topic of the lesson we tried to classify the dimensions not only according to frequency of occurrence but also according to the form and intensity of expression. A three scale model was created to measure the expression of categories. Citizenship and morality dimensions from the textbooks were evaluated by using a three-level scale (high, medium, low):

“1” (high) – a dimension is expressed directly: it is the main topic or the main idea of the thematic unit or lesson. It is clearly pointed out and is easily recognized by pupils, this dimension is developed by giving knowledge, building attitudes and skills (it is expressed through story plots and through narration, practical tasks).

“2” (medium) - a dimension is one of several main ideas presented in the thematic unit / lesson (the main ideas and topics are religious ones) or this dimension is not developed on all three levels of competence (knowledge, skills, attitudes).

“3” (low) – a dimension is expressed indirectly, is obscure or a peripheral idea of the thematic unit / lesson or it is developed by performing practical tasks.



**Figure 2.** Degree of intensity of the citizenship dimensions occurrence in religious education textbooks by using a three-level scale

It can be seen from Figure 2 that *national identity* and *discussion abilities* are very strongly expressed; *tolerance*, *communicative abilities* and *responsibility* are quite strongly expressed. However, there is a lack of education of such dimensions of citizenship as *intercultural competence*, *social activity*, *ability to compromise*, and *respect for law*.

## Conclusion

Content analysis of religious education textbooks revealed that religious education in Lithuania develops not only religious identity, but a certain type of religiosity. Moreover, it contributes to education of responsible, active and intellectual citizens. It should be admitted that the idea of “multi-faith” religious education which creates conditions for inter-cultural and inter-religious communication is not realized in these textbooks. Prevalence of the national identity dimension and poor presentation of different religious, cultural practices and worldviews in the textbooks allows one to come to the conclusion that nation-state citizenship is educated. Other types of citizenship (global, local and cultural) are not educated enough. Thus, revision of goals, tasks and forms of citizenship and religious education in Lithuania should be made in order to provide, according to R. Jackson (2004a), a genuine forum for a dialogue between students and teachers from different religious and non-religious backgrounds and for learning skills to interpret, reflect upon and gain insights into different worldviews.

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# **Prehistory and the Construction of a European Identity in German History Textbooks Today**

Miriam Sénécheau

## **Introduction**

Prehistory and archaeology have often been used to establish a national identity through the political interpretation of finds and ancient cultures. Some well-known examples are the French recourse to the Celts, the Spanish identification with the Celtiberians and the German exploitation of ancient Germanic history in the 19<sup>th</sup>/20<sup>th</sup> century. Ideas that shaped national identity were, in these epochs, put in schoolbooks in order to contribute to pupils' education and to influence their conception of the world (Marienfeld, 1979; Ruiz-Zapatero & Alvarez-Sanchís, 1995). In Germany this phenomenon found its peak during the time of National Socialism. The textbooks spread ideas based on race and glorified the very ancient German past, referring (among other things) to prehistoric archaeology (Hassmann, 2002; Marienfeld, 1979).

How is history presented today? A broad analysis of German textbooks shows evidence to the fact that prehistoric and antique times are still used for political education. But the ideas have changed: 'Multi-ethnicity', 'European identity' and 'open borders' are the ideas that are taught today. The "growing together of Europe" and the "meeting of different cultures" have become new key concepts in the German school curricula, especially in the subjects history and politics.

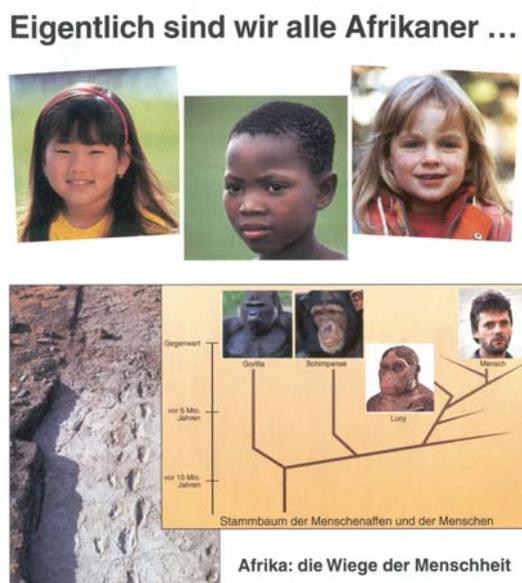
The following examples show how these ideals influence the content of today's schoolbooks. These examples are taken from an analysis of 47 history books that are presently being used in German schools. They were written for pupils in their first year of history classes at secondary school. Depending on the Bundesland (Federal State) and the school type, this corresponds to the 5<sup>th</sup>, 6<sup>th</sup> or 7<sup>th</sup> form. I have examined the chapters on prehistoric and archaeological topics within the framework of my doctoral thesis in archaeology. My perspective and critique are therefore archaeological, not didactical or pedagogical.

This contribution will proceed chronologically, from the time of the first humans, through the Stone Age, the Bronze Age, the time of the Celts, and up to the Romans in the provinces north of the Alps. The text will concentrate on examples referring to political identity in the sense of multi-ethnicity, European identity and open borders. Please note that these ideas are only one part of other political and social ideals that one can find in chapters about prehistory. The concept of gender and family in schoolbook texts and illustrations for example, or the construction of regional or national identity, with the help of archaeology, are other topics of major interest not

discussed in this article (see Sénécheau, 2005; Sénécheau in print). Quotations from these books will be translated into English, but the original texts are in German.

**Evolution of man: teaching multi-ethnicity**

Traditional illustrations of evolution almost always show white people with a human of the European type standing at the end of the development (e.g. Cornelsen, 1994, 17). These pictures with one kind of human walking behind the other in the schoolbooks are usually based on scientific models from the 1960s (e.g. Howell, 1969, 42-45). It is due to new scientific trends that some of the recent German history textbooks show pictures of early humans as being black (e.g. Schroedel 2001, 12). The books also explain that evolution has led to different races, types and colours all over the world (e.g. Cornelsen, 2000, 24f.). Charts on this subject often illustrate the origin of modern man in Africa and his spreading over the entire world (e.g. Westermann, 2001a, 69). The message of most of the new pictures and charts is: 'We all have a common origin. We are all the same. And at the very beginning, we were all black.' One title of a schoolbook chapter even says: "In fact, we are all Africans ..." (Schöningh, 1998, 22).



**Figure 1.** “In fact, we are all Africans... “. The subtitle says: “Africa, origin of mankind” (Schöningh, 1998, 22).

Some of the scientists contradict this "Out-of-Africa" model and believe that homo sapiens could have developed separately in different places of the world ("multi-regional" model, see Auffermann & Orschiedt, 2002, 28f.). The schoolbooks studied

usually don't mention this disagreement among anthropologists. This is certainly not only due to the fact that the material would otherwise be too complicated. I believe that the "Out-of-Africa" model is more suited to a concept that aims to educate pupils today to be cosmopolitan, against racism and for a global world in which skin colour is not to play a role.

In contrast to the ideals that the new illustrations about the evolution of man convey, there are chapters or pictures intending to show that there are people who, "even today", live like in the Stone Age. Corresponding to keywords given in the curricula, peoples such as the Aborigines, the Papuans, the Bambuti or the Pygmies are frequently presented and characterized as modern-day Stone Age cultures – as if they had remained at this "stage of development" (e.g. Westermann, 1994, 40f.; Oldenbourg, 1992, 26). In one schoolbook you can even read the term "cave inhabitants" to describe a people from the Philippines in comparison to Neanderthal man shown as 'cave man' (Schöningh, 1995, 16f.). There is one example of a page in a schoolbook that deals with the topic critically and, in my opinion, correctly (Buchner, 2001, 22): "Are these peoples testimony to the Stone Age?" the text asks, and answers: "No." It explains that indigenous peoples have a history in the course of which they repeatedly adapted to new living conditions. In fact, the tools they use are not a sign of primitiveness. They live in complex social systems, they have their myths and their religion. They do not "remain" in the Stone Age, they are living today. In my opinion, the authors of curricula and of the schoolbooks should give up this tradition of looking to the indigenous peoples in history teaching. This subject could be very interesting in geography classes without assessing any "stage of development".

### ***"Frozen Fritz" and the "European nation"***

Traditionally, for the later epochs after the Palaeolithic Age, German schoolbooks present almost exclusively archaeological finds from Germany or from certain German regions. But there is one important topic which makes an exception: In 1991 there was an important find at the border between Austria and Italy, not far from Switzerland – the Iceman, also known as "Frozen Fritz", in German "Ötzi". He is mentioned in every new schoolbook.

It is interesting to note how the question of his origin is answered in one text example (Cornelsen, 2000, 18): "Who was Ötzi?" the authors ask, and they present a description of a man. The text states that origin and place of birth of the man are unknown. However, the next key words are "nationality: European". The motive for this classification is understandable: after the discovery there was a great argument concerning which nation, Austria or Italy, the Iceman belonged to, who had the right to examine him and to display him in a museum (Fleckinger & Steiner, 2003, 10-26). When the location was finally declared to be South Tyrol, and thus Italy, they agreed that a European team of experts was to study the mummy in Austria and that it would then be displayed in a museum in South Tyrol. The fact that the find is called "European" in the schoolbooks shows that these disagreements should not

play such an important role, and that it was a find of such importance that all Europeans could identify with it.

However, apart from the fact that even today there is no "European" nation, such a procedure is absolutely anachronistic. Nations did not appear until the 19<sup>th</sup> century, over 5,000 years after the Iceman's lifetime. *He* knew nothing about nationalities. In my opinion this example shows that the authors of schoolbooks made "Ötzi" into a European because they were searching for a European identity that they could convey to the pupils.<sup>1</sup>

### ***Trade in the Bronze Age: parallels to the European (trade) Community?***

Europe also serves as an important place of reference for the "Metal Ages". For example, one of the schoolbooks shows a chart with the title "Europe in the Bronze Age" (Klett, 1994, 31). The chart illustrates deposits of copper, tin, and amber and especially the presumed trade routes. The title of the accompanying text reads "Contacts to other peoples via trade" and is followed by the words: "Proper trade routes developed that the traders travelled along to exchange their goods (...). The profession of the trader was interesting but also very dangerous (...). Besides his wares, he brought news of other peoples and regions with him, so that now the people learned more from each other."

People learn from each other, trade binds – that sounds very much like a policy suited to the European Community. It is certainly true that in the Bronze Age the exchange in the broader sense was increased because of the increased trade. However, at that time Europe did not yet exist as a single market, and trade did not stop at the borders of Europe like on this map. Behind the map there is a Eurocentred view that exaggerates the importance of Europe. But it is not only a view of the schoolbook authors. Up until today the scientific community itself has been producing such maps, and the problem still exists that research is limited by artificial borders that do not correspond to the situation in the past (when finds made in another country are not accessible or the language and therefore the literature of the neighbouring country are difficult to understand).

### ***Iron Age: European unity by Celtic culture?***

"Celts, Romans, early Germans – our ancestors in Europe" is the title of a schoolbook chapter dealing with topics of the Iron Age and Roman civilisation north of the Alps (Oldenbourg, 1998, 4f.). As members of these nations, illustrations of "married couples" – the German text says "Ehepaare" – are presented, affixed to a map of Europe. The Celts are often used to claim an early cultural unity in Europe. This "oldest people of Europe" was said to have spread out from its original region on the Danube and the Rhine, bringing its language and culture as far as Asia, Spain, and Ireland (charts e.g. in bsv 1992, 28; Diesterweg, 2001, 32). In some of the

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<sup>1</sup> The editor was informed about the problem and changed the personal description in the following editions.

textbooks they are said to have left their traces everywhere, especially in regions like Brittany, Wales, Ireland and Scotland, in the form of "Celtic traditions". Sagas, myths, heroic tales, the Celtic languages like Gaelic and Irish as well as Celtic names of rivers and places are mentioned (e.g. Klett, 2000, 32; Schroedel, 2000, 39). The message of these schoolbook pages is that present-day commonalities of some European regions are the result of a common history that stretches back into the Iron Age. From a present-day scientific standpoint, this is absolutely wrong.

First of all, one should not, like in one example, choose Stonehenge of all places as a symbol for Celtic culture (Cornelsen, 2001, 47). The Megalithic cultures are relicts of the Neolithic period and have no connection with the Celts who lived nearly 2,000 years later. This popular cliché has existed since the Romantic era, when Celtic Druids and Megalithic monuments were erroneously associated with each other (Baum in Zimmer, 2004, 28). So-called Celtic sagas and myths were first written down in the Middle Ages and much later misleadingly called Celtic (Rieckhoff & Biel, 2001, 14f.). About 1,000 years lie between the historic Celts and the written records of such sagas. The concept "Celtic languages" is also misleading: the term "Celtic" for this group of languages originates in the 18<sup>th</sup> century. It is the result of a misinterpretation of modern Bretonic which was then falsely thought to be the remnants of the language of the Celts who had lived in Gaul (Chapman, 1992, 70-75). There is however no linguistic continuity from the Celts until today. "Celtic traditions" are a product of the modern times, times in which people are searching for an identity and in which tour operators need good clichés in order to make holiday areas more attractive for tourists – today's Celtic music or the quilt have no connection with the archaeological Celts (Maier, 2000, 250ff.). On closer consideration, the cultural unity of the Iron Age is seen to be cultural diversity. Archaeological concepts like the Hallstatt and Latène culture reveal themselves to be artificial, meant to facilitate communication about archaeological material among the scientists (Collis, 2003). The "Celts" probably never existed as a unit, as a "people", neither according to the historical nor to the archaeological sources (Rieckhoff & Biel, 2001, 15f.; Chapman, 1992). From a scientific standpoint, they are therefore hardly suited to be a foundation for the creation of a united European identity.

The end of National Socialism also brought the end of the identification of the Germans with the early Germans in schoolbooks. Today, they are only sporadically referred to as "our ancestors" like in the example given above, where they are named with Celts and Romans together (Oldenbourg, 1998, 4f.).

### ***The "Roman roots of Europe"***

For the purpose of a didactic justification of the lessons on the Roman Empire, the curricula introduce certain teaching goals which combine the keywords "Roman culture" and "Europe". Thus the pupils are to learn, for example, that the Roman civilisation "was of great importance for the common European culture", they are to gain an "insight into the importance of Roman culture and civilisation for Europe "

and they are to become aware of the "Roman roots of Europe" (curriculum for 'Gymnasium' in Baden-Württemberg 1994, 156). At the end of the chapter on Roman history, the schoolbooks now act on these ideas by looking for traces of Roman culture in the present and in one's surroundings (with a special relationship to Europe e.g. Klett, 1999, 128f.). These can be: old Roman buildings and finds, examples of modern architecture which was influenced by Roman buildings, examples from law, the Latin alphabet and Latin numerals, the Latin language etc.

The Latin language is quite frequently used as an element that binds Europe. One example of a schoolbook page has the title "Latin – the language of Europe" (Buchner, 2002, 167). Words from different Romanic languages are compared. There is a map of Europe in the background. It is obvious that ancient Rome still has a great influence on our culture and history. This is not to be questioned here. And it is equally clear that Latin is a language that has influenced many other languages that are spoken in Europe today. But is it the language of Europe? It is also the language of Latin America. And it is not the language of some countries in Eastern Europe. It is only partly the language of Germany by virtue of many linguistic borrowings. The European languages have different roots, and this is not stated here. In my opinion, this example shows that the schoolbook authors are, for political and pedagogical reasons, desperately trying to create a unity where it in fact does not exist. They want to force European unity and for this purpose they are using the example of language which is not necessarily suitable.

### *Ancient Rome and the European Community*



**Figure 2.** The Roman "Denarius" and the "Euro".

The title says "Roman antiquity and European present" (Cornelsen 2000, 195).

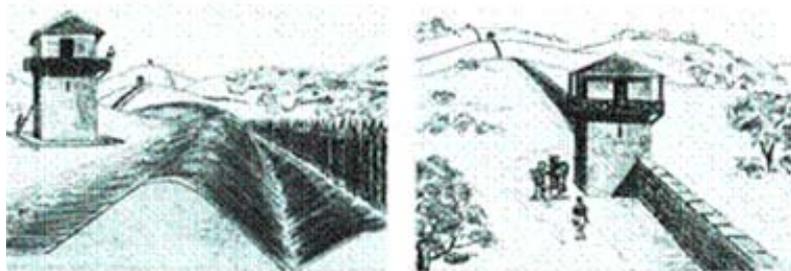
Analysing the textbooks of the recent years, one can find the increasing tendency to compare the Roman Empire to the European Community (e.g. Buchner 2001, 183). In one case, the Roman 'Denarius' is interpreted as an early type of the 'Euro' (Cornelsen, 2000, 195) (fig. 2). The text under the illustrations speaks of the advantages of a single market for trade: that the people in the Roman Empire could trade at stable prices with each other regardless of borders and that the goods were bought and sold within a wide-reaching trading network. Naturally this lends itself

to a comparison with the European Community. However there is a catch: in the cultures of those times, which mainly traded without the use of coins, the standardised monetary system was only a simplification for those who used it. And especially the Celtic and German cultures used coins in a way other than the Romans (Todd, 2000, 94f.). Trade connections existed long before – for example for important raw materials already in the Palaeolithic Age, several thousands of years earlier. Besides, borders in those times did not have the separating importance that today's national borders have, and trade "across borders" can therefore hardly be compared with the present-day situation (Whittaker, 1994).

### ***Romans and early Germans at the Limes***

This part of the contribution is about how, under the influence of pedagogical principles and a new historical view, the interpretation of the relationship between Romans and the Germanic people at the Limes, the border separating the Roman conquered land from the Germanic regions, has developed during the last 10 years. What was in earlier interpretations a place of violent conflict and a defence against the Germanic peoples, a line separating German tribes and Romans, has become a line where trade and cultural exchange took place. Pictures showing war and battles between Romans and German tribes at the Limes belong to an older generation of schoolbooks and have become rare (e.g. Klett, 1995a, 187f.) – today it is important to convey a picture of the peaceful co-existence of Romans and German tribes. In the following, this change will be illustrated by a series of Limes reconstructions from different schoolbooks.

Early reconstructions show a border fortification that is drawn endlessly through the landscape. There is no opening in the wall that could be passed through – the border is long and closed (e.g. Klett, 1994, 66) (fig. 3). Reconstructions like these go back to scientific models from the 1920s.



**Figure 3.** The Limes as a long and closed border (Klett 1994, 66).

In an early further development of this pattern, the Limes is still drawn a long distance through the landscape, but the illustration shows something new: a passage (bsv, 1995, 150). It is guarded by three soldiers. They are standing there although at this moment no one wants to cross the border.

In a next step the Limes is running over many hills, and a passage is guarded by soldiers (e.g. Cornelsen, 1994, 168). A horse-drawn wagon and two horsemen want to leave the Roman Empire. In the pictures of this type from the 1990s, people are always leaving the empire, but almost never does anyone set foot on the empire passing by way of the Limes in the other direction. This might be a coincidence, perhaps an illustrator once began this way and the others imitated the scenes. It is however also possible that a special historical view is depicted here: the interpretation of the border as protection from intruders or invaders, and the idea of Romans as conquerors or bringing culture over to the neighbouring, 'uncivilised' regions. The pattern of the illustration remains basically the same in the next step. There are the Limes with the tower, and again a trader leaving the Roman territory (Klett, 1995b, 248). But the soldier is no longer standing in the immediate area of the gate but at the base of the tower. He just observes the trader passing by.

In a still newer illustration people are – and this is new – passing in both directions (Volk und Wissen, 1998, 158). It was made in 1998 for the pupils of the new Federal States in the eastern part of Germany. The title of the corresponding text says: "The Limes binds Romans and early Germans" (Volk und Wissen, 1998, 161). Further on we read: "In times of peace the Limes was passable. How did the people take advantage of their freedom at the border? At the Limes and in the Roman legion cities, markets were held regularly." And in the following the authors write about travellers moving in both directions.



**Figure 4.** The Limes as a "meeting place" (Klett, 1999, 101).

In a picture from 1999, the Limes is practically unguarded (Klett, 1999, 100f.) (fig. 4). There is traffic in both directions, and trade. It is a very peaceful scene, and its effect is heightened by the use of very friendly colours. The title of the schoolbook chapter is: "Meeting place Limes: Even the might of Rome had its limits, it ended at the Limes. However, the border did not only separate Romans and Germanic tribes, it was also a meeting place." And there is an illustration of a Roman bridge at the bottom of the page which thus becomes a symbol of a bond between the peoples.

In another picture from the year 1999 you can again see the usual components of the Limes illustrations (Westermann, 2001b, 118): palisade through the landscape, tower, and soldiers. The soldiers are talking with each other in a friendly way. The main part of the illustration is in the foreground where Romans and Germans are trading with each other. Everyone is cheerful, and the children are playing together. The title of the entire chapter is: "Living together at Limes", the title of the picture: "Meeting place Limes".

One can find a similar situation in a schoolbook from 2001 (Klett-Perthes, 2001, 156-159): The title of the whole teaching unit is "Romans and early Germans – neighbours at the Limes"; the chapter about trade is called "Trade in the protection of the Limes" and shows a picture with "A Market at the Limes".

From a "bastion against the barbarians" to a "meeting place of the cultures". This change has nothing to do with adapting the historical view to new scientific discoveries – when archaeologists do excavations at the Limes, they always find the same things, roughly speaking: a ditch, a wall or earthwork, sometimes an opening and a tower. Anything else we can see in the illustrations is added to give the pupils a more vivid picture of what might have happened at these places. And this addition is a mirror for images of the past influenced by modern ideas. Of course, there has also been a change in the scientific interpretation of the Limes during the last years. But in the scientific community, the researchers speak of border regions or border corridors on both sides of the Limes and do not see it any longer as a selective "demarcation line" (Whittaker, 1994). The schoolbooks still depict a border line, only what is happening right next to this border has changed. These changes in the textbooks are indicative, in my opinion, of the changes and new understanding of inner-European borders in the present-day society. Today we want open border politics, peace and cultural exchange. This is the message that the pictures convey to the pupils. And it is surely no coincidence that economy and trade play an increasingly important role in these illustrations. The pictures reveal more about the respective society in which they were produced than about historical reality.

### ***Ancient Rome as a "melting pot of people"***

The fact that recent textbooks also emphasise the character of the Roman Empire as a 'melting pot of people and nations' and discuss the integration of different cultures and religions must also be seen as an answer to present-day problems. The key words are 'multi-ethnicity' then and now. This is especially obvious in schoolbooks for combined history and social studies. Recently they have been combining the ancient world and the modern with reference to topics like migration and integration or coexistence of different cultures (see fig. 5).

In one of the textbooks the title for the teaching unit (Klett, 1999) says: "Rome: many peoples in one empire". Three subsequent chapters of the teaching unit are titled: "They were all Romans. The living together of peoples in the Roman Empire", "People from other parts of the world also live among us", "Being a foreigner in Germany. It is sometimes not easy to be a foreigner". The introductory

text about the teaching unit explains: "Rome finally became a large empire in which many different peoples lived together. This was not always easy. And how is it today with us? People with different origins also live here. How do we deal with this? You can get answers to these questions in this chapter" (Klett, 1999, 90).



**Figure 5.** Illustration showing inhabitants of the Germanic provinces and Romans from Italy under the title "They were all Romans" (Klett, 1999, 107).

In another example the chapter "Romans and early Germans – neighbours at the Limes" is followed by the teaching unit "We live together with people from other cultural backgrounds" (Klett-Perthes, 2001; similar: Schroedel, 1999). A third book compares the foreigners' possibilities of obtaining the citizenship in ancient Rome and in Germany today (Westermann, 2001b, 125).

Typically, it is more the similarities between the situations in ancient times and today that are sought, than the differences – which were in fact considerable. This is why historians do not necessarily view the comparison as suitable.

## Conclusion

Most of the examples presented in this article are well-suited to the direction in which German educational policy wants its pupils to be educated: modern history lessons are expected to teach important values like tolerance and openness and they are supposed to develop the pupils' ability for democratic participation. The pupils are to become citizens of a multi-ethnic world and of a European Community with open borders. From our political and ethical point of view today, this is an approach of which we all approve. But answering the question whether history textbooks still use prehistory and archaeology to establish political identity, we have to state: Yes – only the ideas have changed. And these changes are not only to be seen as new scientific results. Rather, they are a mirror of our society and show how present-day questions and problems influence our interpretation and presentation of prehistory – even today.

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# **Analysing Motherhood in Primary School Textbooks: The Case of Spain during the first two Ministries of Education of the Franco Dictatorship (1939-1956)**

Kira Mahamud

This paper summarises part of a doctoral research project in progress. My aim is to analyse the representation, image, and projection of motherhood –and its universe–, as a social and symbolic phenomenon, in primary school textbooks during the first two Francoist Ministries of National Education (1939–1956).<sup>1</sup> Subsequent objectives include elucidating (a) the mechanisms implemented in order to construct and present a particular depiction of motherhood and (b) the motives that led to the construction and presentation of such a symbolic imagery of the universe of motherhood in primary schoolbooks.

## **Emotions in school textbooks**

I would like to present a new approach to the study of school textbooks. I am convinced that we can read and analyse school textbooks from a new angle. To be more precise, I propose the possibility of analysing schoolbooks focusing and rescuing an omnipresent element which has not been thoroughly examined within the context of school textbooks: emotions.

I have paid much attention to emotions in Spanish schoolbooks from the 1930's, 40's and 50's, and have discovered that they constitute a rich source of valuable information about: (a) educational intentions (intellectual education, aesthetic education, behaviour control); (b) educational and teaching strategies and practices (intimidation, tolerance, authoritarianism, indulgence); (c) ideological indoctrination (imposition of a given set of beliefs); and (d) the construction of individual and collective identities (gender and national identities).

The examination of the role of emotions in Spanish schoolbooks has revealed that they have been used as part of the strategies and mechanisms set forth in order to achieve the transmission of the established concepts and models of motherhood and fatherhood, femininity and masculinity, and family; as well as in the construction of the concepts and models of the true Spanish patriot and Catholic.

My hypothesis is that the emotionally charged phenomenon of motherhood was employed and manipulated by the New State and by the Catholic Church as an instrument for the transmission of their respective ideologies (patriotism; Francoism; Catholicism); and for the achievement of their political ambitions (demographic growth; maintenance of the *status quo*; legitimacy of the Regime; construction of a

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<sup>1</sup> Ministries of José Ibáñez Martín (1939-1951) and Joaquín Ruiz-Giménez y Cortés (1951-1956).

new national identity, return to old, traditional values, etc.). The strategies set forth to make such an instrumental use –political, ideological, and religious– of motherhood were various and varied, but their common denominator was to constitute it as (a) a source of social and individual pride; (b) a source and, at the same time, the symbolic space of unquestionable love and happiness; and (c) a sign of both individual and national feminine identity. This implied the manipulation of its emotional charge and of its social –and thus, individual– value. The State and the Church spoke and presented motherhood in highly favourable terms. This praising of motherhood was done in various forms and in different directions, but the most striking of all, found in school textbooks, is the symbolic abstraction constructed and presented to the children. I have called this process: an emotional-linguistic strategy in which emotional indoctrination is the main objective.

### ***Emotions as key objects of study***

Why do I think it is worth exploring the emotions that are found in schoolbooks? Several reasons lead me to focus on emotions in school textbooks:

1. The fact that the school textbooks I have read and analysed are charged with particular emotions, which the children are told/taught/guided to feel, almost as an imposition from the authorities. The abundance of allusions and references to emotions both in school textbooks and in other books on education of the time has caught my attention. There are two possible explanations to this opulence:
  - a) General belief (and pride) at the time in the emotional and sentimental quality of the Spanish people.<sup>2</sup>
  - b) Emotional content of all ideological discourses. Emotions, ideology, and language are intimately related.
2. The conceptualisation of school textbooks as vehicles for the “teaching”, transmission, reinforcement and internal development of (particular)<sup>3</sup> emotions, through the use of language and illustrations.
3. The idea that post-war Spain can be perceived, from a psycho-sociological perspective, as a particularly intense emotional, socio-historical period of time.<sup>4</sup> The 1940’s and 1950’s are years of great emotional intensity. It is, however, those

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<sup>2</sup> Antonio Onieva, Chief Inspector of Primary Education in Madrid, was a firm believer and defender of the Spanish people’s sensibility and sentimentality. His book from 1939, *La nueva escuela española (The new Spanish school)* is flooded with references to the teaching of emotions and the importance of the sentimental dimension of education.

<sup>3</sup> What I am trying to say is that, obviously, schoolbooks do not and cannot “teach”, “show”, “transmit” all emotions. They are, in fact, selective and concentrate on those convenient and predominant emotions at the time.

<sup>4</sup> I was inspired by Lloyd deMause in *The Emotional life of Nations*. New York: Karnac Books, 2002. This thought applies to all socio-historical periods of time, because my argument is based on the fact that individual and collective emotions are always present. However, I think that certain historical periods possess a much heavier emotional load, in particular, warlike and post-warlike periods, for obvious reasons.

emotions which the victors experiment that are presented in schoolbooks because they are in power and control the writing and production of school textbooks. Patriotism and Catholicism are experienced and conceptualized, not only as the supreme social, political, and ideological beliefs, but as ways of feeling emotions towards certain things, events, and people; and even as emotions themselves. Three main emotions prevail at the time: National pride; love (towards God, the fatherland, the family, the mother, and children); and fear. In this respect, it is also necessary to bring out the fact that after the shame of the 1898 “National Disaster”<sup>5</sup> (the loss of the last colonies), the recent “poisoning II Republic”<sup>6</sup> and the cruel civil war, Spain’s victors proclaimed its people’s superiority and launched a national pride campaign. Thus, shame is another prevalent emotion portrayed in two directions: on the one hand, it guides the pride of the “new” Spanish man and woman who have overcome the feeling of inferiority inherited from the past; at the same time, it serves as a warning –in connection to fear– for those who dare to disagree or disobey. In both cases, shame proves to act as a powerful emotion which can control people’s actions (Scheff & Retzinger, 2000).

4. The study of emotions as psycho-sociological phenomena, conditioned by culture and society. I perceive emotions as internal activities of the individual; but they are learned, reflect values, contribute to the construction of reality and exert incalculable influence on human behaviour and thought (Damasio, 2003; Solomon, 1990, 2003). Many emotions possess cognitive, evaluative, and desiderative content (Stocker & Hegeman, 1996). Social recognition and status, for example, are needed for self-respect and self-esteem, and this happens not only at an individual level, but also at all levels of collectivity.

5. The definition of motherhood as a complex, symbolic, multidimensional process and phenomenon affected by a large number of factors: social, economic, political, cultural, religious, biological, psychological, physical, and emotional.

#### ***School textbooks constitute vehicles for the transmission of emotions***

In the schoolbooks I have read and analysed, the emotional-linguistic strategy is not disguised. “What matters is that the lesson penetrates deeply and leaves the heart trembling with emotion”<sup>7</sup> (Serrano de Haro, 1957, 6). These words are illustrative of the educational intention of school textbooks in our period of study. Agustín Serrano de Haro, Chief Inspector of Primary Education in the province of Granada, expresses himself openly in his preface to his school textbook entitled *Yo soy español (I am Spanish)*.

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<sup>5</sup> The loss of the last colonies: Puerto Rico, the Philippines and Cuba, meant the end of the Spanish Empire.

<sup>6</sup> Francoism saw the II Republic (14/04/1931 – 01/04/1939) as the *anti-España*, the heart of all evils.

<sup>7</sup> “Lo que importa es que la lección cale hasta lo hondo y deje la entrañas temblando de emoción.”

He calls the preface, “Some pieces of advice for educators”<sup>8</sup>, and he adds:

“We want them (the children) to start listening to exemplary names and heroic deeds; that God’s and Spain’s matters penetrate as if it were holy salt in the germinal yeast of their conscience. But not precisely because we want them to ‘know’. Not everything must consist in knowing, it is also very important to feel!” (*Ibidem*).<sup>9</sup>

Indeed, school textbooks emerge as ideal vehicles for the “teaching” of emotions. They constitute solid instruments for the transmission of selected information and official knowledge, for the development of collective and individual identities, as well as opinions and perceptions of reality. However, one aspect frequently ignored, taken for granted, and not given enough relevance is the fact that school textbooks also awaken, shape, give a direction, and strengthen (certain) emotions. The challenge is to analyse which particular emotions, why, and how. During the Francoist period under study, such an intention was not hidden, kept as a secret, or disguised. The idea that school teachers should make sure that their lessons affected children’s hearts was extended. Furthermore, it was necessary for them to be emotionally involved as well.

Carolyn Boyd, in her studies of Spanish national identity, discovers that the rhetoric of pedagogical discourse –especially during the 1940’s– focused on emotions, on instilling in children the capacity to feel the “warmth”, the “vibrancy”, the “sentiment”, the “will”, the “lyricism”, the “fervour”, and even the “madness” of the lessons (Boyd, 1997, 259). Schoolbooks, together with teachers who acted as mediators between the schoolbook and the pupil, collaborated in this emotional education and concentrated part of their efforts in teaching, transmitting and reinforcing a singular group of emotions.

***All we need is love: Love is everywhere in school textbooks***

Love is one of the most prevalent emotions in all the school textbooks I have analysed. Love is everywhere, openly displayed and explained in detail: children must love deeply, intensely, passionately, devotedly; and they are told that their mothers love them, God, and the fatherland in the same way. It is interesting to note that in a period of time characterised by hunger, misery, hatred, resentment, and pain, schoolbooks are full of references to love, and in particular, maternal and religious love. Of all human emotions, love could be considered one of the most difficult to use in the imperative form. In theory, it is complicated to compel anyone to love somebody or something. In fact, even maternal love has been called in question as a constant in history (Badinter, 1984).

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<sup>8</sup> “Algunas advertencias a los educadores.”

<sup>9</sup> “Queremos que empiecen a oír los nombres ejemplares y las gestas heroicas; que las cosas de Dios y de España entren, como sal de bendición, en la levadura germinal de su conciencia. Mas no precisamente para que ‘sepan’. Todo no ha consistir en saber; ¡también tiene su importancia el sentir!”

Federico Torres, a popular schoolbook writer, illustrates the three basic loves of the children promoted by Francoist schoolbooks. In the chapter entitled: “Los tres grandes amores” (“The three great loves”), from a well known reading book for girls, he says: “Our great loves are three: God, the Motherland, and the family. The three of them together constitute the basis, the foundation of our life”<sup>10</sup> (Torres, 1942, 129). Children are taught to love their families, their fatherland, and God just as they are explained the benefits of such love and the miseries of its absence. In other words, children are taught to love and to fear the terrible humiliation and consequences of not loving, respecting, and admiring. They are told who and what to love, in first, second, and third positions, although, somehow and sometimes, there is confusion in this respect.<sup>11</sup> Arguments aim at the emotional structure and not at the intellect. Love is the predominant emotion portrayed in school textbooks, though not the only one. Pride, shame, and fear follow it closely.

***Fusion and identification of elements: Fatherland, family, mother***

A fusion and identification of three central political, symbolic and emotional elements is elaborated; as if they were the same entity, but on different levels: the fatherland, the family, and the mother. A dual interesting linguistic construction is created by the State and the Catholic Church to awaken children’s patriotic and Catholic emotions; appealing to their affective structure:

The first step in the emotional-linguistic strategy is the personification of the fatherland as a loving mother. But why not a Goddess? Why not a queen or a princess? Why not a father? The fatherland becomes “mother fatherland” (la “patria” becomes la “madre patria”). This entity has come to be called Motherland. The metaphor –an oxymoron– is not, however, an invention of the Francoist period; it is adopted from the traditional Spanish right wing groups during the Primo de Rivera Dictatorship (1923-1930)<sup>12</sup> (López, 2001). Both girls and boys are called to love their nation just as much as they love their mothers, or even more. At the same time, on other occasions, the fatherland is directly or indirectly referred to as a family, because it wants to include all Spanish people as brothers and sisters, sharing the same mother (the motherland), and enjoying the same feelings of pride and belonging. This fraternity is also closely linked to the religious imagery of Catholics as the children of God.

The use of figurative language, especially metaphors, is aimed at constructing an attractive, emotional familiar imagery, in which all elements are dignified and magnified. The power of metaphors, as linguistic constructions, resides in their being –in essence–, a social, cultural, and linguistic construction. This means that it

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<sup>10</sup> “Nuestros grandes amores son tres: Dios, Patria y Familia. Los tres unidos constituyen el motivo, el fundamento de nuestra vida.”

<sup>11</sup> In this reading book, the second love is the family, following God’s closely. Nothing is said of the fatherland.

<sup>12</sup> Many authors believe that the ideology of the New Regime finds its origins in the Primo de Rivera Dictatorship and further back in the History of Spain.

is fundamentally a linguistic operation, socially and culturally conditioned. Hung Ng and Bradac argue that metaphors are “models for thinking about social and physical objects and for communicating a complex set of attributes in a shorthand that can be readily understood” (Hung & Bradac, 1993, 138). Isn’t this precisely, one the aims of school textbooks? Metaphors can therefore constitute solid teaching tools, but they are also, at the same time, allies of ideology and necessary for its propagation. Lakoff and Johnson express this idea in a different way, stating that political ideologies are always framed in metaphorical terms (Lakoff & Johnson, 1980, 236).

Children become spectators of a poetic image of love, represented by their mothers, their families, and their motherland. The fusion of the three in one sole being encompasses them in an interchangeable manner. Children perceive and identify them on the same level of prestige and dignity. Children are also seduced by the image, experiencing closeness and affection towards the nation which gives them an identity.

In other words, women’s identity was constructed not just on the basis of their compulsory maternity, but through the symbolic formation of motherhood. The phenomenon of motherhood led women to reproduce and represent their families and the Spanish nation, as well as their religion, the Catholic religion. Mothers –not simply women– were portrayed in schoolbooks as feminine symbolic figures –pure, perfect, and immaculate– of the National-Catholic State. Both girls and boys learned to perceive their mothers and mothers in general, as national reproducers and representatives of the Spanish nation. Girls, for their part, could foresee their destiny and duty.

### **Invisible motherhood *versus* visible motherhood**

Fatherhood was seldom represented in schoolbooks as men’s duty or social role, perhaps in the attempt to conceal, forget, or make altogether irrelevant the father’s contribution to the “making of” and arrival of the children (i.e. the idea that a sexual, physical union has taken place). In other words, children arrived because Nature and God had intervened, and motherhood became, paradoxically, a natural and miraculous phenomenon which led to the creation of the family, but in which the father did not participate.

This is demonstrated by the numerous references to children being sent from God, coming down from Heaven, or being brought by a stork. All these classic clichés which have become part of our collective memory from childhood and have survived thanks to the oral tradition of storytelling illustrate the manipulation of the concept and phenomenon of motherhood. In primary schoolbooks, motherhood “starts” when the baby already exists, when the married couple turns into the desired and required family.

Motherhood was never presented in its complete essence, as a process beginning with sexual intercourse (considered taboo), going through pregnancy and obvious physical changes in the woman’s body, passing through the pain of delivery, and

culminating in the care of the baby. The first two stages were ignored and omitted. To be more precise, children were only allowed to know about the last, external, public, social stage and dimension of motherhood: taking care of and educating the baby, the point in which motherhood implied the existence of a family and became equivalent to it. The family was then situated above motherhood itself, in the sense that the latter became its server. This is what allows Federico Torres to place the responsibility of the family's patriotic and Catholic ties on women.

“In the home, the woman is everything. Without her, the family would not exist, with its traditional, Catholic, patriotic ties. For this reason, if she is not a good housewife, the home collapses like a castle of cards blown away by a child”<sup>13</sup> (Torres, 1950, 82).

Thus, schoolbooks contributed to purging sexuality from motherhood and from women's identity. Spanish Gynaecologists, (de Miguel, 1979) men of science, together with politicians and priests, all men as well, had pronounced themselves on women's sexuality and maternity following the ideology of the National Catholic Regime. The exaltation of the symbolic meaning of motherhood, as the feminine national and religious identity *par excellence*, included the silencing of women's sexual identity.

### **Breaking the false mirror**

The texts I have read stipulate what motherhood and the family “should be”, what they are “expected to be”, what they are “desired to be”, from the point of view of the authorized writer, who follows the State's doctrine. They do not describe the real Spanish family of the time; they prescribe it, and they do so employing a contrived and metaphorical language which appeals more to the emotional rather than to the cognitive structure of the reader's mind.

The promotion of women and motherhood is therefore fundamentally false. It only served other purposes. There was no intrinsic value and respect granted towards mothers as individuals, nor on motherhood as a phenomenon by which life is generated. Despite mothers' essential role in the origin and growth of the family, the maximum authority was still the father. Women (as mothers in the context of a family) were present in the political discourse, but only to obey. Such an exaltation of motherhood and the family in a sexist, patriarchal society was based on another factor: children, because, as another reading schoolbook writer says “the good son gives his fatherland everything he has. His life, blood, and wealth”<sup>14</sup> (Bolinaga, 1940, 81).

If in all societies, two of the main fundamental questions regarding identity and morality which an individual may ask him or herself are “Who am I?” and “What

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<sup>13</sup> “En la casa la mujer lo es todo. Sin ella no existiría la familia, con sus vínculos tradicionales, católicos, patrióticos. Por ello, si la mujer no es buena ama de casa, el hogar se derrumba como castillo de naipes al soplo de un niño.”

<sup>14</sup> “Y el buen hijo da a su Patria (sic) cuanto tiene. Vida, sangre y riquezas.”

should I do?”, I have tried to show in this brief paper how in the Spanish society which emerged after the Civil War (1936-1939), schoolbooks imposed an emotional indoctrination –mainly through metaphorical, dramatic, and evocative language– on schoolgirls and schoolboys which coerced them to learn, believe, and feel that the only way to be respectable members of their society was as wives, mothers, and housewives, in the case of girls, and by loving their country as if it was their mother, for both girls and boys. Furthermore, it was by fulfilling this duty that they could be considered good Spaniards and good Catholics. Post Civil War Spain, therefore, represents a fascinating example of how schoolbooks can be employed as vehicles for the construction of a single three-dimensional indissoluble identity: the feminine (maternal), national (patriotic), and religious (Catholic) identity, and for the orientation towards the emotional content and force of national identity through the manipulation of key emotions, namely pride, shame, and love.

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# **Peace in Times of Globalization: De-(constructing) Militaristic Identities in language and social studies textbooks in South Asia: the Case of Pakistan**

Muhammad Ayaz Naseem

The Social Studies and Urdu texts in Pakistan construct a meta-narrative of religion and nationalism that includes only the masculine, militaristic and nationalist narratives from past and present. In this meta-narrative both brain and brawn constitute the *forte* of the male Muslim Pakistani citizen. The sources of knowledge are limited to nationalist and religious scriptures. Thus, excluded from the meta-narrative are women, dissidents and minorities. Alternative texts even if religious or nationalist are also excluded and condemned. Experience is decried as unauthentic and unscientific and thus not a credible source of knowledge. Furthermore, the texts graphically and discursively present knowledge-construction and knowledge-provision as essentially male activities.

In this article I examine the textual constitution of militarism and militaristic subjects by the social studies and language (Urdu) texts that are taught in the public school system of Pakistan. My main assumption is that the educational discourse in Pakistan (especially the curricula and the textbooks) draws upon other discourses such as those of media, law, state, etc. to constitute gendered subjects and subjectivities. In doing so it constitutes docile, domestic subjectivities for women, minorities and other marginalized groups and conversely militaristic subjectivities for males. There are a number of ways through which this takes place. Three techniques that the discourses use are: Normalization, homogenization (totalization), and, classification (hierarchization). In this article I primarily focus on normalization especially the normalization of militarism, normalization of authority and normalization of discipline.<sup>1</sup>

## **Normalization**

Normalization refers to the definition of ‘normal’ by the text. In a post-structuralist sense it means the establishment of measurements, hierarchies and regulations around the idea of a distributionary statistical norm within a given population– the

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<sup>1</sup> For a detailed discussion of how classification and hierarchization are used in/by textbooks and curricula to constitute subjectivities please see Naseem, M. A. (In print). The Soldier and the Seductress: A Post-structuralist Analysis of Gendered Citizenship through Inclusion in and Exclusion from Language and Social Studies Textbooks in Pakistan. *International Journal of Inclusive Education*. Also see Naseem, M. A. (2004). Gendered Identity and the Educational Discourse in Pakistan” in P. Ninnes & S. Mehta (eds.) *Re-Imagining the Discourse: Post Foundational Ideas for Comparative Education*. London: Routledge.

ideas of judgment based on what is normal (Ball, 1990, 2; also see Covaleski, 1993). In simple words, it represents all those meanings that are fixed through various means by the discourse and made to look as if they are natural, ever-present and given. An impression of a broad consensus is constructed about their meaning, and large segments of society do not question them.

These meanings then regulate and govern all relations within the society. Any other meaning or interpretation that falls outside this normality becomes an aberration or deviance. All those who are found to be deviant are (or have to be) disciplined. I must mention that just as the meanings fixed for various signs keep shifting in accordance with the shifts in nature and/or the influence of the discourses that fix the meaning, the nature and range of signs to be normalized also changes. In Pakistan's case the measurement of nationalism, patriotism and what it means to be a citizen is accomplished by normalizing militarism, authority, discipline and a gendered social hierarchy.

### ***Normalizing Militarism: Manufacturing Soldiers!***

Militarism is normalized by the texts in many ways. At times it is conveyed in subtle ways through poems and isolated verses, mainly by figures such as Iqbal, Hali, etc. whose nationalist credentials have already been established by the text. At other times militarism is normalized through narratives of epic proportion from the period of early Islamic history known as the *Ghazvat*<sup>2</sup> (literally: battles but the reference is always to the battles that were fought either during the lifetime of the Prophet (PBH) or in the years following his death). The battles and wars of early Muslim adventurers in India such as Muhammad bin Qasim, Mahmood Ghaznavi, Ahmad Shah Abdali, and Sultan Tughlaq are also used to this end. At yet other times militarism is normalized through stories from the three wars between India and Pakistan. The stories of the sacrifices by the valiant sons of Pakistan who were awarded the *Nishan e Haider* (the highest military award in Pakistan) also work to this end.<sup>3</sup> Last but not least essays, poems and chapters on issues seemingly

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<sup>2</sup> Just as the stories of battles between India and Pakistan and those who fought with bravery and sacrificed their lives (and received Nishan e Haider) abound the text so do the narratives of Ghazvat. A list of full-essay narratives of Ghazvat includes: Badr: Urdu for classes 5 and 6, Yarmouk and Ohad: Urdu for class 7, Karbala: Urdu for class 8. Other stories include military heroics of Khalid bin Waleed with respect to the Battle for Spain and other battles: Urdu for class 7, Ma'az, Mouooz, Hamza, Urdu for class 6.

<sup>3</sup> Captain Mohammad Sarwar: Urdu for class 3 (Punjab Board), Lance Naik, Mohammad Mahfooz—Urdu- 3 (GP, 2002) Rashid Minhas—Urdu-4, Sawar Mohammad Hussain—Urdu-5, Major Tufail—Urdu-6, Sarwar Shaheed and Lance Naik Lal Hussain—Urdu-7. In the textbook for Urdu for class 8 all those who received the military award are discussed in one essay. Other than the ones listed above the list includes Major Raja Aziz Bhatti, Major Mohammad Akram, Major Shabbir Sharif, Hawaldar Lalak Jahan, Captain Colonel Sher Khan. It is interesting to note the name of the last mentioned. The second word in the name colonel does not designate his rank but is his middle name. This is a common tradition in some areas of Pakistan from where traditionally men are recruited for the Armed forces to

mundane and unrelated to war are peppered with articulations that normalize militarism and militancy.

The textbooks to constitute subjects with militarist and often-violent consciousness faithfully follow guidelines provided by the Curriculum Documents (CD) issued by the Federal Ministry of Education. Learning competencies that the CD for Social Studies for classes 1-5 (GoP 2002) seeks to develop include: developing an understanding of Hindu-Muslim differences and the need for Pakistan; enhancing the understanding of the forces working against Pakistan; promoting realization about the Kashmir issue; evaluating of the role of India with reference to aggression; and discussing of the role of the present government in reestablishing the sound position of Pakistan and its freedom fighters before the international community (31).

The text seeks to normalize nationalism based on religion, especially as manifested in the two-nation theory discussed in detail earlier. It also seeks to normalize the Hindu-Muslim binary, the normalcy of war between India and Pakistan, the notion of *Jihad* (through reference to Kashmir) and the normalcy of the state as the ultimate protector. The textbooks produced according to these guidelines not only normalize militarism but also gender it.

For example, in an Urdu textbook from 1970s (PTB, 1974) a gendered and militarist explanation of Jihad is used to normalize militarism. In the handwritten comments and edits of the subject specialist (name withheld), the word 'children' in sentence "there cannot be any Muslim who has not heard of the word Jihad and Muslims know very well the meaning of this word but there may be some children who might not be clear about it" (12) is struck out and is replaced by the word *larky* (boys). The addressee of the text is gendered and the whole lesson then proceeds to explore the militaristic dimension of Jihad. Though war or military action in fact constitutes only one form of Jihad, the text presents it as the only one and it is boys who should understand this concept well. The essay on *Miner e Pakistan* (The Pakistan Monument) in class four Urdu textbooks (PTB, 2002b) has a graphic representation of how militarism is inculcated as a normal value in children. The pictorial representation of Jinnah's address to the Lahore crowd also includes a drawing of a boy holding a placard with inscription "*seenay pay goli khayan gai*" (we will take a bullet on our chest) (PTB, 2002b, 39). The same textbook also has pictures of the Pakistan Army. Similarly the class 3 Urdu text (PTB, 2002a) shows battle scenes on the cover of the book. Holy wars, the nationalist struggle and wars with India normalize militarism and glorify martyrdom. Furthermore, both militarism and martyrdom are constructed as exclusively male attributes.

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name sons after ranks or attributes such as Bahadar (brave), Shaheed (martyr), Ghazi (victorious), Mujahid (Islamic fighter) etc. This is one example of the normalcy of militarism.

### ***Normalizing Gendered Militarism***

All references to the 1965 war between India and Pakistan start with the gendered assertion that Indian forces attacked Pakistan on September 6, 1965 in the dark of the night. The implications here are: Indians are not ‘man’ enough to attack in the light of day (as if military strategy, tactics and timing have no role in war planning); they did not officially declare war (the reference here is to the era of pre-mechanized warfare when men used to challenge men); and when confronted by the Pakistani armed forces they ran away like women. In comparison to this, when the Pakistani Air Force pilots attacked Pathankot (an Indian Air Force Base) in the dark of the night, the timing was evidence of sophisticated battle planning and sheer courage. A poetic articulation of this can be seen in a nationalist poem in class 7 Urdu textbook (PTB, 2002d). The poet praises the crescent on the Pakistan flag in the following words. “This crescent is the honor of the curved blade...this is the sign that made Rome and non-Arabs tremble with fear... this is the symbol of battle victors...who even made the deserts, mountains, jungles and earth tremble” (PTB, 2003d, 22).

### ***Constructing Lions, Rambos and Saints***

Furthermore gendered metaphors are used to articulate and masculinize military heroes. Metaphors of animals of prey (lion, falcon, eagle, etc.) are used to describe military heroes. Military figures are also masculinized with metaphors of male sexuality. Mohammad Hussain Shaheed (a war hero from the 1965 Indo-Pakistan war), for example, is described as having a sinewy body, big black eyes and thick brows (PTB, 2002c, 65). Then they are ascribed with Rambo-like superhuman qualities. In accounts of their martyrdom each one of them fought with multiple bullets in him and fought until the mission was accomplished. Finally, these martyrs are included in the list of revered people by adding the suffix of *rahmaatu’lla alaihi*.

### ***Normalizing Authority***

Gendered articulation of professions and professionals also serves to normalize authority. Take for instance the text that engenders the articulation of a district management position. The stated goal of the CD is to introduce the students to how their local government (district) functions. However, the way it is presented also serves to normalize authority. In the class 3 Urdu textbook (PTB, 2002b, 98) for instance, pictures accompanying the essay on district management show three cops guarding the rather colonial office of the deputy commissioner. Pictures on the next page show male judges, male lawyer, male convicts, etc. this is incidentally also the longest essay in the book (about 5 pages, 109-114). The only female figure in the essay is a nurse. The message of the lesson is that authority lies with the district administration/bureaucracy (which, incidentally, is actually the case) and that all authority figures are male.

The Urdu text for class 7 (PTB, 2002d, 80) conflates the ideas of civic order and discipline with battle discipline by exemplifying the former with one of the *Ghazvat* during the Prophet’s time. The essentialized message is to respect authority and

maintain a military-like discipline. An earlier class 5 Urdu text informs the student that though citizens are given rights by the state, those who 'unduly' demand these rights are not 'good citizens'. The text also informs students that the attributes of a good citizen are obedience, discipline at all costs, national pride, love of community, national pride, etc. (PTB, 2002c, cf PTB, 1974).

It is interesting to note the reproduction of the state in the above-mentioned text. As the father (the knowledge provider) explains the rights of a citizen to his son: "the first right of the citizen is freedom... second right of the citizen is that the state protects the honor, life and possessions of the citizen... A citizen has the right to enjoy all those facilities that are available e.g. water, power, radio, TV, news..." (PTB, 2002c, 78). The passage, however does not talk about justice as a basic right, nor does it explain what is meant by freedom. In light of the above discussion it can safely be presumed that the only notion of freedom that the 'son' will take in is that of freedom from Hindus, the British, etc. Freedom of speech, assembly, association, etc., is never mentioned. Nor does the essay talk about non-discrimination on the basis of sex, color, creed or religious beliefs as the basic rights of citizens. The text emasculates even the male subjects to constitute a docile subjectivity that can be disciplined and ordered. Authority appears to be normal and demanding of rights appears to be an aberration. What is also normalized is the authority of the state as one that safeguards and permits — both masculine attributes. However, the state in this articulation is not a provider or a guarantor of basic freedoms.

### **Homogenizing Theory, Explanation and Reality**

Militarized nationalism constructed by the textbooks and curricula is not only limited to the national level. The texts go on to fix meanings of nationalism at the international level as well. One of the major ways in which such meaning fixation takes place and subjects are constituted and positioned within the discourse is through an across-the-board homogenization of theory and explanation. A prime example of this is the use of the totalizing notions such as *Ummah* and nation etc. by the texts. Theoretically, such totalization is justified by drawing upon the religious notion of *Ummah* (the global Muslim community). The notion is presented in a way that is both divisive and totalizing at the same time. It is divisive in that it separates Muslims from non-Muslims and totalizing in the sense that it obfuscates all cultural, linguistic and sectarian differences within the larger Muslim community without recognizing difference or granting them any rights.

On the level of explanation this totalization seeks to subsume all differences in the notions of nation, national unity and nationalism. Anything that is not or cannot be made a part of the theoretical or explanatory unity of meaning is pushed out into the 'field of discursivity'. The most common technique used in this respect is reference to Mr. Jinnah's speeches, often without giving the students any context in which these speeches were made. For example, the class 5 Urdu textbook tells the students that "Quaid i Azam united the Muslims through his untiring efforts and gave them the lesson of faith, unity and discipline. It quotes Mr. Jinnah to have said: "We the

Muslims believe in one God, one Prophet (PBH) and one Book. Thus, it is mandatory upon us that we should be one as a nation too... If we start thinking of ourselves as Punjabis, Sindhis etc. first and Muslim and Pakistanis second, Pakistan will disintegrate..." (10). The cumulative effect of this totalizing articulation can be seen at two levels. One, all groups are expected to subsume their identity in the larger group (*Qaum* i.e. Nation), and, Two, all individuals are expected to subsume their identities into, first, their respective groups and then the larger group (*Qaum*) itself. Thus, if the group or the individual loses or capitulates some rights, it is justified in the larger interest of the *Qaum*. Conversely, any concession given to an individual becomes a concession for the whole group. Thus, Benazir Bhutto's ascent to power or the appointment of Zobaida Jalal as Minister for education is hailed as an achievement for all women of Pakistan.

### ***Homogenization of Time***

Furthermore, the texts homogenize time in order to further strengthen and normalize the militarism. The first step in this process is the construction of imagined time boundaries in terms of before and after: pre- and post-Islamic (before and after the sixth century — with reference to Arabia and before and after the 15th century — with reference to India); and pre- and post-Pakistan's independence (before and after 1947). This construction of imagined time boundaries is gendered in the sense that the pre- or before is always ascribed feminine attributes and represented as time of darkness, ignorance, sin, moral laxity, war, sexual normlessness, etc. The post- or after on the other hand is ascribed with masculine traits such as light, enlightenment, civility, high morals, and so on.

A gendered totalization of time in Urdu and Social Studies textbooks in Pakistan runs something like this: pre-Islamic Arabia and pre-Islamic India are times of darkness, ignorance, intrigue, war, sin, etc., whereas the post Islamic time in both Arabia and India is marked by light, enlightenment, gallantry, civility, etc. To take one example, a Social Studies text makes the time boundaries fluid in the following way:

Before Islam, people lived in untold misery all over the world. Those who ruled over the people lived in luxury and were forgetful of the welfare of their people. People believed in superstitions... and worshipped false gods. In Iran and Iraq people worshipped the sun also. In South-Asian region the Brahmans ruled over the destinies of the people. They believed that certain human beings were untouchable. There was an all-powerful caste-system. The untouchables lived worse than animals. Human beings were sacrificed at alters of false gods.

The self is thus masculine while the 'other' is constructed as feminine. This feminine 'other' can be located at various levels. On the social level this other is the Pakistani woman who serves three purposes. One, she completes the masculinized self of the Pakistani male, two, since she has to be protected against the Hindu/Jew/infidel she completes the militarized self of the Pakistani male, and,

three, this feminized other in shape of the nation needs the militarized masculine state for protection against the regional and extra-regional enemies.

An example of the last mentioned point is the articulation of space (country) in gendered metaphors. Commonly used metaphors are: Motherland, mother, *dharti*, etc. Similarly, *dharti ki kokh* (Earth's womb) from which crops grow, or *Arz e Watan* (literally earth of the Country), to obtain which (in 1947) thousands of people (read: men) sacrificed their material belongings or lives and women lost 'everything' (*Sub kuch*: meaning their honor) while to safeguard this, the martyrs shed their blood. The nation articulated in this manner becomes feminine and thus in need of protection: who can better provide this protection than (of course) the masculine state and the military?

## Conclusions

The educational discourse in Pakistan discursively constitutes various subjects and subjectivities in relation to each other. Particular subject positioning determines their relationship with the state and other subjects. The main reason behind this discursive constitution is to have docile bodies that can be ordered/organized with minimum force and optimal economy so that their bio-power could be harnessed and exploited and put to use. Once these docile bodies are constituted they are ordered by means of discipline that in turn depends largely on surveillance.

As compared to the industrialized world, in post-colonial societies like Pakistan, the physical violence that results from a consciousness fragmented by the colonial projects, as well as the gendered articulation of nationalism, is still very much the rule. The male subject acquires a fragmented and often violent consciousness as a result of bisexual subject positioning with respect to the state. On the one hand, he is the superior citizen delegated with the surveillance gaze and mandated with limited powers to discipline the gendered 'other'. On the other, he occupies a feminine position in needing the protection of the state from the Hindu, and the Jew: from the enemy both within and outside. The subject constituted by the discourse thus has multiple gendered subjectivities.

Once articulated, the subjects are then positioned in the discourse hierarchically, so that those higher up in the hierarchy are privileged over those lower down. A post-structuralist feminist reading of the Social Studies and Urdu texts in Pakistan shows that the social and national reality constructed by the texts has the military and the state on the top, followed by selected male members of the society, and finally women and minorities on the bottom.

Militaristic, masculine and nationalist articulation is then normalized by the educational texts in conjunction with the media, the judicial, and the constitutional texts. This normalization is carried out by means of overt as well as sub-textual representations of masculinity and patriotism, the co-equating of religion and nationalism as one and the same; and a multi-layered gendered constitution of

subjects where the feminine subject is in need of protection from the masculine and militaristic state.

Thus, we see in Pakistan how the military and militarism of all shades and hues, whether in the form of religious fanaticism, violence against women, children and minorities, or support for *Jihadi* organizations domestically and internationally has come to be seen as normal. A manifestation of the normalization of the military and militarism is the fact that Pakistan might be one of the few countries in the world where the military/defence budget is not under the purview of the parliament, even in times when the country has a democratically elected civilian government.

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# Worlds for Beginning Readers –Representations of “Homeland” and “Family” in Russian and Chukchi Textbooks for Early Reading Instruction since the 1960s

Wendelin Sroka<sup>1</sup>

„Our fatherland, our home – mother Russia. We refer to Russia as our fatherland, because our fathers and grandfathers have lived here ever since. And we call Russia our mother, because she nourished us with her bread, raised us with her waters and taught us her language; like a mother she protects and defends us against all enemies.” (P 6, 213)<sup>2</sup> – An illustration: Three generations in the living-room – mother enters the room, carrying a tray with a teapot and teacups, while grandfather, father and son watch a comic on TV, and grandmother and granddaughter read a storybook (P 2, 9). – Another illustration: A herd of reindeer, father and son dressed with fur coats typical for Siberian nomads, the father teaching his son how to throw the rope in order to catch a reindeer (P 8, 46).

These are just three of a great number of texts and pictures which represent specific views of the world, all of them contained in school textbooks for emergent readers in Russia: *bukvary* (reading primers) and *azbuki* (ABC-books).<sup>3</sup> This paper focuses on two important aspects of the world conveyed in primers published in Russia since the 1960s: “homeland” (*rodina*) on the one hand and “family” (*sem'ja*) on the other hand. Based on a diachronic perspective, attention is paid to homeland and family patterns changing over time, especially in the context of the transition from Soviet to post-Soviet society. In addition, the paper takes into account specific features of

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<sup>1</sup> The author wishes to thank his colleague Ellen McKenney (Frankfurt/Main) for her dedication and patience in proofreading and correcting the English version of this paper.

<sup>2</sup> All quotations in this paper are translations from the Russian original; the translations were done by the author. Transliteration of text from the Cyrillic to the Latin alphabet is based on the International Scholarly System (“Scientific Transliteration”). Such general rule notwithstanding, names of internationally known public figures are romanised according to common practise in English (e.g. “Khrushchev” instead of “Hruščev”).

<sup>3</sup> Russia has a very complex history of reading literacy and of media to support learning to read. This complexity is partly reflected in terminology. Whereas the term *bukvar'* is usually reserved to denominate school textbooks for first-graders, *azbuka* can designate basically three types of books: a) an ABC-book which presents the letters in alphabetical order (according to the Russian alphabet: from *a* to *ja*), usually one letter per page, accompanied by one or more pictures; b) an educational aid to support learning to read at home, with a more or less elaborated didactical design; c) a textbook for reading instruction in educational establishments (kindergartens and schools). The term “primer” is used in this paper to designate both *bukvary* and *azbuki* as far as they are designed to be used as textbooks in educational establishments.

these topics as depicted in primers of mother tongue reading instruction for the Chukchi, a small national minority in Siberia's northeast. This allows for pointing at peculiarities of the public and private life of a small nation with a nomadic tradition and their changes in the process of Soviet and post-Soviet modernisation.

In Russia, primers are by tradition an important means of early reading instruction from kindergarten through first grade, and these textbooks are highly valued not least because they display specific views of the world. Moreover, primers are often thought of as being strongly instrumental in the process of cultural integration of children into the "ruling" value system of society. As Ludmila Timoščenko, a specialist for textbooks in Communist Countries put it in 1991: "The integration into the mental world of mankind, the internalisation of moral values starts with the primer, which to a certain degree determines the tendencies of personal development." (Timoščenko, 1991, 3)

Admittedly the context in which primers operate has changed tremendously since 1991, and empirical evidence of their impact on pupils' attitudes is scarce. Nevertheless, and this is certainly true for the situation in Eastern Europe, primers can tell us a lot about how the world is perceived and evaluated in an educational context which students are exposed to at the beginning of their school careers. 'Culture' in primers covers the public domain of national traditions, politics, labour and technology, but also private domains like family life. In the case of Russia with its specific history and with more than 160 peoples, primers deserve a research interest from a variety of viewpoints, including history of ideology, social history, media history as well as ethnological and educational history.

More generally, the primer serves as peculiar source for what we might call 'educational ethnography' – in the sense of research on specific cultural features of socialised education at given times and in given places. The research objectives of this paper are to answer the following questions:

- How is the topic "fatherland" characterised and which role does the topic play as a means of patriotic education in the textbook?
- How is the family described in general? In which sense is it a place where children grow up? And what are the roles of the family members inside and outside the family?
- Which continuities and changes of the representation of "fatherland" and "family" can be identified, under consideration of the substantial political and social transformation in Russia?
- Which communalities and which differences are found by the comparison of Russian and Chukchi primers?

The analysis covers nine textbooks published in Russia since the 1960s – seven Russian and two Chukchi primers. Due to the scope of the material it takes a broad-based approach, rather than providing for an in-depth analysis of particular issues.

### **“Homeland” and “family” in Russian primers of the Soviet era (1960s to 1991)**

In the Soviet Union, the entire process of textbook production was organised by state authorities. In schools where the language of instruction was Russian all over the Union, i.e. both inside and outside the Russian Socialist Federative Soviet Republic (RSFSR), the Moscow based state publishing house for educational media (*učebno-pedagogičeskoe izdatel'stvo*), founded in 1930 and re-named to Prosveščeniye in 1964, served as exclusive textbook provider. Based on the principle of “one textbook per subject and grade” some generations of reading primers were published between the 1960s and the end of the Soviet Union. Usually, a primer was reprinted every year, and most of them reached more than 10 editions. The number of copies exceeded 2 million per year, thus qualifying it to be a mass medium in its own right.

For this analysis, two Soviet Russian primers were selected: One is a *bukvar'* which had already been developed in the early 1950s, edited by the Academy of Educational Sciences of the RSFSR and written by a team of authors, led by I. F. Svadkovskij (Svadkovskij-primer). Here we consider the 12th edition, published in 1964 (P 1). The second source is the *bukvar'* by Goreckij, Kirjuškin & Šan'ko, which was introduced on a large-scale basis in 1981 (Goreckij-primer).<sup>4</sup> The 9<sup>th</sup> and 11<sup>th</sup> editions, published in 1989 and 1991 respectively (P 2 – P 3) were included in this analysis.

The Svadkovskij-primer (P 1) starts with pictures and short texts focussing on children's everyday life and environment: Children collecting mushrooms, a boy watering flowers, pupils in the classroom (3 et seq.). It is not until the last section of the book that elements clearly devoted to patriotic education appear. Here, the term “fatherland” is introduced in the context of a presentation of Moscow as “the capital of our fatherland” (83). A picture in the upper half of the page shows the Moskva river in front, crossed by a broad bridge, and in the background there is the Kremlin and the building of St. Basil's Cathedral. The text underneath the picture describes the capital as “the most important and the largest city in our country”, and tells the reader that “on the Red Square stands the mausoleum of Vladimir Ilyich Lenin” (83). Another page is devoted to Lenin, with a colour portrait in the upper half and a children's poem praising the founder of the Soviet Union in the lower part (82). In an equal style, a colour portrait depicts Nikita Khrushchev, First Secretary of the Communist Party and Chairman of the Council of Ministers of the Soviet Union of that time (94). The text characterises him as a “fighter for peace” and quotes him as saying “Our people, our party, our state are fighting for a peaceful life on earth”. Finally, a passage on Jurij Gagarin is designed to inculcate patriotic feelings: “We are proud that the first cosmonaut is a person from the Soviet Union.” (92)

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<sup>4</sup> A series of “experimental” editions of the Goreckij-primer with some 1000 copies each were published from 1971 onwards.

Nevertheless, pictures and texts related to family issues outnumber those connected with fatherland by far. Overall, the family is described as the place where children grow up and where men and women have different roles. The family is also well integrated into working life. In the last part of the primer, a separate section addresses the family. An illustration depicts a three-generation-family in the house, described in the text as follows:

Our family is large. We have a separate flat. In the evening, we all sit together in the dining room. Father reads the paper. Mother and grandmother listen. The brothers Kolja and Petja play chess. Sister Sofia sews a dress. Sometimes we watch TV. (80)

Three generations, four children, the family regularly spending the evening together, the father in white collar and with a tie, gender specific activities of family members, the TV-set: What we see, is to a high degree a well-off middle-class family, and there are only two hints to a Soviet environment: The picture shows Kolja with the red scarf of the Lenin-Pioneers, which was the communist organisation for 10-15 year olds, and the text stresses the “separate flat” (*otdel'naja kvartira*) for the family, as opposed to the collective flat (*kommunal'naja kvartira*) which was introduced in Russia after the October Revolution to house several families.

In the primer of the 1960s, everyday family life is characterised by a caring and active mother, the presence of a number of children and – in most situations – by the absence of the father. The first picture in the textbook related to family is supposed to encourage the reading of the word *mama* (mother). It depicts a young mother in a park, sitting on a park bench and knitting, in front of her is a pram, on one side the daughter is jumping rope, on the other side is a small dog (15). This picture, as a couple of others, conveys the message of motherliness and intimacy within the family. More widespread, however, are situations showing a mother busy keeping the house. In the text on “housework”, the mother prepares dinner, while the girls clean the dishes and iron the clothes (73). A picture shows the mother, cleaning the windows, supported by her daughter, who is about to bring fresh water. Whereas the young readers are informed that mother “went to work” (70) or “worked in the factory” (71), nothing is said about the kind of work she is actually doing there. In the area of work the father gets more attention: Vassilij’s father, e.g., is described as a worker in the automotive industry, constructing motors for heavy vehicles which are used in Russia’s High North (93). Furthermore, in pointing out how important the motor is for a vehicle, the text underlines the importance of the father’s work for society.

A last feature of family life represented in this primer concerns the self-organised life that children are apparently used to in many situations. Not only at home, where children do their homework (72), help their younger siblings to dress (25) or watch the moon from the balcony (20), but also in nature: In the forest they collect mushrooms (13), in the garden they harvest fruit (47) and a meadow is a good place to let a model airplane fly (67). Apart from the picture with Kolja in his Pioneer-scarf the Lenin-Pioneers are only mentioned again twice in this textbook (46 & 63).

Whereas the Svadkovskij-primer presents an altogether rich family life and restricts direct references to “homeland” to few pages in the last part of the book, the situation is different in the Goreckij-primer, published in 1989 (P 2). Here, the pupil is addressed in the foreword as follows:

Dear friend! Today you start your journey into a wonderful, extraordinary country – into the country of knowledge. You will learn to read and write, and for the first time you will write the words which are dearest and closest to all of us: Mama, Homeland, Lenin. The school supports you to become a literate and hard-working citizen of our great homeland – the Union of Socialist Soviet Republics. We congratulate you on the start of your educational career, and we donate you the first textbook – the primer. This book will open the door to the world of new, interesting books to you. From this book you will learn how large and wonderful our homeland is and how much the Soviet People undertake so that peace will be on earth forever. (Foreword)

The program of pictures in the first part of the Goreckij-primer follows the canon of “our dearest words”, yet reversing the order: It starts with a whole-page colour portrait of Lenin (2). The next illustration shows children in front giving flowers to a female teacher, apparently at the beginning of the new school year. In the background is a map of the Soviet Union, all in red, and beyond the map a text says “our homeland, the Soviet Union” (3). “Mama” appears for the first time on page 9, as part of the family scene in the illustration described in the introduction to this paper.

The term “homeland Soviet Union” turns out to be the central topic of the Goreckij-primer. It is unfolded in pictures and texts portraying a variety of aspects: the beauty of the country, the performance of the working class under the leadership of the Communist Party, technological progress, the capital as the centre of progress in general, the need to defend the country against enemies and, finally, the national literary heritage. The last part of the primer contains short portraits and extracts from works of no less than seven Russian writers – Puškin, Tolstoj, Ušinskij, Majakovskij, Maršak, Michalkov, Barto and Čukovskij. An attempt to give a notion of “homeland” suitable for children reads as follows:

My and your homeland is the SSSR. What a wonderful native country! Fields, forests, seas and rivers! New factories are being built. Tractors plough the fields. Trains and cars are passing by. High up in the sky, quick Iljušins, Tupolevs, Jaks and Antonovs are flying. The USSR is the country of peace and work. (77)

While the 1989 edition of the Goreckij-primer is very rich in content related to homeland, aspects of family life are again represented in many ways, though more often linked to working life. A first feature is the father engaged in family-related activities: He is playing with his children (19), goes shopping with them to buy modelling clay and a puppet (58), and teaches his son to swim (26). The mother is now depicted as active in three areas: taking care of the children, doing housework and working in the factory. Both parents of young Roma, e.g., are construction workers, who in the past built the metro-lines in Moscow, Kiev and Minsk (59). And Tima’s father as well as Dima’s mother were given the honorary title of “working

hero” (73). The grandfather is introduced as a participant of the Great Patriotic War, who is accompanied by his grandson when attending the meeting of war veterans (102). Lastly, the description of children’s everyday life has been modified since the 1960s primer in so far as their engagement in the “October-children” or Lenin-pioneers’ activities seem to have become more relevant. Now, admission to the October-children-organisation – for 7- to 10-year-olds – is celebrated (89), kids have a badge with the red star of the October-children or the pioneers’-badge (3, 24 and 41) and a Lenin-pioneer shows young children around a museum of the Russian revolution (62).

A powerful and seemingly undisputed Marxism-Leninism and Soviet patriotism in a time when both Marxist-Leninist and Soviet ideology had started to disintegrate is pictured here: Published in 1989 as a textbook for the 1989/90 academic year, the Goreckij-primer can be seen as an example of ‘educational conservatism’ or, as others describe it, of the ‘cultural lag’ of public education. In 1991, a revised version of the Goreckij-primer responded to the new situation (P 3). What is “our homeland” now? The textbook provides two answers: A first answer – a reprint of the text quoted above – declares again the USSR to be “my and your homeland” (77). An excerpt from a work by Konstantin Dimitrievič Ušinskij on “our homeland” gives a second and different answer. As Ušinskij states and argues in detail: “Our homeland, our fatherland is mother (matuška = “small mother”) Russia”. (126) In general, the textbook has reduced the intensity in which traditional political messages were conveyed, but has not given them up completely. On the one hand, the portrait of Lenin has disappeared, as have a number of other texts and pictures on Lenin and Leninism. This was, however, not done consequently. For on the other hand, the foreword, reminding the first-graders of “Mama, homeland, Lenin”, is unchanged, as is text and illustration about the victory of the Bolsheviks (90) as well as the piece on “my grandfather” being a participant of the Great Patriotic War (102). There is also neither a change in the description of parents’ occupations nor any extension of the picture of the family as outlined in the 1980s.

### **“Homeland” and “family” in Russian primers of the post-Soviet era**

The last years of the Soviet Union had already seen first signs of an emerging textbook market in Russia, and this market unfolded enormously during the 1990s. Today, in addition to Prosveščeniye publishers, a number of publishing houses operate successfully in the textbook market on the national or regional level. This is also true for reading primers: The list of school textbooks approved by the Russian Ministry of Education for the academic year 2003/04 includes 11 primers, three of them published by Prosveščeniye (MINOB 2004).

For the analysis of primers of the post-Soviet era, four textbooks were chosen, three of them with Goreckij as co-author: The 1992 and 2000 versions of the traditional Goreckij-primer (P 4, P 5), the *Russkaja Azbuka* (Russian ABC-book) by Goreckij and his old team of authors, published since 1995 by Prosveščeniye as an alternative

to the traditional primer (P 6) and the *Azbuka 1 klass* (1<sup>st</sup> grade ABC-book) by Džeželej, published by Drofa Press, Moscow, since 2001 (P 7).

As was pointed out in the last section, the 1991 edition of the Goreckij-primer had still tried to save some core messages on “homeland”. This attempt was more or less given up entirely in the edition of the following year (P 4). The Goreckij-primer has furthermore not been revised until 2001, which is revealed by comparing the editions of 1992 and 2000 (P 5). Since 1992, the foreword has been omitted and all illustrations of former editions associated with the Soviet Union are missing here, partly deleted and partly replaced by illustrations depicting nature or children’s play. This also applies to Ušinskij’s explanation of “mother Russia”. The sole remaining element of patriotic education is the section on Russian writers and their works. Here, Puškin is presented as “glory and honour of our homeland” (116).

The picture of the family, on the other hand, was principally preserved in the Goreckij-primer from 1981 through 2000. It is again the family of three generations, and Roma’s parents still are construction workers who were engaged earlier in the construction of the undergrounds in Moscow, Kiev and Minsk – the latter now being capitals of independent neighbouring states (59). Only the former “heroes of work” have given room to parents with an ordinary working environment: Now, Tolja’s father works as a toolmaker, while his mother is a kindergarten teacher. (73).

Quite a different world is presented in the *Russkaja Azbuka*, compiled by Goreckij, Kirjuschin, Šanko and Berestov (P 6). Here, the first picture is not a portrait of Lenin anymore, but a drawing of Saints Cyril and Methodius, the apostles of the Slavs, surmounted by a cross (2). In the last part of the textbook, these saints are extensively described as “the first teachers of the Slavs” (214). A double page of the textbook is devoted to “homeland”. It includes a map of Russia, which – in contrast to the former maps of Soviet Russia in plain red – brings out some characteristics of the country: the great rivers, the cities of Moscow and Saint Petersburg and – sitting on sledges pulled by reindeers, or standing beside a tent – some people of Russia’s High North (114 et seq.). Another double page addresses “our homeland” (212 et seq.): It shows a Russian landscape, and above the patron saint of Moscow: Saint George, dispatching the dragon. The next page depicts a monk, writing on a scroll, and underneath once again we encounter Ušinskij’s text on “mother Russia”.

In general, the primer unfolds a concept of “Russia as our homeland” with special reference to national history, religion, tales, poetry and armed forces. A picture, e.g., shows an army of Cossacks, carrying a banner with the picture of Saint Mary with them (158). On the next page a group of modern infantrymen are illustrated, and beyond the picture we encounter the old text about the soldier-grandfather in a slightly modified form: “I have a grandfather. During the war, grandfather was a soldier. He received a mention for bravery.” (159). In most cases, the picture of Russia is that of the past: The grain is harvested with a sickle (163), the blacksmith treats the iron on an anvil (175), and the boy spends his spare time – taking up an old Russian tradition – lying on the oven (185). Only in some cases, where the splendour of Russia is concerned, this orientation towards the past is given up in

favour of symbols of technological progress like a submarine (194) or a skyrocket (92).

In contrast to homeland, the family does not play a greater role in this primer. Representations of family scenarios with two or more generations are limited in number and size. An illustration shows a mother tying the muffler of her son who is about to go to school (34), and a text of one and a half lines reports, that mother sang a song about the kitten (P 7, 91). The most prominent picture presents a family with two children visiting the grandparents who live in the countryside (12).

Another approach is found in the last Russian primer examined in this paper, the *Azbuka 1 klass* by Ol'ga Valentinovna Džeželej (P 7). Here, references to "homeland" are limited to two pages on Moscow as the capital of Russia (146 et seq.). Whereas in the text, the Kremlin and the Red Square are presented as "the heart of the capital", the picture shows Saint Basil's Cathedral in the foreground and the Kremlin with the flag of the Russian Federation in the background, with only a very small part of the Lenin mausoleum visible behind the church. In addition, the text encourages the pupils to visit an exhibition of drawings and photos about "the hero city Moscow – capital of Russia". Family, on the other hand, plays a major role in this textbook, as part of a general approach to describe the world from a children's perspective. Due to this approach many illustrations are designed as children's paintings. Thus, children's life is closely connected to family, be it on an excursion (12), in the garden (18), while playing in the house (84) or at night, when the child is asleep (65). Moreover, the presentation of the relation between generations includes an implicit distinction between family in a narrower and in a broader sense. The broader meaning includes the ancestors, e.g. in the picture series on "Me, dad, grand-dad and great-granddad" (125), and a short text even explains the meaning of great-great-grandfather (ibid.). Another text introduces – by way of a conundrum – the grandfather: He is a man who likes to go to the stadium with his friends, to work in the garden, to drink tea and to eat pierogi, but who is also to be honoured as a "veteran of labour" and a war veteran (ibid.).

The family in the narrower sense is depicted in a number of illustrations and especially in a reading exercise covering two pages. Whereas the primer of 1964 presented an extended family of three generations which was explicitly called "large", we now read: "Our family is small. It is composed of mum, dad, my sister and myself." (114) Later, the son introduces the individual members of the family, particularly dwelling on the father. Dad is characterised as "not tall, but strong and brave". And: "Father knows everything. He saws, he splits wood, he timbers, he launders and paints. He is a cook and a plumber, a tailor and a bricklayer. That's how my father is. With him, it is interesting and funny." (ibid.) The text continues to describe in great detail how the whole family is engaged in preparing a multi-course dinner, and a corresponding picture presents father and son with cooking caps while standing at the oven. In another illustration, the family is about to clean the flat: While mother and son are cleaning the bookshelf, father is vacuum-cleaning the carpet (11). The mother is mostly mentioned in connection with social relations. As

the quoted text on the family points out: “And how is our mum? She is endearing, natural, tender and beautiful.” (115).

### **“Homeland” and “family” in Chukchi primers**

The Chukchi represent one out of a great number of indigenous peoples in Siberia (RAN, 2003). Most members of the ethnoses, numbering around 15.000, live in the Northeast of Russia, in the vicinity of Alaska, on the Chukotka peninsula. For centuries, the majority of the Chukchi had spent a nomadic life in the tundra as reindeer-breeders (‘Reindeer Chukchi’), whereas a minority had settled in homes on the coast, mainly hunting sea mammals (‘Maritime Chukchi’). When the Chukotka-peninsula was conquered by Russia in the middle of the 17<sup>th</sup> century, the relationship between Chukchi and Russians became strained. Under the Soviet regime, the traditional way of living of the Reindeer Chukchi was heavily affected by collectivisation (Gray, 2004). Only at the beginning of the 1930s the Chukchi language began to be used as literary language. In the course of the last decades of Soviet regime, the process of Russification was pushed, amongst other means, by forcefully sending Chukchi children to Soviet boarding schools. This process caused the decline of the Chukchi language, despite some efforts to teach the vernacular in primary school. Today, the Chukchi language is classified as an endangered language (Vakhtin, 1998).

Primers written in vernacular are developed in Russia for mother-tongue reading instruction in “national schools and classes”. In these institutions, reading is taught within two separate subjects, one being “mother tongue” the other being “Russian language” (Kuzmin *et al.*, 2005). The first primer in Chukchi was published in 1932. This section provides a brief analysis of illustrations out of two editions of the Chukchi primer developed in the 1970s by Vdovin, Karavaeva, Lutfullina and Uvaurgina. We consider the 1<sup>st</sup> edition, published in 1977 by the Leningrad branch of Prosveščeniye, and the 4<sup>th</sup> edition, published by the Saint Petersburg branch of Prosveščeniye in 1994.

As far as “home” is concerned, the Chukchi primer of 1977 (P 8) provides an abundance of pictorial representations. There is a threefold message conveyed in the textbook: the homeland is the Soviet Union, the home of Chukchi children includes the Soviet boarding school and the traditional homeland is the pasture land of the nomadic Chukchi.

The Soviet Union as homeland: The first picture in the textbook is a painting showing the demonstration on Moscow’s Red Square in 1977, commemorating 60 years of the October revolution (3). There is a number of pictures of Moscow with the Kremlin and the Lenin mausoleum (124, 126), there are pictures showing Lenin as a young boy (98), as an adult (120, 121) and as a monument (93, 125), and there are pictures presenting the Soviet Army with tanks and warships (118), Jurij Gagarin (119) and October-children (121). This part of the pictorial program of the textbook is very close to the one we have already encountered in Soviet Russian primers. It is

supplemented by a painting of Anadyr, the capital of the Chukchi Autonomous Region, which depicts huge apartment blocks and an airplane in the background as well as two monuments, one to commemorate Lenin and the other one describing the takeover of power on the Chukotka peninsula by the Soviets in 1920 (125).

The home of Chukchi children, as described in the primer, has specific features. On the one hand, family life is not much different from that of Russian children: It takes place in a well-equipped flat, clothing and furniture are European style, and the living room is the preferential location for family scenes as the following examples show: Parents relax in armchairs, while the son plays being a soldier, equipped with a rifle and a binocular (84); children handing over presents to their mother on International Woman's Day (100); a young boy vacuum-cleaning the carpet, while his father sits in an armchair, reading the paper (17). On the other hand, however, the boarding school is introduced as part of everyday life in a series of illustrations at the beginning of the textbook. Families, coming from afar by track vehicle or by helicopter, bringing their kids to the boarding school (4); in the dorm room a boy is awoken by another boy, while a Lenin-pioneer helps another boy to make the bed (10); Lenin-pioneers help young children into their boots and tie their mufflers to get ready for school (12 & 13): 14 pictures in the primer are devoted to this sort of "socialised education".

Nevertheless, the genuine homeland, as presented in a great number of illustrations in this textbook, is the space of the traditional tundra life of the Reindeer Chukchi. In this area, we do not find any separation from family and work or family and school. Here, a large number of pictures exhibits adults and children spending an outdoor life, close to herds of reindeer, organising and preparing food, about to build up and dismantle the tent, and teaching life-skills to the next generation. Whereas women are responsible for food and clothes (41), men take care of the reindeer, go fishing and act as teachers of their sons. Grandfather e.g. explains tundra plants to his grandson (51), and father teaches the son to catch reindeer (46) and fish (30).

By taking a concluding look at "homeland" and "family" patterns of the post-Soviet primer, published in 1994, we see that the pictorial representation has considerably changed (P 9). The first picture in the textbook is no longer a painting of Moscow's Red Square, but a regional landscape with a river, mountains, meadows and forests, that is looked at by a mother and her two children, all dressed in traditional Chukchi clothes (3). Of all the former references to the Soviet Union as homeland, only the picture of Gagarin is left (111); a new painting of Anadyr, the regional capital, is without any Soviet monuments and, besides some apartment blocks also shows private homes (127).

A major change as compared to the first edition is the increase in the number of illustrations related to family life. Whereas most pictures of the "old" Chukchi life in the tundra have been retained, the majority of pictures now point at children in the environment of a modern private home. This is mainly due to the fact that the illustrations on everyday life in boarding school have nearly entirely been replaced by those on family situations. Thus, the picture about the beginning of the school

year does no longer give any hint to families having travelled from afar, but a mother and her children approach a school building on foot, which suggests that it is now within walking distance (4). In the morning, the young boy finds himself no longer in a dorm, but in a bedroom, awoken not by a fellow pupil, but by his mother (10), and the whole family is convened in the kitchen for dinner (15). In this context, gender models have changed as well. Whereas the mother in the past had received presents on the occasion of International Women's Day, she is now pictured a good housewife preparing a meal (100). Another change concerns the image of the father: Whereas in 1977 he had been reading the paper, while his son was vacuum-cleaning the carpet, 17 years thereafter he himself has taken over this task (17).

## **Resume**

The analysis of primers used for early reading instruction in Russia's educational establishments since the 1960s demonstrates that representations of "homeland" and "family" in these textbooks are characterised by continuities as well as by changes. The fact that authors and designers in most cases have tried to draw a more or less precise picture of homeland and family has not changed over time and is true for both Russian and Chukchi primers.

As for Russian primers, the illustrations and texts send clear messages in the Soviet era identifying the Soviet Union as "our homeland". This aspect becomes even more prominent in the 1980s editions than in the 1960s. The message of the Chukchi primer of that time, on the other hand, is ambiguous. Both the Soviet Union and the tundra as the traditional living space of the Chukchi are portrayed as homeland. In the post-Soviet era, a variety of homeland patterns can be found in Russian primers, reflecting a certain plurality of educational and political viewpoints. Here, the distinctive feature of presenting Russia as homeland is the varying degree in which it is done, ranging from an elaborated orientation focussed on a pre-Soviet Russia and its cultural values to a view of the world where references to homeland are restricted to a minimum. In the case of the Chukchi textbook, the former manifestations addressing the Soviet Union have only partly been replaced by references to Russia, giving more room to pictures about Chukotka. At the same time, the ambiguity of confronting the reader with two homelands – the traditional Chukchi living space and modern Chukotka – is preserved.

Representations of family patterns in the textbooks have also significantly changed since the 1960s, and most changes equally apply to the picture of the Russian and the "modern Chukchi" family. First, the large family, encompassing three generations and a greater number of children, has in general been replaced by the small family with two generations and fewer children. Second, the way how family members show their emotions has a specific history: While motherliness played a certain role in the picture of the family as displayed in the 1960s, emotions in this area more or less have disappeared in the 1980s, emerging again in some post-Soviet primers as part of the picture of the family, e.g. in the way a son describes his father and mother. Parallel to this development, the role of the mother experiences a

change. Whereas in the late Soviet era special attention was paid to mothers' participation in working life, more recent textbooks tend to attach her to household and family-related activities. The father, on the other hand, is now more involved in family matters than he was in the past, both in terms of being an 'active father' to his children and of his involvement in housework.

Finally, the family has become more relevant in the post-Soviet era in the sense of being perceived as a natural environment for children outside school. This is partly due to the disappearance of the Lenin-pioneers, which have constituted a prominent agency of socialisation in the primer of the 1980s. In addition, the role of the family is considerably strengthened in the post-Soviet Chukchi primer in so far as the family has replaced the former Soviet boarding school as the place where children grow up. However, Soviet and post-Soviet Chukchi primers are ambiguous again in that they present traditional and family patterns at the same time.

World-views in primers: The findings presented in this paper reveal specific approaches of textbooks for early reading instruction under given social, political and cultural circumstances. The findings may encourage future research in this area, not least in terms of more detailed analyses of individual texts and illustrations, of systematically linking textbook content to current thought and social reality, of supplementing diachronic analysis by an international comparative perspective and of combining inside and outside perspectives.

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## **Gender Issues and Indian Textbooks**

Kalplata Pandey

As women's education is a critical focus for any 'welfare state' there has been special provision for the education of women in every five year plan projects in India. Under the constitution of India men and women are equal citizens in the eyes of the law hence having the equal rights to all state resources. But social, economic and cultural dynamics have prevented the law from translating into reality. The present status of girls' enrolment in primary, middle and high school are 44.1, 41.8 and 39.5% respectively. Female literacy stands at 53.7% compared to 76% for men, from the 2001 census report. According to government reports, 45 districts in India mainly in the states of Bihar, Uttar Pradesh, Jharkhand & Orissa have female literacy below 30% according to the claims of Government of India's report.

The policy makers have time to time opened the dialogue and tried to impress upon the state and its people the gravity and the need to address the role of education in gender parity and gender in educational framework. In the 1967-68 the education commission clearly stated in their report- "Full development of our human resources, for improvement of homes and for molding the character during the most impressionable year of infancy the education of women is of even greater importance than that of men. In the modern world the role of women goes much beyond the home and bringing up of children. She is now adopting a career of her own and sharing equally with man, the responsibility for the development of society in all its aspects. This is the direction in which we will have to move."

The National Policy on Education (1986) revised in 1992, recognized the need to redress traditional gender imbalances in educational access and achievement. It recognized that the entire "educational system is alive to the gender and regional dimension of educational disparities" and that there is a need for a "positive interventionist role in the empowerment of women. In their plan of action it was recommended that all Bureaus of the Department of Education would prepare a concrete action plan addressing gender related concerns as well as a monitoring unit would be created in the planning division of the department to ensure integration of gender issues into policy programmes and schemes". It is clearly stated in the Report of the Task Force on education for women's equality, that "It is impossible to achieve universal Elementary Education unless concerted efforts are made to reach out to the girl child".

Among the various intervention programmes planned by Government in 2000, the 86<sup>th</sup> constitutional Amendment Act. made elementary education a Fundamental Right for all children in the age group of 6-14 years. As education is on the concurrent list and hence a responsibility of both the central and state Government, in July 2003, a special thrust on women's education came from the Indian

government through the National Programme of Education for girls at elementary levels (NPEGEL), as a part of Sarva Shiksha Abhiyan (SSA). A budget of over Rs.10 billion has been promised to this scheme. The programme aimed to develop a Model Girl Child Friendly School at the cluster level (10 villages) with incentives to provide uniforms, free textbooks, bridge courses, remedial teaching stationary etc. Another scheme is formulated on behalf of the government the Kasturba Gandhi Balika Vidyalaya (KGBV) to encourage preferentially backward class and caste girls to be in school. Along with these, the total literacy campaigns (TLCS) have given special emphasis to the empowerment of women, ARISE project by NIEPA to mobilize women & community for UEE, Mahila Samakhya or education for women's equality are some of the efforts that are being made by the Governmental as well as non Governmental organizations.

Despite all the efforts made by different organizations and policy makers, the percentage of girls in comparison to boys according to 2002 data in classes I-V is 46.83, in classes VI-VIII 43.93, in classes IX-X 41.44, in classes XI-XII 41.61 and the overall percentage of Girls enrolment from class 1 to XII is 45.31%.

Therefore the issue of gender in the textbook is concerned with only those girls who are lucky enough to enter into the school premise to avail the opportunity to have education with the help of textbooks.

As far as the gender issues in textbooks are concerned the real situation can easily be viewed by some of the examples collected while reviewing textbooks. A five year old is told in his primary textbook that daddy is the king of the family and mummy a caring deputy. It happens to be one of those textbooks of school children that perpetuate inherent gender bias by assigning traditional roles to men and women reinforcing stereotypes. It is an irony that despite a conscious effort on the part of the National Policy on Education (1986), women are still depicted in traditional type casts as cooks, nurses etc.

Amongst the finding of a survey report by Friends for Education, a forum to uplift of education, culture and civic sense, it was found that average primary textbooks in India is about 115-130 pages carry 80-100 illustrations with 52 percent depicting men and boys, 28 percent neutral objects, 14 percent mixed and only 6 percent portrayed girl-children. Women, however, are not only losing on the number front alone as the hardest hit comes when we see the constant association of certain traits with males & females. Men man spaces that are conventionally and socially public & outdoor assignments that project them in stronger roles like engineers, lawyers, professors, pilots, mechanics etc. Girls, in most cases are shown as passive observers where the boys are performing important experiments. Even in the class six mathematics books of primary classes, men dominate in activities representing commercial and marketing situations. Not one woman has been shown as a merchant, executive, engineer or seller. Even in jobs dealing with money like transaction in bank, saving schemes all managed by men. Five Hindi and five English textbooks evaluated by Friends for Education show that men are more adventurous, schematic, aggressive and with a scientific bent of mind. Those kinds

of texts might be responsible for the lack of interest that girls show for science at the secondary and senior secondary levels. As a result, a majority of girls take literary and social science courses thus ending up as weaker sex stereotypes. In fact the truth is that at a subconscious level these texts are preparing boys to achieve in the market place while girls are trained to be submissive and to obey at home. These gender stereotypes may adversely affect even the emotional psyche of children by forcing them to perform a set pattern of behavior pre-determined on the basis of gender discrimination in which boys are taught to associate with outdoor activities and girls are made confined to indoor activities. Resultantly despite 4000 years of contribution to science and technology our children as well as most of us do not know about most pioneering women in technology like Empress Shi Dun, who invented paper, Nor Mahal who invented the device to perform attar distillation to make perfume, Helen Grliner, who runs a robot company in the world, Franklin who photographed the DNA double helical structure, Maria Michell who discovered comet, Vanitha Rangrajan who is the only Indian women to win an Oscar for her technical work on the movie 'Shrek' etc. These and other such names depict the special role of women in the areas which are projected as the prohibited areas for women to show their talent only.

The effect of this discrimination can be very well observed from this event where female teacher of Lavanya, a first grader in Trichy has marked her answer wrong in the class test because instead of writing "Mother stays at home, cooks food and takes care of the family", she wrote "Mother goes to work, earns money and takes care of family". When asked about this, her teacher answered that she cannot do anything as that is not the answer mentioned in the textbooks. The similar case is of a maths teacher of a junior school who admitted that "I would ask if any in the class could solve the problem. When hands go up, I would pick a boy even though some girls would volunteer "this is just an example of the discriminating behavior due to unconscious bias. The effect of all these reasons led to the social perception of disassociation and the perpetuation of myths of incompatibility between women and technology. This results in the continuation of gender insensitive education for the next generation.

Though continuous efforts are being made since last decades for elimination of female stereotypes in the textbooks but the target is yet to be achieved.

NCERT the apex body of primary & secondary education tried to identify areas in language textbooks in the decade of 80s. Some projects and workshops were launched to build up awareness for the elimination of this gender difference but the situation remains more or less the same. Despite the NCERT, having developed a set of guide lines for the elimination of gender stereotyping in textual material and the same disseminated to the authors and publishers, not much has changed. It all began in 1975 after the conference was held to examine the status of women through curriculum. Along with this, NCERT has also set-up a women s' study group that conducts series of evaluations and workshops.

In report of National Focus Group on Gender Issues with special reference to the impact on textbook & curricular constituted by NCERT it was viewed that initiatives to remove sexist biases in the textbooks undertaken in the last decades are played yet again by their limited understanding. Facilitation of role reversals in order to depict equality amongst sexes without any thought to how the very concept of writing accounts of great men's lives needed rethinking. Exceptional women like Rani Jhansi & Madam Curie were still defined by their domestic roles (textbook writers were careful to point out that despite every thing they continued to perform their domestic roles. In the studies of the books in various states, it is found that women are generally portrayed as passive, dutiful and confined to home. Like the peasants and manual laborers, women are shown largely powerless. The curriculum & textbooks served to maintain the status quo in the larger socio-cultural context in the state and despite all efforts to change the traditional meaning of masculine and the feminine, it still continues to persist along with other oppositional dichotomous categories of active-passive, emotional-rational, nature-culture, dependent-autonomous etc. There is still no conceptualization of curriculum informed by an awareness of how gender is positioned within discourses of knowledge production and its relationship to social power essential in addressing these issues.

After going through the pages it can be easily understood that despite all the efforts what the real situation regarding the elimination of gender stereotypes in textbook is. It is good that now the policy makers and Apex bodies related to education like NCERT & CIBE have taken initiative to reform the curriculum. This is a one step forward in the direction of one of the goals agreed at the UN Millennium summit in September 2000, to eliminate gender disparity in primary and secondary education, preferably by 2005 and in all levels of education by 2015.

The committee for consultation with states for National Curriculum Framework Review set up by NCERT. It is observed that often gender is mistaken as practical category but it actually is a conceptual category, which refers to the ways in which societies distinguish them and assign them social roles. Gender relation is not static, it is a process. The instrumentalist approach adopted so far argues girls education will help in birth control improving family status etc. often fails to understand the need of educating girls as their own right. Now it is essential to integrate it with education. Gender issue has its implication for teacher training also. Therefore teachers have to gather the experiences of gender bias in their life and act accordingly. At present, the reform in curriculum and textbooks are being done very seriously and NCERT the apex body has prepared a 124 page document called National Curriculum Framework 2005 in which slogans like learning without burden and child centered education are being used repeatedly. The NCF (2005) document recognized that "we must use textbooks as one of the primary instruments for equality, since for a great majority of school going children, as also for teachers, it is the only accessible and affordable resource for education". More dramatically, it makes a case for doing away with stereotypes based on gender and caste. This change has been accepted widely and it is believed that a redesigned curriculum will not be imparted through textbooks alone. The teacher will be the one conveying it to

students and however well a text book is written, it should have clear pedagogic methods and the teachers will be trained accordingly. Here are examples of some of the changes that can be viewed after the implementation of NCF (2005) in the area of gender stereotypes in textbooks. ‘Did you know that it was a woman who invented the bullet proof jacket’? Or that the first ‘spiritual leader in history was a woman called Vak, one of several women believed to have written the Vedes’? There are just some of the things school students in the country will learn from the next academic year when the textbooks modeled after the National Curriculum Framework (NCF) are printed. The new textbooks have been designed and written keeping in mind the commitment of NCERT to inculcate gender sensitivity in children from an early age and do away with the gender stereotype. The whole idea behind this is to make students realize that there is no basis for the thinking that women are less competent than men, no matter what the field. It is also decided that the reverse of the cover page of NCERT textbooks will now carry messages underlining the achievements of women in various fields and also how articles in the Indian Constitution prohibited discrimination based on sex and enable the state to implement affirmative discrimination in favor of women.

Despite the reforms proposed in NCF there are reports of various committees that however, women at least appear in most textbooks but reports from most states, point out that gender inequalities and prejudices are perpetuated and the social issues underlying women’s inequality are typically not adequately explained yet. In many privately produced textbooks, the problem is more intense. Thus a moral science guide in Karnataka states that a woman should put up with her husband’s violence in the hope of happiness when her son grows up. The sex segregated curricula in madarassas teach women their domestic roles, while there is no mention of men’s domestic responsibilities.

On the basis of issues raised in the present text it can be said that reforms proposed in NCF (2005) is welcoming but still a lot has to be done to reduce the gender stereotypes in the textbooks. Following are the suggestions which may be helpful in this regards:

- The curricula and textbooks need to be revised especially where the role of female is portrayed only as good house wives. There is a need to include achievements and heroic instances of the female gender in equity to the men.
- Teachers need to undergo gender sensitive course in classroom behavior and interaction with student. Teachers should try gender sensitization technique with their students to correct this misconception. For this teachers have to be trained on these lines.
- It needs to be advertised with the help of textbooks that the human brain is not just any muscle tissue and that causes brain cells to form new connections with each other, the more synaptic transmission the better the thinking process irrespective of gender is.

- Textbooks should go through a gender committee comprising of academics, feminists, historians etc. before issuing them to students to make sure that the textbooks have a gender focus.
- Teachers have to choose those textbooks for children that can help children recognize gender-stereotypical messages. For this, they have to choose those books in which girls/women are portrayed in a positive light with active, dynamic roles as well as in which individuals are portrayed with distinctive personalities irrespective of their gender, the language used in the text is gender free, occupations are represented as gender free, achievement are not evaluated on the basis of gender etc.
- Gender sensitive materials at the primary and secondary levels require inputs from those who have struggled to bring women's voices narrative, experiences and world views into the academic main stream.
- Instead of writing out of superficial thinking about the status of girl child, writers have to feel the real status of girl child in the family in a more empathetic manner.
- The production of textbooks should not be treated as any ordinary activity that can be left to private players or even state governments without any supervision or regulation. Educational materials must be produced within the framework of the constitution and according to processes transparent to public.
- A National Textbook Council as suggested by CAGE Committee should be set up to monitor textbooks.

We all accept that textbooks play a significant role in transmitting a society's culture to children and gender roles an important aspect of the culture. How gender is portrayed in books thus contributes to the image children develop of their own role and that of their gender in society. Therefore it must be taken into consideration with full accountability while producing textbooks for the future citizens of globe.

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## Metaphors of listening in mother tongue textbooks in Norway

Norunn Askeland

This article is a report from my ongoing dr.art. thesis: Communication about communication: conventional and creative metaphors of communication in six mother tongue textbooks used in Norwegian upper secondary schools - 1997-99. On this occasion I will not deal with creative metaphors, but concentrate on conventional metaphors and especially conventional metaphors of listening. My theoretical framework will be cognitive linguistics, and especially Reddy (1979), Lakoff & Johnson (1980, 1999), Sweetser (1992) and Cameron (2003). To explain my findings I draw upon Linell (1996, 1998) and his ideas about the written language bias, and Peters (1998) and his history of the idea of communication. Furthermore I find anthropological perspectives like Rogoff (2003) interesting as a framework for discussion.

Within cognitive linguistics Reddy was the first linguist to extensively analyse metaphors of communication. Lakoff and Sweetser have developed his theories, and Lakoff has become especially famous for titles like *Metaphors We Live By* and *Philosophy in the Flesh*. The titles suggest that metaphors are inevitable (we live by them) and that they are closely connected to the human body. This is also the fact with metaphors of communication. Our experiences with moving in space make it possible for us to talk about communication as a journey.

The conceptual theory of metaphor has been criticized for lack of conciseness (Clausner and Croft, 1997:260; Grady, 1997:270) and for putting too much weight on everyday human experience instead of culture in metaphor making (Croft and Cruse, 2004:203). Nevertheless the theory can explain phenomenon in language that it is difficult to explain otherwise. A cognitive linguistic approach to metaphor analysis implies that you look for a source domain and a target domain in identifying metaphors. When talking about communication we use journey as a source domain for the target domain of communication. Communication can be compared to walking along a path. When we *talk through something* we ask each other '*Where were we?*'. If we are going to tell something to somebody we might experience that *we lose the track* and we might find that we have to *go through it once more*. Or we might say more than we wanted because we were so eager and suddenly it was just *too late to stop*. If you are writing something you might experience *that the process of writing stops* and *you're stuck*. We know that good writers just *go on* anyway but others might choose to throw away what they have done and *start all over again*. Sometimes they never *reach the end* because they don't go on. The expressions in italics above are called *metaphorical expressions*, and a metaphor consists of metaphorical expressions that have something in common. In order to distinguish

between metaphors and metaphorical expressions in the following the metaphorical expressions will be marked in italics (*where were we*) and the metaphors will be marked like this Communication Is A Journey<sup>1</sup>. The journey metaphor is a good example of a metaphor that can portray communication as cooperation between reader and writer, between listener and speaker. In order to find metaphors of listening I first chose to identify metaphors of communication. But first, something about how I found the metaphors and where I looked for them.

### **Methods and material**

The problems connected to identifying metaphorical expressions have been addressed by many researchers, such as Gibbs (1999) and Cameron (2003). Cameron maintains that identifying metaphorical expressions is not unlike catching fish with a net. As we all know, the kind of fish you get is dependent upon what kind of net you use. I have followed the advice of Cameron and established categories based on the concept of family resemblance, which is the kind of category Wittgenstein (1953) suggests is suitable for talking about language use. Family resemblance means what it says, namely that members of a family resemble each other in one or more ways. Some members have some kind of resemblance, but all members do not need to resemble each other to constitute a family.

This methodology means that you have to read through the material many times, and when you do that, you find more and more metaphorical expressions. This can mean that it is difficult to stop reading and telling yourself that you have found enough expressions to establish a metaphor.

For identifying journey metaphors I looked for expressions belonging to the domain of journeys. Other metaphors had to do with feeding and digesting, and so I looked for expressions like spoon feeding, digest, swallow, etc. Some methodological problems are connected to the fact that it is hard to establish rules for what belongs to a domain. Is a burden part of the journey domain, or is it not, when we talk about books that are hard to read? In these matters I find support in Wittgenstein's flexible categories of family resemblance. As a working rule for establishing the metaphors the metaphorical expressions had to be used in all books and more than four times in each of them.

The material consists of 18 textbooks with more than 1700 pages. It is important to keep in mind that textbooks have a lot of illustrations and that there is not very much print on the pages in the books. Therefore the material is not as extensive as it looks. And I did not register all metaphors, only the ones that dealt with these topics: speaking, listening, reading and writing in different media (including the Internet).

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<sup>1</sup> This is after Lakoff 1999. In Lakoff & Johnson 1980 the same metaphor was marked like this: *COMMUNICATION IS A JOURNEY*.

## Results

We will present a list of metaphors showing the source domains for the metaphors of communication in the textbooks I examined. Most of the source domains are not connected to journey metaphors but to objects. This could mean that the emphasis is not on communication as a process but on communication as manipulation of different kinds of objects. Here it is important to have in mind that metaphors can be formulated in different ways. Lakoff puts it this way: Communication Is Feeding. I have tried to catch the listening process by formulating the metaphor in this way: Communicating Is Feeding And Digesting.

I will now comment on each of the metaphors and show what kind of metaphorical expressions that belong to them and further discuss if the metaphors include expressions that have to do with the nature of listening.

### ***Communicating Is Feeding And Digesting***

- He *fed* them with fresh ideas
- Sometimes you have to *spoon-feed* people.
- Give people time to *digest* your ideas
- He *swallowed* it whole

Within this metaphor there is a certain balance between feeding and digesting in the textbooks. This metaphor is also interesting because, according to Lakoff, it is less widespread than the other metaphors of communication mentioned here. The next metaphor for example, Communicating Is Sending And Receiving, occur in languages throughout the world (Lakoff, 1999: 241).

### ***Communicating Is Sending And Receiving***

- I got *my idea across* to him.
- We let them *take turns in speaking*.
- You can't just *cast* such *allegations*.
- The audience must be able to get *the main point*.

This metaphor is very widespread socially and I found many examples of it in my material. Reddy was one of the first to criticise it on the grounds that it makes us think that communication is easily accomplished and just a matter of sending a message through a conduit to a receiver who catches it and eventually unpacks it and understands it immediately. Reddy called it "the conduit metaphor" and wanted to replace it with the toolmaker's paradigm, where communication is looked upon as something you have to work hard for and something that needs activity from both speaker and listener. It should also be noted that there are very few expressions of listening within this metaphor in the material.

### ***Communicating Is Hunting And Being Caught***

This metaphor is related to the sending and receiving metaphor in that it shows the listener or reader as the rather passive prey of the hunter or fisherman.

- Does the author manage to *capture the reader*?
- How can we *hold the audience's attention*?
- Advertising means *aiming for the head and hitting the wallet*.
- *Get the reader hooked!*

The same is the case with the following metaphor.

***Communicating Is Planting and Harvesting***

- What do you think the poet wants *to grow from all of the words he has sown*?
- He *harvested much praise* for his book.

This metaphor will allow for metaphorical expressions that have to do with listening, even though they will suggest little activity on behalf of the listener. But there are very few expressions within this metaphor in the material as a whole, mainly because listening is not a very important subject in the textbooks.

***Communicating Is Composing And Listening To Music***

- You must *find your own tone* when you write.
- They might *lend an ear to* your argument.

This metaphor is more frequently used, especially when talking about poetry. Note also that one of the few metaphorical expressions that has to do with listening, namely 'to lend an ear to something', here is used about discussions.

***Communicating Is Creating And Seeing Images***

In this metaphor the writer is prompted to create images in the reader's head and the reader is told to try to recreate them in his or her mind.

- *Give a clear picture* of the situation.
- We must get the reader *to envisage the situation*.
- *Try to see things for yourself* when you read.

Some of the expressions portray the reader or listener as an active person, trying to envisage something, but most of the expressions in the material is sender-based and not occupied with listening activities.

***Communicating Is Lighting And Seeing***

- It's all about *casting as much light as possible on the subject*.
- It is important to *get your message across clearly*.
- After reading it for a second time *she saw the text with new eyes*.

This metaphor has two other metaphors connected to it: Explaining Is Lighting and Understanding Is Seeing. Metaphorical expressions like *expressing yourself clearly* and *sending clear messages* belong to these metaphors. Peters (1999:28) maintains that in our culture there is a wish for clear communication, and that this is a sign of a therapeutic discourse about communication where the most important thing is to eliminate semantic fog. According to Peters the other discourse is the technical one,

the one with sending and receiving. He also maintains that the two discourses, the therapeutic and the technical one, has dominated the discourse of communication after World War II. I will return to this question in my conclusion.

***Communicating Is Creating Flow And Navigation***

- It is important to *find the right sources*.
- *The language must be fluent*.
- *Let the questions flow freely*.
- It's unwise to just produce *a torrent of words*.

In the technical understanding of discourse it is important to make language flow easily so that there are no obstacles to communication. On the other hand the flow metaphor also underlines the importance of water and wetness and portrays this element as something positive in communication. *Dry words* are boring. *Juicy things* are nice to listen to and in order to think better you can '*legge hodet i bløt*'<sup>2</sup>.

***Communicating Is Producing And Packing And Unpacking And Consuming***

This metaphor is also connected to the technical discourse with producing and consuming:

- Try to *get out* what you want to say.
- *The final product* is ready for submission.
- Right at the end you can *polish up your spelling and punctuation*.
- TV channels *package serious themes in in an attractive and light way*.

I found a lot of expressions related to producing and packing, but did not find any expressions related to unpacking, or to what can be compared to the act of listening. This is probably again due to the fact that listening is not well covered as a subject in the textbooks.

***Communicating Is Constructing And Reconstructing***

- This is how you *build up a narrative*.
- *Raise clear questions*.
- The first words *lay the foundations of the narrative*.
- The word *ingress* comes from Latin and really means '*entrance*'.

This metaphor, however, requires something more from the listener, who will have to do some building on her own to construct meaning. But then again, there are no metaphorical expressions about *reconstruction* in the textbooks. The aspect of listening is again almost absent.

***Communicating Is Doing Handicraft***

- Readers should be able to *pick up the thread of your essay*.

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<sup>2</sup> The idiom '*legge hodet i bløt*' does not have an equivalent in English. In Norwegian it means to put your head in water to improve your thinking. The closest idiom in English will probably be '*rack your brain*'.

- You can *organise your material* in various ways.
- You can *weave in your own thoughts*.
- Try to see *a pattern in the text*.

There are a lot of expressions covering the process of creation. Many of them are from the domain of handicraft, like sowing, weaving or knitting. Not surprisingly there are very few expressions that have to do with listening. So what can be the reasons for this metaphorical silence on behalf of the subject of listening? Could it be that communication is metaphorized as manipulation of objects dealing with products rather than with processes? The next and last metaphor is the journey metaphor, and this one carries with it the possibility of giving listening more space.

#### ***Communicating Is Leading And Following***

- *The author can take the reader to faraway places*
- *In the beginning you must take the reader by the hand and tell him where you are going*
- *Headings are signposts along the way*
- *It is important to follow when someone is talking to you*

As we have seen this is not a very dominant metaphor, compared to all the object metaphors we have discussed so far. Following someone is the same as listening to someone. I guess the reader will not be surprised to hear that there are very few metaphorical expressions from the domain of following and a lot from the domain of leading. Leading is more important than following. Speaking is more important than listening, at least in textbooks of Norwegian for upper secondary school in Norway.

#### **Speaking Well Is Speaking Clearly?**

As I mentioned earlier Peters (1998) maintains that there are two discourses that have dominated the discourse of communication after World War II., the technical one and the therapeutic one. Many of the metaphors above and a lot of the expressions in the textbooks seem to support that view. There are many expressions about sending and receiving and about lightening and seeing. Speaking well in textbooks is to speak clearly or to send appropriate messages that don't even need unpacking. But speaking well could also be to be able to listen and give the listener a more important role in the act of communication. But this is an aspect that is neglected in the textbook discourse about communication.

Linell (1996, 1998) discusses the phenomena of neglect of listening in view of the distinction between oral and written cultures and maintains that listening will be of less importance in the written world because "the written language bias" leads to a belief in fixed word meanings and ignorance of contexts and more dialogical perspectives.

There is reason to believe that the importance of listening is a matter of culture. The American professor of psychology, Barbara Rogoff, is interested in the cultural nature of human development and discusses silence as a cultural phenomenon

(Rogoff, 2003). In many societies, like in North American Native communities (Plank, 1994, after Rogoff) silence is valued and among the rural Malinka of French West Africa, speech is carefully used (Laye, 1959, after Rogoff). Rogoff also refers to Condon (1984) who in a guide book for Americans on how to understand the Japanese, makes a list of Americans' habits that the Japanese grumble about. This list shows that there is a difference between the two cultures as far as listening or silence is concerned. Japanese complain that Americans do not listen well but instead are overly eager to offer their own ideas or ask questions before hearing what others have to say. Condon puts it this way:

An American asks a Japanese a question and there is a pause before the Japanese responds. If the question is fairly direct, the pause may be even longer as the Japanese considers how to avoid a direct answer. The American, however, may assume that the pause is because the question was not clearly understood and hence he may rephrase the question (Condon according to Rogoff, 2003: 312f).

Condon (still according to Rogoff) also comments on the fact that when European Americans speak to someone and they don't answer immediately, they tend to think that the question was not clear enough. In my opinion this shows that European Americans have a firm belief in the metaphor Speaking Well Is Speaking Clearly and also that they have a belief in the words themselves regardless of the context they are uttered in. Not only European Americans but also Norwegian textbook authors seem to believe firmly in the metaphor Speaking Well Is Speaking Clearly.

It would be interesting to have a look at Japanese textbooks to see whether these contain more metaphors of both listening and reading. Rogoff finds that there is a difference between American and Japanese children's narratives, and that European American teachers find that the children's narratives appear unimaginative and sparse. The teachers do not always know the Japanese haiku tradition and its importance in Japanese culture. Through haiku, but also through other activities, the children are taught to observe and listen. Therefore they also develop the ability to read between the lines, also in oral communication. This is an ability that is of great importance in a multicultural society, but this is neglected in Norwegian textbooks, and probably in most other Western countries.

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## **Workshop 2**

### **Textbooks and Educational Media in the Learning Environment**



## **What do subject teacher students learn about cooperative learning and problem solving in WebCT environments?**

Marja-Liisa Julkunen

In Finland, like in so many other countries, one problem in classroom pedagogy has been that even though there have been discussions on pupil centred teaching activities, teacher centred teaching still dominates. The first curriculum for the Finnish comprehensive school was published in 1970 and all schools in Finland entered the comprehensive school system in 1975. The comprehensive school meant that all pupils complete nine years of schooling. Because the whole age group stayed at school and in the same class for so many years, the teaching systems had to be modified as well. One of the main ideas of the comprehensive school was to change teaching to be more pupil centred. One factor contributing to this kind of thinking was Neill's book *Summerhill* (Neill, 1960), which was translated into Finnish at the end of the 1960's.

Quite a significant quantity of research was conducted, where researchers observed classrooms. Different observing methods framed the research, for instance Flanders system, Bellack's linguistic move theory, Bales's feeling category analysis system and Sinclair's and Coulthart's discourse analysis. This research showed that despite of the new curriculum, teaching remained mostly teacher centered and followed the model where the teacher asks questions and the pupils answer.

The next curriculum was published in 1985, and it strengthened pupil centred teaching. The investigations done during that time, however, showed that the pedagogical situation did not change. The average teacher's main teaching style remained the same.

In 1992 yet another new curriculum was published. Before that the Educational Board of Finland asked some educational experts to write small books that discussed for instance new learning theories, i.e. constructivism. The teachers had to read those books so that they could get new ideas with which they could renew their teaching practices. The curriculum, however, was not yet underpinned by constructivism.

At the same time, in teacher education, pupil centred approaches have been the main focus in Finnish universities: both the primary school teacher students and the subject teacher students have been taught to forget their own school experiences in the theoretical studies as well as during the practical teaching periods.

The latest curriculum came to effect this autumn 2005 – now with a long chapter on constructivism. Teacher educators are hoping for a change, finally, in Finnish schools.

### **The purpose, the sample and the method of the study**

As in all the other teacher training institutes in Finland we in the University of Joensuu, at the Faculty of Education and in Department of Applied Education arrange the so called Teacher's Pedagogical Studies (60 ECTS credits). Ordinary subject teacher students take this course in the third or fourth year. In 1999 it was estimated that there will be a shortage of subject teachers especially in mathematics, physics, chemistry, English and Finnish. Some universities were therefore allocated extra funds from the Ministry of Education for the purpose of schooling a group of unqualified teachers, who had been working for years in different parts of Finland. This subject teacher education started at our Department in 2001. Studies in this programme start at the beginning of the autumn term and take two years, because most of the students keep on working during their studies.

My purpose in this qualitative case study is to investigate what these students (N=40) learn of teaching and learning during their studies. As I mentioned in the last chapter, old teaching methods have been very difficult to change. Hence we have chosen quite a new approach to teach these students. The first idea was to use new educational media in their studies as much as possible. On the other hand, that was the only possibility, because studying in this programme can be characterised partly as distance learning. We begun to work in WebCT environment but last autumn it was changed to MOODLE, because it seemed to be an easier environment to use.

In 1999 - 2002 I was the Finnish coordinator of an EU Comenius project called *Think, Create, Innovate*. The project produced internet pages concerning: 1) creativity, 2) ICT in learning, 3) cooperative learning, 4) problem solving, and 5) project work. The purpose of those pages was to help teachers to develop their teaching and to get new ideas for their daily work at schools. The purpose was also to integrate European teachers and to increase international group work between schools from different countries, in this case from Spain, Great Britain, Czech Republic, and Finland.

My course 'Basic studies in teaching and learning' contains 20 hours of lectures and some exercises done at the Joensuu Normal School during the students' first practise period. These students follow six hours of lectures and afterwards they study materials produced in the project. First they read the material and then discuss their ideas in their own subject groups. Finally they write a summary of all the discussions, which I also read and give them feedback.

The students have to read what is written about three topics: creativity, problem solving, and co-operative learning. In this study I will analyse their discussions concerning cooperative learning and problem solving (Those materials are mainly made by Professor Dana Nezvalova from the Department of Physics, Faculty of Sciences, Palacky University, Olomouc, Czech Republic).

My research questions were:

1. What kind of discussions do the subject teacher students produce after reading texts on co-operative learning?
2. What kind of applications can they make to their own teaching subject?
3. What kind of discussions do the subject teacher students produce after reading texts on problem solving?
4. What kind of applications can they make to their own teaching subject?

I have read the discussions produced by the subject teacher students from years 2001-2004 several times by using content analysis. First I tried to find out, how the students had understood the concepts of problem solving and cooperative learning. After that I classified the discussions and the summaries in order to find out a) what kind of understanding their discussions showed, and b) what applications they had made.

I read the students' discussions and conclusions for the first time when they wrote them during the course and again when I had to evaluate their performances for grading the course. For this study I read the texts over and over again in order to get a clear picture of their ideas. For this reason I have not, for instance, asked anyone else to read the text in order to verify the credibility of my interpretations. I will do that later when I analyse the whole material and take into account also the students' discussions on the third topic, creativity. In my later research I will also analyze students' self esteem products based on effective teaching elements by Kyriacou (1991).

## **Some theoretical starting points**

### ***Learning by using ICT***

One of our main purposes in using learning material produced on internet pages and working in WebCT or MOODLE environment has been to teach subject teacher students to use ICT. Lehtinen and Sinko (1999) have concluded that there are over 1000 research papers that have shown that ICT students learn more and faster and that ICT improves students' motivation. Lehtinen and Sinko have also listed some of the self-evident benefits of information and communication technology as follows: interactivity, possibilities for multiple representations, possibilities to simulate real phenomena, world wide access to information, and tools for synchronous and asynchronous communication.

Salomon, Perkins and Globerson (1992) refer to cognitive effects as "effects with technology obtained during intellectual partnership with it, and effects of it in terms of the transferable cognitive residue that this partnership leaves behind in the form of better mastery of skills and strategies".

In our case, this has been the second important reason to teach students to use ICT as a discussion platform and to learn some new teaching methods and behaviour from each other. The idea of collaborative learning is based on Vygotsky's ideas:

Every function in the child's cultural development appears twice: first, on the social level, and later, on the individual level; first, between people (interpsychological) and then inside the child (intrapsychological). This applies equally to voluntary attention, to logical memory, and to the formation of concepts. All the higher functions originate as actual relationships between individuals. (Vygotsky, 1978, 57)

Although the subject teacher students are not children any more, this idea can be seen significant in all new learning situations. In a way the students are children because of their few teaching experiences: most of them do have teaching experiences, but their theoretical knowledge of different teaching methods etc. is poor.

Also Rogoff (1990, 90) emphasizes the idea of cognitive apprenticeship. By that she means that it supports learning in a domain by enabling students to acquire, develop and use cognitive tools in authentic domain activity. Learning advances through collaborative social interaction and the social construction of knowledge.

***Some aspects related to the two strategies used in student-centred teaching: problem solving and cooperative learning***

The internet pages that the students have to read before they start to write their opinions about problem solving and cooperative learning describe both of these teaching/learning strategies in quite an illustrative way. They explain how these strategies work and what the teacher's role is in each part of the process. Hence something could be said on the general principles of these two strategies.

Problem solving is usually defined as formulating new answers, going beyond the simple application of previously learned rules to achieve a goal. Problem solving is what happens when no solution is obvious. (Mayer & Wittrock, 1996) Some psychologists suggest that most human learning involves problem solving (Anderson, 1993).

This example shows, I think, that if the teaching is based for instance on problem solving or on problem based learning, the pupils really are the subjects of their learning and the role of the teacher is to support their learning. That is one of the main reasons we have chosen this kind of teaching activity to teach our subject teacher students.

The research indicates that cooperative learning has positive effects on pupils' empathy, tolerance for differences, feelings of acceptance, friendships, self-confidence, and even school attendance (Solomon, Watson & Battistich, 2001). The terms group work and cooperative learning are often used synonymously, but their meaning is not the same. Group work simply means that several pupils work together whereas the meaning of co-operative learning is much wider (Woolfolk,

2005, 479). In our case, Vygotsky's theory (i.e. 1978) concerning the meaning of social interaction in learning situations has been important in choosing co-operative learning as an example to teach subject teacher students some pupil centred strategies. These are seen as suitable for teaching most of those subject areas that our students come from.

## **Results**

### ***Cooperative learning: The concept of cooperative learning***

The students, whose discussions I have now studied, are almost unanimously of the opinion, that cooperative learning is a good way to improve the social skills of the pupils, even though it can be said, that good social skills are a prerequisite for successful co-operative learning.

The students wrote, for example:

Cooperative learning offers children an opportunity to work with other children, to value them and listen to their opinions from early on. Through co-operative learning pupils on the first grades of elementary school can understand that they have an important role in the group, and if the group wants to perform well, s/he also has to make an effort. The more effort s/he makes, the better results the group can achieve.

Cooperative learning was also seen to improve the pupil's sense of duty as each participant has to carry some responsibility on their own learning as well as that of the other participants. This reflects a transfer from focusing on the self to taking others also into consideration as well. An ideal would be that all classroom activities would be conducted respecting the principles of co-operative learning.

Cooperative learning is based on values that have been discussed and agreed on together. These values mean a shift from competitive, individual-centred thinking towards a process where other participants are helped in their learning as well. This process does not only have objectives related to gaining knowledge, but also objectives related to learning to learn in a more social and ethical manner.

When considering the possibility of using cooperative learning methods with teenage pupils, the pupils themselves were seen as an obstacle to satisfactorily using the method.

Many of the pupil's have been accustomed to being passive and this can lead to them also being quite timid. In cooperative learning they should learn to take responsibility. Also many teenagers have problems with social interaction skills.

Cooperative learning was also seen as one way of changing the students' attitudes:

Cooperative learning can change the attitudes of the pupils towards both the teacher and the other pupils.

In the students' discussion, one distinct advantage of cooperative learning was also, that through this method the pupils can teach each other.

Many children learn better and faster from children of their own age than from a teacher. On the other hand, the pupil who takes the role of a teacher has to understand the subject matter. Perhaps not all pupils can master this.

Student discussions, and naturally also the summaries made of these discussions, focus most on comparing traditional group work and cooperative learning methods. The students had negative experiences of group work from their own school times and this contributed to attitudes being univocally positive towards cooperative learning.

### ***Cooperative learning and teaching subject of the participant students***

Students participating in the course had very positive attitudes towards co-operative learning. This fact was stressed also in the summaries made of the student discussions. Not many individual contributions to the discussions mentioned examples on what type of issues or themes could be taught through this method. The following examples show, however, that while studying the material the students had kept in mind the practical implications in teaching their own subject area.

In studying languages cooperative learning would suit well, for example, for repeating grammar lessons, such as memorizing cases. It would be good also for studying the culture and geography of the countries where the language is spoken. I would not, however, use it to teach new topics on a grammar lesson.

### ***Problem solving: The meaning of problem solving***

Subject teacher students' discussions concerning problem solving can be divided into four different types. Some of them think that problem solving is best used mainly in situations where teachers have problems managing the class, when pupils disturb teaching and learning or with pupils that have social problems.

A teacher has also pedagogical problems: what is the atmosphere in the class. The beginning of a lesson can be critical for the whole lesson, for instance if something difficult happened during the break, the problem must be handled immediately. The atmosphere for teaching and learning has to be suitable.

The second issue the subject teacher students discussed concerned planning lessons: how carefully the teacher must think about everything beforehand and what the main questions or the most meaningful parts of one lesson are. This understanding of problem solving is natural, of course, because the students' experiences in planning lessons or in estimating how many different things can be discussed during one lesson are so poor. The word problem has been understood in quite a wide sense, in its general meaning.

My opinion is that problem solving is one of the main things in a teacher's work. Planning education requires that the teacher can put many things together, the planning of a single lesson as well: the use of time, priority of what is the most important thing to teach, choosing the "right" teaching methods and analysing the needs of different pupils.

The third meaning the students gave was the “real” meaning of the term: problem solving was seen as a good teaching approach.

Problem solving must be connected with reality. The pupils have to understand that there is not only one right answer or solution to the task. Hence the pupils must be encouraged already from the first school years to tell their opinions and to argue their solutions. This will lead to deeper learning.

Problem solving means development and creativity, which both are skills needed also out of the school. Pupils should be taught to solve problems independently so that they can make the right decisions in their life.

The students also thought about problem solving from the pupils’ point of view, as the following quotes exemplify:

If the pupil has adopted his/her knowledge by using the atomistic way in his/her studying, abilities for problem solving are not as good as with pupils, who have used holistic approach in their studies. The pupil may also have difficulties to find the right problem solving strategies due to the lack of experience or because of the tasks are too difficult.

For the fourth understanding of problem solving the students evaluated models presented in the material in groups. Almost all groups came to the same conclusion: the different models seem to define problem solving approximately the same way as an ongoing process. They thought also that both the pupils and other people solve problems intuitively and they are not conscious of the different steps presented in the models.

We think that no one is conscious that he or she is operating according to some model; different steps in problem solving situations follow each other. We do not evaluate whether the solution is good or bad: evaluation follows naturally despite of the way the problem was solved.

### ***Problem solving and the teaching subject***

Most of the subject teachers who connected problem solving with their teaching subject were language teachers. These examples show, how they thought about using this approach in their own teaching.

In language teaching the children like exercises, where there is a clearly defined problem and only one solution, i.e. “What is the opposite of this word?” or crosswords. But if they have to translate the sentence, they are not eager to do it, because they think that the translation is difficult.

In art education most problems have many solutions, because the main thing is always self-expression.

These examples show that the subject teacher students can reflect on possible new directions to teaching. In most conclusions that they made they also understood problem solving as a pupil centred way of learning.

The pupils have to learn problem solving already from the beginning of their schooling instead of passively receiving knowledge that the teacher tries to transfer from his/her head to the pupils' minds.

## Conclusions

Student discussions and the summaries that were based on the discussions gave a clear picture of how the students learned both from each other and from independent study of the course material. The summaries also show distinctly that even those participants who at first expressed different opinions later changed their point of view.

Both cooperative learning and problem solving are teaching methods, which have been discussed for years, but have been slow to evolve into the daily practice, at least in Finnish schools. Reading the student discussions also brought joy as in almost all of the student contributions these methods were connected to constructivism and change in the role of the teacher. The students saw the teacher as a mentor, who supports the pupils when they are experiencing difficulties, and who guides the work done by the pupils. It would therefore seem that a new generation of teachers, who are more open to new ways of teaching is emerging. This can, at least, be said of the opinions expressed by the group of participants in this web course. It would be worth another study to see how they themselves work as teachers.

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## **Socialisation in the changing learning environment: Some considerations for research**

Veronika Kalmus

Socialisation is a significant area of study, which is currently out of the mainstream research agenda. It seems that the concept of socialisation and now popular concepts of the “information society”, the “digital age”, etc. belong to different research paradigms or discourses. Nevertheless, this does not mean that practices of socialisation have ceased to take place in the so-called information age. Practices are changing (together with learning environments) and are certainly difficult to study, but this does not imply that we should not conduct research in this area.

In this theoretically-oriented article, I will outline some considerations which are important to bear in mind when studying socialisation in the changing information environment. First of all, I shall pose the question of whether anything is changing at all; that is, I will briefly discuss the concept of the “information age”. Secondly, I will define what I mean by the concept of socialisation. The main part of the article discusses some theoretical considerations regarding socialisation and education in the informatising society.

### **Are we entering a new age?**

The concepts of the “information age”, the “information society”, the “knowledge society”, the “media society”, the “information revolution”, “new media” etc. are widely used and contested among social scientists. I tend to agree with the party of more sceptical authors who suggest that the concept of the information society should be granted the status of “problematic” (Lyon, 1988). The concept has definitely some value as a heuristic device in exploring features of the contemporary world, but it is too inexact and too ideological to be acceptable as a definitive term (Webster, 2002, 21).

Moreover, several writers, for instance Anthony Giddens (1987), Herbert Schiller (1996) and Frank Webster (2002), emphasise general continuity over change in contemporary societies. These and some other authors (e.g. May, 2002) can be described as sharing a thesis about the informatisation (or informationalisation) of society, believing that informational developments must be accounted for in terms of historical antecedents and continuities. Giddens has noted that modern societies have been “information societies” since their beginnings (Giddens, 1987, 27). The problem of the label of “information” becomes even more acute in the context of education and socialisation, which has been information-laden already in the pre-modern era. It is, however, reasonable to talk about the changing information environment as well as about the changing learning environment (not about, for instance, the “new learning environment”).

Despite the multifaceted critique on the concept of the information society, there is some consensus among writers using the concept or its many synonyms. Most of them agree that “information is now of pivotal importance in contemporary affairs... that not only is there a very great deal more information about than ever before, but also that it plays a central and strategic role in pretty well everything we do” (Webster, 2002, 263). The ever-changing practices and patterns of production, consumption and interpretation of mediated information also have implications for education and socialisation.

### **The concept of socialisation**

The English word “socialisation” has many meanings. The social scientific usage of the term embraces two aspects of the designated process. The first aspect derives from the point of view of society. In this sense, socialisation means transmission of the culture of the society to individuals. The second aspect of socialisation derives from the point of view of the individual and means the process of becoming human in one’s social environment (McCron, 1976).

It is possible to move beyond the society/individual dichotomy by taking a view of socialisation as an interactive, dialectical process between two sets of actors – the individuals being socialised and the agents of socialisation. This perspective is, in fact, favoured by a number of scholars (e.g. Berger & Luckmann, 1991 [1966]; Giddens, 1984; Rosengren, 1994). I consider it helpful to describe this dialectical process as taking place in the “field of socialisation” (Kalmus, 2003), which embraces the individuals being socialised, the agents of socialisation, and the dominant and peripheral sub-systems of the society (cf. Pawelka, 1977). Between these four components there are mutually influential relationships which can be described in terms of agency and structure. In theories of socialisation, “structure” normally refers to society and its institutions, which function as the agents of socialisation, while “agency” refers to the individual being socialised. I tend to think that “agency”, with necessary conceptual elaboration, can be used also with regard to agents of socialisation; to designate on one hand their varying ability to influence the individuals being socialised, and on the other to refer to their potential of intervening in and transforming the very social system and its structural principles they are intended to reproduce through socialisation.

The two main aspects of socialisation (society and individuals) may be maintained, however, as separate analytical categories for distinguishing between the macro level and micro level of analysis. On the macro-level, I prefer to think about socialisation as a set of intentional, mainly discursive, practices guided by the ideological agenda of the society or a particular socialising agent. This aspect of socialisation can be studied by analysing, for instance, school curricula, textbooks, media content, etc. On the micro-level, socialisation refers to practices of interaction between the individual being socialised and the society or socialising agent. Such practices can be studied by looking at, for instance, reception of textbooks or media content, or socialisation in families (e.g. parents-children interaction).

## **Research questions for studying socialisation**

We can pose two broad research questions for the macro-level and the micro-level of analysis, respectively. The macro-level question would be: What type of socialising practices do the various interest groups in society employ in order to maintain or build the society, which allows them to pursue their interests and retain or improve their positions of authority (cf. McCron, 1976, 30)? The micro-level question would be: How do individuals, faced with the constraints and opportunities of the structural properties of society, engage in and interpret the practices of socialisation?

### ***Relations between knowledge and power***

In examining the macro-level question first, it is important to pay critical attention to how informational developments are handled in public discourse. As several authors (e.g. Lyon, 1988; May, 2002; Robins & Webster, 1989) have warned us, the coming of the information society is often viewed as an entirely natural and logical social advance. This type of discourse, however, glosses over the reality of domination by powerful, particularly economic, interests and advances the prospect of technocratic control and the so-called “cybernetic order” (Robins & Webster, 1989, 8). Kevin Robins and Frank Webster (1989) urge us to look at the hidden values of technocratic thought, especially its implications for school curricula. They argue, for instance, that the “information revolution” and the emergence of neo-Fordist management are closely associated with changes in the nature and philosophy of education. Robins and Webster rely on Jean-François Lyotard’s discussion of the “postmodern condition” which has brought along the instrumentalisation and commodification of knowledge, and its subordination to the principle of “performativity”. Accordingly, educational institutions are “required to produce competences and no longer ideals” (Lyotard, 1979, 79). Robins and Webster are convinced that even the “discourse of ‘computer literacy’ embellishes and simultaneously clouds the real issue on the government’s agenda: work literacy” (Robins & Webster, 1989, 125). In a similar vein, John M. Broughton (1984) has argued that the hidden curriculum of computer literacy encourages the development of liberal, positivist values such as individualism, voluntarism, instrumentalism and utilitarianism. These important considerations, unfortunately, remain mostly theoretical and speculative in these authors’ work. They have, however, revived extremely relevant questions for empirical research in the informatising society, questions which address the relation between knowledge and power, namely: “What is taught in schools? Why is it taught? In whose interests is it taught in this way at this time? Above all, what is not taught? And why not?” (Robins & Webster, 1989, 276).

On the micro-level, there are several considerations to be taken into account when studying socialisation in the informatising society.

### **Emerging learning communities**

It is important to bear in mind that individuals are not isolated from one another when they engage in and interpret the practices of socialisation. We have to consider that discursive practices of socialisation are increasingly faced with what Stanley Fish (1980) has called “interpretive communities”; that is, by groups receiving, interpreting and interacting with the same messages at the same time. Some authors, for instance David Buckingham and Don Tapscott, point to the development of informal, democratic and sometimes international “learning communities” (Buckingham, 2003, 202) on the Internet, where pupils and students rely on each other for doing their homework and “debate everything online” (Tapscott, 1998, 134). They may also discuss many aspects of schooling, including the behaviour of their teachers. Empirically, Mark Warschauer (1999) has shown in his study of computer-mediated communication in college classrooms in the state of Hawaii how students, through electronic interaction and reflection with their colleagues and teacher, achieved new understandings and even reinterpreted their previous readings of texts.

### **The changing nature of texts**

The changing nature of texts has several crucial implications for socialisation and education. Authors who have written about hypertext and multimedia (e.g. Bolter, 2003; Kress, 2003; Landow, 1997) speak about the changing relationship between author, text and reader: the importance and authority of the author and the text are lessening, whereas the importance, freedom and power of the reader are increasing. If we consider the potential of hypertext and multimedia on the World Wide Web, we can see that the processes of reading and writing become analytically even more complex. Firstly, the Internet places an unprecedented amount of information on any topic at the hands of individuals with access; and secondly, the Internet makes any computer user a potential “author of a new kind” who can produce and publish texts, alter texts, write and “write back” (Kress, 2003, 173). In accordance with overall changes in texts in the age of multimedia, school textbooks have also begun to change. Conventional textbooks are:

carefully structured, coherent expositions of knowledge, knowledge to engage with reflectively and to ‘absorb’. The new ‘books’ are often collections of worksheets; no careful development of complex coherent structures here, and no deliberate carefully reflective engagement with these pages. These are books to work with, to do things with, to act with and often to act on (Kress, 2003, 21).

### **The changing role of the agents of socialisation**

There is a reason to speak about the changing role and importance of the agents of socialisation. I will firstly discuss the media.

It is obvious that the media are less and less mass oriented as markets and audiences have been “segmented and specifically targeted” (Castells, 1999, 48). In connection

with this we can also speak of the growing fragmentation of audiences and the individualisation of media consumption, reception and production. Such developments have been welcomed by advocates of the “communications revolution” as the increasing “empowerment” of audiences by new media. However, more sceptical observers, for instance David Buckingham, argue that audiences are more likely to simply have ever-increasing opportunities to consume rather similar media contents in terms of quality and the values of consumer society (Buckingham, 2003, 30). Another important observation by Buckingham is that previously distinct boundaries between children’s and adults’ media worlds are simultaneously disappearing and being reinforced. On the one hand, children have easier access to media contents meant for adults, while on the other hand, they are increasingly participating in globalising cultural and social worlds that are inaccessible and incomprehensible to their parents and teachers (Buckingham, 2002, 32). Moreover, as Jane Kenway and Elizabeth Bullen (2001) point out, the “knowledge politics” of children’s consumer culture often explicitly oppose those of formal schooling – children’s media culture has increasingly become an arena in which values of conformity and seriousness are subverted and undermined.

Regarding the role of the school, there is wide consensus among authors: critical as well as celebratory writers agree that the role of the school has diminished in the informatising society. This claim is supported by the axiom about the death of intermediaries in every field (defended, for instance, by Bill Gates; see Mattelart, 2003, 138). In line with this, the commodification of knowledge and the simultaneous “industrialisation of training” (Mattelart, 2003, 140) lessen the importance of the school and the university as agencies in their own right, and leave the individual as a free-floating unit faced more or less directly with the values, offers and demands of the market in general and the labour market in particular. Also, the function and tasks of teachers are changing. At a time when knowledge is becoming increasingly commodified and organised, “teachers lose control of the curricular and pedagogic skills to large publishing houses” (Apple, 1982, 114). Accordingly, the function of teachers becomes that of implementing school and classroom management strategies (Robins & Webster, 1989, 262). In the universities, the age of the professor is drawing to an end. As Jean-François Lyotard has put it, the professor “is no more competent than networks of memory banks for transmitting established knowledge, no more competent than interdisciplinary teams for dreaming up new moves and new games” (Lyotard, 1979, 88).

Developments of the same sort are celebrated by techno-optimistic writers such as Seymour Papert, Nicholas Negroponte, Don Tapscott and many others. Papert declares that Ivan Illich’s well-known conception of a deschooled society will become a reality and even a necessity with the presence of computers that will, in his words, undermine the old vested interests and the hierarchical system of knowledge that now characterises society (Papert, 1979, 85). Negroponte proudly proclaims that we may be a society with “far more teaching-disabled environments” and “far fewer learning-disabled children” as the computer facilitates “learning by doing” and “playing with information” which makes the material more meaningful

(Negroponte, 1995, 198-199). Tapscott argues that by exploiting the digital media, educators and students can shift to a new, more powerful and more effective paradigm of interactive learning. This may involve, for instance, a shift away from pedagogy to the creation of learning partnerships and learning cultures, a shift from learning as torture to learning as fun, and a shift from the teacher as transmitter to the teacher as facilitator (Tapscott, 1998, 142-149).

Some empirical studies on this matter (e.g. Sandholtz, Ringstaff & Dwyer, 1997; Warschauer, 1999), however, confirm that the sociocultural context of a school strongly influences how computers are used with students. Moreover, “this influence is neither total nor direct but is mediated by the beliefs of individual teachers” (Warschauer, 1999, 37). Teachers have “a degree of autonomy within the constraints of established school and classroom structures” (Warschauer, 1999, 41). According to Henry Giroux (1988), teachers are not only objects of societal and institutional influence but also agents for transforming their own teaching and their institutions. In terms of the theoretical model of socialisation, it is likely correct to assume that in the field of education there is a multi-layered system of structures and agencies, in which the agency of individual teachers is still relatively important vis-à-vis the structures of the particular school, the education system and society.

### **The changing relations of authority**

Most of the authors agree that relations of authority and power between adults and children are changing in many ways in the informatising society. First of all, children have gained power as consumers of media (and as consumers in general): “As children’s access to technology increases, they no longer have to watch or read what their parents choose” (Buckingham, 2003, 28). Moreover, due to the new media technologies, authorship is no longer rare, which brings about a lessening in the author’s or the text’s authority (Kress, 2003, 6). This allows Gunther Kress to argue that there is no longer an unquestioned acceptance of textual power (that means, adults’ power), not even in schools (Kress, 2003, 173). Some empirical studies have shown that once students got used to working with computers in schools, they began to challenge traditional assumptions about classroom organisation (Sandholtz, Ringstaff & Dwyer, 1997; Warschauer, 1999).

Probably the bravest assertions on this matter have been put forward by Don Tapscott (1998). Much of his argumentation is based on the claim that for the first time in history, children are more knowledgeable and literate than their parents and teachers about an innovation central to society, that is, computers and the Internet. He argues that the Net Generation, the first to grow up surrounded by digital media, “bathed in bits”, will transform all traditional institutions. He believes that families are becoming more open in the sense that authority is shared more than in the past, as children are an authority on an important issue. Also, the power dynamic between pupils and teachers will be forever altered, not only because at times pupils train teachers in how to use computers, but also as education moves from the paradigm of teacher as transmitter of information to pupils learning through discovery and new

media. Tapscott goes further, arguing that because the Net Generation has the tools to question, challenge and disagree, this generation is becoming a generation of critical thinkers. He believes they will force institutions such as the market, business and government to move towards greater democracy, interactivity, responsiveness and access, and question fundamental tenets of the social order. I believe we have every reason for being rather sceptical about this assertion. As Kevin Robins and Frank Webster (1989) argue, relations of power and control do not just dissolve away; they may merely take another form. My hypothesis is that the mediating agency (and, hence, authority) of the family and the school in the field of socialisation may, indeed, be lessening, leaving children interacting more directly with other institutions and the social system.

### **Concluding remarks**

This brings us to the conclusion that changes in one agent of socialisation (e.g. the media) instigate changes in the role and authority of others such as the school, the family and peer groups. It seems that the importance of the school and the family is lessening to some extent in the informatising society, while the importance of peer groups (as members of the Net Generation, learning communities and consumer trend setters), may be growing. In other words, the mediating agency of the family and the school in the field of socialisation may be decreasing, leaving individuals interacting more directly with the social system.

Finally, we have to take into account that there are overwhelming information inequalities between different countries and also within countries. Globally, most children are not growing up digital (Tapscott, 1998, 12). Moreover, there are several very powerful social and cultural factors such as religion, ethnicity, social class and gender which are intervening with the developments I have outlined above. Therefore, we cannot actually talk about any uniform model of socialisation in the informatising society. Instead, we have a great diversity of possible socialisation patterns, which call for further research and theoretisation.

### **Notes**

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# Students' Learning Strategies: Statistical Types and their relationship with Computer Literacy

Diana Šaparnienė

## Introduction

As modern society is becoming more oriented to advanced technologies, a new type of literacy - computer literacy – is being more widely discussed. Like reading, which by socialisation scholars is sometimes rightly called the socialisation of socialisation or secondary socialisation, computer literacy has become an essential precondition for a person's successful socialisation and his/her professional career. For this reason education, as an important factor for society development, has begun to play an essential role, particularly in addressing the issue of literacy and computer literacy in particular.

Not surprisingly, the issue of computer literacy is increasingly widely addressed in research works around the world as well as in Lithuania (Hayden, 1999; Johnson, Eisenberg, 1991; McMillan, 1996; Mitra, 1998; Oderkirk, 1996; Petrauskas, 1998; Šaparnienė, 2002, Šaparnienė *et al.*, 2002). Analysis of the scientific literature has proved that the impact of cognitive and non-cognitive personality traits on computer literacy levels has not been sufficiently studied. The impact of personality traits on computer literacy and its level was researched by M. Igbaria, A. Chakrabarti (1990), A. Harrison, R.K.Jr. Rainer, (1996), G. A. Marcoulides, Y. Stocker, L. D. Marcoulides (2004), *et al.* At an international level and especially in Lithuania there is a shortage of research on computer literacy analyzing *whether a person's preference for one or another learning strategy can influence the development of his/her computer literacy. The question of whether searching for statistical types of the investigated persons results in the demonstration of different computer literacy levels and other important factors still remains unanswered.*

A number of factors influence a person's academic achievement and his/her occupational success. Work with new technologies requires new, different abilities as compared to work with the old ones. The fact is that these new abilities are more "cognitive". In order to satisfy his/her need to communicate, work and learn, a person has to perceive their surroundings, be attentive to certain moments and elements of activities, think and express him/herself. This means that a person's activities are impossible without cognitive processes. The latter are developed through activities or expressed by special types of activities.

Understanding of a person's cognitive abilities is necessary for his/her effective education and development. Despite the fact that the link between a person's computer literacy and his/her cognitive features is evident, the issue has so far not been widely studied.

Although the success of human activities is determined by a number of variables, an important position in the hierarchy of learning success is occupied by a person's *learning strategies*. D.M.Smith and D.A.Colb (1996) state that a person's learning strategy defines how he/she behaves in various everyday situations; he/she learns more effectively, easily, and comfortably when his/her learning needs are generated by his/her learning experience. In other words, a learning strategy outlines the way a person learns. For example, R. Dunn (1986) defines learning strategy as a way of perceiving and preserving information and abilities. Many authors (Gregorc, 1979; Davidson *et al.*, 1992) emphasize that learning strategy is an obvious observed behaviour, which reveals how a person gains, processes and collects information.

Basically the presented definitions state that *learning strategy is linked with the way a person processes and perceives information in learning situations*. Moreover, scientists agree that learning ways and habits are a conditionally permanent construct, invariable in various learning situations and contents. However, in the course of time, learning strategies may change with changes in experience.

Research on computer usage confirms that learning strategies contribute to success. For example, R.P.Bostrom and others (1990) ascertain that while learning to work with a computer, students of a convergent learning style (Colb's taxonomy) achieve better results than students of other learning styles. G.V.Davidson and others (1992) also maintain that students who have certain learning strategies perform better than others.

Literature surveys (foreign and Lithuanian) have clearly shown a shortage of research in which the relation between computer literacy and a person's cognitive abilities is examined. One of the reasons for this could be the narrowness of the investigated theories.

*The aim of this article is to identify and describe existing students' statistical types by their learning strategies and to show the connection with factual computer literacy.* The paper deals with the scientific problem related to the hypothetical assumption about the impact of a person's cognitive trait - learning strategies - on the peculiarities of computer literacy in the system of higher education.

### **Research methodology and characteristics of empirical basis**

The *empirical-experimental part* of the present study is based on a series of diagnostic studies of 1004 surveyed students. They represented 4 universities and 5 high schools and colleges in Lithuania. 84.7% of the sample were university students, 15.3% – students from high schools and colleges. The major part of the sample, 73.1% (N=733) were students from management and economics study programmes. The remaining respondents (22.9%, N=271) included students from other areas: education, philology, informatics, physics, mathematics, technical, agricultural and health sciences. The study was based on voluntary participation and anonymity.

*Study instruments.* A test (theoretical and practical) on computer literacy (CL) and 2 anonymous closed type questionnaires “Student and computer” and “Student and studies”, consisting of a series of questions on computer literacy and studies, were designed (Šaparnienė, 2002). The study instruments (tests) designed by other researchers were used to study the respondents’ attention, to rate their general intelligence and their knowledge of terminology, and to measure their verbal and non-verbal intelligence.

The presented paper analyses the most significant empirical research findings, which identify students’ statistical types by their learning strategies and the relationship with computer literacy. For this purpose the respondents’ answers to the questions on learning strategies (questionnaire “Student and studies”) and the results of the test on computer literacy are analysed.

*Psychometric validity of the diagnostic study variables* identified and discussed in the article.

1) *Computer literacy test.* Using the method of expert analysis, a two-part computer literacy test was designed. With the aim of assessing the respondents’ general knowledge of computers, 19 theoretical questions were included in the first part of the test. The second part of the test was composed of 24 practical tasks, to assess the respondents’ competence using the applied software in practice. For every step in the test percentage frequency was calculated and the parameters for main tendencies were selected: average, standard error and standard deviation (Table 1). With the aim of measuring computer literacy, standard validity rates are presented in Table 2. The rates presented in the table are evidence that the scale constructed to measure computer literacy is valid (Bortz, 1993; Anastasi, Urbina, 2001).

**Table 1.** Parameters of the computer literacy test scale

	Scale average	Standard error	Standard deviation
Theoretical part of the test	9,7 (max 19)	0,26	3,4
Practical part of the test	25,4 (max 48)	0,69	9,4

**Table 2.** Validity indices of the computer literacy test scale

	<i>Cronbach coefficient</i>	<i>Gutman Split - half coefficient</i>	<i>Spearman Brown coefficient</i>
Theoretical part of the test	0,73	0,72	0,72
Practical part of the test	0,90	0,84	0,85

2) *Test on learning strategies (or learning ways and habits).* The test consists of 81 statements, which reveal various learning aspects and learning factors, starting from

special logic and psychological learning techniques and tactics and concluding with the management of learning time, learning ergonomics, etc. The psychometric validity of the scale was evaluated by factorial analysis using the method of Principal Components and VARIMAX rotation. 19 factors were extracted during primary factorial analysis; secondary factorial analysis multiplexed the statements to the model of 6 factors (which explains 55.7% of dispersion of the variables). Factorial analysis (especially secondary factorial analysis) presented a rather significant link between the majority of statements and the factors; their inside grouping is theoretically significant. It should be noted that a rather high correlation of the statements' estimation with extracted factors was obtained. This is evidenced by the limits of the meaning variation of the correlation coefficient ( $0.52 \leq r \leq 0.88$ ). The descriptive power (dispersion) of the factors ranges from 15.8% to 10.7%. Kaiser-Meyer-Olkin (KMO) coefficient, which in this case is 0.80, shows to what extent the matrix is valid for the factorial analysis. Inner consistence of the factors, evaluated by Cronbach alpha coefficient, remains above the limit of 0.5, therefore, all five factors are homogeneous enough.

The first factor, explaining 15.8% of the dispersion of all the variables, combined the statements on *structured, methodological activities*: intended planning of learning time, learning the exactly marked amount of material, planning the succession of the learning material, usage of schemes, marks, summaries, etc.

The second factor, explaining 15% of the dispersion, combined the statements on *reflectivity*: attempts to relate new material, conceptions and theories with the old ones and experience, comparison of various theories and conceptions, search for alternatives, critical evaluation of the studied material, etc.

The third factor combined the statements on *interactive learning in a group* (dispersion – 13.4%), the fourth factor – *learning ergonomics* (dispersion – 10.7%).

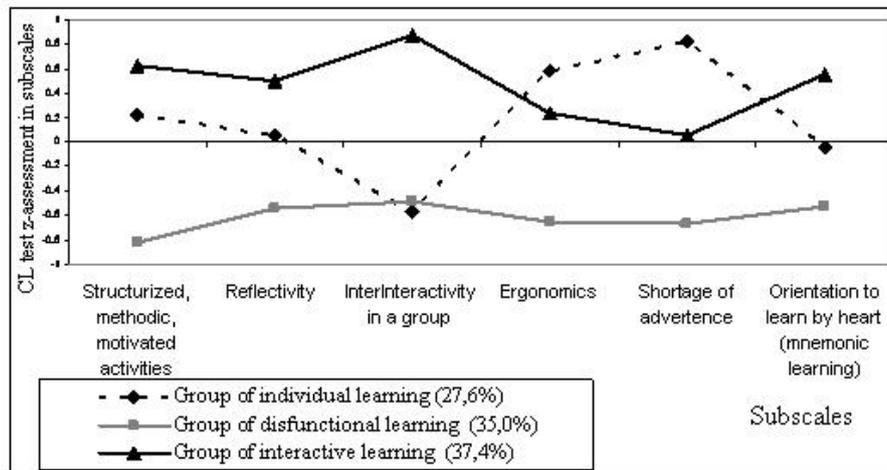
In the secondary factorial analysis the factors *shortage of advertence* and orientation to learn by heart (*mnemonic learning*) formed individual cases.

## Research results

In order to divide the respondents into groups by their learning strategies, statistic analysis of the respondents was carried out. For classification Cluster Analysis was used. Since the number of the surveyed students and the classified objects is quite large, k – Means (k – number of clusters) cluster analysis was chosen. The determined cluster structure is shown in the graphs below.

Typologization of the surveyed students by their learning strategies was significant. The classification was made using six subscales of the analyzed scale, obtained through secondary factorial analysis. The format of the scale answers is four-staged and includes the following variants of answers: “especially rarely”, “rarely”, “often”, “very often”. According to the dynamics the respondents (N=774) were

attributed to three clusters, in what appeared to be the most informative and best interpretable way. Graphic expression is presented in Figure 1.



CL – Computer Literacy

**Figure 1.** Typology of learning strategies. 3-cluster model (N = 774)

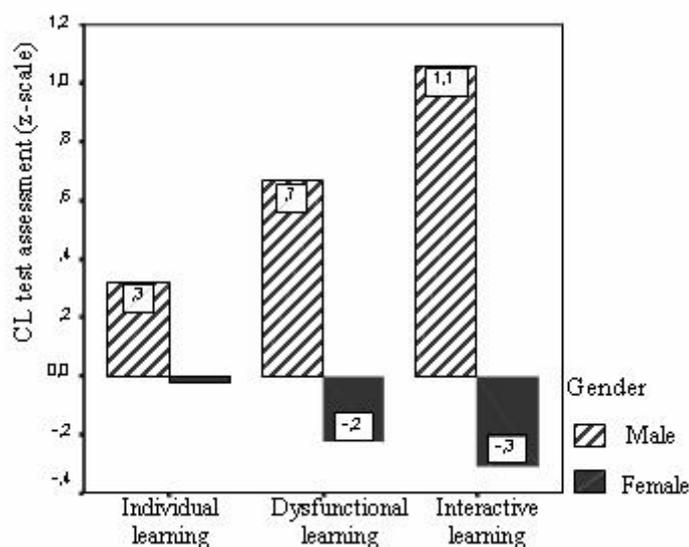
The first group consists of 27.6% surveyed students, the second – 35.0% and the third – 37.4% surveyed students. Table 2 illustrates percentage distribution in the clusters by gender. In the first and third clusters there are relatively more women, in the second cluster men evidently dominate.

*Cluster 1.* This cluster includes attentive students who are motivated to learn structurally and methodically. Reflectivity and mnemonic learning are characteristic for them; they need supportive and favourable learning conditions (suitable ergonomics). The surveyed students in this cluster are more likely to learn individually than interactively, i.e. individual learning is characteristic for them. This is conditionally a *group of individual (or functional) learners*.

**Table 3.** Percentage distribution of the surveyed students in the clusters by gender

	Gender		Total
	Male	Female	
Cluster 1	54	160	214
	23,9%	29,2%	27,6%
Cluster 2	118	153	271
	52,2%	27,9%	35,0%
Cluster 3	54	235	289
	23,9%	42,9%	37,4%
Total	226	548	774

*Cluster 2.* Specific learning attitudes and habits are not characteristic for this group. The surveyed students value some interactive work in a group, and sometimes reflective, mnemonic ways of learning are typical for them; however, they are not attentive or motivated to learn structurally and methodically. *Dysfunctional learning* is more characteristic for them. Table 2 illustrates that this group includes the highest percentage of male students. It could be that the mentioned features partially reflect a male stereotype.



**Figure 2.** Assessment of the computer literacy (CL) test by learning strategies and gender of the surveyed students

*Cluster 3.* This is a functional group of leaders. *High interactivity in a group*, motivated, methodical, structured (although not always attentive activities) and sometimes mnemonic learning are characteristic for this group. Ergonomic conditions in the learning process are not important for them.

We aimed to disclose the statistic structure of the three variables – *gender, learning strategies and factual computer literacy*. Figure 2 reflects the graphic form of the structure. The graph of the three variables shows a very strong and specific effect of statistical interaction – the relation of the factual computer literacy and the clusters depending upon learning strategies. Figure 2 presents obvious gender effects: 1) computer literacy of female students is lower than that of male students in all clusters; 2) interactive learning is less characteristic for female students, who appear to prefer the other two learning strategies – dysfunctional and individual types of learning. As a consequence, *the highest computer literacy level of male students can be reasonably related to interactive learning in a group, of female students – to more individual learning.*

A person's interaction with a computer through the scheme "human – machine" is actually an interactive process. Practice has shown that it is much easier to master any unknown computer operation with the help of an experienced specialist who immediately demonstrates how and what to do, with the help of *interactive learning with educational media*. It appears that studying a voluminous manual on computers and learning from one's own mistakes and trials is usually less effective and attractive.

## Conclusions

The research data has shown that the usage of a cluster analysis method, searching for statistical types of students' population by the variation of their learning strategies, has served its purpose. During the research the factually existing statistical types of students by their learning strategies were revealed; students oriented towards individual learning, dysfunctional learning and interactive learning were identified and described, and the relation with their factual computer literacy was also determined. *The highest level of computer literacy can reasonably be related to interactive learning in a group.*

Qualitative description of "pure" statistical groups, depending on the expression of features and the determination of these groups by percentage in the general population, is essential information with which the process of formation of computer literacy should be optimized and promoted. *While selecting the already existing and/or developing new educational computer literacy strategies and methods, and preparing textbooks and media, we should focus not on abstract "faceless" learners, but on very definite and truly existing types of learners.* In other words, the search technology for statistical types provides an opportunity to apply such classical and highly relevant didactical approaches as *learning differentiation and learning individualization* more effectively and efficiently.

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# **Psycho-Semantics of Management Constructs: Expression of Democracy among Schoolteachers**

Gintaras Šaparnis

## **Introduction: The scientific problem of the research**

The background of the empiric research was an anonymous postal survey of 289 Lithuanian school teachers and 187 school managers, in the form of an open ended questionnaire. The aim was to identify the most important (according to the respondents) problems relating to school management, the expression of democracy and authoritarianism in school management, the problems of self-governance in an organisation and school management development perspectives. This paper in particular presents data analysis of the answers provided by pedagogues to an open ended question. The question was as follows: *Are there any manifestations of democracy in your school? If “yes” (or “sometimes”), in what way are these rudiments asserted in your school?*

289 respondents provided 634 statements to the question. Using the method of qualitative (hermeneutic) content analysis, the empirical statements were generalized into 42 semantically homogeneous categories. The control procedure of the validity and inter-subjectivity of the categories are presented in the paper by G. Šaparnis and G. Merkys (2000a). Afterwards, quantitative data analysis was carried out. Using the method of descriptive statistics the categories were rated by the frequency with which they were referred to. With the help of cluster analysis taxonomic regularity of the categories was researched (Šaparnis, 2000b).

From the aspect of methodology the research is based on an empirical social research approach to a combined qualitative and quantitative research – triangulation (Denzin, 1970; Cohen & Manion, 1994; Bitinas, 1998; Charles, 1999; Mayring, 1988; Kardelis, 1997; Lamnek, 1993; Merkys, 1999).

The conceptual basis of the research was an attempted combination (congruency) of different theoretical traditions (nowadays referred to as classical). The following theories are implied: humanistic psychology, an approach of social psychology to an authoritarian personality, authoritarian social relationships and the theory of symbolic inter-actionism (Rogers, 1969; Maslow, 1971; Adorno, 1969; Oesterreich, 1974; Blumer, 1969).

Moreover, an important theoretical context of this research is the research on management (including education management) and organizational behavior (Jucevičienė, 1996; Jucevičius, 1996; Želvys, 1999; Kalvaitis, 1997; Večkienė, 1996; Targamadžė, 1996 and others). However, it should be admitted that the authors failed to find any evidence of diagnostic research systematically and

professionally carried out in Lithuania on education management. Research deficiency in this field is a significant aspect of this research problem.

For substantiation of the theoretical part of the research and data interpretation, a significant role was played by a particular branch of psychology – psycho-semantics (Sinchenko and Mescheriakov, 1996). One of its main concerns is research on what subjective implications individuals and social groups tend to attribute to verbal (lexical) stimuli. Reference to the analysis of psycho-semantic structures provided an opportunity to achieve substantial results in such fields as differential psychology, psycho-diagnostics and social attitudes (Osgood, 1959). In our particular research the role of the word-stimulus was played by a stimulating material formed on the basis of a lexical unit “*democracy*”, presented to the respondents in different problematic contexts on organization management.

The **aim** of the research was to disclose the psycho-semantics of the opinions held by comprehensive school educators on the expression of democracy in education management.

This aim was achieved using a non-standardized questionnaire composed of open-ended questions, and through combining the methods of qualitative and quantitative content analysis.

The process of management in a comprehensive school was the **object** of the research

The problem of any scientific research may be defined in the form of a question because it is a logical form of a scientific problem (Merkys, 1995). A scientific problem of our research is defined by a series of definite questions:

1. What is the rating law of subjective psycho-semantic categories which reflect the expression of democracy among school teachers?
2. What is the character of the taxonomies of psycho-semantic categories of the referred "topics" which empirically result from data rating?
3. What is the inner structure of empirically traced psycho-semantic units which reflect the expression of democracy?

## **Research results and discussion**

Relying on the selected and proven scheme of statistical data processing, cluster analysis of the formed categories was carried out. This provided an opportunity to form the taxonomy of categories. The configuration of computerized dendrograms and the data of standardized cluster distance scales show that it is most expedient to refer to a 3 cluster model (Tables 1, Table 2). Category rating data statistically may reasonably form 3 homogeneous groups (noted by the rating). It is symptomatic that one of the clusters consists of only 2 categories. These are the categories that outscore other categories by the frequency rating they noted.

A grounded qualitative interpretation of 3 groups (clusters) is given in Table 1.

**Table 1.** Qualitative interpretation of taxonomy results according to a 3 cluster model

Group number in the dendrogram	Interpretation of the model of 3 groups (clusters)
Group 1	<i>high rating</i>
Group 2	<i>medium rating</i>
Group 3	<i>low rating</i>

**Table 2.** Rating of categories of teachers' opinions about the expression of democracy in the organization (N=289)

Category	Noted frequency	%	Group number by a 3 cluster model
It is permitted to express opinions, give suggestions	79	27%	1
Majority of decisions are made collectively	73	25%	1
Functioning of schoolchildren's self-governance	44	15%	2
Possibility to work independently and creatively	43	15%	2
Functioning of the school council independently and actively	40	14%	2
Schoolchildren can express their opinions	36	12%	2
Parents are involved in school life	30	10%	2
Good, close community relations	25	9%	2
Functioning of teachers' trade union	22	8%	2
The aim is to educate independent individuals	18	6%	2
Good teacher-schoolchildren relations	17	6%	2
Introduction of election practice at school	17	6%	2
Imitation of democracy	13	4%	3
Researches and opinion polls are carried out	11	4%	3
Tolerant school leaders	11	4%	3
Opinions of majority are considered	10	3%	3
Moderate control	9	3%	3
School work plans are discussed with teachers	9	3%	3
No barriers for qualification update	8	3%	3
Pupils' rights are discussed and acknowledged	7	2%	3
School – like an open community	7	2%	3
Opinion of teacher majority can change leaders' decisions	7	2%	3
Inter-reliance	6	2%	3
Teachers' personal matters are considered	6	2%	3
Delegation of decisions and responsibilities	6	2%	3
Schoolchildren plan and organise extra-curricula	6	2%	3

Category	Noted frequency	%	Group number by a 3 cluster model
activities			
Criticism of school leaders is normally accepted	5	2%	3
Schoolchildren are allowed to choose extra-curricula activities	4	1%	3
Information sharing	4	1%	3
Schoolchildren's education is based on democratic principles	4	1%	3
Teacher is a child's helpmate	3	1%	3
Too much democracy	3	1%	3
It is possible to remove an "intolerable" teacher	3	1%	3
Functioning of informal groups is tolerated	3	1%	3
Democracy is discussed at sittings	2	1%	3
Work is organised keeping to self-approved rules	2	1%	3
Work load is discussed and allotted by teachers themselves	2	1%	3
Qualification assessment commission	1	0,3%	3
Daring communication with schoolchildren's parents	1	0,3%	3
Schoolchildren are permitted to apply to school administration at any time	1	0,3%	3
No ignorance because of political beliefs	1	0,3%	3
Functioning of school radio	1	0,3%	3
Sharing of teaching experience	1	0,3%	3

From the aspect of interpretation the greatest attention in this context is paid to the categories characterized by the highest frequency with which they were noted. It is symptomatic that by the dimension of "democracy" top positions are taken by the categories of the same content (Table 3).

The main part in the structure of teachers' conception about the expression of democracy at school is taken by the dimension of *opinion expression* (whether an opportunity to express it exists or not) and the dimension of *collegiality*.

**Table 3.** Examples of category statements that reflect the dimension of democracy

Category	Statements
It is permitted to express opinions, give suggestions	Expression of one's opinion
	Teachers can express their opinion on various questions
	Very often it is possible to express one's opinion and suggest various things
	It is possible to express opinions and give suggestions
Majority of decisions are made collectively	Majority of decisions are made collectively, after discussions with teachers
	Some matters often depend on teachers' suggestions
	Parents, teachers and pupils take part in decision making
	Urgent problems are solved collectively

Generally, the keyword "*opinion*" takes an exceptional position in the researched psycho-semantic structures and quite frequently appears in category formulations. Apart from the categories provided in Table 3, such categories as "*Pupils can express their opinion*", which refer to the commented keyword are worth mentioning. If we formed a compound frequency rating of the categories based on the keyword "*opinion*" it would break all records in comparison with other categories. Naturally, psycho-semantic structures are not a purely speculative and subjective matter; they more or less reflect real (objective) social relations. At this point we may make a hypothetical assumption about empirically traced and proven regularity of criteria. In other words, it may be soundly claimed that the *character of opinion expression* in the school community is the main criterion which differentiates the prevailing management style in the organization. The traced regularity of criteria is significant from two perspectives – diagnostic (e.g., compiling standardized closed-type questionnaires on school management) and school management monitoring (e.g., granting leaders categories in management, etc.). The dialogue, which, inter alia, means a person's ability to listen to and tolerate other opinions in social relations, is an essential indicator of an anti-authoritarian personality type and for an authoritarian personality is the basis to take psycho-corrective measures. In turn, speech (opinion) freedom, according to political sciences, is an attributive feature of democratic society.

Therefore, two circumstances, namely: 1) an exceptional position of the keyword "*opinion*" in the psycho-semantic structure of the surveyed teachers and 2) theoretical validity of the phenomenon of opinion expression (as a basic indicator) in social psychology, management and political sciences, allows an understanding of this point as the main criterion of a dominating management style in an organization. In other words, specificity of opinion expression in an organization is one of the most reliable criteria and diagnostic indicators with which to differentiate school management style.

Moreover, we could hypothetically claim that the stated fact is culturally specific, and especially relevant for the countries and cultures of the so called “new democracy.” It is possible to make an assumption that in societies with deeper democratic traditions, free expression of opinions is an unquestioned matter. Therefore, from the perspective of its differential potential, this criterion is not as relevant and significant as it may be for the countries of “new democracy” to which Lithuania is referred. It is no secret that most contemporary school leaders and teachers started their professional profiles in a system where the expression of non-conjuncture opinion was not only unwelcome but even risky. In the decades of assimilation of social mechanisms, an inadequate attitude towards public expression of an “*unacceptable*” or “*different*” opinion was formed. On the other hand, this stated fact reveals the potential for school management development based on appropriate and modern attitudes towards free expression of opinions in the school community.

From the perspective of school management development we would like to juxtapose the stated fact with other facts traced during the survey. It should be noted that while designing strategic visions of school management (Šaparnis, 2000a; Šaparnis *et al.*, 2003) school leaders gave priority to “*community and partnership development*” and “*intention to perfect*”, whereas teachers preferred “*improvement of school microclimate*”, *etc.* It is obvious that if free expression of opinions in a school community is not guaranteed, the reality for strategic management visions and expectations of both, leaders and teachers will be very problematic. An assumption may be made that opinion expression guarantee is a systematic determinant in the managerial and social relations of an organisation. In other words, guaranteeing (or neglecting) the dimension under discussion makes a direct impact on a number of other significant management dimensions. Consequently, the noted congruency of the surveyed facts assuredly emphasizes an exceptional role of *the character of opinion expression* in organizational culture and modern effective management.

In this context other significant tendencies of democracy expression in school management are worth discussing; moreover, the results of the survey give a sound basis from which to do this.

A significant criterion which allows detection of a democratic management style and a type of social relations formed at school is functionality of active institutions within a school. It is shown in the formulation of corresponding categories and authentic statements given by the surveyed (Table 4).

The character of psycho-social relations and the social microclimate in an organization is also considered to be an important criterion. It is proved by such categories as: “*Good, warm community relations*”; and “*Good teacher-pupils relations*”, *etc.* Alongside the phenomenon of opinion expression discussed in this context, an important criterion is the dimensions reflecting psycho-semantics of “*independence and initiative*”. Examples of the corresponding categories are:

“Opportunity to work independently and creatively”; “No barriers for qualification update” and others.

**Table 4.** Examples of categories’ statements that reveal functionality of school’s active institutions

Category	Examples of statements
Functioning of schoolchildren's self-governance	Schoolchildren's self-governance functions at school
	In schoolchildren's self-governance
	The board of monitors
	Schoolchildren's Seimas (Parliament)
Functioning of school council independently and actively	Independent functioning of the school council
	Functioning of the school council
	The school council functions
	The school council functions actively
Functioning of teachers' trade union	Teachers' trade union was set up
	Teachers' trade union exists
	Trade union exists
	Teachers' trade-union functions actively
Introduction of election system at school	The school committee is elected
	President's elections (in the schoolchildren's council)
	School director's democratic elections (by secret vote)
	Election of the school council

With reference to the selected strategy of statistical data processing it was aimed to also detect, alongside the regularities of ratings and taxonomy categories, regularities of category structures as well. In order to disclose statistical links and to switch to a reduced number of primary variables factorial analysis was used. Prior to this, while analyzing the matrix of inversions, we eliminated categories which were irrelevant for factor analysis.

Factorization of categories gave acceptable results. 12 primary variables (categories) were reduced and generalized in the model of 5 factors (Table 5).

Statistical linkage of the majority of categories with factors and their inside grouping in terms of interpretation appeared to be theoretically significant in the factor model of democracy categories. It should be noted that rather high correlation of category ratings with the extracted factors were obtained. This is evident in the fluctuation limits of the correlation coefficient values ( $0.42 \leq r \leq 0.85$ ). This shows that formed categories are appropriate since they meet the methodological norm of the *construct validity* commonly accepted in diagnostic researches.

Meaningful grouping of categories inside the factor should be considered. In the factor model of categories of democracy factors, F1 and F5 clearly reflect the institutions of democracy, factor F2 – psycho-social relations, factor F4 – the

dimension of freedom. A little more problematic is the interpretation of factor F3, consisting of variables reflecting meaningfully non-homogeneous dimensions.

**Table 5.** Factorial analysis results  
(teachers' opinions about the expression of democracy at school)

Factor number	Categories	Values of factor weights
F1	Functioning of schoolchildren's self-governance	0,85
	Functioning of school council independently and actively	0,84
	Functioning of teachers' trade union	0,68
F2	Good, warm community relations	0,77
	Good teacher-pupil relations	0,73
F3	The aim is to develop independent individuals	0,76
	Parents are involved in school life	0,67
	Majority of decisions are made collectively	0,42
F4	Schoolchildren are permitted to express opinions, give suggestions	0,85
	Opportunity to work independently and creatively	0,63
F5	Pupils can express their opinions	0,75
	Introduction of election system at school	0,69

**Note.** Computer extracted factors explain 60,7 % of all factors

## Conclusions and discussion

The main part in the structure of teachers' conception about the expression of democracy at school is taken by *the dimension of opinion expression* (whether community members can express it) and *the dimension of collegiality*.

It is expedient to state hypothetically that the character of opinion expression dominant at school as an organization is the main criterion which differentiates the prevailing management style at school. From the diagnostic aspect this is the main indicator which allows the recognition of a concrete management type in factual school management reality.

It is possible to make an assumption that opinion expression guarantee in a school community is a systemic determinant of management and social relations in the organization. In other words, guarantee of the dimension under discussion has a direct impact on many other essential dimensions of management.

A hypothetical assumption may be formed that the discussed criterion of opinion expression is culturally specific, i.e. more relevant for the so called "new democracy" countries.

Alongside the phenomenon of opinion expression, a significant criterion which allows a more reliable differentiation of a democratic management style and type of social relations formed in the organization, is active functioning of school institutions (school council, trade unions, schoolchildren's self-governance, etc.)

In the psycho-semantic structure of teachers' opinions (on the question of democracy expression in an organisation) a significant role is played by those categories which disclose expectations of creativity, independence and initiative, and of a favourable psychological and social climate.

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# **The textbook as bridge or fire wall between practitioners and theorists in vocational training**

Anna-Lena Göransson

## **Introduction**

In vocational training students and teachers are faced with “theory” in the form of written-text based, often abstract information. Teachers and students are expected to read, critically study, question and reconstruct these texts into new knowledge of their own. The advantage with verbal articulation in vocational training is that an opportunity is provided to question, critically examine and discuss one’s own knowledge and one’s own action patterns. By verbalizing, systematizing and generalising around one’s own knowledge and placing it in relation to the knowledge of others, all practitioners can attain an increased awareness about how they do things, what they do, and why one way of acting can be better or worse than another in a given situation. My thesis (Göransson, 2004) describes how a group of firefighters, who consistently maintain that they are “practitioners and not theorists”, relate to language based knowledge and language based “knowledging” in their vocational training. This paper presents the main results of my research and how this study has influenced the textbook production at the Swedish Rescue Services Agency (SRSA) where I work as an editor.

## **Theoretical background and research method**

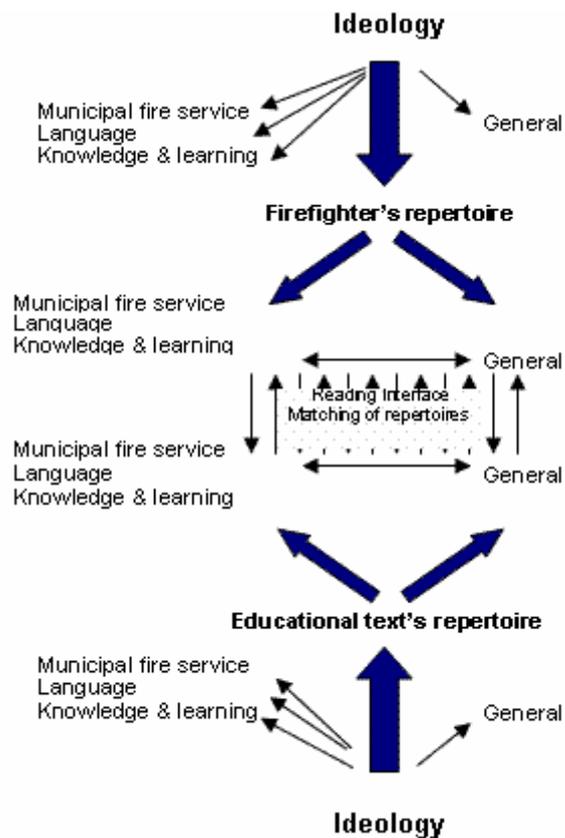
Our social contexts are of crucial significance to what and how we read, write and learn. Wertsch (1997:15) uses the term *sociocultural* in order to understand “how mental action is situated in cultural, historical and institutional settings”. Researchers such as Cazden *et al* (1972), Heath (1983), Bruner (1986) and Säljö (2000) make it clear that explanations for linguistic behaviour should be searched for in the social sources of language, not amongst individuals or language systems as such. According to Vygotsky (1962) linguistic interaction is the fundamental condition for learning. But when the everyday language of the students encounters the logical-scientific paradigm (Bruner, 1986) at school, language can create problems. Accordingly students can require support, examples and models to be able to increase their linguistic repertoires and to take on new subjects.

Considering the significance of “linguaging” for learning I find it urgent to examine how students who call themselves “practitioners and not theorists” and who primarily want to learn by physical practice, relate to various forms of verbal based learning; and try to understand what this “knowledging” implies for them. With the focus on the students as learning language users I searched for understanding of what was going on in the educational setting from a sociocultural perspective to learning and within the parameters of a didactic perspective (Uljens, 1997) from

external contexts to the actions of the students and teachers in the educational setting. The SRSA has four colleges where firefighters and fire brigade officers for the Swedish fire service are trained. I collected data at one of these colleges during 10 weeks of a 15 week problem-based firefighter training course. I carried out classroom and training field observations and 12 interviews with 6 of the students at the beginning and at the end of the course and 2 more interviews with the two most talkative students six months later.

I noted and analysed the communication in the educational setting with support from those aspects compiled by Dell Hymes (1986) to describe situation context and to understand text in context: **Setting/Scene**, **Participants**, **Ends**, **Act sequence**, **Key**, **Instrumentalities**, **Norms** and **Genres**. This means I noted the communication in the educational setting by focusing on *where*, *who* was communicating *what* with *whom*, with what *aim* and *object*, and in what *way* etc. I wanted to know *how* and *about what*, *when* and *where*, and *in what way* students and teachers talked, read, wrote and listened to each other, and how all this influenced learning in relation to the course objective. I wanted to find out what opportunities the linguistic tools that they used provide for uniting theory and practice in vocational training for firefighters.

Inspired by Kathleen McCormick (1994), who considers reading as a meeting between reader and text, I consider the learning process as a meeting between what I call *the educational text* and the students. By educational text I mean that which the students encounter in the educational setting in the form of teachers' actions, teaching methods, textbooks etc. together with underlying factors such as curricular directives, educational ideologies etc. McCormick's view is that reading and comprehension always occur within a collective, in a social and cultural space, and that reading is steered in different directions due to the varying features of the text, who is reading and in what context the reading is taking place. The readers create their own texts in relation to the author's text, aided by the (general and literary) *repertoires* and *strategies* they have at their disposal while reading, and their underlying ideology. What McCormick calls *matching*, occurs when the repertoires of the text and the reader are in agreement and the reading occurs without problems. If the repertoires are not in agreement, *mismatching* occurs and the reader may give up reading. *Tension* occurs when the reader is sufficiently familiar with the text's repertoire to be able to read and understand it, but disagrees with it or opposes it for various reasons. Where McCormick focuses on the reader's literary ideology I focus on "culturally conditioned experiences, beliefs, knowledge and expectations" about language and language use, knowledge and learning and also about the fire service, which influence the behaviour of the actors in the studied educational setting:



**Figure 1.** The learning process as a meeting between student and educational text (after McCormick, 1994).

## Results

When the study was carried out one of the entry requirements for the firefighter training course was to have completed at least one year's employment as a firefighter on a municipal fire brigade. As the experiences of the students function as active co-creators in the construction of knowledge I wanted to understand what the firefighters take with them into the educational setting and into the learning situation. I came to understand that the bonds between the individual firefighters and the job are strong. A firefighter's identity is based on his professional role, of which they are very proud. They do like their job and feel a strong affinity with their watch, which they often describe as being like a family. There are many common personality traits among brigade members, for example the desire for challenges at work, physical strength, a competitive spirit, an interest in practical work, the desire to work in groups etc. I understood from the firefighters that they work in a

hierarchical, greedy organisation in which the brigade and the watch are of major significance to the individual firefighter's socialization into the profession and his vocational role. Practical work knowledge is developed by doing, while simultaneously learning to use the group language. In that way one also becomes party to the attitudes and values that go with the language. Newly arrived firefighters learn, for example, to know their place, to listen and to be humble towards elder colleagues.

The firefighters recreate and reconstruct their work culture in practical actions and in informal discussions and stories of past incidents. They talk a lot and they know how to describe their many workplace experiences and also how to tell a good story and to back up or undermine a good story teller. But, a fact is that they seldom read or write at work. And they haven't documented much of their work knowledge in writing, which means that the field's other representatives, such as researchers, fire protection engineers and the pedagogues at the central administration of the SRSA, who have partly different verbal tools and also a more developed tradition of written-text to fall back on, articulate in writing what they think should be firefighter's knowledge.

It's obvious that different practices with different attitudes and tools for acting meet in the educational setting, which in itself is a situated practice with its own rules for interaction, which means for example that reading was considered as a natural activity in connection with learning. But when presenting his library findings in class (after two weeks of self study) one firefighter articulates the gap between his own everyday language (in italics) and the "logical-scientific paradigm" of the textbook in this way:

Firefighter 3: Fire. A rapid often uncontrolled oxidation process, the result of which is the development of heat and light of varying intensity, *I've written there. And of course, the principal qualities of a fire I've mentioned a little as well.* A flammable liquid vaporizes and the pyrolitic gaseous fuel, created during vaporization, consists of various... reacts with oxygen and forms products of combustion, such as carbon monoxide, carbon dioxide *and water and a little of that stuff. That's what I've mentioned... I've written a short story of how fire spreads, or of a fire's progress then...*

Many of these students want, and need, reading support. Many of them want to be told what they are expected to do with the information they get. They want their teachers to prepare for their reading by going through the textbook. They appreciate illustrations. Many students told me that a picture says more than a 1000 words. They are good at reading pictures both in textbooks and in their work place reality:

ALG: You mean firefighters remember situations as pictures?

Firefighter 5: Yes, I think so. That's the way you learn. I mean, to be a firefighter, that means life long learning, so to speak... and then you get used to take things in that way. You remember what it looked like, what happened there. It is very important to have that ability.

The firefighters' creation of meaning is multimodal. They articulate facts, skills, understanding and familiarity in words and body language. They "read" emergency situations with all their senses. They inspect the colour of the smoke because they know this can tell them about the various contents and how to proceed. They search for people in smoke-filled rooms where it is not possible to see with one's eyes, but where it is possible with one's arms and legs. They also willingly exchange examples, tips and advice with each other verbally.

I found a great discrepancy between the activities, participation and engagement at the different learning scenes. When the setting changed the students changed and so did the communication and the atmosphere. But here was a great change over time. At the beginning of the course all the interviewed firefighters explained that they were prepared to read and write as the course demanded. But having expressed joint ownership and a will to participate in the knowledging with their own contributions, they backed out and at the end of the course rejected large sections of the educational text as something that belonged to others:

Firefighter 1: Maybe you've been out on the training ground and trained and worked like hell and extinguished fires and been all in a sweat and come home and had a shower... Then you don't want to sit down and read a book, do you? But that's what they want us to do here.

The clearest example of mismatching was the problem based learning which the students understood to be working-group meetings and reading and writing. The firefighters were not familiar with and had not previously encountered the method and several of them were "rusty" when it came to reading and writing. Confusion, despair and irritation were all mixed together when the students had to formulate study questions in writing, search for information in the library and report on the knowledge in compendium form. The firefighters felt that "theory" took up too much time in relation to the practical exercises, and they saw much of the library and classroom work as a waste of time. They can hardly be said to have lived up to the role as active, knowledge-seeking, responsible PBL students. They displayed no desire for deeper theoretical study; instead they limited themselves and searched only for functional knowledge that they could use in practical situations:

Firefighter 6: We are firefighters. I think we get more theoretical knowledge here than we actually need. What we need is basic: practice, practice, practice.

Several less experienced firefighters digested most of the indoor lessons in silence, for example because they felt inferior to the more experienced ones and felt that they had nothing to add to the lesson, but probably also because they had learned at the fire station to be humble, quiet and listen to their elder colleagues. On the other hand, outside the classroom and during the whole learning period there was an uninterrupted informal dialogue between the students with a great amount of exchange of information and experience. Quite often these discussions took the form of lively stories about various incidents the firefighters had been involved in. A few times this also happened in the classroom and then the atmosphere changed:

Firefighter 6: You noticed that in the classroom, didn't you? When someone with experience tells us something then you wake up and listen. Then you learn. And vice versa, when someone without practical experience talks about something....

The firefighters expressed a common point of view about how and what they wanted to learn: They wanted to learn from professionals who could provide them with "real" knowledge, insight and experience:

ALG: You have said that many times now.

Firefighter 5: What?

ALG: That you want experienced firefighters as teachers.

FF: Yes. We do talk about that. That's the problem here. There is no firm link with reality. I mean if you have a class with students who will become dentists and learn how to drill a hole in a tooth, then you don't ask a helicopter pilot to teach them that, do you?

Practical training was appreciated. Increased reference to fire and practical knowledge, increased engagement in learning. Already in the garage when preparing for an exercise on the training ground there was a good atmosphere. The firefighters moved faster, talked more and there was a feeling of expectation in the air. After common emergency response exercises the different groups often had lively discussions with their instructors about what they had done, how it went, and how one possibly ought to have acted. This common reflection in direct connection to a joint incident/experience was felt to be meaningful.

## Discussion

These attitudes, expressed by the firefighters in words and actions, were partly explained by Donald Schön 20 years ago. According to Schön (1983, 1987) professional knowledge is part of a collective knowledge system in which ambitions, language, value systems and much more are shared. Schön says that a skilled practitioner does not apply general theories or general rules in his actions, but instead has access to a repertoire of examples, pictures, interpretations and actions that he has adopted from his own working community or has access to via his own experience.

I think that a constructive meeting between educational text and a work culture requires that the students display openness towards those who want to convey knowledge; but also that the educational institution in question is sensitive to and makes use of the students' action patterns, attitudes and outlooks. This suggestion also applies to language. Here knowledge was silenced when the students were adapting to each other and to the prevailing power structures. The firefighters in my study also silenced the knowledge of the fire protection engineers and the educationalists by rejecting it. The firefighters looked for tried and tested "recipes" to follow. But at the same time they maintained that every work situation is unique and that theory and reality seldom tally. This is without doubt the dilemma of every practitioner. If a theory is to prescribe exactly what is to be done then a large

number of factors must be fixed, stable, invariant and unalterable. This is never the case in an emergency call out and it is never the case in a class room.

The realization of the intentions of the educational text had required a lot of work and support from the teachers. The study implies the need for teachers to be able to cope with the linguistic difficulties that might occur in the classroom when it comes to increasing the student's repertoires with learning from written and abstract texts, to motivate this kind of learning and to scaffold the students by acting as good models for developing language use. This means to me that teachers must reflect on questions like: What does it mean to search for knowledge? What does it mean to read, write, talk and listen in various contexts? What does this mean to me and my students here and now? To listen to and challenge the person learning is important both on an individual and collective level. The group has a huge influence on the individual's creation of meaning. This means that the teacher not only needs to find and operate in the individual's zone of proximal development, but also needs to find and operate in every student group's collective development zone.

A sociocultural perspective allows us to combine physical and mental actions and see the teacher's most important task as facilitating creative understanding by creating a good breeding-ground for both verbal and non-verbal interplay in educational settings. Scaffolding is not a technique to break down and simplify tasks, but rather a subtle interplay that builds on mutual understanding between the various actors in the educational setting. These students were familiar with and appreciated narratives. I am convinced that their work related narratives can function as a bridge between unique incidents and generalized knowledge, between everyday language and abstraction. It can allow practice and theory to meet and pave the way for a developed languaging in which the students can raise their experiences to a common general level with the help of an analytic teacher.

Dialogue, reflection and critical thinking require a breeding-ground and stimulation. I believe that one reason for the rejection behaviour is the fact that neither the fire service nor the educational setting at the time of the study was a natural place of growth for these skills. There was no living reading, writing, analysing, critical examining tradition to grow into, and the majority of the teachers had no pedagogic tools to support the students in a developed written-text based languaging. But some teachers, even some "helicopter pilots" did succeed in stimulating languaging and learning. These teachers took the working situation of the fire fighters as the point of departure for their lessons and created constructive tension in the learning space. Observing such lessons I noted that the atmosphere changed in the classroom and that the students became active and engaged in accordance with the acting of the teachers and the possibilities they created. During such lessons the firefighters used their verbal tools with both engagement and skill. If they were afforded more such opportunities to grow into a functioning verbalised educational practice and in addition were supported in an active reflection of their own study, there would have arisen, I believe, several more fruitful transactions in the educational setting.

## **Textbooks for firefighters**

Study texts should, regardless of form, genre or mode, convey new experiences and insight. Both experience based examples and scientific theories play an important role for learning. But for constructive tension to come about requires that the reader has the option of placing earlier experiences in relation to the new ones. If the firefighters can match the text to their own work experiences then there is a reduced risk that they will reject the text.

As an editor I want to build bridges between theory and practice. I want to make books which create a good breeding ground for learning, by meeting, engaging and challenging the readers. I want to make books which create constructive tension between earlier experience and new knowledge and thus let the firefighters observe their workplace reality with “new eyes” and see more than they did before in unique situations. I want to stimulate them to reflect on their own knowledge and also on the knowledge of others.

Reading and understanding don't depend on linguistic capability only, but also on the readers' attitudes and feelings towards the text. Abstract texts, written by people who are felt to belong to “the others” may hamper reading. Reading is facilitated if the text is related to ones own culture and if the reader is familiar with the content. Reading is also facilitated if the reader feels that the text is interesting and if the reading task is felt to be meaningful for one's future (e.g. Abu-Rabia, 1996, 1998a, 1998b). To me as an editor it is important to find “the contact zone” between the author and the reader. The fact that the firefighters belong to an oral culture and their identification with the profession makes me work with narratives and interesting examples from real emergency call outs and other work related situations together with reflections on what happened, and why. The students' appreciation of practical experience and skill make me introduce the authors, with photos, as reliable with experience from the field, not only from schools or books. The firefighters expressed a preference for textbooks with a clear layout and without compact tracts of text. I use many photos in which they can recognize their own workplace culture, and illustrations which make them see what the author wants to tell them. I have watched these students handle a book and I know that they look at the pictures first. If they find them interesting, they read the captions, and if they are still interested they may read the text near the pictures. This means that they must find a book that looks so interesting that they grasp it and open it. Then the book must not frighten or bore them.

Book design and layout can invite a reader in, but to maintain the reader's attention, there requires something else. A concentrated nominal style, with lack of clear connections between ideas and events, does not promote a deeper understanding (cf. Beck *et al.*, 1995; Reichenberg, 2000 and her article in this volume). I ask the authors to use their “voice”, to come closer and talk to the reader, provide realistic descriptions and examples, set knowledge generating questions, explain, give reasons, narrate with active verbs, use the reader's terminology or carefully explain

their own etc. I work with short introductions and summaries and let important information also appear in “fact boxes” which are easy to find on the pages. Theoretical sections with formulas and equations are often put on coloured background signifying a different way of describing firefighters reality.

But still, the experience-potential that is contained in the text will not transfer to the reader automatically. What matters is not the textbook itself, but what the teacher does with it in the classroom (cf. Horsley, 2002). The teachers in my study had been told to remain in the background and not to interfere when the students were “searching for knowledge”. They did not introduce any textbooks and they did not demand the students to read special chapters in special books. Of course this influenced the students’ reading behaviour. I tell the teachers I meet that textbooks need mediators. I encourage them to read together with the students, to show them books and to demand that the students read them. I encourage them to help the students reflect on the texts. And I tell them to become reflective practitioners themselves and consider reading, meaning making and understanding as didactic who-what-how and why-questions including their own influence on the educational text and its influence on the student’s languaging.

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# **Video Based Classroom Observation Systems for Examining the Use and Role of Textbooks and Teaching Materials in Learning**

Mike Horsley and Richard Walker

## **Introduction**

This paper will report on research using video based classroom observation systems to explore the use and role of teaching and learning resources in student learning. At the IARTEM conference in Bratislava (2003) Horsley and Walker presented a theoretical typology of the role of teaching and learning materials and textbooks in supporting learning. This typology has been used to evaluate video based classroom observation systems for observing the role of texts in learning, and as the basis for emerging research on video based classroom observation studies on the use of teaching and learning materials in teaching and learning. The paper will report on the methodological considerations of video based classroom observation and on the data generated by this approach.

## **Why study teaching and learning resources using video?**

Video offers a promising alternative for studying teaching (Stigler, Gallimore & Hiebert, 2000). Using video analysis to study teaching and learning resources and learning has special advantages.

Video enables detailed examination of complex activities such as the use of teaching and learning materials from different points of view. Video preserves classroom use of teaching and learning materials, by many people with different kinds of expertise, making possible detailed descriptions of many classroom lessons. It increases the opportunity to develop powerful theoretical observational systems to analyze the use of resources in the classroom and learning situations.

Collecting samples of lessons provides information about teaching and learning materials across a range of conditions, classes subjects that can be then subject to analysis. As the Japanese lesson study approach highlights it is important to know what actual teaching looks like and how the use of teaching and learning materials are used, on average, so that national discussions can focus on how teaching materials are being used and mediated by students and teachers.

‘Collection of data by video also presents many challenges such as ensuring that standardized filming procedures are used in all countries; determining what information to extract from the classroom events recorded on the tape and how to quantify the information so that it can be analyzed in a meaningful way; and investing sufficient time and expertise to develop codes to describe the data and to train coders so that the data are reliable’ (Hollingworth, 2003).

Classroom observation systems have become more popular in Australia as a result of the Australian Federal Government's Australian Government Quality Teaching Project. This project based on action research and practitioner inquiry has encouraged many teachers to observe each others teaching and in some cases video it for later analysis. As well, some of the Australian states Departments of Education have developed video coding systems based largely on the work of Newman and Zeichner (NSW DET 2003). These systems are usually termed quality teaching.

Internationally the efficacy of studying teaching and learning resources using video can be identified by following the results if the 1999 TIMMS video study and exploring its conclusions about teaching and learning resources. A clear result of the videoed lessons was that mathematics teachers in different countries mediated their use of textbooks and teaching and learning resources in different ways, despite the fact that much of the text material was similar. Differences in the textbooks of the countries participating were also researched. This paper presents classroom observational methodology for exploring the role of teaching and learning resources in teaching. It presents an observational system that has evolved to take into account the mediation of teaching and learning resources by teachers and the role of teaching and learning materials in the Zone of Proximal Development (ZPD). An original observational system has been modified to include sociocultural explanations of learning.

### **Major Findings of Australian TIMMS Video Study**

Australian researchers in mathematics education (Hollingworth, 2003) analyzed the Australian video materials from the 1999 TIMMS study. As in other countries in the TIMMS study, at least 90 per cent of lessons made use of a textbook or worksheet of some kind. Although the study did analyze the teaching and learning resources used, textbook researchers using a sociocultural approach to the use of learning tools such as teaching and learning resources could have realized additional data and insights. Accordingly, an improved classroom video observational system based on a sociocultural approach to the use of learning materials in teaching and learning was developed.

### **Sociocultural theories and textbook pedagogy**

Changing conceptions of the nature and role of textbooks are very much in accord with sociocultural analyses of textbooks and their use by teachers. The changing conception of textbooks, as indicated in Table 1, is very much related to changing views and theories concerning the nature of student learning. When, under the influence of behaviourist theories, learning was considered to involve the acquisition of knowledge textbooks were primarily vehicles for transmitting knowledge and therefore focussed on the provision of information and congruent activities. Teachers and textbooks were the knowledge authorities and textbooks structured programs of learning for both teachers and students. As learning came to be conceptualised as knowledge construction in constructivist theories, textbooks were

increasingly conceptualised as providing opportunities for students to construct understanding through the provision of multiple knowledge sources; multiple sources provided parallel narratives involving written text and illustrations and allowed students to develop their own understandings. Textbooks also increasingly provided students with activities for learning, reflecting constructivist views of the active nature of learning.

**Table 1** Changing conceptions of textbooks

Roles	Transmission	Constructivist	Sociocultural
Teaching and learning materials e.g. textbooks	Source of information Basis of transmission Knowledge authority Structure of a teaching and learning program	Activity and inquiry source Provision of multiple sources for students student knowledge construction Multiple sources for teacher selection	Scaffolds learning. Enculturates students into disciplinary knowledge and practices Source of inquiry activities Basis of explicit teaching
Student	Passive recipient of information provided in teaching and learning materials and by teacher	Active agent in text inquiry activities	Uses text in collaboration with other students, Engages in authentic activities of disciplinary communities
Teacher	Authority in knowledge domain, Dissemination of appropriate knowledge	Creator of environments for active learning and inquiry.	Collaborative participant in enculturation process. Uses text to create intersubjectivity, establish common student goals, Identifies and utilises texts to create ZPD for students Uses materials to enculturate students into key disciplinary understandings

Sociocultural theories increasingly come to dominate understandings of the nature of learning, and as sociocultural analyses of textbooks become more prominent. Textbooks are likely to increasingly be seen as enculturating students into disciplinary knowledge and practices, as the basis of scaffolded learning experiences and explicit teaching, and as the basis for collaborative student activity. Table 1 indicates the roles of teachers and students have also changed as theories of learning have changed.

### **Incorporating sociocultural approaches to learning into the The TEXTOR Video Observational Methodology**

The TEXTOR (textbook observational record) was first developed by Horsley & Laws (1993) for use in classroom observational studies of textbook and resource use. The value of this observational device in classroom research has been acknowledged by Pingel (1999).

The TEXTOR schedule sought to identify the following aspects of textbook and learning material use:

- how students read the text
- whether pre-reading or activation and assessment of prior learning took place
- what tasks were set by the teacher
- the teachers purpose for using the texts in class
- how students used the text in the classroom
- the length of time texts were used in teaching and learning
- the use of texts for homework
- how the student gained access to texts
- the details and condition of the materials being used
- the length of time taken to issue and collect texts

Although this observational instrument was not developed according to a sociocultural theoretical framework, it does lend itself to such an analysis and interpretation. Observational schedule items such as student reading and pre-reading activities provide insights into teacher scaffolding of textbook activities and teaching and learning materials, while items concerning teacher set tasks and student learning activities provide an understanding of the mediated use of textbooks in the classroom. Other schedule items provide information on the availability, utility and appropriateness of texts used in the classroom.

Application of sociocultural components to the TEXTOR observation system allows other key aspects of the role of teaching and learning materials, modification of texts. Text mediation by teachers and the zone of proximal development to be explored. The TEXTOR observation system was modified to include

- teacher – student collaboration
- teacher modification of text and teaching and learning resources
- scaffolding
- student – student collaboration

The augmented TEXTOR is now used to study these key aspects of learning and teacher modification of teaching and learning resources.

Novice and expert teacher use of teaching and learning materials study was conducted using the adapted TEXTOR video based observational methodology.

A novice and expert teacher study on their comparative use and mediation of teaching and learning materials was conducted. The use of teaching and learning

materials was explored in 12 classroom lessons of an expert teacher, compared to 10 classroom lessons of seven novice teachers.

The study demonstrates that novice teachers spend considerable time and energy in locating, selecting and preparing text resources for their lessons. There were, however, many differences in the way these teachers used these resources when compared to the expert teacher. Although the novice teachers also scaffolded student use of text material and learning resources through various activities, they spent far less time in this scaffolding process than the expert teacher, and the nature of their scaffolding differed from that of the expert teacher. A significant proportion of the time novice teachers spent in scaffolding and pre-reading activities was spent in focusing student attention and explaining to students the purpose and structure of the lesson. There was less emphasis on alerting students to the underlying structure of the knowledge sources and teaching and learning materials, and significantly more emphasis on the topic and content that formed the outcomes of the lessons. The expert teacher's scaffolding, on the other hand, was far more focused on using the materials to help students understand the knowledge to be learned. Novice teachers scaffolding was far more focused on the content itself.

These differences in scaffolding strategies also reflect differences in the materials selected, procured and photocopied for lessons by expert and novice teachers. The expert teacher, with greater pedagogic experience and knowledge, chose teaching and learning material that best represented disciplinary understandings and which met the learning needs of her students; often these consisted of multiple sources of knowledge and were presented in collage format. She rarely made use of activities or exercises from textbooks. While the novice teachers also made use of multiple sources from texts, they made much greater use of textbook activities, exercises, problems or questions. This reflected their more limited pedagogical experience and knowledge. The expert teacher, on the other hand, had her personal fund of activities and exercises which she could draw upon as needed.

There were also significant differences in the use made of textbooks and learning resources by expert and novice teachers. Novice teaching strategies often featured students working individually to complete activities and tasks while the expert teachers' teaching focussed on collaborative and group use of texts and learning resources. In novice teacher classrooms there was far less emphasis on teaching and learning strategies that scaffolded and unpacked the teaching and learning materials for students, far less time was spent on teaching students to deconstruct the literary and structural aspects of knowledge sources, and far less collaboration and joint construction of meaning took place between the teacher and the students and amongst students themselves.

From the perspective of a sociocultural analysis of expert and novice teacher use of textbooks, it is clear that novice teachers were much less concerned with using texts and learning resources to enculturate students into the academic disciplines taught. While the expert teacher used text material to provide students with essential disciplinary knowledge, including multiple knowledge sources, novice teachers

mostly used texts and learning resources as sources of activities and exercises for students. Novice teachers provided students with much less scaffolding than expert the expert teacher, and the nature of this scaffolding differed in important ways. Novice teachers were also much less likely to use collaborative teaching and learning approaches than the expert teacher, and they were much more likely to have students working individually and unassisted in their classes. This suggests that novice teachers were much less likely to create zones of proximal development for their students so that their students were much more likely to be working in the zone of actual development.

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# **Review and Analysis of Research and Initiatives on Curricular Materials on Honduras**

Jesús Rodríguez Rodríguez

## **Introduction**

The purpose of this paper is to present some reflections regarding the programmes & research on curricular materials in the Honduran context. In our opinion and considering the recent work on the subject, this document addresses the urgent need to help systematise the policies and activities carried out in Honduras regarding curricular materials. In general terms this work is the result of an invitation by the National University of Honduras to work on issues related to curricular materials and I took advantage of that to get an overview of the situation of curricular materials in Honduras.

The elaboration of this paper involved a series of activities. First of all, a review of articles and research on curricular materials. Secondly, the experience of collaborating with teachers at the Teaching University and at the National University of Honduras, as well as lecturing in Tegucigalpa and in San Pedro Sula. Special mention should be given to the contribution of the interviews and visits to a variety of institutions and schools; most notably those with directors of the Ministry of Education, and schools in the urban and rural areas of Tegucigalpa, Progreso, Tela, Ceiba, Trujillo, the Bahía Islands, Rincón Del Buey, San Antonio Tabesco, and La Laguna among others. I must also mention the interesting conversations with Spanish volunteer teachers in the region of Copan Ruinas.

## **Main Initiatives, Programmes and Research Regarding Printed Curricular Materials**

### ***Initiatives and Programmes***

Among the main Initiatives and programmes carried out in Honduras, we would like to point out those that are a part of International aid policies aimed at promoting literacy and the development of appropriate strategies. We would also like to mention those programmes which have been run by the national government. From these, those we considered to be most representative were selected based on how widespread the programme was and on the availability of publications analysing the programme, seeing as in Honduras it is not easy to find centralised information systems or databases on the topic.

*1. UNESCO/Germany Project, 507/RUA/11, "Elaboration of Texts and Reading Materials for a Basic Education within Central America and Panama"*

This initiative is directed toward aiding countries in the sub-region by improving the skills of those responsible for planning, preparing, and elaborating texts and reading material, exchanging field experiences, promoting reading and a Sub-Regional Network of co-operation for elaborating and producing texts and reading material for a primary education.

The aim is to contribute to The Educational Project in Latin America and the Caribbean, as well as the commitments adopted under The World-wide Declaration For All and the corresponding framework for action to satisfy learning needs. Through this Project, it was sought to make materials available to the producers and distributors of school texts that would act as "Self-training Modules", in such a way that they could become tools for fostering skills and activities associated to improving the quality of school texts.

*2. First National Fair on Scholastic & Didactic Materials*

In Project AID5220273 "The Efficiency of Primary Education" Component number 2, which is entitled "Enabling In-service Teachers", establishes that the areas of enabling for Primary School Teachers shall be the following: optimising teaching techniques, methodological & scientific capabilities, community participation and the use of school texts.

In response to what the Project establishes in this component, its implementation team (The Centre for Updating Teaching) undertook a study on the enabling requirements for in-service teachers regarding technical-methodological aspects. They concluded that one of the factors explaining poor academic performance is the scarcity of didactical material available in schools. The materials that are used are sometimes elaborated by the teachers themselves by drawing on resources from the Community or materials usually purchased at high cost in local shops.

*3. Materials for Adults*

In 1981 the government of Honduras through its Ministry of Public Education and the United Nations agreed to put into place at the Francisco Morazón Teaching College a "Project for Education in Populations" for the school and extra-curricular levels. The section on adult education led to the production of the following: a manual for the education of new readers and 13 didactic guides for the accelerated primary education of adults.

*4. Programmes developed in Indigenous Communities*

A large part of the Honduran population belongs to indigenous communities. There are currently a number of projects and programmes in place which are aimed at recovering the culture of these ethnic groups, however, some of these projects focus only on the process of production, analysis, and selection of materials. Nevertheless,

the daily reality of indigenous peoples, their problems, and their culture are rarely reflected in national textbooks or other curricular materials.

### **Research**

We now go on to describe several of the most significant research studies carried out in Honduras focusing on analysis and evaluation of curricular materials in this context.

#### *1. Primary Education Efficiency Project (PEEP)*

The main objectives of this program includes the development of educational material such as School texts and the enabling and updating of teachers regarding correct usage. Moreover, this project has set up a practical educational research component for the achievement of its practical goals. The purpose of the study was to provide the Education Ministry with policy options regarding professional development activities for Honduran primary school teachers.

#### *2. The Availability, use and quality of didactic materials and their relation to school performance*

One of the main objectives of our work was to determine the availability of didactic materials in Honduran primary schools and ascertain their use in teaching-learning practices. This Project was undertaken by The Unit for Measurement of Educational Quality (UMCE) of the Francisco Morazán National Teaching University (PROMEB) as a part of The Project of Basic Educational Improvement sponsored by the Secretariat of Education. Out of the 20 conclusions presented by this study, we have selected the following:

Textbooks are the principal didactical material available to Honduran primary schools, and there are probably two reasons for this. The first is related to the methodology used in classrooms and the other is that official textbooks are never missing in state educational institutions because they have been supplied by the government in appreciable quantities, despite the scarcity of other books, notebooks, teacher's guides, and booklets.

Although our analysis detected a general lack of so-called "other didactic materials", more of these materials and a wider variety of resources are available in urban schools.

Most of the educational mediating elements for classrooms have been provided by either school teachers, or pupils and teachers.

Many researchers have suggested that because of the scarcity of resources in most Latin American education systems, textbooks should play a primary role in learning. Therefore, the application of study results regarding textbook design principals may significantly increase the efficacy of educators, textbooks and students.

## **Main Problems Related to Curricular Materials in the Honduran Context**

*Teachers Absenteeism.* One of the basic problems with respect to teachers is their lack of consistency in attending class. Among the reasons that have an influence on this problem we would like to point out the following: low wages, lack of incentives, scarce training, and lack of attendance control by the government. Given this background, textbooks provide some sense to the activities that teachers are supposed to carry out. These materials are used as a type of “safety measure” against potential problems among members of the educational community, in such a way that the preparation of lessons and planned activities is “facilitated”.

*The Condition of Schools.* It is difficult to imagine that great improvements in the use of Curricular Material in Honduras are possible when a visit to schools in that country reveals a lack of (or even potential for) libraries, special purpose rooms, personnel qualified to advise on the selection process, and meeting rooms. This situation is even more desperate in rural schools. It is common to find schools without desks, without tables on which to place resources, and without furniture in which to store materials. It seems utopian to think of having electricity for a projector or computer when many communities do not even have drinking water.

*Lack of school budgets for the acquisition of Curricular Materials.* The lack of a clear awareness of the need to think about and discuss the role of materials in the curriculum leads to the present situation in which concern for materials basically occurs only at the time of making decisions in the classroom. On their own, teachers are “expected” to give “meaning” to their materials in the educational context, and use those that they consider most appropriate, or, instead, limit their activities to the specifications in the materials provided by the government. Specific mention and measures concerning curricular materials are rarely present in school educational and curriculum plans. Similarly, school budgets -that are generally quite small- rarely mention a specific allocation for purchasing such materials.

*Materials deficit both in quantity and in quality.* There is no doubt that in certain school contexts in Honduras - such as indigenous populations- teachers and pupils lack even minimal materials. This means that students have to worry about sharing materials with their classmates.

It is pitiful to witness, as we did on several visits to villages, how students had to return books at the end of the school year and how many times they were penalised for dirtying them at home. It is hard to maintain materials in good condition when homes often do not have electricity, running water, or even a table and when the same space is often used as a kitchen, bedroom and reading room.

In addition, teachers are responsible for how the students use the textbooks. This fact may seem irrelevant, but it commonly affects the type of activities that teachers and students carry out with materials.

*Improvised Publication.* One of the main problems detected in Honduras involves the publishing process. Thus, some of the principal International initiatives that are being undertaken in this country involving Curricular Materials focus on the pedagogical training of current and future publishers of educational materials; for example the UNESCO/Germany's Project (1994)

The process of editing and publishing educational materials requires efficient management and co-ordination so as to produce materials with an acceptable level of quality in terms of illustrations, design and so on. Many developing countries lack the resources required to produce and distribute the textbooks that are needed. Furthermore, it seems that measures have not yet been taken to correct this situation. According to Altbach (1983, 331), "Good textbooks require planning, preparation, financing, testing and distribution; they require great quantities of paper, good printing presses and success depends on the co-ordination of economic, government, publishing and printing resources."

*Lack of Database on Materials.* This is a problem common to many educational systems, and it is especially serious in a country like Honduras. Therefore, it is necessary to establish which published materials actually exist in the country and which are available in the various regions and schools. Currently, schoolteachers are unaware of a large part of the publications adapted to the indigenous context which could be useful for teachers and students of these regions in their teaching/learning processes.

Finally, other problems regarding curricular materials affecting this country and which appear in the study by Pearce (1983) include the fact that parents do not have sufficient economic resources to buy books and that this has a terrible affect on school attendance. Also, numerous countries have come up against obstacles and resistance when starting to use their national languages in education instead of old colonial languages. There is also a lack of competent translators and services for their training. The estimated durability of books from a physical and pedagogical point of view is another important concern because it has an influence on the financing of publishers as well as on the purchase of educational books, especially in developing countries which do not tend to have experience in the matter. School publishers run into great difficulties to establish realistic timeframes and the decentralized stock of books often increases cost and worsens supervision problems, but improves the availability for book sellers.

## **Recommendations and Researched Proposals**

### ***Recommendations***

For the purpose of guaranteeing minimum standards of quality in the process of analysis, selection, and utilisation of printed curricular materials in Honduras, we propose a number of indispensable recommendations.

- *An interdisciplinary Committee is needed to review textbooks and guarantee that each area receives an appropriate and equal treatment.*
- *State policies should be defined regarding the production of curricular materials in order to avoid arbitrary production without including minimum contents.*
- *A unit should be set up within the Ministry of Culture for the purpose of controlling those materials produced by educational institutions in order to guarantee that they meet minimum standards of quality.*
- *The activities involving curricular materials should be professionalized.*

One of the greatest challenges in Honduras is to professionalize teaching activities involving curricular materials. This is surely not unrelated to other factors mentioned in this paper. The present proposal should make teachers more aware of the importance that curricular resources have on the educational process and of their ideological power. We hope that this leads to more collaborative research activities regarding materials.

*Use of "Evaluation Guides".* We consider the distribution of evaluation guides to be indispensable. Moreover, activities should be included in training courses to show teachers how to use materials adequately.

*Materials should address the indigenous diversity of the country.* Many of the teachers that go to indigenous communities lack the economical resources to survive there. Thus, it is a common experience that the community itself has to provide teachers with food and shelter. In many cases a structured community organisation is necessary for their "upkeep". In this setting, teachers find themselves without practically any materials at all, and the materials that they may have do not address the indigenous reality they are immersed in<sup>1</sup>.

*Improving the Library System.* Although it may seem utopian and difficult to carry out, it would be advantageous to provide the country with an effective library system that would allow school children to access a minimum amount of resources and materials. It should be remembered that one of the most serious deficiencies is that educators and students lack varied materials. The existing libraries are generally not technically or administratively in contact with each other, and each one follows its own criteria. The staff that work in these libraries do not present any specific training. In these circumstances, users receive a poor quality of services.

### ***Proposals for Research***

Having reviewed some of the main problems and difficulties associated to curricular materials in Honduras, we go on to describe areas of research which in our opinion could be useful for orientating political, administrative, and educational decisions.

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<sup>1</sup> I had the opportunity to witness this fact during a visit to an indigenous community where a teaching intern on his first day meeting the community, expressed his willingness to teach class in exchange for the upkeep offered by the community and a measly salary.

*The need to analyse the use of materials in border areas.* One of the main problems detected in Honduras is the constant "movement" of the political borders of the country. In recent years, Honduras has seen several changes in its borders. Teachers, parents, students, publishers, and so on live in the midst of border tension such that they are unsure about which materials should be used. The impression exists that using materials pertaining to the more prosperous country may bring along better training possibilities as well as the possibility of working in that country in the future. This can be deduced from the experience of educators teaching in these border regions.

*Ideology transmitted by materials.* A large part of the materials used in Honduras belong to the "First World". These materials generally arrive under the pretext of "charity" seeking to relieve the lack of minimal resources. Nevertheless, it is usually the case that neither their content nor approach addresses the Honduran reality. Instead, these materials reflect a reality with meanings and values that are quite different from the context in which they are supposed to be used.

It is necessary to investigate the socialising effects of these materials and how they may be contributing to distorting the study of history in the areas where they are to be used.

*The use that is made of these materials.* Although a relatively wide range of bibliographical resources are currently available internationally on how teachers use materials (Area, 1991 and 1994; Borre, 1996; García, 1991; Mondedero, 1999; Paredes, 2000, among others), there are actually very few studies on the use of materials in Honduras. Although several studies have been carried out in this country on the use of materials in the classroom (Galo *et al.*, 1994), we consider that there are still many questions to be answered in this area such as the following: How are materials used by indigenous peoples? What interaction occurs between materials pertaining to other cultural realities and materials produced for the Honduran reality? These and other questions are still unanswered and they require an analysis with the aim of understanding what is currently going on with materials.

*Free textbooks.* As a result of a variety of strategies, in recent years there have been a large number of promotional campaigns in Latin American countries involving so-called "free textbooks" or "free material". It would be interesting to analyse how these materials are distributed, what types of material are offered for free, what contents and ideology they transmit, and so on. Likewise, it would be wise to at least be aware that, although this free material is sometimes presented as the "great salvation", they may also bring along a series of problems affecting booksellers. As Pearce indicates, "...booksellers need capital to buy, and furnish shops, and to gather a stock of books. It is often difficult for them to obtain this capital, because banks are reluctant to extend loans when the stocks of books are the only collateral." (1983, 357).

The need to compare the texts of the materials used in bilingual schools, state city schools, private city schools, and state rural schools. The general opinion of teachers is that there are clear differences in terms of quality and objectives.

## Conclusions

The purpose of the present study has been to describe some of the principal problems facing curricular materials in Honduras. As we have previously mentioned, the initiatives in this area are basically limited to granting free textbooks, campaigns for the promotion of textbooks, and so on. Apart from the criticism we have made regarding the contents and structure of books available in this country, there is without doubt a critical scarcity of materials and economic resources allocated to the purchase of materials as well as of training activities for developing design and selection strategies.

We would like to end with some final reflections to orient future decisions on curricular materials:

- How can a child find "utility" in a printed material, when so many of them are forced for a variety of reasons to beg in the streets and do not even have enough time to attend class?
- How can an indigenous child enjoy reading a textbook at home when the only light available in the evening comes from the fire his mother has prepared to prepare food for an average of 6-7 children?
- How can teachers possibly purchase good books or participate in training activities when they have to work two or three shifts and maintain other jobs just to earn a living.

Perhaps many of these problems are well on their way to being solved, others may be on the right track and we hope that the rest will not have to wait too long. Our aim has been to at least express the doubts and concerns stemming from our work with these materials. It is likely that what is presented here is only the tip of the iceberg in so far as the situation and problems. In any case, it is our desire to delve deeper to discover the aspects that can contribute to improving the work with curricular materials.

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# Reading to learn from expository texts

Monica Reichenberg and Sten Gunnar Axelsson

## Introduction

What Swedish pupils read and how they read change from elementary grades to secondary grades. In grades 1-2, narratives are mostly used to teach reading skills. In grade 3 the pupils are introduced to expository texts and from grade 4 there is an increasing emphasis on this text type. Expository texts differ from the narratives and place different demands on the reader in that narrative texts are personal and include such elements as theme, actors, plot, and conflict. Thus, the texts are often exciting and it is rather easy for the young reader to become engaged and identify herself with some of the actors. Expository texts present facts, opinions, problem-solution and are mostly impersonal. It is not that easy for the reader to feel engaged and involved (Lundberg, 1984).

Studies have demonstrated that many young readers – although they decode adequately well – have difficulties making meaning from expository texts (Skolverket, 2004). Having difficulties with a text can give the pupils the notion that they as poor readers are to blame. More seldom they seem to blame the author. Maybe it has not even occurred to them that behind the texts there is a fallible author. Unfortunately, the comprehension of expository texts has not been in focus for educational research in Sweden in recent years, although an increasing number of pupils seem to have difficulties dealing with the literacy demands placed on them (Skolverket, 2004). There is certainly a need for more research in order to understand how the pupils process expository texts and whether their reading comprehension could be improved.

## Deposing the authority of the text

International research over twenty years has shown that instruction in comprehension can have beneficial effects on pupils' comprehension. The instructions have taken several forms, e.g. talking about texts in the classroom: *Instructional conversations* (Goldenberg, 1993), *Reciprocal teaching* (Palincsar & Brown, 1984), *Questioning the Author (QtA)* (Beck *et al.*, 1996). QtA is especially interesting because the text is viewed as the product of a human author who is potentially fallible. Armed with this view, pupils can view texts as less impersonal, authoritative, and incomprehensible, and realize that texts are open-ended and incomplete and that they, as readers, have to contribute something to complete it, for instance by asking the author hypothetical questions. QtA deals with the text through teacher-posed author-oriented queries, such as "What is the author trying to say" and "What do you think the author means by that?" The purpose of these queries is to assist pupils in their efforts to understand when they are reading a text

for the first time. QtA takes place on line, reading segments of the text and discussing the ideas and events encountered. The teacher has segmented the text where the pupils may be expected to have difficulties. The pupils stop reading in this place and collaborative construction of meaning is performed by questioning the author. Stopping to discuss a text also allows readers to consider different alternatives. Questioning begins by eliciting what the author says and what that actually means and how it connects with other text ideas. Thus, QtA encourages collaborative discussions in which pupils are forced to deal with ideas in order to construct meaning. Wrestling with the text during reading gives pupils the opportunity to learn from one another, to question, and consider alternative possibilities, and to test their own ideas in a safe environment (Beck *et al.*, 1996).

### **The aims**

The overall aims of the present study were to investigate how teachers and pupils talk about expository texts in the classroom; and to investigate to what extent structured text talk (QtA) affect teachers' and pupils' talk about expository texts. The following more specific questions are focused on:

- a) What kinds of questions do teachers regularly ask when reading expository texts in the classroom?
- b) How do pupils regularly respond to these questions?
- c) What strategies do the teachers regularly use to get the pupils to interact actively with the text when reading?
- d) What possible effects can structured text talks have regarding teachers question types and strategies, pupils' answers and interaction with the text?

Our main focus was on poor struggling readers. The QtA approach of segmenting the text and the idea of questioning the author was adopted. However, there are some differences between the present study and Beck *et al.* (1996). The pupils in the experimental groups were instructed to skim the text first, to get a general view of the material before the text was segmented. Furthermore, unlike Beck *et al.* the pupils read the texts in small groups.

This approach has been used in another study by Reichenberg (2005) with 17 year old students, but at that time without control groups.

### **Method**

#### ***Participants***

Six groups of pupils – four experimental groups and two control groups– participated in the present study. For practical reasons it was not possible to get four control groups<sup>1</sup>. The average age of the pupils was 10.3 years at the beginning of the

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<sup>1</sup> Since the study was performed in country schools the number of classes to choose from was limited.

study, and they attended grade 4. There were six pupils in each group – two good readers and four poor readers. Good readers were included to facilitate discussion and give the poor readers cognitive courage (Lundberg, 2005). The pupils were selected on the basis of a screening procedure including two tests of reading comprehension together with teacher estimation of the pupils attitude to reading, their ability to reflect and infer, and their propensity to superficial reading. The tests and the teachers' ratings indicated that the poor readers had difficulties to understand what they read although they could decode adequately. The pupils attended four schools in the countryside in the Swedish county of Västra Götaland.<sup>2</sup>

Six teachers, four female and two male, also participated. The teachers were selected because they were interested, not because they were nominated as exemplary. Five of the teachers had long experience of teaching from 16–33 years. Only one of them, a teacher in the control group, had just 4 years of teaching experience. The names of the pupils and the teachers are fictional.

### ***Material and Procedure***

Data collection began with videotaping six regular lessons, one for each teacher in order to observe the teachers' question types, strategies, pupils' answers and interaction with the text. All teachers were instructed to talk with their pupils between 20–30 minutes about a text taken directly from a textbook. Since it was their first videotaped session, it seemed fair that the teachers had a text they felt comfortable with. The pupils had not read the text before.

After the regular lessons, the teachers in the experimental groups were invited to participate in seminars led by the senior investigator. In these seminars the regular lessons were analyzed. Furthermore, current reading research about reading comprehension, reading strategies, different question types, etc, was discussed. The teachers were also introduced to QtA. Between the seminars QtA was practised in the classroom before videotaping each experimental group a second time. Then there were seminars again where the teachers' experiences of QtA were discussed before videotaping each experimental group a third time.

Each of the control groups continued with a second and a third videotaped regular lesson. In all 18 lessons were videotaped.

In the first QtA lesson the pupils read a text called "In the classroom" (281 words). The text dealt with pupils in a Swedish school at the beginning of the twentieth century. In the second QtA lesson, a text called "Plenty of jobs in industry and many new-born babies" (262 words), which dealt with how society changed during the fifties and sixties (Stark & Skiöld, 2000), was read. The texts were chosen by the

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<sup>2</sup> The two tests were Ängelholmsprovet (Franzén, 1996) and SL 40 (Nielsen *et al.*, 1997). Each pupil's ability to identify the written word had been tested at the beginning of the term. According to ratings done by Sten Gunnar Axelsson, special education need coordinator, the poor readers were able to correctly identify the written word.

senior investigator from a textbook which were not used at the selected schools and the pupils had not had the opportunity to read within the subject area which the texts addressed. The teachers were introduced to the texts one week prior to videotaping. Characteristics of these texts were that they were relatively information dense with several gaps in them. There were also many infrequent words and concepts in the texts. Consequently, poor readers were expected to encounter difficulties in gaining a deeper understanding if they were to read the texts, by themselves silently in the classroom.

The teachers, including those in the control groups who read the same texts, were introduced to each text one week prior to the videotaping. All data was collected in the spring of 2005.

## Results

First, the teachers' question types and the pupils' answers will be presented. Then, representative excerpts from the text talks illustrating the teachers' strategies and the pupils' interaction will be given.

### *Question types and pupils answers*

From earlier research and experience (Reichenberg, 2005) four main questions and a few subcategories could be identified:

1) *Factual*, where the pupils just have to retrieve information from the text to be able to answer the teacher's question, e.g. "Does the bat have a good eyesight?" *Specific factual* questions where the teachers encourage pupils to express themselves in their own words, e.g. "The segment you have just read aloud, what was it about?"

2) *Check knowledge*, where the teacher wants to check if the pupils know, for instance, the meaning of a word or if they have the necessary prior knowledge, e.g. "For how many years do you have to attend school?"

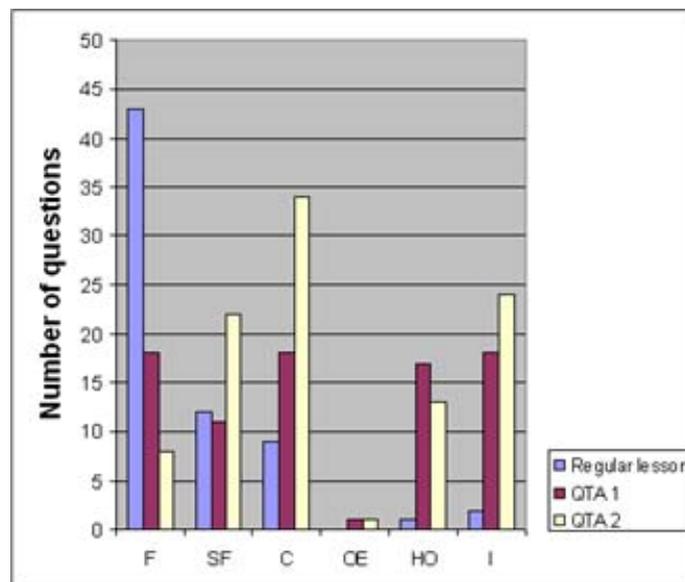
3) *Open-ended*, where there are several possible answers to the question and the answer is not to be found in the text, e.g. (Dysthe, 1996). *Half-open questions* are included here, e.g. "Is there anything in this passage that the author has omitted?"

4) *Inference questions*, where the pupils have to read between and beyond the lines to be able to answer the questions, e.g. "Why do you think the children had to finish school and start working?" (See Cain & Oakhill, 1999, for a further discussion of inferences).

"Question" here refers to any utterance by the teacher related to the act of questioning the pupils. Procedural questions, rhetorical questions and discourse maintenance questions, (e.g. giving turns, "Does anyone else have any suggestions?") and questions not related to the text were left aside. Repeated questions, i.e. questions repeated or paraphrased, were coded as one (see also Janssen, 1996). The senior investigator categorized the teachers' questions. To

determine reliability two independent raters got the different questions described according to the investigator's definitions. However, the two raters were not allowed to see the investigator's categorizations. In order to give the raters exactly the same information the definitions were written down. Then, independently of each other, the raters categorized the questions. There was a 96 per cent agreement between the investigator's categorizations and the raters.

As can be seen from Figure 1, factual questions dominated during the regular lessons in the experimental groups. There were only two inference questions and one half-open question. Regarding the control groups the check knowledge questions and factual questions dominated. Both teachers asked one respectively two inference questions.



**Figure 1.** Teachers question types. F (factual) SF (Specific factual) C (Check knowledge) OE (Open-ended) HO (Half-open) I (Inference)

One tendency observed during the regular lessons in the experimental groups was that the teachers asked many questions where the pupils just had to answer with one word:

- Teacher Berg: What do the cows on this special farm eat?
- Henrik: They drink 100-150 litres a day.
- Teacher Berg: What do you think they eat?
- Henrik: Some hay and fodder.
- Teacher Berg: Is there anyone else that knows what the cows eat?

Henrik: Oats.  
Teacher Berg: Oats, yes.  
Emma: Pellets.  
Teacher Berg: What are pellets?

And so the text talks went on in the same manner and this was typical for all regular lessons. The same tendency could be found in the control groups.

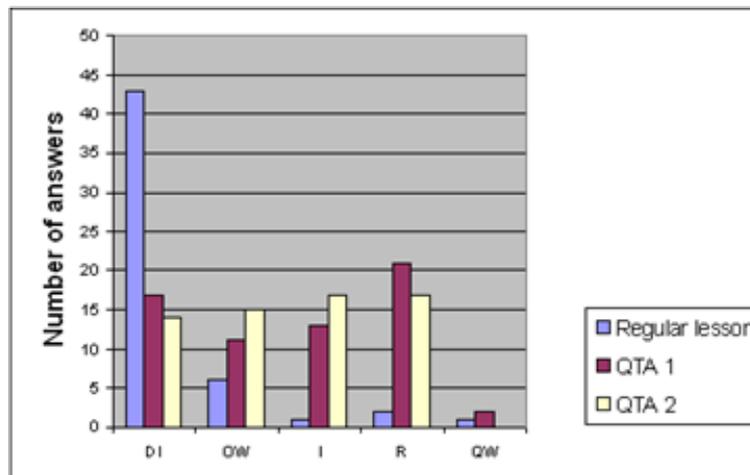
The number of teacher questions increased during the QtA lessons (Figure 1). There was also a dramatical change regarding the question types. The number of purely factual questions had decreased. Instead, there was an increase in specific factual questions. There was also an increase in check knowledge questions, but contrary to the regular lessons the teachers checked not only the meanings of words but also if the pupils had the necessary prior knowledge. Almost half of the questions were inference- and half-open questions. Regarding the control groups the number of teacher questions decreased during the second and third regular lessons. The teachers asked no specific factual questions and few half-open questions. One of the teachers asked very few questions related to the text. He also had a tendency to answer the question he asked himself.

### ***Pupils' answers***

From earlier research and experience (Reichenberg, 2005) five types of answers could be identified:

1. *Retrieved information* directly from the text, word by word
2. *Retrieved information* from the text but in the pupils' own words
3. *Inferences*, i.e. read between and beyond the lines.
4. *Reflections*, includes commentaries about the text and pupil initiated questions, e.g. "Why were the schools in the countryside that small?"
5. *Questions* about the meaning of words

Repaired answers, i.e answers repeated or paraphrased, were coded as one. The investigator categorized the pupils' answers. To determine reliability the same test was performed as described above. There was a 98 per cent agreement between the senior investigator's categorizations and the raters.



**Figure 2.** Pupils' answers: DI (directly from the text), OW (own words), I (inference), R (reflection), QW (Question about words)

Figure 2 shows that most of the pupils' answers were taken directly from the text during the regular lessons. Very few of the pupils chose to express themselves in their own words. They made just one inference and two reflections. Furthermore, none of them either questioned the author or commented the text. During the QTA lessons the pupils' answers had undergone a change. The pupils' propensity to retrieve answers directly from the text had decreased. More than half of the answers were inferences and reflections. Regarding the control groups there were few pupils' answers in one of the groups because the teacher mostly gave the answers himself. In the other control group the pupils made some inferences and reflections.

#### *Teachers' strategies and pupils' interactions with texts*

The teachers made, on the average, between six and nine segmentations in "In the classroom" and between six and eight in "Plenty of jobs in the industry and many new-born babies". Every segment included about 37 words.

The teachers applied different strategies to make the pupils grapple with text ideas. At each segmentation, they most often started by asking a specific factual question and then a collaborative discussion took place where the author was apostrophized. To make them read between the lines, teacher Skog applied the following strategy:

- Teacher Skog: [...] Is there anything in the text that the author has omitted?  
 Alva: I think there should have been explained why there were such big windows in the newbuilt houses and why it was so important with big bathrooms...  
 Amanda: I think so too because now we just got an incomplete sentence, like "my name is" and nothing else.

The pupils actively contributed to their peers' ideas during the QtA lessons. As can be seen from the excerpt below they succeeded in finding out the reasons why not every single class was allowed to have their own classroom. Fredrik and Per were good readers but Hugo was a poor reader with a low self-esteem who spoke very quietly. The teacher used the strategy of marking, i.e. she drew the attention to what Hugo had brought up in order to emphasize its importance. Bringing a pupil's idea on to public arena is important because it represents a first step in using pupils' ideas for developing discussion.

- Teacher Skog: The text states that the classes consisted of pupils of different ages. What does that mean?
- Per: That there were not very big schools and one single grade could not be alone in the classroom but had to be there together with other grades.
- Teacher Skog: Alva!
- Alva: I agree with Per but maybe there were so many pupils in one single classroom because they did not have enough teachers.
- Teacher Skog: Fredrik!
- Fredrik: They did not have enough classrooms.
- Teacher Skog: Maybe.
- Fredrik: And not enough pupils in each grade.
- Hugo: Maybe there were just a few pupils in each grade.
- Teacher Skog: Will you repeat ...
- Hugo: Maybe there were not so many young pupils but many older ones so they had to share a classroom.

When all segments were read the teachers most often made a final summary. This was not done in the control groups. The time spoken about the text in the classroom also changed from on average 16.5 minutes during the regular lesson to on average 31 respectively 24 minutes during the QtA lessons. The figures indicate that segmenting a text and dealing with text ideas on-line is more time-consuming than just reading a whole text through silently in the classroom and then discuss it.

## Discussion

In this study, structured talks (QtA) online affected the way that four teachers and their pupils talked about texts. The results demonstrated that the teachers not only asked more questions during the QtA lessons but also that the question types changed. The number of purely factual questions decreased. Instead there was an increase in the number of inferences, half-open questions and specific factual questions. The increase of teacher questions as well as the changing nature of the questions was probably a consequence of the teachers' reflecting on their lessons by viewing the tapes, reading transcripts, discussing the effects of different question types and teacher strategies etc. In the control groups the number of teacher questions' decreased during the second and the third regular lessons.

The changing nature of teacher questions produced a change in the pupils' answers. During the QtA lessons all pupils, both good and poor readers, interacted more

actively with the text when reading and they inferred from and reflected on the content. The author was also questioned on several occasions. Consequently, the time spent on discussing the text increased during the QtA lessons. The pupils' active involvement in the structured text talks was probably a consequence of the spread-out discussion which facilitated comprehension and interpretation of complex sections in the texts. Dealing with a complex expository text in the course of reading may be particularly effective for poor readers. It can scaffold their comprehension processes by providing opportunities for them to reflect upon events and ideas, to scrutinize connections as they are encountered in the expository text being read. The present results are in accordance with Beck *et al.* (1996). The pupils in the control groups seldom had the opportunity to wrestle with text ideas and they never questioned the author.

During the QtA lessons the teachers – in contrast to those in the control groups – were also more attentive to where the pupils were in their construction process, their prior knowledge, etc; and that affected the way they directed the talk about the text. The results are for the most part in line with Beck *et al.* (1996).

A limitation of the study is that there are just two control groups. Another limitation is that one of the teachers in the control groups had less experience from teaching than the other teachers. This fact may have affected the teacher's way of questioning and use of strategies.

The pupils in the present study attended grade 4. The majority of them had inadequate reading strategies in the beginning of the study. However, the study indicated that they had the potential to develop into good, active readers. This underlines the importance of putting the teaching of reading comprehension on the agenda and start asking inference and half-open questions already in grade 3. Inference questions are necessary if the teacher wants the pupils to get a deeper understanding of the text. By asking such questions, the teacher is likely to become a model for the pupils when they have to question the author on their own.

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## **Workshop 3**

### **Quality, Evaluation and Selection**



# Textbooks as Learning Resources

Anthony Haynes

During my time in publishing I have become interested in assessing textbooks from a structuralist point of view. Most publishers devote time and money to the assessment of the content of textbooks. They frequently employ subject experts for that purpose. However, they tend to devote less attention to the assessment of textbook structure. This chapter demonstrates one way of assessing structure by drawing on educational theory.

The focus will be on textbooks published for undergraduates in Literary Studies. I have chosen this area deliberately. I write at a time of considerable pessimism in the industry concerning the current state and future development of the textbook market and yet, behind the backs of the pessimists, some publishers have quietly been growing their programmes by colonising subjects not previously regarded as textbook markets at all. Literary Studies, in particular, has in recent years (at least in the UK) seen a burst of innovative textbook publishing.

I shall, in particular, focus on the second editions of Peter Barry's *Beginning Theory*, Robert Eaglestone's *Doing English* and Rob Pope's *The English Studies Book* (all published in 2002). All of these books have been widely adopted.

## A Question of Genre

Before these texts are assessed, however, it may well be asked whether they are in fact textbooks. Rob Pope's book unquestionably is: the large format, the explicit address to undergraduates, and the inclusion of pedagogic activities all make that clear. The author must have known that this was a textbook when he wrote it (though he shows on the first page that he prefers the term "handbook"). But what of *Doing English*? This is a small book containing no exercises or activities. To judge from the text, it is quite possible that the author did not originally intend the book as a textbook. The subtitle ("A guide for literature students") is equivocal on that score. The first paragraph of the introduction runs:

If you are studying English literature for AS/A2 level, for the International Baccalaureate or on an Access course [pre-degree courses offered in the UK], or are starting a degree in literature, this book is for you. In fact, whatever English literature course you are taking, no matter where you are, this book is not only an ideal stepping-stone to higher education but also an introduction to crucial new questions and ideas about English and literature (Eaglestone, 2002, 1).

The first sentence implies that the book is intended not as a textbook but rather as supplementary or introductory reading. The second sentence, however, blurs the issue and thus opens up the possibility that the book may be used as a course text by students already on a degree course.

Now, whatever the original authorial intention, the book has indeed been used as such (aided, no doubt, by such textbook features as the inclusion of summaries in the form of bullet points at the end of each chapter). The more it is used as a course text, the more its sales will be driven by lecturer recommendation and the more the pattern of sales will resemble those of textbooks: the book will sell off the backlist through multiple orders at certain times of year. Though this may not resolve the question of genre from some points of view (that, say, of a linguist researching discourse analysis), from a publisher's perspective it certainly does: the book is a textbook because it exhibits in the market the behaviour of a textbook.

On the scale of textbook-ness, Peter Barry's book comes somewhere between Pope's and Eaglestone's. It has the same small format as Eaglestone, but is more substantial and provides "Stop and think" boxes that approximate to pedagogic exercises. It is addressed explicitly at undergraduates. Interestingly, in the introduction the author says that the book's "emphasis on practice" means that it is "a 'work-book', not just a 'text-book'." The "just" is ambiguous: it could mean either (a) that the book offers all that a textbook (or "text-book") offers and more besides or (b) that it is better than a mere textbook. One should note in passing that authorial nervousness over the term "textbook" is typical of subject areas only recently (or still in the process of being) colonised by textbook publishing. From the point of view of the publisher, however, there is no doubt: this is a textbook because it will behave as such in the marketplace.

### **Educational Theory**

There are various ways in which theories drawn from education may assist structuralist assessments of textbooks. For the purposes of this chapter I shall focus on learning theory – in particular, David Kolb's theory of experiential learning.

In *Experiential Learning: Experience as the source of learning and development* Kolb argues (or asserts) that there are four "modes" of learning (Kolb 1984). These divide into two pairs, each defining a spectrum. The first pair comprises "concrete" learning (learning from particular examples of realia, the here-and-now, the nitty-gritty and so on) and "abstract" learning (learning from deductive theory, generalisation, abstract concepts and so on). The second pair comprises "reflective" learning (standing back, recapitulating, considering afresh) and "active" learning (learning from doing things, intervening, trying something new).

I should say straightaway that I am aware that Kolb's theory is open to criticism. I acknowledge that the derivation of Kolb's very neat, clean, models is worryingly remote from empirical research findings. I draw on Kolb for pragmatic reasons: in my work as a publisher I have found Kolb's concepts easily memorable, communicable (to both editors and authors) and applicable. Moreover, whether or not one is convinced that there are learning modes of the type that Kolb claims, it is undeniable that in defining them he covers several different aspects of learning. As a

result, any publisher developing textbooks based on Kolb's concepts is likely, willy-nilly, to broaden the kinds of learning experience that those books offer to readers.

### **Assessing Literary Studies textbooks**

Now let us look at *Beginning Theory* through Kolbian lenses. How does it look? To answer this question I will focus on just one chapter, namely that entitled "Narratology" – though because most chapters in the book are constructed on a similar pattern I am confident that an analysis of other chapters would yield comparable results.

Peter Barry certainly caters for the concrete mode of learning. The final five pages of the chapter provide a case study, consisting of one narratological reading of one literary narrative – namely, Edgar Allan Poe's story, "The Oval Portrait" (Barry, 2002, 242-46). Barry also facilitates the concrete mode of learning by providing, in an appendix, the actual text of that narrative (Barry, 2002, 272-75).

Barry provides plenty of opportunity for abstract learning too. For example, the main body of the chapter consists of an exposition of the theories of three narratologists (Aristotle, Propp and Genette), introducing such concepts as "mimesis" and "diegesis" (Barry, 2002, 224-39).

Thus we may say that the concrete-to-abstract spectrum of learning is well covered in *Beginning Theory*.

What does Barry offer the reflective learner? Perhaps his section entitled "Stop and think" is intended to encourage reflection (Barry, 2002, 240-41). In fact, though, its execution is rather curious. It invites reflection on just one aspect of Barry's foregoing discussion, namely the use of technical language (Barry asks the reader to consider whether there is a good reason for using jargon in narratology). This reflection is thus rather partial – and he does little to encourage readers to relate the contents of the chapter to their own prior knowledge. Here he surely misses an opportunity. All of his readers will have had experience of hearing, reading, and telling narratives, yet at no point does he invite them to reflect on their own experience.

Barry also rather ignores the opportunities for active learning. The sentences in the section "What narratologists do", for example, are all third-person descriptive sentences (Barry, 2002, 241). For instance, he says that narratologists "counteract the tendency of conventional criticism to foreground character and motive by foregrounding instead action and structure." Actively-minded learners can of course convert that into an imperative directed at themselves ("Study a narrative from the point of view of action and structure rather than character and motive!") – but the point is that they are left to make the grammatical conversion: Barry doesn't provide it for them (and, in any case, the advice offered is pretty rudimentary). Nowhere does Barry suggest that readers explore narratology by constructing narratives of their own.

Thus we may say that *Beginning Theory* covers the concrete-to-abstract spectrum of learning much more fully than it does the reflective-to-active spectrum.

To what extent is this finding typical of Literary Studies textbooks? By way of testing this we may compare Barry's chapter with that entitled "Narrative and Closure" in Eaglestone's *Doing English* (though we should be wary of treating Eaglestone's chapter as typical of his book, since there is some variation in the pattern of chapters within the book). Like Barry, Eaglestone provides plenty of opportunity for abstract learning. He too outlines the narratological theory of Vladimir Propp and introduces abstract concepts (notably that of "closure"). Eaglestone also caters for the concrete learner. Though in his much briefer chapter there is no room for an extended case study such as Barry's analysis of Edgar Allan Poe, Eaglestone does provide frequent examples to particular narratives. He refers to texts by literary authors such as Jane Austen, James Joyce, Joseph Conrad, Henry James and Thomas Pynchon and to examples of fairy stories, television programmes and film. Thus Eaglestone, like Barry, covers both ends of the concrete-to-abstract spectrum of learning.

What of the reflective-to-abstract spectrum? Eaglestone provides opportunities for reflective learning more consistently than does Barry. He encourages readers to reflect on their experience of narrative in everyday life. In the discussion of the way that narratives construct the world, for example, Eaglestone's grammar switches to the second person: "if you were asked to tell someone about yourself – at a job interview, say – you quickly outline the broad story of who you are, where you come from and so on" (Eaglestone, 2002, 98). Similarly in the discussion of narrative closure Eaglestone asks, "How irritated are you if you miss the end of TV drama or the last few minutes of a football game?" (Eaglestone, 2002, 101). In such ways Eaglestone consistently prompts readers to reflect on their experience of both producing and receiving narratives.

Latent in such prompts is an opportunity to provide exercises designed for active learners. When, for example, Eaglestone asks, "Would you read a book or see a film if you knew that the end was missing?", this could lead on to a suggestion that readers either search for such narratives (Nikolai Gogol's classic, *Dead Souls*, for example) or try to compose one (Eaglestone, 2002, 101). Eaglestone, however, never in fact follows through to provide invitations to active learning. Thus *Doing English*, though catering more frequently than *Beginning Theory* for reflective learners, tends to share that text's lack of awareness of the active mode of learning.

Now let us consider briefly, by way of contrast, the provision for learning in the section entitled "Narrative in story and history" in *The English Studies Book* (Pope, 2002, 218-24). This section consists of discursive prose followed by some activities and, finally, some points for discussion. Here again there is plenty of opportunity for abstract learning: the text introduces concepts ("fabula" and "sjuzet", for example) and theories (those of Propp and Labov). However, there is less provision, at least in the discursive passages, for the concrete learner: though some authors and narratives are mentioned, such mentions are very brief and extremely generalised. The

discursive part of Pope's text makes no explicit invitation to reflective learning: readers' prior experiences of narratives are ignored.

To some extent, however, the learning activities provided by Pope do compensate for the lack of opportunities for both concrete and reflective learning in the discursive text. For example, Pope invites readers to "Draw on one or more of the models/checklists supplied ... to help analyse a narrative and a process of narration which interests you" (Pope, 2002, 223). Furthermore, these activities also provide (in a way that neither *Beginning Theory* nor *Doing English* do) for the active learner. This is most evident in the third activity provided by Pope:

Adapting beginnings and endings. Speculate how you would film and edit the opening and closing sequences of a novel with which you are familiar. Be sure at some point to consider all the main technical, formal and social dimensions referred to above (Pope, 2002, 223).

Such an activity does not provide for out-and-out active learning: readers are asked to "speculate" rather than to actually either produce or edit narratives for themselves. Nevertheless, the exercise is clearly a step towards the stimulation of active learning.

## Conclusion

In summary, we may say that *Beginning Theory*, *Doing English* and *The English Studies Book* all provide frequent prompts to abstract learning. Two of them – *Beginning Theory* and *Doing English* – do this too for concrete learning. *Doing English* provides more fully than either of the other two texts for reflective learning, though through its learning activities *The English Studies Book* also does this to some extent. The section in *The English Studies Book* is the only one that explicitly provides for active learning. None of the books offers balanced provision for all four modes of learning.

These findings suggest that there is an opportunity for the authors each to learn from their counterparts when working on the next editions of their books. And (this, of course, interests me a good deal!) there is a wonderful opportunity for an enterprising publisher to score over the competition by producing a textbook that provides comprehensively for all four of the modes of learning described by Kolb.

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# Visual texts in Finnish history textbooks

Jaakko Väisänen

This paper reports on visual texts in history textbooks used in Finnish upper secondary schools. The key concept of this paper is visual text and its content in history learning. In this paper visual texts are not perceived as pictures, maps and graphs but also “imagetexts”. Texts and visual texts are not separate phenomena in textbooks but only different means to represent historically and culturally constructed information. Studies on textbooks are usually based upon the assumption that the meanings lie in the text itself. Textbooks are as a store of meanings shared the community. On the other hand constructivist and cognitive learning studies claim that the comprehension of meaning lies in the complex interaction between the author's intent and his/her performative ability to encode that intent.

## What is a visual text?

In language, text is a broad term for something that contains words to express something where as linguistics text is a communicative act. In literary theory a text is the object being studied, whether it is a novel, a film or a TV commercial. The broad use of the term derives from the rise of a philosophical theory of the functions of signs and symbols (Sonesson, 1998; Nöth, 1994).

There is a saying "*a picture is worth a thousand words*". We also know how difficult it is to transform a picture into words. One of the reasons for this difficulty is that images can have an infinite number of interpretations and inferences. No text description can possibly cover all these interpretations, and nobody knows exactly which inferences people will draw (Mikkonen, 2005, 17). However, in the era of knowledge-based economies and hybridized media to transform the earlier saying into the phrase "*a word is worth a thousand pictures*". That means the flood of pictures or imagery (Kress, 2003). Some other researchers use in this case the concepts “imagetext” or “scriptovisual text” (Mikkonen, 2005, 47-48).

Nowadays when we use the concept of literacy we refer not only to the skill of reading but also to situations in which we have constructed meanings from various types of texts. Then we refer to the concept of multiple literacy (Knobel and Lankshear, 2004; Kress, 2003). In that case we consider the text as a space or a way of interacting or conveying our experience to them.

But as Nöth (1994) and Wenz (1997) argues the text as a space provides a semiotic paradox. Structurally, human interaction is an acoustic phenomenon without spatial extension: it is structured as a sequence in time. However, product of this process is the text, which is referred to very often in terms of spatial metaphors. Already Saussure, speaking of the phonetic chain only in terms of time, attributed a spatial dimension to the linearity of signs. First dimension is the literal meaning, the second dimension is called meta-textual topoi of space, levels, or surface structures and the

third dimension is intra-textual or inter-textual reference, or meta-textual organization of units such as chapters. The findings of Nöth (1994) may confirm the hypothesis on the cognitive origin of these linguistic expressions. Cognitive semantics has attempted to explain space metaphors in everyday language by referring to the biological relevance of how humans perceiving space and orienting themselves within it in phases of pre-linguistic language acquisition (Lakoff, 1987, 269-292).

### **The pedagogical uses of pictures**

I analyzed in my thesis different functions that pictures may have in three history textbooks (closer Väisänen, 2005, 76-79). One analyzed textbook was published in 1965 and the others in 1995. In my analysis I apply categorization created by Levin, Anglin and Carney (1987, 35-37 and 45-48). The comparison reveals firstly that most pictures in Finnish history textbooks are either decorative or presentative. More surprisingly is to find that there are few images that can be classified as being transforming or interpreting images. Third finding was that the functions of images in Finnish history textbook have not changed during the decades. In a pointed way it could be argued that the dominance of decorative and presentative images suggests that the choice of images has been steered by the paradigm of behaviorist learning. The paradigm of behaviorism argues that all meanings in the text have cultural meanings common to everybody; in other words pictures only extend or interpret some mentioned in the text.

The comparison also manifests that the amount of images has not increased considerably in time. In this sense, firstly, Finnish history textbook seems to be not highly illustrated. The second conclusion is that the linear texts predominate in textbooks regardless of the time of publishing. The functional classification does not describe the whole truth. In her study Tang (1994) uses the concept “*graphic percentage*” to explain how many pages in a textbook have illustrations. In my opinion graphic percentage may reveal some indications of the usage of a dual-coding system in planning a history textbook. Compared with the results by Tang (1994) Finnish history textbooks are not so visualized as Canadian, Mexican or Japanese textbooks of social science. In this respect there is no flow of visual texts in Finnish textbooks. On the other hand comparison indicated that the designers of history textbooks for on thing or another do not use the advantages of Paivio’s dual-coding system.

#### ***Other kinds of visualizations***

On the other hand, all visualizations concerning historical processes in these particularly textbooks are not pictures. There are different types of visualization to help the learner to understand phenomena of history or historical concept of transition. When we speak about visualized or hybridized culture we usually mean the amount of pictures. The notion of flood can also mean other kinds of visualizations as Nikula (2004) pointed out in her article. I would like link this to

transition more deeply but it was not possible because the textbook published in 1965 contains neither maps nor other kinds of visualization. The only visualizations in this textbook were only one graph and eight tables. In the textbooks of 1990's situation is different. There are lots of maps, graphs, tables and presentations which have some features of multimedia (closer Väisänen, 2005, 83-86). In this respect clear transition has taken place.

The transition could be explained from two points of view. The first transition concerns the paradigm of history teaching. In the 1960's the emphasis was on political history, but in the 1990's on social and economic history. It seems to be characteristic to social and economic history to present information in the shape of tables and graphs. The second explanation is the choice of text-ideology. Maps, graphs or tables provide an opportunity to present information that is even tighter form than text.

Also in this direction there are in textbooks many pictures, figures, or diagrams that are appended to very little or no explanatory information at all. The following conclusion may be drawn: tables and graphs usually make meanings mentioned in text more confuse. The students then have to explain concealed or confused meanings of graphs or maps by making them imagetexts or semiotic Gestalts. Students could say for example:

- *"this graph of population reveals the growth of the cities"*
- *"this map shows the enlargement of the Finnish territory"*.

These non-linear texts change into images. We do not only describe or repeat the information of graph or map but also read the data between the lines by making enlightened guesses. In this respect there is no difference between visually impaired and non-impaired readers. In cognitive psychology (Billig, 1999) text is defined as that which is the subject of commenting, that which is quotation discussed. That is which is a quote or is considered worth quoting. In other words, a text is something that gives rise to a meta-text.

Actually it seems that we don't read the data contained in a graph or a map, but we relate the impressed data with our prior knowledge, beliefs or even bodily movements. Therefore the concept of literary involves something more than how to operate in a language system. We end up with the concept of discourse, by which we normally mean "ways of being in the world". In this respect language is part of discourses, but discourses are more than the language because they relate identities to the usage of language [Knobel and Lankshear (2004); content analysis applies a set of techniques to a given text to determine (Fairclough, 2004, 236-246; Potter and Wetherell, 1995, 6-10)].

These findings lead to a broader analysis of interaction between written text and visual text or non-linear elements. Firstly, unless visualizations interact with the meanings of the text these visualizations can only confuse reader. Pekkala (1999, 137-138) has drawn the following conclusion:

"In general, the older books' text does not always refer to the pictures presented on the same page. Correspondingly, the captions do not always refer to the text in the chapter. This could be a common feature in textbooks. The same pictures can be used in different captions, though the context is usually the same".

My analysis confirms the conclusion drawn by Pekkala. In my analysis images and different types of graphs can usually be considered only as extensions of the text and seldom deepen student's skills to analyze information more deeply. In these books decorative or presentative pictures have become "worth a thousand words" or "imagetexts".

### ***Linguistic visualizations***

In Paivio's (1971) dual-coding theory non-verbal imagery and verbal processes are distinguished primarily in terms of their functions as symbolic systems, although an assumed relationship between the two processes and visual and auditory sensory modalities has functional implications. In the classical approach the concept "*image*" was used to refer to consciously-experienced mental processes rather generally and distinctions were drawn in terms of the sensory modality of the image as revealed by introspection.

Metaphors and figurative devices in according to Cameron (2002, 6-9 and 37-40) cannot be analyzed with statistical methods because metaphorical meanings are conveyed through an interaction between readers and receivers. Critical discourse analysis (CDA) uses the concept of artifact when describing those linguistic features influence on social processes. These artifacts are always culturally defined tools by which people try changing their reality or "*lived world*"<sup>4</sup>. In most interactions, users of language bring with them different dispositions towards language, and these are closely related to their social positions. By using CDA it is conceivable to analyze this kind of problems and reveal "*descriptions of the materiality of language*". In according to Fairclough (2000, 241-244 or 2004) each text had to be analyzed from four points of views<sup>5</sup>

We think that by using this linguistic device we can convey more information or some attitude towards the phenomenon. I will illustrate this with two examples:

*"Man has been a modest outsider in the great play of mankind."*

*"Industrialization created a brave new world of big cities. These cities seem to live a life independent of the surrounding countryside and nature."*

Firstly, the expressions "*a modest outsider*" or "*brave new world of big cities*" contain the idea that the text-writer uses these expressions not only as figurative

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<sup>4</sup> Originally concept is in German *Lebens Welt*. It was first introduced by Husserl. Later Habermas gave this concept a three-dimensional definition. It follows that these social and cultural processes are never arbitrary although Burkitt (1999, 6-10) emphasized that our bodies are the source of our collective experiences and a site for opposition to established power relations.

<sup>5</sup> These points of views are: 1. Representing, 2. Relating, 3. Identifying and 4. Valuing.

devices, but also to show his attitude to nature itself. These sentences, the relation between man and nature, reveal features of ideological discourse. In this discourse wild nature is valued as the only real nature. In the course of time urban nature has separated from real nature. Secondly, these sentences reveal features of another discourse. According to this discourse man is in a continuous fight against nature. Nature has put man in irons but he will free himself from these irons. These two examples lead us to interpreted knowledge. Such knowledge poses always dilemmas and not free from ideological or cultural practices as Fairclough (2004, 20-24) has pointed.

Metaphors when used as an educational tool tends to suggest references to the text-writer's own attitudes towards the pieces of knowledge conveyed. Although in Finnish history textbooks text-writers want keep the role of external observer, they actually reveal their own epistemological and ontological premises (Väisänen, 2005, 95-97). In my opinion, critical discourse analysis offer adequate linguistic tools for analyzing metaphors not only as linguistic phenomena but also as devices used for expressing attitudinal knowledge. Metaphoric expressions never contain extensive description about an historical event, but only a certain facet of this event<sup>6</sup>.

This can be demonstrated by looking at the way reality and fiction is linked by imagination in literary space. Here modern aesthetics of space is opposed to the traditional separation between space and time and its adequate media, say, painting and fiction. This is the line of argument. But if we understand the linearity of texts as a projection of semiotic principles structured on the basis of the linguistic principles, we may logically also argue for a cultural convention or social order of space designed through texts: it is a matter of categorizing perception through shared knowledge, or, as Lakoff (1987, 126) puts it, seeing always means "seeing as". The natural embodiment of the perceived spatial relations is culturally encoded and thereby leads to a kind of iconic link between perception, language, and the world perceived. However, the codes representing space are not merely images of the surrounding world but instructions to its individual and social construction

- After the wedding the Greek woman devoted herself completely to taking care of "oikos" (i.e., the Greek household).
- When the earnings of breadwinners were insufficient to maintain his family, women and children had to go work in manufactures. The conditions of the workers in manufactures were not any better than those of a convict in prison.

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<sup>6</sup> If we understand culture as a form of memory, and if we avoid separating cultural memory from the historical processes or other human communication, we may well combine the two sources referred to earlier - the cognitive and the rhetorical - and link them to the cultural process of semiosis which finds its Gestalt in texts. Focusing on the problem of how to represent the complexity of three-dimensional space in the linearity of one-dimensional sign sequences. Wenz (1997) suggests that texts may develop their own notion of space within which the reader will find his orientation during the process of reading. In other words, it is the reader who constructs "text spaces" based on the interpretation of semiotic Gestalt.

We can draw two conclusions from these example sentences. Firstly, by using metaphors (i.e., *devoted herself completely to taking care of "oikos"* in stead of for example running a household and *breadwinner* in stead of for example husband) in these sentences text-writer suggests that running the household is more valuable for women than working outside the home. Secondly, metaphoric expressions tell something about practices guiding the text-writer's thinking. In this case the metanarrative in the background stresses the role of man as the main actor in historical events. These questions determine our cognitive perspectives from which we look at historical events or phenomena. In this case text-writer uses gender as an imaginary community. For example Bauman (1990) names concepts of this kind something to identify with. If the reader does not have prior knowledge about gender issues to estimate intertextual features he/she consider above presented dilemmatic information as a only and common truth.

## Discussion

Despite the concept of historical transition has been the major theme in Finnish curricula, one of the main results of my analysis is that these three textbooks seldom use visual text as a pedagogical tool to represent historical information. It seems that no drastic change has taken place from the 1960's to the 1990's.

Secondly, my study reveals that visual texts in Finnish history textbooks are not primarily used as a mean to increase understanding of the situation mentioned in the text. The genuine meaning of Latin word "*illustration*" was to make textual meanings clearer or more understandable. This is not the way to use images in Finnish history textbooks. My categorizations show that most images have a nature of decorative or presentative and so have few interactions with the text. Conclusion can be drawn despite of the time of publishing. The only visible minor change is that the captions related to the pictures are nowadays shorter than 1960's. It is obvious that the possibilities of pictures are not very well thought out. As Selander (1991, 68) puts it: "*nice pictures which may have very little to do with what is mentioned in the text.*"

In fact, history is a school subject where we learn by reading text not by analyzing visualizations. This is a prevailing educational practice. Lankshear and Knobel has argued in their book (2004, 100-110; or Kress, 2003) that schools have shown little understanding of changes in literacies. A few changes have been taken place in textbook layouts, learning paradigms or means of textual representations. In this respect my study buttresses Knobel's and Lankshear's argumentation. It has been taken long time for granted that linear texts are something to learn and other elements something to watch. From the semiotic point of view every text or visualization has on the inside a text-world life that is ordered and meaningful. On the other hand outside of text is chaotic, disorderly and impossible to understand (Sonesson, 1998).

In the context of school textbook might be the best tool for safety and order because teachers can study the text before the lesson and most of the meanings in the text are familiar to teacher. There is only a light enhance that something unpredictable will happen in the classroom. If the teacher uses more visual texts or imagetexts as a pedagogical material, students have lots of opportunities to ask unpredictable questions or express their astonishment for example. Pupils might ask something that the teacher is not prepared or does not know.

By saying this one forgets the third side of that phenomenon. In the same time, as analysis based upon CDA points out, Finnish textbooks have also many hidden socio-cultural practices constructed by “*socially situated speakers and writers*” at the schools (Fairclough, 2004, 20-25). Although we see the world of visualization as chaotic in general, we can also see that images often lead to immediate comprehension in the classroom. This is something that is much more difficult to gain from reading a text. Images, metaphors or pictures have cultural properties that reveal certain relations or narratives automatically. This is why charts are often used instead of tables, or maps instead of long text-based route descriptions. Paivio (1971) argues that visual information helps to process and remember verbal information and vice versa. Critics of multiple-channel communication have contested that overloading the senses through multiple channels could result in less efficient learning, and that the addition of cues in a second channel or even excessive cues within the same channel can be distracting and detrimental to learning.

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**“When anyone can publish anything”  
How to evaluate sources according to textbooks  
for different educational choices**

Anita Norlund

Evaluation of sources is a proficiency with a long tradition in academic contexts. It is today, due to the fact that the Internet has become a contributor with sources, met with a discussion on young people’s desirable skills in evaluating sources, text based or others. Such an encounter between the old and the new creates a possible field of tension, worth examining. Still, it should be remembered that a more gradual development occurred during the greater part of the 20<sup>th</sup> century, while the educational ideal changed, “moving away from a formative, structuralistic, hierarchical and firm view of knowledge towards a function-oriented, tentative, questioning and relative one” (Selander, 2001, 41).<sup>1</sup> This more modern view of knowledge includes that the student “learns to evaluate information from various sources” (p 20) and that electronic texts are paid attention to. The transfer from page to screen will have political importance on literacy situations and may involve a shift of power (Kress, 2003). Fairclough points out that literacy has a remarkable value in our society but is today not distributed in a fair way. However, there are reasons to be optimistic; power inequities may be changed when the Internet is now available to many people (Fairclough, 2001).

**The theoretical framework**

Being a good evaluator of sources, I argue, partly means being good at judging risks. The evaluator needs to weigh the credibility in sources, and possibly reject sources that are less trusty, or even false. Risk thinking may be considered a characteristic of late modernity (Giddens, 1991). This is contradictory; Giddens points out how security nowadays has rather grown and actually dominates the risks.<sup>2</sup> In spite of this fact, we are perpetually occupied with risks. Every single modern individual is expected to become an expert, to make strategic plans and reflexive decisions in a multiple choice society. Expert-related issues to stay critical towards, or to place trust in, are interwoven into our daily life. A complicated relationship between risk and trust arises. Moreover, risks may be numerous and global and cause a feeling of powerlessness among people (Beck, 1986/1998)<sup>3</sup> This looks different today than in the past when risks were visible and consequently they need to be approached in a scientific way. Although risks may strike everybody and although they are not distributed parallel to wealth, it does not hinder that the distribution of risks are

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<sup>1</sup> The report mainly deals with the subject of Physics.

<sup>2</sup> For instance concerning health care and hygiene.

<sup>3</sup> Beck mainly illustrates this by reasoning on ecological risks.

linked to social class and that the skills needed when facing risks, are related to education and income (Beck, 49). In a safe financial position it is possible to choose where to live and where to be educated. Through education people are taught how to handle risks or to refrain from them. Beck maintains that class society is made even more accentuated, not the opposite. Due to this fact, it is important that education runs counter to such a tendency. Gramsci, who took a particular interest in schools and educational power relationships, described the Italian school as withheld through hegemony; “a system of values, attitudes, beliefs and morality that has the effect of supporting the status quo in power relations” (Burke, 1999, 2). Gramsci criticized the Italian school system for calling the vocational school democratic, when it in fact emphasized differences and where “the mass of the population was kept in its place” (6). Education made sure that no counter hegemony was produced and that nothing threatened a societal consensus.

Evaluation of sources could be looked upon as an old middle class skill with its roots in archaic literature studies and likewise a skill that in Gramsci’s words is associated with bourgeois values.<sup>4</sup> In contrast to this it can, according to me, also be considered to be a skill useful when opposing to the traditional. A further angle on the political element is that critical proficiencies, i.e. being self-regulating, taking risks but also acting in a well-considered way, are proficiencies that are important for employability according to New Labour policy documents (Mulderrig, 2003). This is being criticized by Mulderrig who points out that an earlier *intrinsic* value for education, now has taken the form of an *extrinsic* value for economy.

### The study

Educational media have often been discussed in the light of its, not seldom negative, capacity as a value carrier. Textbook research has focused a myriad of such matters; social, religious as well as cultural ones (LaSpina, 2003; Montgomery, 2005; Hårenstam, 1993; Ajagán-Lester, 2000). However, it is more difficult to find textbook studies concerning skills, which will be the focus in the study presented below. Phenomena where individuals meet institutions are interesting to study (Berglez, 2000). In the case of this study, students meet with school as an educational institution via textbooks. The tone and the intention of textbook writers are frequently neglected matters in textbook research (Selander<sup>5</sup>, 2001). To meet this, I have partly chosen to examine the interpersonal structure (Hellspong, 2001) where the social interplay offered by the books, can be focused. Useful terminology for such an analysis includes “participant”, “sender”, “receiver”, “social roles” and the way the receiver is “addressed”.

What used to be an academic expert skill is now related to the vast Swedish majority, since evaluation of sources is a syllabus goal for the subject of Swedish, for the lower as well as for the upper secondary school. This fact requires that the

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<sup>4</sup> The term is used in Burke’s presentation on Gramsci (1999).

<sup>5</sup> By referring to Långström.

skill is materialised in educational media. The material chosen for my comparative analysis consists of twelve textbooks, one of them combined with a web-based part. They are all meant to be used by students who take the same compulsory course (qualifying everyone for higher education) irrespective of what kind of programme they attend. However, the textbooks are aimed at different target groups; students at upper secondary programmes preparing for further studies or at programmes preparing for vocations. These two types of programmes recruit students with two types of social backgrounds.<sup>6</sup>

Studying textbooks has its natural restrictions, which I do not intend to go deeper into. However, I like to highlight the fact that texts demand the reader himself or herself to add something to the understanding or for conclusions (cf Selander, 2001). It should be observed that pupils are actually able to do cynical readings as well as resistant ones (Kalmus, 2004). Still, it is not possible to interpret texts in any possible way (Gjerstad, 2004). By studying the meaning the media intend to create, knowledge may be added. Educational media should, consequently, not be looked upon as arbitrary materializations of representations (Selander, 2001; Fairclough, 2001; Jaworski & Coupland, 1999).

My text selection includes all twelve textbooks available during the spring term of 2005. The part that most clearly treats the phenomenon in focus, i.e. evaluation of sources, has been chosen respectively. Before giving a closer description of four selected textbooks, I would like to pinpoint that when looking at the desired student behaviour in all the books, one is struck by the similarity in the books, most of them using words as “anything may be published”, “published by anyone”, focusing primarily on the Internet. In modernity the local and the global meet and time and space cannot be clearly protected (Giddens, 1991). In my opinion, sources in general and the Internet in particular seem to be an illustration of this modernity; information is taken for granted and available 24 hours a day.

## **Two emerging patterns**

I now intend to go on to the main part of this article, drawing on the survey of the twelve textbooks. There are textbooks that differ from a stereotype and there are contradictory features.<sup>7</sup> Even so there are major traces that need being shed light on. By letting four books illustrate two contrasting ways of approaching students in an educational programme diversity, I argue that two different kinds of identities are encouraged. One pattern encourages a leisure oriented student identity and the other encourages a more academically oriented identity. The patterns seem to be related to the kind of programme the books themselves define as their target audience.

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<sup>6</sup> According to statistics from the year 2000.

[www.scb.se/statistik/UF/UF0501/1998102/UF73SM0301.pdf](http://www.scb.se/statistik/UF/UF0501/1998102/UF73SM0301.pdf)

<sup>7</sup> In addition, I would like to emphasize that textbooks are produced under diverse conditions, where the layout and illustration choice may be restricted by the publishers' aesthetic policy or design decisions.

So is the first pattern, the leisure discourse, linked to students attending vocational programmes?<sup>8</sup> The two books representing the vocational programmes address their receivers as leisure text consumers. The topics and tasks included in one of the books are generally motivated by the fact that they “take off from the students’ everyday life”. The skills are placed in a mass media context, which could in fact tell us that the students are expected to be interested in societal issues. This does not seem to be the fact, though, since the first news that is dealt with is about a flying saucer. And when another piece of news is presented, mentioned as difficult to evaluate, it tells the students that if they hear about a company in China using child labour it might be a misunderstanding or a rival’s rumour. Solidarity is not the main issue when political questions are brought up. Instead the students are to evaluate their leisure media habits or make personal reflections such as: “What is a fun piece of news, do you think?”

The leisure features are found in the cases even when students actually are expected to be text producers. Internet is here mentioned as a possible information source when the students are asked to prepare a presentation about how to make or produce something, about a hobby, a sport “that you practice”, a journey etc. In the other book the students practice by putting together facts about his or her idol. The pictures that appear show recreational situations; a coloured photo shows a sunbathing, sleeping boy with a newspaper covering his face and a transistor radio close to him. Colour means fictionality (Tønnessen, 2004). The message with the flying saucer is emphasized by coloured photos, representing a dead alien and a non-realistic spacecraft, possibly influenced by film aesthetics. It fulfils some of the criteria that present as giving low credibility to pictures (Pettersson, 2001).

The interplay with the reader can be characterized as close and private. The chapters in one of the vocational books are thematized in close titles like *Here and now* and the text choice includes articles dealing with “topics that move students at this age, i.e. bullying, isolation and influence from commercials, but also topics like fear, betrayal and love”. The tasks connect to personal feelings, personal opinions and private habits. Consequently, the authors approach their readers in a close, personal way, using tag questions like “do you think?”, the personal singular pronoun ‘you’ and colloquial words such as “pal”. A closer look at the article, the one about the flying saucer and the factory in China, reveals that the reader repeatedly is addressed in the non-typical pronoun “you”, something that is explained by the fact that the article is a fictive one, written by the textbook authors.<sup>9</sup> What looks like an authentic article with a three columned layout, a preamble and a background in a greyish/beige nuance, has been given a personal ingredient that does not correspond to what is expected from real articles.

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<sup>8</sup> One of the books is mainly aimed for students at The Individual Programme, a grade detention programme, and for vocational programmes, still for the actual course.

<sup>9</sup> In the leaflet from the publishing company it is confirmed that the articles are written by the textbook writers themselves.

In addition to this, the books in question show a relation with its reader that is built on insecurity, giving the Internet great attention. The fictive article *Do not get fooled!* states that “anyone in the whole world may write anything, without you being able to check where the information comes from or whether it is true or false”. The other book says that “[o]n the Internet anything can be published and hardly anything controlled. Loads of information which are not checked by anyone reach millions of people/.../There are lots of people trying to influence you with their opinions, even if they want to hide it behind facts. Only you can unmask them!”. The quotations illustrate an authoritarian and dramatic tone, as does imperative chapter headings like *Take control!*. The sender uses imperatives, exclamation marks, modal verbs<sup>10</sup> and a warning voice. When using the Internet the student’s responsibility is “particularly important” or “extra important”, i.e. reinforced in adverbs. The insecurity of the Internet is noticed in a phrase like “[t]ruths as well as rumours and evident lies”. Parallel to this the student is left alone to ‘unmask’ the villains. It is emphasized that the student is himself/herself responsible for judging.

It is dubious whether the students understand that help is embedded in an imaginary article. Besides, the questions that are placed after the article do not clearly inform whether the answers are to be found in the preceding article or in the student’s mind. The other book places its guiding questions in resource pages. There is no manifest intertextuality (Fairclough, 1992) to these pages, though. The linearity between the expository texts and the tasks in these books is broken.

Moving on to the other pattern, the two chosen textbooks address the academically oriented students actually as students. The proficiency is placed in an educational context, used when writing assignment papers, and students are text producers using factual literature. We find that one of the books express that it will make students familiar with the way the academy presents matters. The books show fewer combinations of modalities and have a higher degree of scientific character. The text impression is dense and sometimes there is an absence of pictures. Young people appear in pictures as students although one of the books use coloured drawings of students in a so called docusoap. The other book uses black-and-white photos showing students studying at a desk or in front of a computer having some of the criteria that give credibility (Pettersson, 2001). The tasks are higher order ones where students are expected to know what it means to ‘make parallels’, ‘draw well thought out conclusions’, ‘analyse’, ‘compare’ and ‘discuss’. These books have chapters with more distanced titles, just stating various, communicative, skills.

The text writers use the pronoun ‘we’ but then turn to addressing the readers as “you”, in the plural, not in the singular. Consequently, this way of being personal has a different character. On the whole the language is more formal, for example in using the word ‘classmates’ (instead of “pal” that was used in the other type of book), nominalizations and verbs in the passive, a ‘man’-address as well as the generic pronoun ‘one’. Moreover, the language is somewhat archaic, for example in

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<sup>10</sup> Four times in ‘ought to/should’ and once in ‘must’.

words such as ‘outermost’. Both books use the word ‘skribent’, a Swedish word with a Latin origin that shows its formal professional meaning, signalling an academic approach. The initial, reiterating sentence of a quotation is of a classical origin in its rhetoric:

How shall we handle all the knowledge that we get, how shall we know what our sources are worth, how shall we be able to separate the bad sources from the good ones?

In addition to this, students move in a public sphere for instance when they are asked to practise critical skills by scrutinizing a political party programme.

One of the books presents its reference to the resource page in a manifest reference. Both books place the task directly after the expository text and students are guided how to value sources; “Compare your Internet sources with encyclopaedias and factual literature. Rather inform about the printed sources if you find the same information in these.” To sum up, the instructions are both more detailed and give more elaborated guidance in weighing and evaluating.

The books express trust in the students’ ability and independence. One book suggests: “Sometimes you will certainly not agree with us – then, look at our text just as some compasses and not as a map!”. There are also verbs in the present tense which may signal that the student moves forward like in a reported style. It is argued for what sources generally are considered most trustworthy. “Avoid what is too private”, the student is requested when it comes to homepages. These books are not as imperative; the phrase “you get the opportunity” gives a less demanding impression and the language is devoid of superlatives.

Critical reading is defined:

Critical reading, does that mean to sit with one’s arms folded, the corners of one’s mouth down? No. That would rather be having a negative attitude to reading. To read critically means having a questioning attitude towards what one reads.

The Internet does not get a prominent position in the quotation. There are two possible reasons; either the Internet is neglected or it is considered to be a natural source. Nevertheless, the Internet is not dramatized to the same extent as in the other pattern.

### **Possible social consequences**

Two discourse patterns have been presented, different in the way of addressing their receivers. One of them is more informal. On the one hand, taking everyday experience (and everyday language) as a starting point, can be a way of reducing hierarchies (Fairclough, 2003). On the other hand, the discourse of counselling that is apparent in for example schools, “seems in some cases at least to have been turned into a means to greater institutional control of people through exposing aspects of their ‘private’ lives to unprecedented institutional probing” (Fairclough, 2003, 60).

The vocational books include personalising features in their attempt to show confidentiality, a plausible example of synthetic personalization, “the simulation of private face-to-face, discourse in public mass-audience discourse” (Fairclough, 1992, 98). It is worth noting that the Internet is not treated as useful in a vocational context. The receivers are not addressed by the senders as future professionals, something which could have been expected. The social frame of a text and the real situation do not always agree (Hellspong, 2001). Here an example of such a disagreement emerges; the institutional real, expectedly formal, situation does not agree with the more informal, personally constructed social frame. The participants are given confusing social roles. On the whole, the interpersonal analysis shows asymmetric relationships.

In the other more formal pattern the social roles may be considered more consistent with what are expected in a school context. It expects students to be eager to learn and encourages educational ambitions. However, the middle class approach, for example in the generic pronoun ‘one’, which is a middleclass pronoun, might give reduced access for students from lower classes (Fairclough, 2003). Some participators are not included in the formality that is common in prestigious practices (Fairclough, 2001). An aspect of possible social consequences of this is the fact that the National Test of the Swedish B-course has particular requirements. According to the nationwide grading instructions students in their essays should “go beyond the purely private” to reach the higher grades, something that would speak for every student’s right to get acquainted with more formal topics.<sup>11</sup> Most often at the National Test one more personal topic is given, which, however, does not give the opportunity to get the highest grade. A recent topic was what in Swedish metaphorically means *My favourite place*. It turned out to be a problematic one, requiring a lot of originality to make such a well-known topic interesting. The speech part of the test, which among other things intends to test the student’s ability to use sources, propose topics that may seem complicated in the light of what some of the textbooks offer familiarity with, for example *What has discovery expeditions meant?*. Further support for the fact that informality and formality, the private and the personal, have not been made equally evident to students is found in a study where Swedish teacher students found it difficult to select and evaluate (Ask & Sandblad, 2003). The results differed depending on what programme students had attended; those from the vocational programmes showed greater difficulties when asked to write factual essays about sustainability, far from a recreational context. Two types of texts were found among those who were not as successful as the others; one that was not formal and distant enough, but aggressive and arguing in an unscientific way, and one that was informal and private, resembling a life story.

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<sup>11</sup> It is worth noting that phrases like “make parallels”, that frequently are to be found in the instructions of the national tests and often is a worry to the students, was found in books for academic programmes.

## Discussion

The Internet seems according to textbooks to be a source to warn of mainly pictured with an emphasis on insecurity. The survey confirms the assumption earlier made, that the school environment is possibly included in “institutionally structured risk environments” (Giddens, 1991, 117). Foremost, the textbooks for the vocational programmes, exemplify a contemporary “dramatising of the risks” (Giddens, 1991, 173). The growth of a certain late modern phenomena colonizes space as well as time by letting people having constant access to them (cf. Giddens, 1991).<sup>12</sup> The fact that all textbooks, with one exception, include Internet issues confirms that the Internet is considered to be what students have common access to. From this, follows that they also have difficulties in avoiding it. Students have the chance to use it, but also need to know when not to. This demands complex work from the students; work that includes acting rationally as well as to let feelings aside (cf Giddens, 1991, 171). Everyone has to become his own expert but in different ways (cf Beck, 1986/1998, Giddens, 1991). My textbook study shows that the vocational students are those who, at least by textbooks, are particularly left to their own responsibility. School books do not equally distribute ways of handling knowledge or sources. Those who are socialised into evaluation of sources end up in a world of constant weighing and judging, but are also instructed by textbooks how to do this, and may meet the need for the scientific approach (cf. Beck, 1986/1998).

Success is made into the responsibility of each individual. This self-regulation in the form of lifelong learning is motivated by the unstable situation on the labour market (Mulderigg, 2003, 5). Literacy, where I regard evaluation of sources to be an advanced form, is highly valued in our society but unequally distributed (cf Fairclough, 2001). Fairclough hoped for a change but when diverse groups of students are called upon diverse ways of handling the Internet, I mean that the optimism of its democratising potential risks being futile. In this sense, textbooks as an institutional materialization actually run counter to its democratizing potential. In Gramsci’s words my study could be looked upon as revealing a hegemonic phenomenon, where school, in a less perceivable way, contributes to maintain a polarised situation.

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<sup>12</sup> For example, having access to fresh vegetables the year around.

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# **Evaluation of history textbooks by students of primary schools and high-schools in Serbia**

Arsen Djurovic

## **Introduction**

In year 2000 when we had celebrated one of the most important dates in the history of Serbian culture, the 100<sup>th</sup> Anniversary of the Archives of Serbia foundation, one of the most popular themes in the scientific and cultural circles was a forthcoming educational reform that raised and stressed the question 'How can our educational system be modernized?' There is no coincidence that this issue was raised at the same time as the celebration of the significant anniversary in Serbia at the beginning of the 21. century, because The Archives, the institution that along with libraries and museums plays a very important social role within every nation in the process of orientation towards a national and cultural identity, as well as within the educational process<sup>1</sup>. Three segments of the teaching process are set aside in the question referred to above: transformation of schools as institutions of great social importance and transformation of the school syllabus and curriculum at all levels of education (encompassing primary, secondary and higher education) and creating modern textbooks. We underline this, first of all, considering previous attempted reforms of education that completely failed,<sup>2</sup> and in spite of expected positive effects (on modern schools, syllabus and curriculum) they resulted in an even worse situation, which is hard to find the way out of. 'Victims' of that failure were actual participants in the teaching process: teachers and students, often completely disorientated and helpless in trying to find a solution to make history teaching more interesting and intellectually 'more provocative' not only to many generations of students (in primary and secondary schools), but also to Belgrade University students and students of other universities in Serbia towards the end of the second millennium. In searching for the answer to the basic research issue we set ourselves this goal: What should be done to make the teaching more informative and consequently, more inspiring in order to stimulate the students' thinking processes? How can the students become more interested in understanding the teaching of

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<sup>1</sup> Among the first users of the archive materials in the Archives of Serbia, as soon as it was established, were professors and students from the High School, and later, from the University, as well as professors from the Belgrade Gymnasia Schools (Milenko Vukićević). So as per the records of Dr Mihailo Gavrilović, the first Chief of the Archives, during 1904 there were 20 individuals using the archive materials (seven professors from the High School, two students from the High School, one professor from the gymnasia school etc.). Education Gazette, 1905, 612-613.

<sup>2</sup> It is about-called Šuvar's reform of schools since 1980.

history as a possibility to have 'divergent and ample ideas about the past'<sup>3</sup>, and how can we ensure an awakening conscience about an integrated history chain and inspire the students to reflect upon their own role in the history seen as the process of continuity (past, present and future)?<sup>4</sup>. To this body of questions also belongs one which refers to creating good, paper based history textbooks.

The results of a three-year survey conducted with the participation of the 4<sup>th</sup> year students of The Faculty of Philosophy, History Department, at Belgrade University, carried out within the project "Methodology Problems of Teaching History in Primary and Secondary Schools in Serbia" are exposed in this essay. The purpose of this survey is establishing the popularity of History as a school subject as well as the didactic characteristics of History Textbooks within Primary and Secondary education from the students' point of view.

### **Methodological approach**

The purpose of this survey is to establish the popularity of History as a school subject as well as some didactic characteristics of History textbooks within Primary and Secondary education from the students' point of view. In order to respond fully to this task in a methodological sense, we used the method of an anonymous survey which, having in mind the age and intellectual potential of Primary and Secondary school students, enabled exact scientific findings.

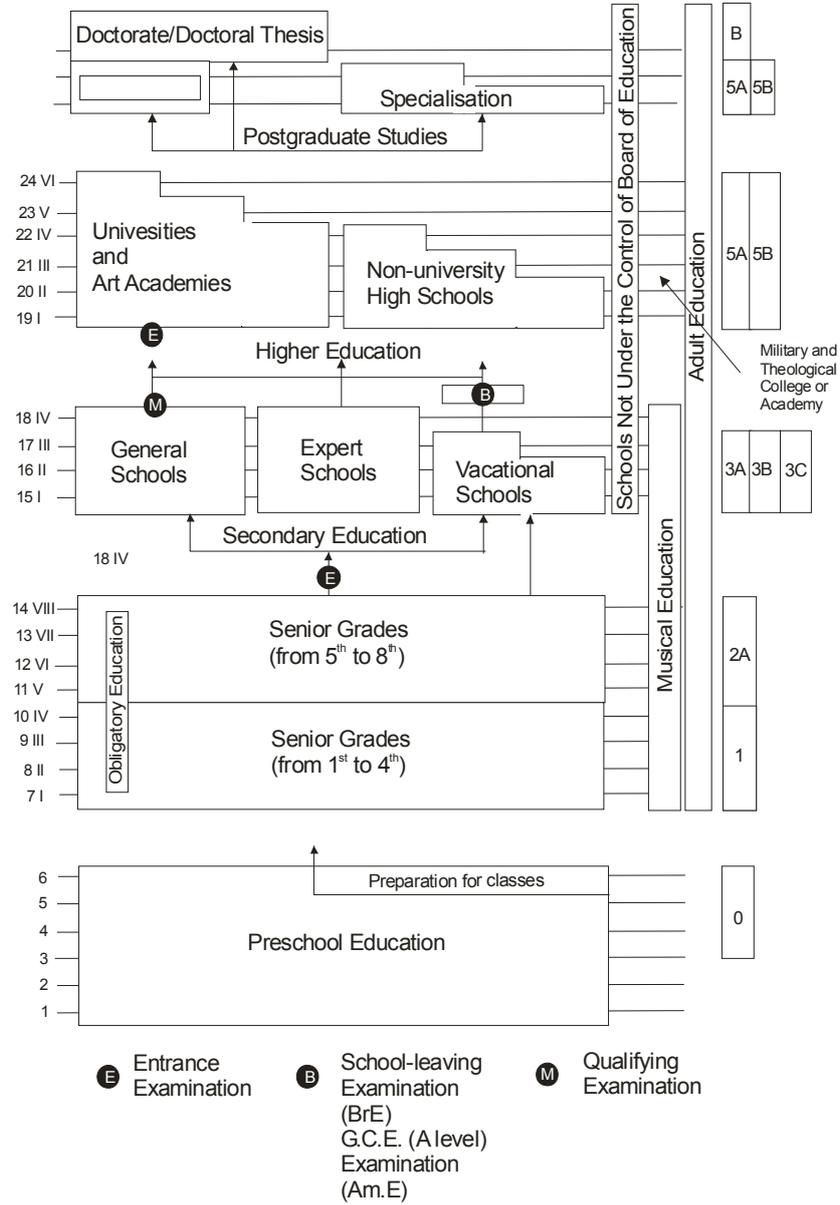
The survey comprised 40 primary schools with 950 students (age 14), as well as 45 secondary and vocational schools with 1020 students in Serbia (age 18). Our attention was directed towards Primary, Secondary and Vocational schools due to our former research which has shown that in the process of deciding on necessary reforms of the educational system, particularly when dealing with the preparation of and the publishing of new textbooks, students' opinions and suggestions were not taken into account to a proper extent. Therefore, we focused on senior primary school students (7<sup>th</sup> and 8<sup>th</sup> grades) and secondary and vocational schools (3<sup>rd</sup> and 4<sup>th</sup> grades) who have had a certain experience in using textbooks and other handbooks (3 years in primary, and 3 and 4 years in secondary schools) in order to get exact responses to the questions asked in this survey. Precise and brief responses given by students to the questions posed (on the popularity of History as a school subject, structure of the syllabus and characteristics of history textbooks) have been subjected to critical analysis and statistical processing.

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<sup>3</sup> Dr Andrej Mitrović (1970), Historical Conscience, In: *The First Yugoslav Workshop on Teaching of History*, Novi Sad, 20.

<sup>4</sup> Bibliographic data about papers which we have published about these issues are shown in references.

## The Educational System in Serbia



Source: Ministry of Education

## **The Educational system in Serbia**

The last reform of the educational system in Serbia took place in the beginning of autumn in year 2000, at the same time as major political changes occurred. Two changes were stressed in the attempt to modernize the educational system:

Primary school education was planned to be extended to 9 years instead of 8, and to be divided into 3 three-year cycles, together with a curriculum reform for primary and secondary schools. Special attention was paid to the preparation of a new Law on Textbooks that would make the publication of alternative textbooks and handbooks possible (Workbooks and the Collection of sources, etc.) for all levels of education. That is extremely important since only the textbooks printed in state institutions, such as the institution for textbooks and teaching material, were used in the teaching process. Basically the well prepared reform was not completely implemented. This refers particularly to the number of years of primary school which was planned to be increased to 9 years, this idea was abandoned in the meantime. Still, the most significant improvement has been made only recently by passing the Law on Textbooks and, to some extent, by the changes of the curriculum. These changes that were the responsibility of the Ministry of Education were followed by the creation of a new curriculum (that has still not been implemented), and the professional analysis of the existing textbooks by eminent historians from the History Department at the Faculty of Philosophy in Belgrade<sup>5</sup>. We contributed to this research with the results from our several-years' observational studies of this matter from a completely different point of view; the students. They are certainly an inevitable factor in the process of drawing any sort of conclusion, especially when it comes to reforms of educational systems. It is interesting to analyze the structure of the existing educational system in Serbia in order to understand the problems that have been elaborated on in this work. It can best be perceived from the following scheme:

The basic structure of the system consists of several levels of education; pre-school education (from 3 to 6 years), primary education (divided into two levels, from 1<sup>st</sup> to 4<sup>th</sup>, and from 5<sup>th</sup> to 8<sup>th</sup> grade), then secondary education (from 1<sup>st</sup> to 4<sup>th</sup> grade) and university education<sup>6</sup>. In this period special attention was paid to the education of national minorities and it seems correct to say that in this respect the standards that are applied in other European countries were met. The course of future reforms will most certainly be turned to primary level, i.e. the secondary educational system, so that the existing system, when it comes to the duration of education, will be in accordance with the educational systems in the European Union.

## **About History textbooks**

During the last 10 years of the 20th century the textbooks were the subject of research of a big number of experts from different areas in most European countries. The results gathered from the research were presented on numerous international conferences dedicated to this problem. Bearing in mind objective differences that

exist in Europe when it comes to the quality of textbooks (both the quality of the content as well as the quality of the didactics) that are used in the teaching process, it is noticeable that the countries of South East Europe, following in the footsteps of those who were ahead of them, have taken considerable steps in order to improve the quality of important teaching material as textbooks, workbooks and other manuals. The results of the research from 1996, conducted in 29 states (Youth and History Survey) best show that this was inevitable. The research has shown that the students do not appreciate the existing textbooks (Joke Van Der Leeuw-Roord, 1999). Unfortunately, Serbia was not included in this report due to well known political reasons. Of course, it does not imply that similar research projects were not conducted in Serbia in that period. Our interests in doing the research on textbooks started in 1991. At the beginning the research included only two primary schools and one high-school<sup>5</sup>. We turned our attention to students, in other words to their assessment of the quality of history textbooks. We discussed the first results of this research while attending summer-school session at the George Eckert Institute in Braunschweig at the end of September 2001. Even today it gives significant support to the Serbian research. These first research projects show that due to the fact that textbooks were outdated, 70% of the students included in the survey gave negative notations to the textbooks. The basic remarks referred to texts being uninteresting, comprehensive, including too much information (years, names, personalities), there was a lack of illustrations and photographs, and the quality of printing (the black-and-white technique) was poor. On the other hand, by the end of 2001, a team of experts from the Faculty of Philosophy in Belgrade disclosed the results of the analysis of history textbooks for primary schools, high-schools and vocational schools. The students' assessments were not included in these results, only the remarks given by expert historians. A general remark referred to the fact that the curriculum and the textbooks that were written in accordance with it are, in many respect, outdated, with numerous flaws and old fashioned estimates of historical events and processes, mainly those belonging to the 20th century. The problem is even more complex since the 1990 curriculum has been in use since then. In spite of the attempts to change the curriculum (1996, 2001 and 2005), the essence of the curriculum has not been significantly changed. Along with the textbooks, this is considered to be one of the most serious educational problems in Serbia in the last decade. But, although new changes have been prepared, necessary changes have not yet been made, except for abridging existing curricula somewhat. As far as history textbooks are concerned the majority of flaws were noticed in the history textbooks for the last year of primary school, i.e. high-school<sup>6</sup>.

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<sup>5</sup> It refers to " Pavle Savić " Primary school" Vukica Mitrović " Primary school and The tenth grammar school " Mihailo Pupin " in Belgrade. Two hundred and eighteen students form primary school and two hundred and sixty-two from the secondary school.

<sup>6</sup> It refers to the textbooks : N.Gacesa, Lj.Mladenovic-Maksimovic & D.Zivkovic, History for eight grade of primary school, Institute for Textbooks and Teaching Tools,, Belgrade 2000, N.Gaceša, D.Živković & Lj.Radović, History for the fourth grade of secondary school, Istitute

The analysis of these textbooks shows that political history issues are dominant. Hence the history textbook for the 8th grade comprises 39 teaching units that refer to political issues which comprises 88.6% of the textbook, while only 6 or 13.4% of the book refers to social history issues<sup>7</sup>. A similar ratio can also be seen in the history textbook for the 4th grade of the high-school where; out of 66 teaching units only six comprise issues of social, economic and cultural history<sup>8</sup>. These indicators speak for themselves and pervasively support our attitude that these textbooks are utterly uninteresting and totally boring and are not fit to improve the students' knowledge of history. Another problem that was noticed during the analysis contributes to this conclusion. It refers to the number of teaching units that refer to general and national history that are present in the textbooks for primary school, i.e. high-school. Contrastive analysis shows that national history is presented in 29 teaching units, comprising 66% of the teaching material in the textbook for the 8th grade of primary school, while general history is presented in 15 teaching units, comprising 34%. A similar example can be found in the history textbook for the 4th grade of high-school, where the national history comprises 58% of the textbook, while general history comprises 42% of the textbook. Remarks regarding the style of the teaching units should be added to these indicators, as well as those that regard historiographic interpretation of the historic events from the Second World War and later.

Our previously mentioned findings referring to curriculum and history textbooks constituted a fruitful foundation for further research on this complex issue, which significantly hindered the process of modernization of the Serbian educational system. In our attempt to overcome the existing problems as fast as possible, during the next three years (from 2001 to 2004) we proceeded with the research using the new generation textbook for the 8th grade of primary school, i.e. 4th grade of high-school<sup>9</sup>. We would like to use this opportunity to point out that only one textbook published by the State institute is being used in the teaching process.

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for Textbooks and Teaching Tools, Belgrade 1999. This textbook had more publications with insignificant changes that were made. Besides new textbooks, it is still being used in the teaching process and in some schools in the country.

<sup>7</sup> See. Juric, J., Lazarevic, B., Djurovic, A. & Dimic, Lj. (2001), Face to face with the new beginning Curricula and history textbooks. *The Teaching of History*, 13, 112-113.

<sup>8</sup> Ibid, 113 .

<sup>9</sup> The textbooks are : D.Kovačević, D.Mikavica, B.Bešlin & B.Šimunović-Bešlin, History for the eight grade of primary school, Institute for Textbooks and Teaching Tools, Belgrade 2001, K.Nikolić, N.Žutić, M.Pavlović & Z.Špadijer, History for the fourth grade of secondary school , Institute for Textbooks and Teaching Tools, Belgrade 2002. Since 2005-6 another textbook has been included in the teaching process: History for the eight grade of primary school, Belgrade 2005, that will be included in the current research.

## About The Results of the Survey

When discussing history teaching, it is necessary to present the age level and the number of history classes held per week in our educational institutions. This will be done in the following scheme:

### *History as a school subject is taught in the following institutions:*

- In primary schools from 5<sup>th</sup> to 8<sup>th</sup> grade (in 5<sup>th</sup> grade 1 class, the others 2 classes per week)
- In secondary schools (grammar schools) from 1<sup>st</sup> to 4<sup>th</sup> grade (2 classes per week)
- In three-year vocational schools only in the 1<sup>st</sup> grade (3 classes per week)
- In four-year vocational schools the 1<sup>st</sup> and the 2<sup>nd</sup> grade (2 classes per week)

The existing curriculum is not suitable for the complexity of topics taught within one week. This problem is particularly emphasized with the 5<sup>th</sup> grade primary school students, who are taught 'History of Ancient Times' once a week. The problem is particularly emphasized because this is the first time they study history in school. Unfortunately, this problem has not been solved yet, which certainly bears a negative influence on the whole process of history teaching in primary school. We have covered one more aspect of history teaching in our research.<sup>14</sup> We tried to find out to which degree certain subjects are popular among students, taking into consideration the subjects taught during the four-year education in primary and secondary schools. We were incited to do this by the fact that history was, according to a pilot research project including only a small sample of students in 1991, almost at the end of the popularity list, in the penultimate position. The result is mainly a consequence of, not only the teaching methods (which are traditional), but also of the quality of textbooks stipulated by The Ministry of Education for each particular educational level. The ranking of school subjects based on the students' answers is shown in the following chart, first for primary, and in the second part of this paper, for secondary schools as well.

### *Research results on the popularity of history in primary schools (the 8<sup>th</sup> grade).*

The number of schools included in this research project: 40

The number of students included in this research project: 950

#### School subjects according to their popularity

- |                       |                                 |
|-----------------------|---------------------------------|
| 1. Geography          | 8. Informatics/Computer science |
| 2. Physical education | 9. Technical education          |
| 3. Serbian language   | 10. Biology                     |
| 4. Musical education  | 11. French language             |
| 5. Arts               | 12. Mathematics                 |
| 6. History            | 13. Physics                     |
| 7. English language   | 14. Chemistry                   |

When we compare the data from the ranking list, we see that history has taken the sixth position. Compared with the previous period, it certainly is a significant improvement, however not entirely satisfactory. Still the fact that history is not among the most unpopular subjects any more (biology was the most unpopular one), shows that history teaching has significantly improved. On the other hand, the fact that for example French language was at the end of this ranking list is surprising. The reason for this is not only because French language teachers are not well prepared, although many have not had the opportunity to attend professional French language courses in France, but mainly because the students start learning the second language relatively late (the fifth grade). As far as the position of sciences is concerned (mathematics, physics and chemistry), this is to be expected because these students are unjustly burdened with a lot of duties (the number of classes, written assignments and control tests), which certainly influence their opinions.

Another result from our research refers to the assessment of history textbooks by the students. Even this problem was analyzed on two educational levels. The following table shows the results on primary level.

***Research results on the characteristics (positive and negative) of History textbooks for primary schools (the 8<sup>th</sup> grade).***

The number of schools included in this research: 40

The number of students included in this research: 950

<b>Positive characteristics of the textbooks (53.6%)</b>	<b>Negative characteristics of the textbooks (46.4%)</b>
Illustrations and photographs	Long and comprehensive teaching units
Clear and comprehensible text	Lack of illustrations
Interesting texts	Uninteresting (boring) texts
Concise teaching material	Unclear texts
Comprehensive text with many details	The important things are not separated from the unimportant ones
Questions after a unit	Russian Revolution in 1917
Explanations of the unknown terms	Serbia and Montenegro by the end of the 19 <sup>th</sup> and the beginning of the 20 <sup>th</sup> century
Historical charts	The world by the end of the 19 <sup>th</sup> and the beginning of the 20 <sup>th</sup> century
Yugoslavia between the two World Wars	There is no reminder
World War Two	Weak coherence between teaching units
World War One	Not enough information of National history
Biographies of historically important personalities	Questions after texts of each teaching unit
No positive characteristics	
No answer -	No answer -

If data from the table are analyzed, one will see that 53.6% of the students assessed the existing History textbook positively, stating precisely their remarks, i.e. the positive and the negative characteristics of the textbook. Compared to the results of

previous research, these results can be regarded as a significant improvement, but certainly not sufficiently satisfying. The analyses of the answers give space to some serious thinking for potential authors of History textbooks. How can the deficiencies the students pointed at and gave good reasons for be eliminated? How can the texts the students assigned positive characteristics to be improved? In our opinion, it is one of the important steps to be undertaken in order to write textbooks that will meet the required standards that Joke Van Der Leew-Roord outlined in her interesting study (J. Van Der Leew- Roord, 1999, 123-124).

This work has also observed and dealt with this problem in Serbian secondary schools. The same problem has been present for years both on this level and on lower levels, i.e. the levels of primary education. The problem also comprises the fact that schools are not equipped with modern teaching material, and furthermore, that only one History textbook is being used on this level. It surely influenced the students' remarks that they made during our research. We will first comment on the ranking of subjects according to their popularity by the 4th grade students of secondary schools. The results are shown in the following table.

***Research results on the popularity of History in secondary schools (4<sup>th</sup> grade).***

The number of schools included in the research - 45

The number of students included in the research - 1020

Ranking of school subjects according to their popularity:

- |                       |                                  |
|-----------------------|----------------------------------|
| 1. Physical education | 8. Mathematics                   |
| 2. Serbian language   | 9. French language               |
| 3. English language   | 10. Biology                      |
| 4. Philosophy         | 11. Physics                      |
| 5. Informatics        | 12. The Constitution and the Law |
| 6. Sociology          | 13. Chemistry                    |
| 7. History            |                                  |

If data from the table are analyzed, one will see that History is placed as number seven among the other subjects. This position may be considered as an improvement, compared to the previous period, similar to the case of primary education, since this subject also was at the mere end of the list according to the students' popularity ranking.

The students' written notations of the History textbooks show that there has been a considerable improvement, i.e. the textbooks standing were considerably better. This can be extracted from the following table.

***Research results on the characteristics (the positive and the negative ones) of History textbooks in secondary schools (grammar schools) –the 4<sup>th</sup> grade***

The number of schools included in the research: 45

The number of students included in the research: 1020

<b>Positive characteristics of the textbooks (52.8%)</b>	<b>Negative characteristics of the textbooks (47.2%)</b>
Charts and photographs	Numerous factualism (dates, years, names, battles)
Clear text	The important things are not separated from the unimportant ones
Interesting text	Boring text of the teaching units
Precisely and concretely presented events	Lack of interesting things
Graphical design	Weak connection of the teaching units' contents
Good layout of the text	Lack of topics from the history of everyday life
Selection of the topics from the National history	There is nothing positive
Contributions to the expanding of knowledge from general history	
No answer -	No answer -

If data from this table are analyzed, one will see that that 52.8% of students assessed the textbook positively, which may be considered a considerable improvement compared to the previous period, although not sufficient, bearing in mind the initiated process of modernization of the Serbian educational system. In our opinion, the students' remarks, although often contradictory, can be useful to the future authors of textbooks, as well as to those who want to start writing workbooks and other forms of written teaching material that can be used for History teaching in secondary schools.

On the other hand, a much more significant problem is present in History teaching in vocational schools where the textbook written 12 years ago is still in use<sup>10</sup>. Our attention has been directed to four-year vocational schools where History is taught only in the first (from prehistory to the middle of 19<sup>th</sup> century) and the second grade (from the middle of the 19<sup>th</sup> century to the end of the 20<sup>th</sup> century). The research includes 10 schools and 245 students. The conclusions are more than disturbing because 51.8% of the students included in this research commented negatively on the History textbook that was in use. The analysis of their answers shows that they mostly made remarks about the fact that a considerable period of time was covered in the textbook, and so the texts were too comprehensive and included too much historical information. There were also made negative remarks about the style of the History textbook, as well as the lack of illustrations and the dominance of political history issues.

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<sup>10</sup> M.Perović & B.Smiljanić, *History for the first grade of four-year vocational schools*. Institute for Textbooks and Teaching Tools, Belgrade 1993. A new textbook is being used only since this year.

Based on these findings, as well as on the remarks of the textbooks mentioned previously, a precious source of knowledge is provided that can be a good basis for future research in this very important segment of education.

## Conclusions

The comprehensive analysis of the collected material (surveys) has demonstrated that History, measured by its popularity in school, ranks as number six or seven in a group of fourteen subjects, which is considered to be a solid basis for further research into this issue.

If we study the students' responses more deeply, the students have rightfully pointed out a number of flaws. The dominant ones are the selection of topics (mostly) from political History, extensiveness of the basic text of units, the language used, the amount of factualism which suppresses and does not encourage thinking, lack of sources (posters, caricatures, etc.) which would supplement the basic text etc. On the other hand, the positive characteristics, which refer to the increased number of units from General History, the choice of photographs of historical persons and monuments as well as historical maps, have been singled out. The importance of these findings attained after years of research widely exceeds school limits. In our opinion, they outline a direction for future authors of History textbooks, not only in Serbia, but also in the rest of Southeast Europe.

The change of curriculum is one of the preferential missions in the act of creating new textbooks. Serbian History textbooks, according to the evaluation of students in primary and secondary school, have not fulfilled the basic academic and pedagogical standards of modern textbooks. It is obvious that one of the reasons is due to neglecting students' opinions of the books they meet daily, opinions that are brought forward in this study. Before creating new textbooks, it is necessary to study the historiographic and didactic value of this educational aid more closely. This is the best and the shortest way to produce modern textbooks that are to become important backing assets in the modernization of education.

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# Producing and Adapting Educational Materials with and for the Elderly in Rural and Urban Contexts<sup>1</sup>

Jesús Rodríguez Rodríguez and Helena Zapico Barbeito

## Introduction

The present experience was carried out in the Faculty of Education Sciences, University of Santiago de Compostela. It was part of the 3rd year course, “*Teaching for Adult Education*,” for the degree in Social Education, that is, the education which is conducted outside of schools or which varies from conventional school methodology. (Examples of settings where social educators work include: socio-cultural entertainment, work with marginalized groups, elderly education, activities organised by town councils, and others)

The activity described here was done in collaboration with a variety of schools, associations, institutions and social groups in the autonomous region of Galicia (Spain). This experience was motivated by our desire to address the needs of the elderly from a didactic perspective as well as by our interest in analysing the role of didactic materials in non-formal education contexts (as fundamental elements in educational processes). The production and use of educational materials for the elderly was an opportunity for teaching and learning with elderly people and an excellent occasion for Social Education students to act as real co-ordinators of initiatives. The approximately 60 initiatives stemming from the course, “*Teaching for Adult Education*,” were an opportunity to extend the usefulness of the university beyond the classroom. These initiatives constituted a contribution because they address social issues that are increasingly important to the elderly population such as loneliness, use of free time, cultural and socio-affective deficiencies, physical and psycho-social limitations, educational limitations, and so on. Furthermore, another fundamental objective, where our elderly population has a vital role to play, involved the recovery and preservation of the linguistic and cultural heritage of Galicia. The practical application of the initiatives spurred an intense collaborative effort among a variety of education professionals and was an enriching experience both personally and professionally.

In order to better understand our proposal, we should keep in mind the following considerations regarding didactics:

- School education is the preferred scope of action for Didactics, however, it can be said that Didactics occurs anytime that there is an intentional teaching/learning process, and that, nowadays, this occurs in educational settings outside of schools.

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<sup>1</sup> This Experience was awarded the First Prize for Educational Innovation by the University of Santiago de Compostela.

- Education makes use of didactic means and resources.
- It is difficult to conceive of teaching/learning processes without didactic materials.
- The resources present, in turn, ideology, values and socio-economic connotations.

### **Development of proposals**

First of all, each of the educators was given some general guidelines for the elaboration of materials with and for the elderly. They were asked to include the following in their materials proposals: title, context, aims, contents, strategies, materials development, evaluation, results of carrying out the project, conclusions, bibliography and sources consulted.

In addition, a training session was held to clarify what it means to produce materials with and for elderly people in order to address problems. Afterward, students contacted associations and institutions in order to identify needs regarding educational resources for working with elderly people. Then, students went on to produce each of the materials. The materials proposed included a final assessment section for students to comment on what the experience had meant to them and to the people who the activity addressed. Some sessions were recorded on video for later viewing and analysis. The students were also asked to keep a journal in order to be able to have adequate knowledge of the elaboration process.

At the time of putting the projects into practice, we encouraged the authors to keep in mind not only the requests from the elderly people, but also differences in learning styles, work habits, and time availability. We specifically emphasised the fact that there was no need to think that each project had to address a broad range of subjects. Instead, it was emphasised that the experience with a single grandparent at home was just as valuable as the experience with all the members of an entire association. The projects were introduced at the beginning of the semester and developed throughout the course. The students were asked to identify contexts for work with the elderly, especially those people in a situation of social risk (i.e., isolation, marginalised, dependence).

The following issues were also kept in mind: the rigor and up-to-date nature of the contents, analysis of values and attitudes which are transmitted, openness of the material, diversity of materials, care for formal aspects, coherence with respect to institutional projects, etc.

The main objective of the activity focussed on the elaboration of materials adapted to the socio-cultural context of the elderly, keeping in mind that the scarcity of specific educational resources means that the social educator carries most of the responsibility for the dynamics of the activity. The following aims were also addressed:

- To make didactic materials available, appropriate for needs and activities of the elderly.
- To make materials available specifically adapted (for example, many of the materials used up to now to teach elderly people to read in Spain are the same as those used to teach primary school children in schools).
- Participation or support by the university in the activities carried out with the elderly in our society.

Generally speaking, the following were the materials proposed and elaborated;

- Materials elaborated by the students themselves for use with elderly.
- Materials elaborated jointly by students and the elderly
- In some cases, adaptation of existing materials to the characteristics of the elderly.
- It is important to remember that generally the materials are used as support for some type of project or work initiative involving the elderly.

Regarding the elderly context, it is important to remember that materials are not currently adapted or contextualised for the reality of the elderly and they are not normally mentioned in the resources.

### **Description of materials**

Overall, the materials produced can be categorised into seven groups according to the general subject area they dealt with:

- Transmission of the cultural heritage of the elderly: these materials focused on preserving the cultural and experience of the elderly, as well as Galician cultural folklore. There are proposals involving such things as the elaboration of books based on the life experiences and memories of the elderly, the creation of a cookbook between grandmother and granddaughter, and the production of a magazine of stories set in a residence for elderly people.
- Inter-generational relationships: a diverse type of materials with a variety of formats aimed at fostering inter-generational contact between youths and elderly. These materials include such things as traditions, popular tales, legends, and descriptions of farm activities.
- Memory stimulation: the materials in this category are aimed at exercising and improving memory. To this end, a variety of techniques, dynamics and strategies are employed.
- Materials for health/ physical exercise: these resources are produced in order to foster the acquisition of healthier habits and life styles by applying relaxation techniques, improving autonomy in the organization of taking medications, physical fitness, nutrition, etc...
- Cognitive skills/ basic education: these materials are directed toward “discovering” new cultural and educational interests for the elderly, which provide them with a

wide variety of knowledge and experiences for the purpose of improving basic cultural deficiencies that may exist. It is the case, for example, with the experience “Grandparents, what do we learn today?” in which a Social Education student designs a program for her grandparents involving literacy, training workshops on floral issues, informational talks, visits, and so on. Other materials give the elderly an introduction to the analysis of the influence of the mass media, ecology and environmental education, the use of the Euro, etc...

- New technologies: these resources are meant to bring the participants into contact with the world of computers and internet, as well as the use of appliances and a variety of electronic devices.
- Likewise, some of the materials designed and employed included activities and proposals for making educational use of free and leisure time.

## **Conclusion**

We go on to describe some of the main implications of the project for students in Social Education – co-ordinators and promoters – for the elderly participants and for the groups and associations to which they belong.

The creation and application of these resources has been a truly new and enriching experience for students training for a career in the field of Social Education. The design, adaptation, and use of these materials for the elderly has allowed the authors to reconfirm the belief that old age is not simply a time of decline and deterioration, as is too often thought in our society. Instead, it is a process that varies according to each person’s previous possibilities and development. It is also a time to promote, maintain and develop new capacities, learning, and enriching life experiences.

With respect to the elderly people who have participated and the institutions where the experiences were carried out, we can say that-- depending on the nature, the characteristics and the specific sense of each material—they have encountered feelings and experiences that also have influenced their lives in different ways: some have received training in a variety of areas ( new technologies, the euro, the mass media, literacy, therapeutic strategies and techniques, relaxation, etc...); for others it has meant participating in experiences of inter-generational relationships, entertainment, and others have been able to develop a variety of skills and capacities ( physical, cognitive, memory, etc...); and others have discovered new ways of using their free time for educational purposes.

Without doubt, all the participants experienced a considerable increase in their self-esteem. Their self image has been enriched insofar as the new training has enabled them to discover capacities they did not know they had. Their potential has been raised and new avenues of personal fulfilment have been opened. The elderly people involved expressed opinions such as the following: “this isn’t possible”, “this activity isn’t for us,” “that is for young people”, “I’m too old for that”, “I don’t need to learn any more”. After participation in the activity, however, many students heard

elderly people express another type of opinion: “It’s just a question of getting started, in the end you can do it”, “who could have told me that at this age I would still be able to learn so much”.

Finally, it is worthwhile to remember that carrying out our experiences such as these are not free of problems. Undoubtedly, the varied nature of the proposals is personally and professionally enriching, but, at the same time, it implies a degree of difficulty in the follow-up and evaluation process. I must also point out that the structural quality of the materials could be better in some instances; nevertheless, we would rather emphasise the didactic significance of the proposals, the work in term of reflection on the part of the elderly, the elaboration, adaptation and application of the materials, etc

In general terms, the following are some of the main conclusions that can be drawn from the experience. “Social Educators” learned to identify contexts and needs for materials in contexts that were not strictly scholastic. They tested and put into practice with elderly people some of the potential provided by new technologies. Furthermore, intergenerational collaboration habits between elderly people and activity co-ordinators were developed. This activity has helped to improve the conditions and quality of life of the elderly people involved.



## **Process of Development and Testing of Textbook Evaluation Criteria in Slovakia**

Maria Nogova, Jana Huttova

Since the late 1980s, as a result of higher demand for quality education, experts have paid more attention to the issues of efficiency and quality of education. In several countries experts have concluded that in spite of increasing expenditure on public education the level of education funding is insufficient and does not show a significantly upward trend. Therefore, theorists as well as practitioners have been searching for a solution to this unfavourable state of affairs. International surveys conducted under the auspices of the International Association for the Evaluation of Educational Achievement (IEA), and later on also the Organisation for Economic Co-operation and Development's (OECD) Programme for International Student Assessment (PISA) aimed at evaluating students' achievements and measure their readiness for life. In addition to international comparisons of educational achievements, the outcomes of these studies have been analysed to indicate which direction the development of education should follow. Slovakia's results in these international surveys and comparison with other countries have contributed to the ongoing discussion about the quality of education.

Increased attention has been paid also to quality of textbooks and to creation of new textbook policy. As a response, the National Institute for Education (NIE), in cooperation with the Open Society Institute (OSI) based in Budapest, has carried out a long-term project entitled 'Textbook Policy in Slovakia'. Its main objective was to propose a new textbook policy and strategies how to improve the quality of textbooks and to increase the efficiency of state funding of textbooks. The project began in 2001 with a review and detailed analysis of all aspects of textbook policy in Slovakia. The whole project was highly participative and representatives of the Ministry of Education, local self-governing bodies, publishers, teachers, experts in individual school subjects as well as students were involved in the project at its individual stages. The final document proposed a set of actions and recommendations to improve individual components of textbooks policy, including establishing an independent textbook approval committee, streamlining the process of textbook publishing, an improved system of collecting orders from schools and finally, a more efficient system of textbook distribution.

The main task of the second phase of the project was to prepare a new textbook approval and evaluation system. As a result, a new set of criteria and evaluation methods has been developed to be used for: 1) the evaluation of sample manuscripts in a tender process; 2) the approval and publication of completed manuscripts, and 3) the evaluation of textbooks used at schools. The process of development and piloting of the new textbook evaluation criteria took place between 2002 and 2005. Since 2006 the new criteria have been used in practice.

Due to the space limitation for this article, we focus primarily on the process of developing and piloting the new evaluation criteria. We also provide only a brief summary of methods used.<sup>1</sup>

### **Definition of textbook quality and key categories**

At the beginning, we defined the quality of textbooks based on social needs, general educational objectives and up-to-date pedagogical and psychological theories of learning. The contemporary theories of learning that are utilised in Slovakia place emphasis on the role of a student in the active acquisition of new knowledge. Thus, quality textbooks not only serve as the main source of knowledge, they also need to help in developing the student's personality, in respecting his/her individual skills, stimulating interest in learning, and in supporting interactivity.

On the basis of these identified attributes of quality, 6 key evaluation categories (KEC) were derived: compliance with principal pedagogical documents, personal development, content selection, social correctness, methodological approach, and visual layout.

These KEC had to be further elaborated and quantified. Therefore, we continued with the identification of main functions from which a system of specific criteria was derived.

#### ***Textbook functions as a basis for the creation of evaluation criteria***

From identifying the 6 KEC, we moved to textbook functions. We looked at the extent a particular textbook complies with the identified functions. Textbook experts state that the quality of a textbook is determined by the extent to which it fulfils didactical functions. We agree with Arno Reints who argues that: "the assessment of the quality of a certain product means that we have a clear idea about the functions of the product... The instructional functions of teaching materials depend on various aspects: their target group, curricular area, textbook type, the manner in which teachers intend to use these materials." (Reints, 2002). Rogiers and Gerard (1998) also claim that textbook functions depend on users, textbook focus as well as the environment in which the textbook was created. According to Jaan Mikk, the most important function of a textbook is to motivate students to learn (Mikk, 2000, 17). These and other experts (e.g. Zujev, 1986) have broadened the scope of didactical functions of textbooks and ranked them in order of importance.

When assessing the quality of textbooks the NIE checks to what extent they fulfil the following functions/roles: to provide appropriate information, to acknowledge and encourage different interpretations, to motivate students to learn, to develop student's social skills, to develop personal competencies, to develop various learning

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<sup>1</sup> Readers interested to gain a more detailed information about the whole project or about its specific aspects should contact the authors at maria.nogova@statpedu.sk or jhuttova@osi.hu

approaches, to encourage student's self-learning, to provide instructions for lessons, and to support assessment and self assessment.

### ***Identification and Hierarchy of Criteria***

Based on the above theories and knowledge, the NIE prepared a set of clearly formulated functions that a textbook should serve in the contemporary educational process. 18 evaluation criteria were subsequently derived from these functions. Individual criteria are crucial for the overall quality of the textbook, but they do not all have the same level of importance. Therefore, in the next step we classified these criteria into different levels. Based on consensus among internal and external pedagogical experts, a two-dimensional hierarchy of criteria was created (Table 1).

**Table 1**

Hierarchy of Criteria (Related To Content And Pedagogy): Categories, Levels, Scores							
6			Content correct, accurate and up-to-date with disciplines				8
5	Text appropriate to student age	Core content clearly defined	Compliance with course standard	Development of student's attitudes, competencies and skills	Content elaboration to promote student learning	Compliance with curriculum	7
4		Usefulness in everyday life	Graphic presentation of text	Social correctness			6
3		Student readiness to integrate into broader community	Didactical elaboration of content	System of questions and tasks			5
2			Motivational and aesthetical quality of illustrations	Presentation of content			4
1		Compliance of pictorial material with text	Balance between core and supplementary content	Logical structure of Content			3

The number of levels was not determined beforehand. The hierarchical arrangement is not cumulative. The main aspect affecting the placement of a certain criterion into the hierarchy was how much the quality of education is affected if the particular criterion is not fulfilled. The criteria are not disjunctive, but rather constitute an interconnected, overlapping system, which every textbook should comply with in a complex way. The criteria at the horizontal level are equivalent, while those at the

vertical level are ranked into 6 levels. At Level 1, the lowest score is 3, which is a figure that still allows evaluation with a sufficient degree of sensitivity. The purpose of the horizontal and vertical hierarchical arrangement of the textbook quality criteria was to create conditions for objective quantitative evaluation.

#### ***Detailed specification and scoring of criteria***

In terms of content, the criteria are defined on the basis of requirements that specify their quality. The maximum score for each criterion is given in Table 1. How much the requirement for each criterion is fulfilled is specified in more detail by indicators for the minimum, average, and maximum value. In the future it will be necessary to modify and set indicators not for boundary values, which are relatively unambiguous, but rather for internal intermediate values. For example, in the case of the criterion of “Usefulness in everyday life” (maximum score 6), indicators for the values 5-4 and 2-1 would be more beneficial.

#### ***Scaling individual criteria - Example***

**Category 2:** Personality development

**Criterion 2.3** Usefulness in everyday life

**Requirement:** Content (text, tasks and illustrations) is elaborated in such a way that it provides examples from real life, and develops student’s abilities and competencies to appropriately solve real-life problems.

Scale	Indicator
6	Real-life issues are fully and consistently incorporated in the whole textbook.
5-4	
3	Text enables fulfilment of this requirement but is not systematically applied across to whole textbook.
2-1	
0	The textbook totally lacks real-life applications or uses inappropriate examples.

#### **Grouping of criteria into key evaluation categories (KEC)**

The above mentioned criteria were grouped into 6 KEC determined at the beginning of the process. The overall weigh for each KEC is a sum of maximum scores for individual criteria specified in Table1.

I. The key category “**Compliance with Principal Pedagogical Documents**” contains the following criteria: compliance with the curriculum, the logical structure of subject matter, and compliance with the course standard. The overall weigh of this category is 17 points.

II. The key category “**Personal Development – Values, Competencies, and Skills**” contains the following criteria: development of students’ basic skills, student integration into the broader community, and subject matter usefulness in everyday life. The overall weight of this category is 18 points.

III. The key category “**Content Selection**” includes: technical and factual accuracy of information, conciseness of content in terms of elementary subject matter, and balance between elementary and additional content. The overall weight of this category is 18 points.

IV. The key category “**Methodological Approach**” includes the following criteria: stylistic characteristics of text, content accessing methods, presentation of educational content in terms of learning and instruction, and the system and formulation of questions and tasks. The total weight of this category is 24 points.

V. The key category “**Graphic Layout**” contains four criteria: graphic presentation of text, clear graphical presentation of educational content, matching pictorial material and text, quality of illustrations in terms of motivation and their aesthetic value. The weight of this category is 17 points.

VI. The current globalisation of the world goes hand in hand with the issue of ensuring mutual respect between people in society. Therefore, a separate category was created, entitled “**Social Correctness**” and containing one criterion – respecting social correctness, with the maximum score of 6 points.

The maximum aggregate score for all 6 KEC is 100 points (Table 2). In order for a textbook to be evaluated positively in terms of its quality, it must achieve the 60% level in each category.

**Table 2**

Summary of Key Evaluation Categories		Max. score
Content and pedagogy		<b>100</b>
I.	Compliance with principal pedagogical documents	17
II.	Personal development – values, competencies, skills	18
III.	Content selection	18
IV.	Methodological approach	24
V.	Graphic layout	17
VI.	Social correctness	6

### Checking the validity of criteria

In order for the above textbook quality evaluation criteria to be implemented in practice, it was necessary to prove that they were a valid and reliable measurement instrument. To determine the validity of the criteria in terms of their content, we asked education experts, teachers and subject specialists to review, test and evaluate

them. By means of a combination of different methods (expert analysis, questionnaires, interviews, and the testing of criteria on finished textbooks) we sought to find out if all aspects of textbook quality were covered by the criteria. Also, we aimed to verify whether the results of the quantitative evaluation based on the criteria (scoring 6 KEC) corresponded with the qualitative evaluation provided by individual evaluators (verbal feedback and written comments). To ensure the general validity of the criteria for all subjects, for testing purposes we selected textbooks from various subject groups: Slovak Language, Biology, Geography, Chemistry, ABC-book for the visually impaired, and Music.

The individual criteria were repeatedly modified on the basis of these findings. After several rounds of piloting we prepared the final set of evaluation criteria, which have been used in practice since 2006.

### **Determining the reliability of criteria**

In order to be able to declare that textbook evaluation is objective, we must be confident that all evaluators have understood the criteria in the same way. Reliability of scales and indicators for individual criteria (described earlier) was tested on 4 already published textbooks and 11 manuscripts (for 3 school subjects). 29 evaluators in total participated in this stage. Most attention was paid to evaluating the manuscripts because of the fact that there are at least seven evaluators per manuscript in a tender process. A higher degree of consensus among these 7 evaluators and their evaluation results indicated a higher degree of reliability.

Several methods were used to determine reliability:

- a) Pearson's Correlation Coefficient was used to determine a mutual relation between pairs of evaluators and their reliability. The resultant correlation coefficients were within the range of 0.726-0.975 with most of them within 0,726-0,859. This indicates a high degree of correspondence between the scores given by the pairs of evaluators.
- b) Comparison of the variation range between the maximum and minimum assigned score as well as comparison of the positive and negative evaluation of a textbook according to a certain criterion served to determine the degree of correspondence among all evaluators (at least 7 evaluators per manuscript in a tender process).
- c) Cronbach's alpha scale used to determine the reliability of individual criteria served as a basis for modifying and reformulating the indicators.

The analysis of measurements showed which modifications needed to be taken, but these did not significantly change the overall framework of the criteria. By means of these modifications, certain internal specifications of the criteria were fine-tuned. At the same time, by means of the analysis of quantitative as well as qualitative methods, some criteria were excluded from the final version. The first version contained 24 criteria, while the final, simplified version has 18 of them.

The combination of various methods confirmed the high overall validity and reliability of the criteria. The new set of evaluation criteria and their specifications were positively received by evaluators. They were welcome as a useful instrument for a more objective textbook evaluation. Evaluators were pleased by the fact that the criteria allowed complex assessment of all aspects of a textbook. They emphasised that the new system could appropriately guide their work while leaving sufficient room for additional recommendations and personal comments.

The new system for the objective evaluation of textbooks was also welcomed by publishers and authors of new textbooks. The criteria are available to all parties concerned, which contributes to greater transparency and credibility of the textbook approval process. The next necessary step is to completely separate the approval process from the Ministry of Education and set up an independent committee with full decision-making powers. However, political support for this step is presently lacking.

### **Conclusions and summary**

On the basis of the experimental testing of the criteria in practice, which lasted for several years, and the analysis of evaluation results, we have finalised the textbook quality evaluation criteria and made them available for use at all stages of the approval process concerning new textbooks and also for the evaluation of already published textbooks.

The process of creating new evaluation criteria has shown several important factors necessary for the successful introduction of a new, more objective and transparent textbook approval system.

First, it has initiated a debate about the quality of textbooks and the education system as a whole. As a real education reform has not yet taken place in Slovakia, there is no generally accepted definition of the quality of education. At the early stage of identifying the basic evaluation criteria, it was shown that the overall concept of education was highly needed. Without clearly articulated new education policies and laws, changes in textbook policies are fragmented and partial. The new set of the criteria reflect the existing textbook policies as well as the current state of research and pedagogical theories in Slovakia.

Second, foreign experience has played an important role in the whole process as Slovakia lacked experience in several areas. Especially textbook research has been very much neglected over the past decade. Contacts and materials obtained through IARTEM have proven really invaluable. Through the Open Society Institute, the National Institute for Education has gained access to several years' experience of other countries in developing and implementing new textbook policies. Thus, the NIE has obtained a database of textbook policy documents, textbook projects and set of criteria used in a number of countries. These materials have served as a source of inspiration as well as a test group in the course of preparing its own system.

Third, the whole process of creating, experimental testing, and gradual implementation of the criteria took almost five years to complete. Throughout the process, the NIE cooperated with all parties concerned. Thus, not only necessary feedback, but also broader stakeholder' support were ensured. Any change in textbook policy in countries with state funding for textbooks is always closely monitored and may meet with strong resistance.

The NIE has drafted a number of recommendations for performing other necessary changes to the system of approval, publication, and financing of textbooks. Some of these measures have not won necessary political support to date. We hope that the overall reform of the content of education will be launched in the near future and that the documents drawn up by the NIE will be part of this reform.

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# **The Textbook Selection in Primary and Secondary Schools**

Zuzana Sikorova

The paper reports on the research concerning the textbook selection process in Czech primary and secondary schools, carried out at the University of Ostrava in 2004. The Czech Republic belongs to those European countries where the Ministry of Education still approves lists of textbooks. It means - in the case of primary and lower secondary school textbooks - that only those with the 'approval clause' are free of charge. Nevertheless, the lists of approved textbooks include a relatively great number of items. Thus the final solution of textbook selection remains on schools and teachers. The conception of a teacher as the key agent in textbook adoption process was the starting point of our investigation.

The research problems of textbook adoption and selection fall into the great research group of 'the development of textbooks' (Johnsen, 1993, 28) or 'process-oriented textbook research' (Weinbrenner, 1992, 21). The investigations in this field are relatively frequent in the USA (e.g. Muther, Farr and Tulley in 1980s; Woodward, Tyson in 1990s), but quite rare in the European educational research. E. B. Johnsen's monograph from 1993 is the significant but rather rare information resource.

If we summarise the findings of our research, we can claim as follows: the processes of the textbook selection and adoption are not explored sufficiently; in spite of that it is possible to state two main conclusions:

- a) The idea of an optimum textbook is false. It is very difficult to specify general views which would qualify the selection of one textbook and deny the other. The textbooks work in the frames of various educational conceptions declaring different demands (Westbury, 1994; Bamberger, 1994; Johnsen, 1993).
- b) The decision on textbook selection must be made in the light of specific characteristics of their users – students and teachers (Grant, 1990; Westbury, 1994; Bamberger *et al*, 1998; etc.). It means that teachers play a key role in the process of decision-making. It is only the particular teacher who knows the particular conditions under which the textbook will work in the class.

## **Research aims and methods**

The research investigation was carried out among primary and secondary school teachers in Ostrava – a region in the Czech Republic. The main aim of the study was to identify and describe the role of teachers in textbook selection and evaluation in

schools. The research sample was represented by 784 teachers of general education subjects in Ostrava – region. The sample was selected on the base of stratified choice and includes 5 groups of respondents: primary school teachers, lower-secondary school teachers and the teachers from 3 types of upper-secondary schools (general upper-secondary, secondary technical and vocational schools). We applied a questionnaire method with multiple-choice questions and scales; an individual semi-structured interview was applied in pilot and pre-research studies. The investigation was focused especially on the following issues:

- What is the role of teachers and other participants in textbook selection process in primary and secondary schools?
- To what extent do the external factors influence the process of textbook selection?
- What are the teachers' needs concerning textbook selection and evaluation?

#### The role of teachers and other people

We used a few questions of different formulations in order to find out the textbook selection strategies; the first one was: “How were the textbooks you are working with selected?” The respondents quoted particular titles and the ways they were chosen. Thus the data of 2523 textbooks were gathered. All presented versions of answers may be summed up into two categories:

1. The teacher had an opportunity to participate in selection of the textbook he/she was working with – it includes the following multiple-choice variants
  - ‘own choice’;
  - ‘in co-operation with the colleagues’;
2. The teacher had no opportunity to participate in selection of the textbook he/she was working with – it includes the following versions
  - ‘the decision of headmaster (or subject head teacher)’;
  - ‘the textbook had been already used’;
  - ‘I do not know how the textbook was selected’.

**Table 1.** Teacher's opportunity to participate in decision-making

<b>Participation</b>	<b>Number of textbooks</b>	<b>Percentage</b>
Participated	1852	73.4%
Not participated	671	26.6%
Total	2523	100%

In other items we asked the respondents to describe the situation in their schools – who took part in textbook selecting process in their schools and who decided the textbooks to be selected (see table 2).

**Table 2.** Decision-making on textbook selection in schools

Variant of response	All responses		The only response	
	frequency	percentage	frequency	percentage
Every individual teacher	121	15.4%	43	5.5%
Teachers together	655	83.6%	429	54.7%
Headmaster	160	20.4%	30	3.8%
Subject head teacher	155	19.8%	10	1.3%
Not know	8	1.0%	x	x

Most of the teachers took part in textbook selection in their schools: 73% textbooks the respondents were working with had been selected with their participation. Group decision-making was the most frequent way of textbook selection in schools in our sample (84% of respondents); 15% of respondents confirmed the individual choice. The role of headmasters was important as well. First of all they approved of the chosen textbooks - almost 50% of respondents confirmed the fact, and not only in a formal way; was formal approval indicated by 23% of respondents. Furthermore, 20% of teachers claimed that headmasters had taken part right in the textbook selection process. Nevertheless, an authoritative decision-making was not typical - only 5% of respondents asserted that the headmasters alone made the decisions. The differences between primary and lower-secondary schools on the one hand and upper-secondary schools on the other were proved: primary and lower-secondary school headmasters took part in selection more frequently (30%) than their colleagues in upper-secondary schools.

Statistic analysis showed that teacher's opportunity to select the textbook for his/her teaching had varied depending on

- the length of teacher's practice: two groups of younger teachers with (0-5) and (6-10) years of teaching practice participated in textbook selection less frequently than other groups with longer practice;
- the school type: the primary school teachers participated in textbook selection less frequently than teachers from other 4 groups - more than 44% of textbooks they used had been selected without their participation;
- the teacher's qualification: it was no surprise that fully qualified teachers had taken part in textbook selection more frequently than non-qualified respondents.

The most important issue we dealt with in this investigation was to verify if there is a relationship between 'teacher's opportunity to participate in textbook selection' and 'teacher's satisfaction with this textbook'. The hypothesis was formulated:

H 1: The teacher's satisfaction with the textbook he/she uses in the lessons depends on his/her opportunity to participate in the textbook selection.

In the course of the research an additional hypothesis was elaborated:

H 2: The teachers who selected the textbook individually are more satisfied with it than the teachers who selected it as members of groups.

The respondents expressed the degree of their satisfaction in 5-point scale, where '1' meant 'not satisfied at all' and '5' 'fully satisfied'. The teachers evaluated the textbooks they were using in given school year 2003/2004 quite highly: mean scale value was 3.68 (standard deviation = 1.06, median = 4, number of evaluations = 2523). Both null hypotheses were tested with one-way analysis of variance (H 1: the value of test statistic  $F_{0.05}(1;2422) = 69$ ; probability  $p = 0.0001$ ; H 2:  $F_{0.05}(1;1771) = 13.53$ ;  $p = 0.00024$ ). Both hypotheses have been proved.

**Table 3.** Teachers' satisfaction with textbooks in relation to participation in their selection

Degree of satisfaction	<i>Teacher's participation in textbook selection</i>				
	yes			no	total
	individual choice	group choice	total		
arithmetic mean	3.97	3.75	3.79	3.39	3.69
standard deviation	1.02	1.03	1.03	1.10	1.06

### *The influence of external factors*

'External factors' in our work meant social, economic and other backgrounds, the circumstances that accompany the textbook selection while the textbook characteristics were considered to be 'internal factors'. We offered 8 external factors and the respondents had to score each of them in the 5-point scale: '1' meant minimal influence, '5' maximal influence.

**Table 4.** The influence of external factors

Factor order	arithmetic mean
1. Ministry of Education approval clause	3.63
2. Sufficiency of information regarding books	3.39
3. State of school finances	3.21
4. Commercial leaflets from publishers	3.03
5. Socio-economic status of students families	2.81
6. Parents' willingness to share costs	2.78
7. Students' opinions on textbooks	2.18
8. Opportunity to sell used textbooks	2.06

The most important external factor influencing the textbook selection was 'approval clause' from the Ministry of Education. It is understandable in primary and lower-secondary schools because the state subventions are allocated only to approve textbooks. But it was the most influencing factor for general secondary school teachers and secondary technical school teachers, too. The approval clause seems to be regarded as a sort of quality guarantee or at least as a guarantee of correspondence with obligatory curricular documents.

The orders of factors according to primary and lower-secondary school teachers were the same and their correlations with the orders according to general secondary and secondary technical school teachers were quite high, too (Pearson's coefficient  $r_p = 0.7$ ). But vocational school teachers rated the influence of external factors in an entirely different way. The two most influencing factors were according to them 'the socio-economic status of students' families' and 'the willingness of parents to share the costs'. It is not surprising if we consider the fact that students often come from socially disadvantaged backgrounds. Nevertheless, it is important not to subordinate the textbook quality to its price and to search for some ways of help. It is also symptomatic that 'students' opinions on textbooks' took the 7<sup>th</sup> or the last place: 30% of respondents rated it with minimal score '1' and other 20% score '2'; the mean value was 2.18. The users, who the textbooks are intended for first of all, have almost no influence on the textbooks they will be working with for the whole year.

#### ***Teachers' needs and interests concerning textbook selection***

One of the research purposes was to find out what needs concerning textbook selection the teachers had, that means:

- if they had enough information available and where this information came from;
- if they would welcome any help, possibly what kind of help could be useful for them.

#### ***Sufficiency of information on textbooks***

It can be said that the respondents regarded themselves as well-informed: 67% of them chose the answer 'yes', moreover 17% 'definitely yes', only 11% answered 'no', 1% 'no, not at all'. Statistically important differences were proved between younger and older teachers. The groups of respondents with (0-5) and (6-10) years of practice regarded themselves as less informed than the groups with longer practice.

This begs the question of what kind of information the teachers have got. In our opinion teachers should have both an overview of newly edited titles for their subjects and some ideas of basic qualities of these textbooks. Almost never they have an opportunity to try out the textbooks in their lessons and mostly they don't have enough time and energy to analyse e.g. 5 parallel textbooks in detail. That is why we considered the issue of information resources to be the key problem and asked where the teachers obtained the data on textbooks from (see table 5).

**Table 5.** Information resources concerning textbooks

	<i>Information resource</i>	frequency	percentage
1.	Commercial leaflets from publishers	589	75.1%
2.	Visits to bookstores	508	64.8%
3.	Colleagues' opinions	389	49.6%
4.	Textbook exhibitions	324	41.3%
5.	Dealers from publishing houses	304	38.8%
6.	Educational journals	284	36.2%
7.	Professional teachers organisations	198	25.3%
8.	Other resources	43	5.5%

'Commercial materials on textbooks' from publishers were the most important information resources for teachers from all 5 types of schools: for about 67% of respondents from primary and lower-secondary schools, 82% from upper-secondary schools. 'Textbook exhibitions' organised by publishing houses are almost as important as 'commercial leaflets' for primary and lower-secondary teachers (62%). 'Dealers' who personally attend the schools took the 3<sup>rd</sup> place in order. It is quite clear from these data what influence the publishing houses exert upon the textbooks that are actually used at schools.

In the Czech Republic there is no institution or organisation for systematic evaluation of textbooks and other teaching materials. Some reviews are published in professional and educational journals. Maybe that is why only 36% of respondents used the 'educational journals' when looking for the information.

#### ***The need for help in textbook selection***

Most of the respondents (61%) would welcome some kind of help in the process of textbook evaluation and selection, about 33% did not need any help. It begs the question to what extent the teachers are able to evaluate and select the textbooks and whether they have the necessary knowledge and skills. In the Czech Republic there are no special courses. Teacher students can gain some knowledge on textbooks during their studies; teachers in-service can be naturally experienced in evaluating textbooks. The problem is that even an experienced teacher need not to have an overview of all the textbooks available and may not have time enough to explore the textbook thoroughly. We believe the teachers do need some kind of help in form of the reviews from independent evaluators available.

Some differences were proved among various groups as to the need of help: e.g. more primary school teachers as well as younger teachers would welcome help than teachers in other groups. Rather surprisingly the relation between 'need for help' and 'satisfaction with the textbook' was not proved.

*The resources of help***Table 6.** The order of help resources

Variant of response	frequency	percentage
1. Other teachers' opinions	532	67.9%
2. Experiment (opportunity to try the book in lessons)	502	64.0%
3. Reviews from some independent institution	260	33.2%
4. Students' opinions	236	30.1%
5. More detailed information from publishers	199	25.4%
6. Other response	33	4.2%
7. Not know	7	0.9%

The respondents considered 'other teachers' opinions' (68%) and 'own experiment' (64%) to be the most important sources of help. While the opportunity to work with five or six textbooks available in the Czech market is minimal, the textbook research can be of a great help for the users. It is obvious from the table (see table 6) that the respondents considered the 'other teachers' opinions' to be more helpful than 'reviews' from independent experts. It begs the question why. If it is due to less confidence in 'theoreticians' than in 'practitioners' or if the teachers have experience of issued reviews which are aimed at subject-field analyses rather than at educational qualities of textbooks. Only about one third of respondents would regard 'students' opinions' as helpful. Although this finding is not very flattering, it is in correspondence with the student status in traditional schooling. On the other hand the statistic analysis proved that teachers with shorter practice had been more interested in students' opinions than other groups: more than 40% believed it was useful to know it. The beginning teachers with 0-5 years of practice would also welcome the independent reviews more than other respondents. These findings seem to be quite optimistic.

**Summary and conclusion**

We tried to explore the role of primary and secondary teachers in the textbook selection process in schools of one region in the Czech Republic. The respondents had quite a great opportunity to participate in the process. The prevailing procedure used in textbook selection was teachers' group decision-making. The role of school headmasters lied primarily in approving of selected textbooks. The most important external factor influencing the selection process was the presence of approval clause of the Ministry of Education while students' opinions of textbooks had minimal influence. The teachers were convinced they had quite a lot of information on textbooks and they mostly relied on the data from commercial leaflets. Nevertheless, almost two thirds of them would welcome some kind of help in decision-making process.

In our research an absolute majority of our respondents (more than 93 percent) stated that they definitely wanted to select textbooks for their lessons. Our investigation proved that they were more satisfied with the textbooks they had been

able to select. It is not always possible to enable every teacher to select the textbooks. But we believe it is necessary to support the teachers' right to participate in this process. Teachers should not be forced to use textbooks that they consider inconvenient, of a low quality, not corresponding with their individual teaching styles and, above all, with their students' needs.

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## **Evaluation and Selection of School Textbooks in Kenya: The Role of the Ministerial Textbook Vetting Committee**

Daniel Chebutuk Rotich and Joseph Musakali

In pre-independence period and immediately after independence in 1963, textbooks in Kenya were mainly produced by the multinational publishers, and mainly in the United Kingdom where these publishers had their headquarters. This however, changed in 1965 when the government of Kenya established Jomo Kenyatta Foundation (JKF). At that time also, a curriculum centre was established by amalgamation of a number of subject based curriculum centres to form Kenya Institute of Education (KIE).

The formation of these two institutions - KIE and JKF was aimed at producing textbooks locally. There is always a need for a mechanism to review and control the quality of learning materials used in classrooms with regard to relevance, content, educational approach and efficacy, as well as to ensure that the provision of learning materials reflects government policies (Askerud, 1997). The government's intention was to use KIE to write and JKF to publish textbooks that are socially and culturally acceptable to the Kenyan people and reflect government policies. The government therefore used KIE to identify teachers, educationists and lecturers in teacher training colleges to write manuscripts. The major aim was to produce books that conform to the curriculum, but are also culturally and socially relevant to the needs of the Kenyan pupils.

Although the government established JKF to publish textbooks, it could not produce enough textbooks for all Kenyan schools. Multinational publishers were therefore allowed to publish some textbooks that were developed by KIE and also develop others that conform to the curriculum. The multinationals thus continued to dominate the market even after the establishment of JKF. These multinational publishers that dominated the market from early 1950s to late 1980s included Longman, Oxford University Press (OUP), Heinemann and Macmillan (Rotich, 2000). These publishing firms dominated the industry because they had financial resources to attract well-trained personnel.

When Kenya changed her education system in 1985 from 7-4-2-3 (seven years in primary, four years in secondary, two years in high school and at least three years in university) to 8-4-4 (eight years in primary, four years in secondary school and at least four years in university), the two state-owned publishing houses – Kenya Literature Bureau (KLB) and JKF dominated the production and distribution of textbooks for both primary and secondary schools. KLB had been established through an Act of parliament in 1980 to replace East African Literature Bureau (EALB) that stopped its operations after the collapse of East Africa Community. Following this change in education system, the government, through the Ministry of

Education Science and Technology (MoEST) started to categorise textbooks into core and supplementary textbooks. The core textbooks were those authored by KIE and published by JKF and KLB while the supplementary readers were those published by other publishing houses – the local and multinational publishing firms. Ironically the government used KIE to evaluate these books yet by extension, it was an author. There was only one core textbook per subject in a class, which all schools in Kenya were expected to use.

### **Methodology**

Various documents were analysed to come up with this article. These include; the three issues of approved list of textbooks for primary and secondary schools (2003 – 2005), the guidelines on production of textbooks, the actual textbooks and other related documents.

The justification for analysing these materials was three-fold, first, to understand what publishers are required to produce and submit to KIE; secondly to evaluate what publishers produced after the evaluation exercise and finally to compare the number of textbooks that are recommended from the categories of publishers: the local private publishers, the state owned and the multinationals.

### **Process of Evaluation and Approval**

Publishers usually submit proposals for suitable textbooks in accordance with the requirements and timetable established in the procedures by the Ministry and KIE. The textbooks can be existing titles without changes, radically revised textbooks, or entirely new textbooks that conform to the curriculum and syllabus.

Publishers pay a non-refundable Kshs 5,000/= (approx 50 Euros) to KIE for a set of evaluation and approval procedures documents. An additional non-refundable submission fee of Kshs 7,500/= (approx 75 Euros) per subject and class is also paid in a bankers cheque to the Director, KIE. Submissions are only accepted from publishers who are legally incorporated and registered in Kenya. All primary textbooks submitted are accompanied by teachers' guides and they must not include the name of the publisher.

The membership of Ministerial Textbook Vetting Committee (MTVC) is drawn from senior members of MoEST headquarters. This committee, which is the custodian of the requirements for textbook approvals, approves the appointment of subject panel members and one administrator who collate results from subject panels. The administrator's report is used by the MTVC to announce the list of approved textbooks. The MTVC is not however, bound by the recommendations from the subject panels.

## **Composition of the Evaluation Panels**

There are separate evaluation panels for each curriculum subject. The members who are recommended by KIE and approved by the MTVC, are usually seven comprising:

- a non-scoring moderator who also acts as chair,
- a subject specialist representative of the MOEST, Inspectorate,
- a panel secretary who is a specialist in the subject and has knowledge of the curriculum,
- a subject specialist teacher trainer, and
- three experienced teachers.

## **Evaluation**

In the actual evaluation, each panel member marks each submitted textbook or teacher's guide individually, without prior consultation with other panel members. The moderator identifies any significant deviations that may occur in marking between individual evaluators. After scrutiny and moderation, the marks of the individual panel members are totalled and averaged. The best total submissions up to maximum number permitted for each subject and class level are recommended to MTVC for the award of approved status. Marks are awarded according to the following criteria:

- Conformity to the curriculum- syllabus coverage;
- Content- relevance of content to subject specific objectives, accuracy and correctness of the subject matter, appropriateness to the level of the learner, organization of the subject matter and promotion of emerging issues;
- Language- accuracy/correctness of language, appropriateness of the language to the level of the learner;
- Exercises and activities- appropriateness to the level of the learner, adequacy, variety, relevance to the syllabus and clarity of instructions and questions;
- Illustrations and design and layout-relevance, variety, adequacy, clarity, colour, proportion, captioning, numbering and labelling.

The teacher's guide is also assessed separately according to the following criteria:

- Diagnostic assessment exercises;
- Provision of additional content for the teacher;
- Activities to support multi-ability learning;
- Suggestions to use low-cost or no-cost materials;
- Clarity of writing and presentation of text;
- Clear cross referencing to the textbook;
- Clear methodology and support for pupils with special learning difficulties.

When the technical specialist approved by the MTVC is evaluating textbook, they assess the dummies submitted. The dummies must meet the minimum technical specifications provided. There are no marks allocated, unlike other criteria it is

either a pass or fail. Therefore, it shows that even textbooks with good marks on content, language and design but with poor technical specifications may not pass.

MTVC approval requires a summary of the evaluators' marks for each submission, and may also inspect individual evaluator's mark sheets. KIE is expected to maintain a complete set of all evaluation documents for at least one year after completion of formal evaluation and approval processes. The textbooks are recommended and approved by the subject evaluation panels and MTVC respectively without subjecting the actual textbooks to the scrutiny of the market. These textbooks therefore have neither preliminary testing nor are they presented to teachers for piloting. In standard practice, the ministry should stipulate the content matter and may define textbook requirements, and then the private publishers publish and market the produced textbooks (Chatry-Komarek, 1994). In the Kenyan system, however, the ministry, through MTVC vets the textbooks before they are published.

### **Challenges in Evaluation**

Section 16 of the evaluation document requires all panel members to be scrutinized to ensure that there are no conflict of interest, for example members must not be in full-time or part-time employment with a participating publisher, must not be authors of books being evaluated or advisors, consultants, shareholders, board members or be involved in any other way with a participating publisher.

The document is, however, silent on the authors of the approved textbooks who are from KIE. Such members may leak information pertaining to evaluation and/or influence the panellists' decisions. Secondly, since in most cases they evaluate dummies, the final product may differ from the dummy. There is no system of quality control. That is why in our findings, a number of approved textbooks fell short of some of the requirements. In one of the texts for instance, the table of contents does not match the body of the text while in others, illustrations are poorly done. Still in others the paper quality is wanting. Textbooks with mistakes still make their way into the market and enjoy the sales once approved.

In the document, under section 14 (Minimum Physical Specifications and Type Requirements), it is stated that publishers should produce affordable but durable books without compromising quality and that the books should be durable enough to last for at least 3-4 years. It is also stated that all books should be strongly bound and finished to withstand constant handling and environmental conditions that may apply. This is not easy to ascertain since books are presented for evaluation as dummies and not as finished products. The technical specifications are very specific on text paper, cover, binding, types and type sizes and page design layout. The problem is that a publisher may not apply them once the book has been approved.

In the 2004 rigorous evaluation exercise a small, upcoming indigenous publisher, spent more than Kshs 35 million in production plus a non-refundable fee of Kshs 3.5 million evaluation fee and yet none of its 35 submitted titles was approved.

Schools have been spending huge amounts of money to repair poorly bound textbooks by publishers out to make quick profits hence school principals have been having problems convincing school boards to allow them to contract unprofessional binders to mend them (Kareithi, 2005). It is also claimed that some publishers have formed an unholy alliance to fleece schools because they seem to compliment each other by alternately covering certain topics very well and others poorly. Schools are therefore forced to buy two sets of books for a subject.

Local book publishers, especially the indigenous, have blamed three international aid agencies funding the free primary education for imposing stringent printing standards that are impossible to meet. Both printers and publishers say the conditions set jointly by UK's Department for International Development (DFID), the World Bank and the Swedish International Development Agency (SIDA) are impossible to meet. This has made the local publishers to opt for offshore printing. However, the quality of some locally produced textbooks is low. Besides poor quality paper, local printers have failed to ensure standard book covers and binding that will make the book last longer.

Macmillan Kenya Publishers which is a multinational publishing firm prints their textbook titles both locally and abroad because it is cheaper and convenient for them, and translates into cheaper book prices for consumers. There is also a claim that some unscrupulous publishers have previously influenced KIE to approve sub-standard books.

In the 2004 evaluation and production exercise, publishers were informed of the successful textbooks in October. They were supposed to print and produce the books between October and November, for schools to place orders with booksellers in November and had a December deadline for orders to each selected booksellers. With this kind of pressure, mistakes are likely to be made especially in production. The publishers had only four months to print their approved texts in sufficient number for the more than 17, 000 primary and 3000 secondary schools, promote and market. Printers cannot cope with this kind of pressure (Muroki, 2004). The current (2005) exercise is operating on the same kind of deadlines. Notification of the successful titles for 2006 was made in mid-October 2005.

Kenya has four major private printers - The English Press, Auto Litho, Kenya Litho and Sun Litho. Apart from the above, the two state-owned publishing houses have their own printing presses. Others have come up but do not have the capacity to handle large volumes of work and may not meet KIE stringent conditions. This is why publishers opt for offshore printing, thus denying the economy the revenue. Furthermore, the printers abroad take time to print the titles because they usually have other works queuing. It also takes about three months to ship books from far distances like Malaysia to Mombasa, not to mention the bureaucracy of clearing consignments at the port of Mombasa.

Offshore printing makes it difficult to maintain competitive standards. In some titles, the paper differs in whiteness and opacity. Some textbooks have very poor opacity

that you can almost read what is on the flip side of a given page. The rustless wires in the saddle stitched textbooks are not evenly spaced in some titles and are not fully closed at centre. The appearing size of typefaces also varies. For instance, Times Roman 16 points looks smaller than Palatino 16. The page layout and design varies in many textbooks because there is no standard way of layout. Quite a number of textbooks do not adhere to the principles of design. Some of them combine symmetrical and asymmetrical layout unsuccessfully. Registration of colours in some textbooks is wanting while others have poor or illustrations.

### **Approved School Textbooks of New Curriculum**

The government through the Ministry of Education, Science and Technology introduced new curriculum and/or syllabi when it produced guidelines in 2002. The implementation was to be done in phases as follows:

- 2003: Standard (grade) 1 and 5(primary) and Form 1 (secondary school)
- 2004: Standard (grade) 2 and 6(primary) and Form 2 (secondary school)
- 2005: Standard (grade) 3 and 7(primary) and Form 3 (secondary school)
- 2006: Standard (grade) 4 and 8(primary) and Form 4 (secondary school)

The process of implementation of the new curriculum started in June 2002 when the Ministry officially approved the new syllabi and developed vetting and evaluation criteria, methodology, rules and regulations. The guidelines on textbook evaluation and approval procedures for developing and distribution of textbooks were distributed to interested publishers. This was done when the Ministry put an advertisement in the press in July 2002 requesting publishers to purchase the documents from KIE. The materials that were to be developed by publishers were to be ready for evaluation by November 2002, three months after purchasing the documents. The rules stipulated that the MTVC was to vet and recommend a maximum of six titles per subject per class for primary and secondary schools.

### **Primary School Textbooks**

Since the implementation of the new curriculum in 2003, three phases of new textbooks had been completed by 2005. In the first phase, 26 publishers submitted their textbooks for vetting and evaluation; nine firms managed to get at least one title to the recommended list. In that first phase for the two classes (standard 1 and 5), a total of 63 titles were approved. Due to the short time given to the publishers to prepare the textbook materials, some subjects had less than six titles recommended to schools. Table 1 below shows the publishers and their subject textbooks that were approved.

**Table 1.** Approved List of Primary School Textbooks 2003

<b>Publishers</b>	Class/Subject								
	English	Kiswahili	Maths	Science	Art & Craft	Social Studies	CRE	Islamic R.E	Physical educ.
KLB	1,5	5				1,5	1,5		
Phoenix Publishers	1		1			1	1,5	1,5	
JKF	1,5	1	1,5	5	1	1,5	1,5		1
OUP	1,5	1,5	1,5	1		1,5	1,5		
EAEP	5	5	1	1		1	5		
Dhillon Publishers	5		1,5						
Macmillan (K) Publishers	5	1		1,5			1,5		
Evans Brothers		1,5							
Longhorn Kenya Publishers		1,1, 5,5	1,5	5		1	1		

Key: 1 – Standard 1

5 – Standard 5

In the second phase, a total of 17 publishers submitted their textbooks for consideration and ten publishing houses had their books on the recommended list. In this phase textbooks for standard 2 and 6 were considered in addition to resubmission for standard 1 and 5. Between them there were 80 new titles recommended. These titles included resubmissions for standard 1 and 5. This confirms that when the first phase was introduced, the time allowed for publishers to prepare the textbook materials was too short. Table 2 below shows the publishers and class subject textbooks that were approved in the second phase.

In the third phase, 31 publishing houses submitted their titles for consideration and 12 publishing firms managed to have at least one title on the recommended list. Between the 12 publishers there were 75 new titles on the recommended list and that includes textbooks for standard 3 and 7 and resubmission for other classes from the first and second phases. Table 3 below shows publishers and their class subject textbooks approved.

**Table 2.** Approved List of Primary School Textbooks 2004

<b>Publishers</b>	<b>Class/Subject</b>								
	English	Kiswahili	Maths	Science	Art & Craft	Social Studies	CRE	Islamic R.E	Physical Educ.
KLB	2		6	5		2, 6	2		
Phoenix Publishers	2, 6	6		2, 6			2		
JKF	2, 6	6	2, 6	1, 6	2, 5, 6				
OUP	2, 6	2	2, 6	2		6	2	1, 2, 5, 6	
EAEP		2, 6	2, 5	2, 5, 6		2			
Dhillon Publishers	6		2, 6	1, 5, 6					
Macmillan (K) Publishers	1, 2, 6	2, 5, 6	6	2		2, 5	2		
Evans Brothers		2, 6		2, 6					
Longhorn Kenya Publishers	1, 2, 6	2, 2, 6	2, 6	1, 2, 6		2	2, 6		
Focus Publications			2, 5			5			

**Key:** 1 – Standard 1: 2 – Standard 2: 5 – Standard 5: 6 – Standard 6

At the end of phase three, there were 218 titles in the orange book. These titles were shared by three categories of publishing houses – the local private publishing firms, the multinationals and the state-owned publishing houses. The local private publishing firms whose titles were in the orange book were six; this accounted for 50 per cent of the publishing firms whose titles were recommended. However, their share in the textbook market is 40 per cent. It should be noted that the large local private publishing firms control majority of this percentage. The number of state-owned publishers is two accounting for 17 per cent of publishing firms in the textbook market. They however control 25 per cent of the textbook market. The multinationals that participated in the textbook submission exercise were four; this accounted for 33 per cent of the operators whose textbooks were recommended. Their share in the textbook market was 36 percent, almost equal to that of local private publishing firms.

The above scenario demonstrates that large publishing houses with access to financial resources attract well-trained personnel, produce textbooks in a short time and had higher chances.

**Table 3.** Approved List of Primary School Textbooks 2003 - 2005

Publishers	Class/Subject								
	English	Kiswahili	Maths	Science	Art & Craft	Social Studies	CRE	Islamic R.E	Physical Educ.
KLB	1,2,5,7	3,5,7	3,6,7	3,5,7		1,2,3,5,6,7	1,2,5,7		
Phoenix Publishers	1,2,3, 6	6	1	2, 6		1	1,2,5	1,5	
JKF	1,2,5,6	1,6	1,2,5,6	1,3,5,6	1,2,3,5,6,7	1,5,6	1,2,5		1,2,5,6,7
OUP	1,2,3,5,6,7	1,2,3,5,7	1,2,3,5,6,7	1,2,3,7		1,2,3,5,6,7	1,2,3,5,6	1,2,5,6	
EAP	5	2,3,5,6	1,2,5	1,2,5,6		1,2	5		
Dhillon Publishers	5,6,7		1,2,3,5,6,7	1, 5, 6		2,5,6			
Macmillan (K) Publishers	1,2,3,5,6,7	1,2,3,7	6	1,2,5,7		2,3,5,6,7	1,2,3,5,6,7		
Longman (K) Ltd	3,7		3	3,7		3,7			
Evans Brothers	5	1,2,5,6,7		2,3,6					
Longhorn Kenya Publishers	1,2,3,6,7	1,1,2,2,3,3,5,5,6,6,7,7	1,2,3,5,6,7	1,2,3,5,6		1,2,3,6,7	1,2,6		
Focus Publications			2, 5			3,5			
Malimu Publications			3						

**Key:** 1 – Standard 1: 2 – Standard 2: 3 – Standard 3: 5 – Standard 5 6 – Standard 6: 7 – Standard 7

## Secondary School Textbooks

Secondary school textbooks go through the same process of evaluation and a maximum of six titles are recommended from which teachers are expected to select one as the core class textbook. In the first phase seven publishing firms managed to get at least one title for form one to the recommended list. During this phase some subjects like Biology, French and Computer Studies had no course book recommended for that year, therefore, students in form 1 continued to use books meant for the old curriculum.

In the second phase, the ministry advertised for submission of form 2 textbooks and resubmission for missing form 1 textbooks for vetting and evaluation. During this phase, ten publishers managed to have at least one title in the recommended list. When the recommended list of the third phase was released, cumulatively, a total of 12 publishing houses had their books listed. These publishing firms were in the three categories of publishers that operate in Kenya. However, in the secondary school market, the market share was dominated by the big publishing firms regardless of

their categorisation. Out of 12 firms, five of them had more than 10 titles each on the recommended list of 154 titles.

**Table 4.** Approved Textbooks for Secondary Schools, 2003 - 2005

Subjects	Year/Form					
	2003	2004		2005		
	Form 1	Form 1	Form 2	Form 1	Form 2	Form 3
English	1,2,3,4		6,3	6	7	1,3,6,7,10
Kiswahili	3,6	2	3,6	10	1,7,10	3,6,7
Mathematics	1,3,5,6		3,6,7,10	4,7	5	1,3,5,6,7,12
Chemistry	6,7	4,8,9	1,3,6	1	4,7,10	1,3,4,6,7,9
Physics	3,4	6,7	6,7,9	9	3,4	3,4,7,12
Home Science	2,7			11	7,11	7
Agriculture	2	7,9				1,4,7
Geography	3	6,7	3,7	11	1,10	3,6,10
History & Government	1,2,3,4		1,3,6,7	6,7		1,3,6,7
CRE	3	6,7	1,6,7		3,7	3,6,7
Business Education	2,3,7	4	3,6,7	6,11	11	3,7,10
Physical Education	4					4
French		2			2	
Biology		2,3,6,7,9	3,6,7		1,4	1,3,7
Computer Studies				6	6	

Key: 1- Longman Kenya Publishers

2- EAEP

3 - OUP

4- JKF

5- Dataweb Enterprises

6 - Longhorn (K) Publishers

7 - KLB

8 - Univ. of Nbi Press

9 - Phoenix Publishers

10 - Macmillan Kenya Pub.

11- Focus Publications

12- Malimu Publications

## Conclusions and Recommendation

Textbook preparation for publication is a long process that requires adequate time to allow for identifying authors, writing the manuscripts, processing them for production, evaluation and printing. In the Kenyan case, publishers were given less than three months to come up with manuscripts, prepare dummies and submit them

for evaluation. After evaluation and approval, they had less than two months to print and distribute them. This has led to publishers not being able to prepare and submit textbooks in all subjects in the curriculum.

The technical specifications of the approved textbooks that were given to publishers were very stringent and could not be met by most publishers. Some of the textbooks which were approved were not in conformity with the required standards. This could have been due to the evaluation of dummies as opposed to the actual textbooks to be used. The research also found out that after evaluation and approval of the dummies, there seemed to be no follow-up by the MTVC to ascertain if the textbooks that go to the market meet required standards. At the same time, there seems to be more emphasis on the technical specifications as opposed to the contents, thus locking out books whose dummies did not meet the minimum technical specifications but with good contents. This could have resulted into publishers preferring to print their books outside the country, hence denying local printers printing jobs and revenue to the country as a whole.

It is therefore recommended that the Ministry of Education in Kenya should consider whether it is prudent to continue using dummies as a bench-mark for textbook recommendation. There is also need to come up with criteria of assessing textbooks that are already in the market if they are still within the technical specifications. It is prudent also to redefine the role of MTVC to include monitoring of textbooks being released into the market to see if the standard on the dummies were maintained.

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# **The Swedish State Approval of Textbooks 1974-1991**

Anna Johnsson Harrie

During the last decades there have been profound changes in the governmental control of school and education in Sweden. One of these important changes, that so far has not attracted the researchers' attention, is the repeal of the official approval scheme for textbooks and teaching aids in 1991.

Some countries have an official approval scheme for textbooks and some countries do not. Johnsen points out that it is difficult to see any pattern in, or special reason for, the differences. But there was a tendency, he says, that many countries with an approval scheme reduced or repealed their examination in the 1990s (Johnsen, 1993).

From 1938 and onwards the Swedish Government had an official approval scheme for examining books before they could be used as textbooks in Swedish schools. An approval committee, with the help of especially appointed examiners, performed the actual examinations. From 1938 until June 1974 the examination was compulsory for all textbooks. There were several aspects that should be examined, for instance the price of the book and that the content corresponded to the national curriculum. From July 1974, and until the official approval scheme was repealed in 1991, the examination was compulsory only for textbooks and teaching aids in the social sciences. Social sciences included civics, history, geography and religion.

The political decision to change the approval system in 1974 was taken by the Swedish Parliament. The new law stated that the aim of the approval scheme was to see that the textbook was impartial and in accordance with the goals and the guiding principles of the national curriculum (Svensk författningssamling, 1974, 438).

In 1982 the approval scheme was, once again, discussed in Parliament and a few changes were decided. One of the two major changes concerned the organisation of the approval committee. The committee was transferred from the Swedish National Board of Education, (Skolöverstyrelsen), to the state-owned Institute for Information about Textbooks (Statens institut för Läromedelsinformation). The second major change was that the approval committee no longer was to decide whether a textbook was to be accepted or not. Instead, the approval committee would make a statement about each book. The aim of these statements was to help schools when deciding which textbook they would use. The work of the approval committee can from here on be seen as a sort of consumer guidance. The instructions for what to examine remained unchanged. The purpose was still to see that the textbook was impartial and in accordance with the curriculum (Svensk författningssamling, 1983, 273). This was kept unchanged until the examination was repealed in 1991. After that there is no official approval at all of textbooks in Sweden.

### **A presentation of the study**

The aim of my coming dissertation-thesis is to study both the political discussion about, and the actual implementation of, the approval scheme in Sweden 1938-1991. In this article I will present one part of this work: a study of the examinations of textbooks in civics for grammar school during 1974-1991. All examinations performed by the approval committee from three different time periods have been studied.

There are two things in focus in this article. The first concerns the instructions that the examiners received from the approval committee. What was it that the approval committee wanted the examiners to concentrate on? The second concerns the written statements from the examiners. What did the examiners really write about in their statements? The aim is to see what the approval committee pointed out as the most important task for the examiners and how the examiners performed their task.

This is a study of the implementation of the political decision about textbook approval. Lindensjö and Lundgren describe implementation not as one process, but as many different processes, and give two examples: guideline writing and field-implementation. Guideline writing is when the civil servants interpret a political decision into rules. Field-implementation is the execution of these rules in a certain case (Lindensjö and Lundgren, 2000). These two concepts can be useful when we want to take a closer look at the Swedish approval scheme for textbooks. The guideline writing in this case is the approval committee's interpretation of the assignment in the written instructions to the examiners. The examiners' statements about certain books are to be seen as a part of the field-implementation process.

Three time periods have been chosen for this study, each of them lasts eighteen months. The first period, from July 1974 to December 1975, is the first months of the examination. The second period, from July 1983 to December 1984, is when the changes decided in 1982 officially came into force. The third period, from January 1990 to June 1991, is the last months of the examination before it was repealed.

Two sorts of material are used in this study. The first material is the different memoranda with instructions that the approval committee gave to the examiners. There were no, formally decided, instructions when the examination started in 1974. There were a few drafts and after a year, the approval committee formally decided on a memorandum with instructions. This memorandum was revised in 1977, 1984 and 1988. The second kind of material is the examiners' written statements concerning certain textbooks. The length of these statements varies from four lines to nearly 14 pages.

During the first period in this study, 1974-1975, the approval committee had to make decisions about 18 civic textbooks for grammar school. In these 18 cases the appointed examiners wrote 45 statements. Many of the cases consisted of several textbooks and supplementary material in the same series. It was common that

different examiners examined different books. The approval committee could also decide to let more than one examiner make a statement about one book.

During the two other time-periods, there were fewer cases. 1982-83 there were six cases and a total sum of eleven statements. In all but one case there were two examiners who examined each book. 1990-91 there were five cases and two examiners in each case. Since one statement is missing in the files, there are nine statements from this period.

Before we look closer at the statements we shall look at the instructions from the approval committee.

### **The instructions from the approval committee**

A month before the approval committee started its new work in July 1974, there was a memorandum set up at the Swedish National Board of Education, which included a draft of guidelines for the examination of textbooks. Another draft was made a few months later by one of the examiners. The approval committee did not officially decide upon any of these drafts. But at least the later one was sent to all the examiners for their information. In these early drafts the question of accordance with the national curriculum is of vital importance. Another important aspect is that the textbooks should be activating and stimulating for the pupils. Finally it is also stressed that it is important that the facts are correct and in accordance with the latest results from the social scientists (Skolöverstyrelsen, Läromedelsnämnden, F3:1).

The approval committee decided to appoint a working team to write instructions for the work of the examiners. The team started to work in the autumn of 1974 and they presented their first draft to the approval committee in December 1974. Their work continued and in June 1975, they presented their final proposal. The approval committee officially decided to use this memorandum with instructions for the examiners. So one year after the examination had started, the official instructions for the examiners were stated. The memorandum was later slightly altered in 1977, 1984 and 1988. The main part of the memorandum, though, was kept unchanged until the examination was repealed in 1991.

The memorandum is based on six questions that the examiners were expected to use when they examined the textbooks. The questions in the 1975 memorandum are:

1. Are different events, aspects and opinions given reasonable room?
2. Is there any incorrect information?
3. Is the textbook misguiding or biased?
4. Has the author presented potentially controversial aspects?
5. Is the presentation of different topics neutral?
6. Is the presentation in accordance with the goals and the guiding principles in the curriculum? (Skolöverstyrelsen, Läromedelsnämnden, F3:1)

The questions one to five are, in the memorandum, followed by comments, explanations and examples, to try to make the meaning of the questions clearer for

the examiners. The last question though, is only followed by a few quotations from the curriculum and the government bill (Skolöverstyrelsen, Läromedelsnämnden, F3:1).

In the explanatory text following the second question, about incorrect information, it is stressed that this question only is relevant in cases when incorrect information causes a bias. The examiners could comment on incorrect information in other cases as well, if they wished, but it was irrelevant for the approval (Skolöverstyrelsen, Läromedelsnämnden, F3:1).

In the version from 1977 the only question that has been changed is number five. The new question is:

5. Does the presentation in the textbook favour or treat unfairly one part, (opinion, values, etc.) to the benefit of another by, for instance, irrelevant and subjective opinions, difficult language or a bias in the pictures or tapes? (Skolöverstyrelsen, Läromedelsnämnden, F3:1)

In 1984, the questions were left unchanged. The main change in this version is that the statements now should not result in a decision of whether the textbook was approved or not approved. Now it should instead include a short summary of the pros and cons of the textbook (Statens institut för läromedelsinformation, A4C).

In 1988 two changes were made. One is a change to question number two, where the new wording is: Is the information as correct as possible? The second change is a change of order. The former sixth question, about the curriculum, has been moved. In this version the question about accordance with the curriculum is placed first. There is also new text that stresses that the examination has two main purposes: to guarantee objectivity and correspondence with the curriculum. The other five questions in the memorandum have kept their relative positions (Statens institut för läromedel, A3C).

From this we can see that the memorandum set up by the working team in 1974-75, from the very beginning, is different from the drafts made previously. The first drafts have a focus on the national curriculum and it is important that the facts in the books are correct.

From the very first draft made by the working team, their memorandum has been clearly dominated by questions about bias and neutrality in the textbooks. It was irrelevant if the facts were incorrect, as long as it didn't cause a bias. This has not been changed in the following alterations. In the last version, from 1988, the question of accordance to the curriculum got a stronger position. Following this study of the guidelines for the examination we will now look at the examiners' statements.

### **Four different notions of an officially approved textbook**

The statements from all three periods have been read thoroughly and they have been split up into different parts, depending on what kind of criticism they are dealing with. These different text parts have then been organised into different categories. This way four analytical categories have been created from the statements. Each of the categories concerns a special aspect of the textbook and its liability as a useful aid in the school context. Each category shall be seen as an ideal-typical notion of what an officially approved textbook should be like. The categories are ideal-typical in the meaning that they do not exist in their pure form, but are stylised to show the most essential features.

One important result from this study is thus that the statements can be described after four different ideal-typical notions of an officially approved textbook. These four notions are balance, correctness, design and curriculum. The four ideal-typical notions are described one by one before we will look closer at how they are represented in the statements.

In the notion of balance the most central thing is that there is no hidden agenda in the textbook. The text and the pictures have to be neutral. The author is not allowed to propagate a certain opinion in the book. Avoiding controversial subjects is not the way to solve this problem. On the contrary, it is important that controversial subjects are described and that different aspects are balanced against each other. It is also vital that the textbook is neither partial, nor includes moralising or emotive statements.

The notion of correctness focuses on the facts in the book. It is crucial that the facts are correct. There must be no intentional or unintentional factual errors. It is also important that the facts are as up-to-date as possible, considering the printing time. The facts also need to cover the most essential parts of the subject.

The main focus in the notion of design is that the textbook has to have a good educational design. The language is important. It should neither be too difficult nor too childish. Another essential part is how the content of the book is arranged. The textbook should interest the pupils in the subject. That is not only a question of text, but also the pictures and maps are important here. The book and the tasks given to the pupils should be engaging and activating. The textbook must be adapted to the pupils' age, previous knowledge and experiences.

According to the notion of curriculum the most important criterion for an approved textbook is accordance with the instructions in the national curriculum. The book must cover the topics that are to be treated in this school subject. In the national curriculum there are also a few principal ideals: democracy, gender equality, international solidarity and critical thinking. It is crucial that each textbook is permeated by these ideals.

In the following section we will see how these ideal-typical notions are represented in the examiners' statements.

### The examiners' statements

In an examiner's statement about a certain textbook several of the four notions described above may be represented. To be able to see how frequent each of the four categories is, every statement has been categorized according to its dominating notion. The first criterion, when to decide which category that is dominating a certain statement, is room. The notion that has been given the greatest amount of room in a statement is defined as the dominating one. If no single notion has been given a greater amount of room than the others, the next criterion has been if the examiner anywhere in the statement says that a certain aspect is the most important. If neither of these two criteria can be fulfilled in a statement, that statement is seen as impossible to categorize. Each one of the 65 statements has been categorized this way and the results for the different periods can be seen in the following table:

	Balance	Correctness	Design	Curriculum	Impossible to categorize	Total number of statements
<b>1974-75</b>	21	17	3	1	3	45
<b>1983-84</b>	3	7	-	1	-	11
<b>1990-91</b>	-	6	1	2	-	9
<b>Total number of statements</b>	24	30	4	4	3	65

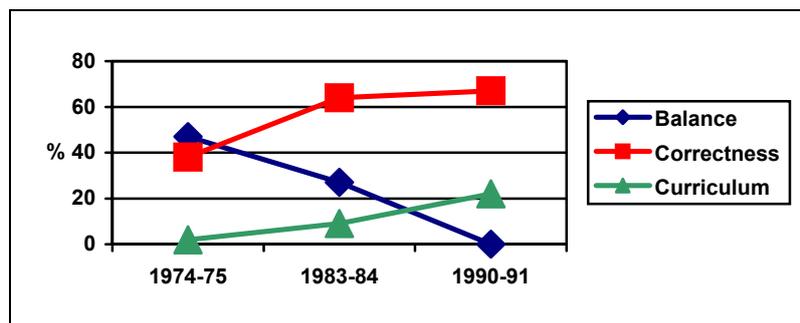
In the period from the start of the examination in July 1974 until December 1975, the approval committee had 18 cases concerning civic books for the grammar school and the examiners wrote 45 statements (Skolöverstyrelsen: Läromedelsnämnden, F1:1-5). Nearly half of these statements are dominated by the notion of balance, which makes this category the most common, during this period. The second most common category is correctness. The other two, design and curriculum, only dominate in a few cases.

In the second period, from July 1983 to December 1984, there were six cases and eleven written statements (Statens institut för läromedelsinformation, E3D:2-3). Correctness dominates in more than half of these statements. Balance dominates in a few statements and curriculum in one of them. Design is not the dominating notion in any of the statements from this period. The most common dominating category has thus changed, from balance to correctness.

In the third and final period, from January 1990 to June 1991, there were five cases and nine statements (Statens institut för läromedel, E1B). Two thirds of these statements are dominated by correctness. Design dominates in one and curriculum in two statements. Balance does not dominate in any of these statements.

When comparing the results from the three periods we see that the notion of balance is the most common during the first period, but is less common in the second and not represented at all in the last period. The category correctness is commonly used through all the three periods, but relatively more used during the two latest. Design

is not common as the dominating notion during any of the three periods, although there are a few statements in the first and the last period. The category curriculum, finally, is not common as the dominating category during any of the three periods. Though it is possible to see that it is receiving a slightly greater share in the latest period. For three of the categories, i.e. balance, correctness and curriculum, we can see some interesting changes when we compare the results from the different periods. These changes can be seen clearly in the following diagram.



The frequency of balance changes clearly from dominating nearly half of the statements in the first period, to not dominating any statement in the last period. Correctness is the second most common in the first period and the far most common in the second and the third period. We can also see that curriculum becomes more common during the second and especially the third period.

## Conclusions

The purpose of the examination, according to the formulation in the law, was to secure that the textbooks were impartial and in accordance with the goals and guiding principles in the curriculum. That was the political decision. In this article we have looked at how this decision was implemented when it came to the examination of civic textbooks for grammar school.

When we first look at the process of guideline writing we see that this process took one year. We can see that the categories, which were defined from the statements, also can be applied on the instructions. The two earliest drafts are dominated by the notion of curriculum. Correctness and design are also represented. But the memorandum written by the working team, and officially decided upon by the approval committee, is dominated by balance. Although this memorandum was altered in 1977, 1984 and 1988, all the versions are still dominated by balance.

When we look at the process of field-implementation, we see that during the early period balance dominates in nearly half of the statements. It is less common during the second period and in the last period no statement at all is dominated by balance. So the written guidelines stayed unchanged and kept their focus on balance during

the whole time of examination. At the same time the practice of the examiners changed.

Correctness is quite a strong notion in the first two drafts of instructions. But in the memorandum written by the working team, it says clearly that this was mostly irrelevant. In the examiners' statements, though, the picture is different. Correctness was here the most common or the second most common during all the three periods. Correctness is not a strong notion, neither in the political decision nor in the guidelines, but in the field-implementation of this decision correctness is often a dominating notion.

Curriculum plays an important role in the political decision about the examination. It also dominates the two earliest drafts for instructions. It is represented in the memorandum with instructions. But the question of accordance with the curriculum is at the end of the instructions and is not presented in the same way as the other five questions. In the latest version of the memorandum, this question had been moved to the beginning. So the notion of curriculum has a stronger position in the last version of the memorandum. When it comes to field-implementation, curriculum is never common as the dominating category. Here we can see that both the written guidelines and the field-implementation differ from the political decision.

Design is never common, but there are a few statements that are dominated by this category in the first and last periods.

There has been no similar Swedish study carried out, which makes it difficult to compare the results. However, a study conducted in Norway (Bjørndalen, 1982), concerned with statements from the examiners in Norwegian, natural sciences, mathematics and social sciences shows that the statements were more concentrated on correcting the facts of the textbooks than discussing pedagogic and didactic aspects of them. So the category that we here call correctness seems to have been widely presented in the Norwegian material as well. In the same way design seems to have been less common in the Norwegian statements. The two studies have these two results in common.

The official assignment for the Swedish approval committee was mainly the same from 1974 to 1991, and so were also the written guidelines. But there was an important difference between the political decision and the written guidelines when it came to the notion of curriculum. Accordance with the curriculum is an important part of the law, but not of the guidelines. The actual field-implementation diverges from the instructions in the way that correctness is very common in the statements and that balance diminishes in the statements, from being the most common in the first period to disappearing totally in the last period. The study shows that the actual implementation diverged from both the political decision and the instructions. The actual implementation also did change over time.

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# **Greek primary teachers' preferences for and characteristics of science textbooks**

Ioannis Exarhos

## **Purpose**

The purpose of my current work is to identify Greek primary teachers' preferences for science textbook structure, as well as to describe the characteristics of science textbooks, function of illustrations in science textbooks and science text. Any attempt to improve primary school science textbooks or influence change in how they are selected and used in the classroom must necessarily begin with an assessment and analysis of teachers' actual preferences and perceptions of science textbook.

## **Instrument**

A Shymansky, Yore and Good (1991) questionnaire was modified and enriched with statements related to illustrations and science textbook characteristics in order to suit my research. Two pilot studies for the new questionnaire were carried out to identify inconsistencies, word ambiguities and to enhance the reliability and validity.

Questionnaire's validity was established by a factor analysis. The basic assumption of this factor analysis is that the valid fundamental components underlying the questionnaire's design will be revealed as principle components with specific conceptual unity similar to which was intended. The factor analysis data were interpreted as 10 factors clustered into the three conceptually unified dimensions central to the study: science textbook structure, science text, and illustrations.

The reliability of the perceived science textbook structure, science text and illustrations in science textbooks were determined by Cronbach's alpha method (Anastasi, 1982). The 13-item science textbook structure subscale analysis yielded a reliability index of 0.619. The 9-item science text subscale analysis yielded a reliability index of 0.719. The 9-item function of illustrations in science textbook subscale analysis yielded a reliability index of 0.643.

The new questionnaire consisted of 32 items in a Likert-type scale and yielded internal consistency of 0.82 (Cronbach's  $\alpha=0.82$ ).

## **Method-Sample**

A random sample of 78 Greek primary public schools in Attica (province of Athens) was drawn from the National Registry of Greek primary public schools at the Pedagogical Institute and it consisted of 720 teachers. The study was carried out from September 2002 to January 2003. Every Greek primary public school which

participated in the study received a folder with questionnaires and a letter explaining the purpose of the study and instructions on how to fill in the questionnaires. The head teacher of each school was instructed to distribute the questionnaires to the school personnel and after three weeks the teachers put their completed questionnaires in the folder. The investigator assured the respondents' anonymity. By the end of January 2003, 572 completed questionnaires were returned from the 78 Greek primary public schools which participated in the study.

### Analysis of data

The 572 completed questionnaires were codified and analyzed by the researcher with the use of S.P.S.S 12.0 in a computer.

The analysis provided Pearson  $r$ , ANOVA, frequency distributions, percentages, mean and standard deviations.

### Science textbook structure

Response data in Table 1 focus on Greek primary teachers' perceptions of science textbook structure.

**Table 1.** Greek primary teachers' perceptions of science textbook structure (Mean, Standard Deviation, and Percentages of 572 respondents)

Questions (Depended variables)	Mean	Standard Deviation	SA	A	U	D	SD
1. "Hands-on" activities should be central to science textbook.	1.74	0.718	62.4	31.7	2.7	2.8	0.4
2. Science programmes should challenge students to explain natural phenomena.	1.23	0.486	79.4	19.2	0.9	0.4	0.2
3. Topics that allow for "hands-on" inquiry by students should be selected over topics that do not.	1.41	0.639	65	31.3	1.9	1.80	0.2
4. Teachers in teaching science should use a learning cycle that follows the "explore-concept introduction-concept application".	1.63	0.739	51.8	38	6.3	3.4	0.5
5. Science in upper elementary grades should be designed to prepare students for the concepts that will be taught in the secondary school.	1.91	1.066	44.2	35.7	8.1	9.2	2.8
6. Students' interpretation of data from science experiments should be emphasized more strongly in science text.	1.72	0.908	50.3	34.4	10.5	2.8	2
7. Teachers should be given the freedom to structure their own sequence of topics and instructional activities.	1.90	0.988	40.2	41.8	8.3	7.4	2.3
8. The total number of science topics should be reduced to allow for more thorough coverage of those remaining.	1.78	1.073	55.3	28.8	7.2	7.4	3.3

9. The science text should contain all the information needed by a reader to understand an idea.	1.41	0.806	72.1	21.2	2.5	2.5	1.8
10. Students should be given the freedom to structure their own sequence of topics and learning activities.	2.91	1.252	10.8	36.9	17	21.3	14
18. A table of contents should be included in science textbooks.	1.27	0.621	82.3	8.9	8.4	0.4	0
19. A subject index should be included in science textbooks.	1.19	0.567	87.5	8.1	3.2	0.7	0.5
23. Each concept's practical application should be included in science textbooks.	1.16	0.438	86.6	11.8	0.9	0.7	0

\*SA=Strongly Agree, A=Agree, U=Undecided, D=Disagree, SD=Strongly Disagree

Based on the responses, it appears that teachers believe “hands-on” activities should be central to science textbooks (items 1, 2, 3, 4) and students’ interpretation of data from science experiments should be emphasized more strongly in science texts (item 6). Teachers are in favor of the conceptual development within the school organization (item 5), flexibility in sequencing topics (item 7) and depth versus breadth coverage of content (item 8). However, teachers are not willing to turn science topics and activities over to their students (item 10) nor do they realize that a textbook cannot contain all the information needed to understand an idea (item 9). Greek primary teachers’ responses on item 9 contradict the responses on the same item from Shymansky, Yore and Good (1991) survey in the U.S.A.. One explanation might be that Greek primary teachers had “one centrally approved science textbook” policy for many years and could not comprehend the function of different multiple resources. Greek primary teachers felt that a table of contents, an index and practical applications of science concepts in every day life should be included in a science textbook (items 18, 19, 23).

### Science text

The response data in Table 2 focus on Greek primary teachers’ perceptions of science text included in a science textbook.

The response data in Table 2 indicate that the author of science text should introduce technical vocabulary and new concepts gradually (item 16), as well as introductory questions (item 20) and summaries (item 22). Greek primary teachers prefer the author of a science text to use different patterns for signaling the important information such as box asides (item 14). Science text structure that includes at least one of the relationships cause-effect, problem-solution, and compare-contrast in a paragraph as well as in a chapter is preferable to Greek primary teachers (item 11). Titles and headings of science text should include the basic information of the text (item 12) and science text information presented with discourse consistency is considered important (item 13). The contradictory findings from items 11 and 13 make it obvious that Greek primary teachers do recognize the unique structure of science text but they are influenced by narrative text as well. This discrepancy could be explained by the fact narrative text is heavily used in other disciplines. Roberts

(1983) pointed out that such discrepancies exist in the philosophical rationales of many science teachers. Greek primary teachers emphasized a cycle of “concept introduction-concept clarification- examples” in a science text (item 15). These data further explain that teachers’ opinions are significantly influenced by narrative style of text and they lack in-depth consideration of expository science text and its unique language. Greek primary teachers prefer the author to signal explicitly the structure of the text, presenting his/ her opinion at the end of the text (item 17).

**Table 2.** Greek primary teachers’ perceptions of science text in a science textbook (Mean, Standard Deviation, and Percentages of 572 respondents).

Questions (Depended Variables)	Mean	Stand ard Devia tion	SA	A	U	D	SD
11. Science text structure should include at least one of the relationships cause-effect, problem-solution, and compare-contrast in a paragraph as well as in a chapter.	1.50	0.713	60.1	32.1	4.7	2.4	0.2
12. Titles and headings of science text should include the basic information of the text.	1.52	0.817	64	24.2	8.1	3.2	0.5
13. Science text information should be presented with discourse consistency.	1.18	0.430	84.2	13.9	1.9	0	0
14. The author of a science text should use different patterns of signaling the important information such as box asides, and introductory questions.	1.43	0.707	67.1	25.6	5.3	1.4	0.5
15. The author of a science text should use the cycle “concept introduction- concept clarification-examples” in his/her writing.	1.68	0.988	57.5	26.9	8.1	5	2.5
16. The author of a science text should introduce the use of technical vocabulary and new concepts gradually.	1.84	0.744	63.3	28.7	5.1	2.3	0.5
17. The author of a science text should signal explicitly the structure of the text, presenting his/her perception at the end of the text.	2.34	1.195	28.5	33.3	22.2	8.2	7.8
20. Introductory questions should be included in science textbooks.	1.72	0.858	49.2	33.6	13.8	2.5	0.9
22. Summaries should be included in science textbooks.	1.64	0.952	59.1	25.5	9.4	3.9	2.1

\* SA=Strongly Agree, A=Agree, U=Undecided, D=Disagree, SD= Strongly Disagree.

### Perceptions about science illustrations in science textbooks

The response data in Table 3 indicate that Greek Primary teachers advocate a satisfactory number of effective and distinct illustrations that help their students comprehend the text (item 24, 25).

**Table 3.** Greek primary teachers' perceptions of the illustrations included in a science textbook (Mean, Standard Deviation, and Percentages of 572 respondents).

Questions (Depended Variables)	Mean	Standard Devia- tion	SA	A	U	D	SD
21. Diagrams (graphs, charts) should be included in science textbooks.	1.84	0.974	44.9	35.7	12.6	4.3	2.5
24. A science textbook should include a satisfactory number of illustrations to help students comprehend the text.	1.10	0.340	90.9	8.2	0.7	0.2	0
25. Distinct and effective graphic devices should be included in science textbooks.	1.10	0.351	91.2	7.5	1.1	0.2	0
26. In a science textbook photographs and line drawings should be used to help students to clarify text.	1.13	0.386	89	9.8	0.9	0.3	0
27. Illustration in a science textbook should increase students' interest to read the text as well as to motivate them in discussing further in classroom.	1.12	0.381	89.5	9.3	0.9	0.4	0
28. In a science textbook, a picture should be positioned as close as possible to the sentence referring to it (e. g. look at picture 3) and should be accompanied by caption.	1.51	0.767	62.2	27.3	8.3	1.4	0.7
29. In a science textbook an illustration should provide students with additional information to the written text.	1.96	1.053	41.2	33.9	15.3	6.4	3.2
30. Analysis of the kind of criterion performance that is desired of the student(e. g. to understand a concept, to remember unfamiliar content, to transfer text concepts) should define the kind of illustrations (e. g. representational illustration, line drawings, charts) which should be used by the author of a science textbook.	1.43	0.667	64.7	28.8	5.6	0.4	0.5
31. Pictorial models or illustrations which represent facets of the science text which cannot be presented comprehensibly in a written form should accompany the complicated expository science text.	1.42	0.736	69.4	21	7.8	1.3	0.5

\*SA=Strongly Agree, A=Agree, U=Undecided, D=Disagree, SD=Strongly Disagree.

The function of illustration in clarifying science text (item 26), increasing students' interest and motivation (item 27) and providing additional information to the written text (item 29) is supported by Greek primary teachers. Thus, they indicate that pictorial models or illustrations that represent facets of the science text which can not be presented comprehensibly in a written form should accompany the

complicated expository text (item 31). The majority of teachers prefer pictures that are positioned as close as possible to the sentence referring to it and be accompanied by a caption (item 28). In addition, the author of a science textbook should choose illustrations according to the kind of criterion performance that is desired of the students (item 30). Furthermore, they consider diagrams (graphs, charts) as a basic component of a science textbook (item 21).

In a statement (item 32) examining teachers' training in selecting the most appropriate science textbook for their students, seven out of ten Greek primary teachers expressed confidence in their ability and three out of ten lack of confidence in science textbook selection (Mean=2.22, Standard Deviation=1.444 of 572 respondents).

In order to clarify and enrich teachers' perceptions of science textbook characteristics such as structure, science text and illustrations, a random sample of 55 Greek primary teachers who had previously answered the questionnaire were interviewed. An in-depth semi-structured interview was chosen (Wengraf 2001). The term "semi-structure" suggests a certain degree of standardization of interview questions, and a certain degree of openness of response by the interviewer (Wengraf 2001). Questions related to science text, language, science textbook structure and function as well as types of illustrations were prepared. In addition, a question to rate science textbook characteristics was added in the interview. Each interview was tape-recorded and extended notes were written by the investigator. Each interview was subsequently transcribed in a word processor. The 55 in-depth semi-structured interviews were analyzed with a systematic grid which used text, illustration and science textbook structure as key words.

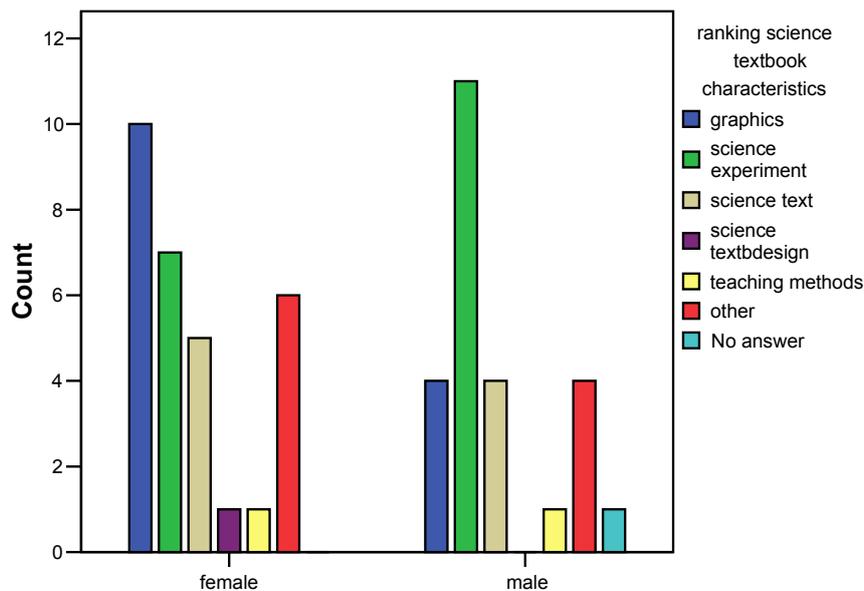
The data from the questionnaires and the in-depth semi-structured interviews indicate that Greek primary teachers held misconceptions related to science text. These were confirmed by the questionnaires and the in-depth semi-structured interviews and indicate that respondents:

- Prefer science text to be as simple and comprehensible as possible
- Have difficulties in recognizing science text as a unique genre
- Prefer narrative text to expository text.
- Are aware of technical language
- Are led to childism.

The ambiguity about science text that was expressed could be explained by the fact that Greek primary teachers teach a lot of narrative text in other disciplines and they are familiar with its form. Furthermore, Greek primary teachers could not easily distinguish science text as a unique genre (Lemke, 1990). In addition, some teachers adopt the idea that science is too hard for children and the language of science (and thus the science) has to be watered down and made personal without technical terms. Martin (1985) described and labeled this idea as "childism". Greek primary teachers are not aware of the historic evolution of the scientific genre, nor of the fact that is not the function of narrative to classify, decompose measure and explain. For this

purpose, the genres science has itself evolved, are naturally more appropriate. The functionality of science text and the technicality it contains cannot be avoided. Teachers have to deal with it; they need to understand the structure of the genre and the grammar of technicality.

On the other hand, Greek primary teachers' perceptions of science textbook structure were contradictory. Teachers' responses in a question to rate the importance of science textbook characteristics indicate that teachers did not rate science textbook structure as high as they rated the other science textbook characteristics (Figure 1). Furthermore, the questionnaires' analysis validated that their perceptions of science textbook structure were ambiguous. They perceive it as full of "hands-on" activities packed between the two covers of the textbook, and including an appendix, a table of contents and practical applications of science concepts. On the contrary, they are aware of the conceptual development within the school organization, prefer flexibility in sequencing topics and activities to meet their students' needs and prefer science experiments to be emphasized more strongly in science textbook structure.



**Figure 1.** Greek primary teachers' preferences for science textbook characteristics

During the semi-structured interviews Greek primary teachers were asked to rate science textbook characteristics in a scale indicating their importance. Data in Table 4 indicate that male teachers rate science experiments as the most important characteristic of a science textbook. On the contrary, female teachers rate illustrations as the most important characteristic of a science textbook. A possible explanation, which is supported by the semi-structured interviews, is that female

teachers prefer illustrations as a starting point of discussion and a text-driven model to teach science. On the other hand, male teachers prefer experiments and an inductive teaching model. In other words, male teachers prefer a textbook with experiments, inductive questions sequencing, and many illustrations. Such textbooks might be a useful adjunct to current teaching practices but do not provide satisfactory models for writing in science. Students should be explicitly taught how to write and use technical language in science. If this situation does not change, teachers would rather focus on content without taking language into account, probably with an increasing emphasis on science activities rather than science texts. The emphasis on doing science as opposed to learning science, the model of the child as a mini-scientist participating in activities analogous to those undertaken by scientists centuries ago as they began to formulate their picture of the world should change. The effect of the advice given is to foreground doing (observing and experimenting) and place language, especially written language in the background. This means that children are not taught to access the genres science has evolved to store information, which leads to a tremendous inefficiency in teaching writing across the curriculum. Teachers' perceptions are constantly driven by teaching methods alongside scientific knowledge based on pedagogical content knowledge and restricted by curriculum documents and every day practice.

### **Summary**

Greek primary teachers hold contradictory and ambiguous opinions related to science textbook structure. They perceive it as a science content full of "hands-on" activities that are packed between the two covers of a textbook and include an appendix, a table of contents and applications of science concepts. On the other hand, they are aware of the conceptual development within the school organization, prefer flexibility in sequencing science topics and activities (a non-linear textbook) and prefer science experiments to be emphasized more strongly in a science textbook.

Greek primary teachers are clearly opposed to a "limited-text" plus illustration science textbook. They have difficulties in recognizing science text as a unique genre, indicating their preference for narrative text. They are concerned about science language; especially the introduction of new science concepts and some teachers are concerned with "childism" (Martin, 1985b). Greek primary teachers are concerned about comprehensibility in science text.

The use of graphic devices is well accepted by Greek primary teachers as motivating, informing, clarifying and reinforcing science text. Both genders prefer a variety or mixed type (realistic and abstract-symbolic) of illustrations as a result of their beliefs rather than studying current graphic devices research. Current research indicates that effective learning with illustrations can be fostered through instructional design by the author of the instructional material and through adequate processing strategies by the learner. Effective learning with graphic devices is not dependent on the professional appearance of graphic devices but rather on the

relation between these displays, the task demands and the learner's cognitive abilities. Thus, graphic devices should be designed according to the Gestalt laws, with a view to communicating, teaching and learning (Schnotz, 2002).

In addition, male teachers rate science experiments as the most important characteristic of a science textbook. Male teachers prefer experiments and an inductive teaching model. Their opinions are shaped by their practical experiences as well as scientific knowledge. On the other hand, female teachers prefer a great number of different types of illustrations as a starting point for discussion and a text-driven model to teach science.

The data from the survey and semi-structured interviews have implications for the design, selection and evaluation of science textbooks and for the science curriculum.

## **Discussion**

The above gender discrepancy in Greek primary teachers' preferences for science textbook characteristics has tremendous implications for the design of science textbooks. In addition, if someone considers that the female /male percentage ratio that serves in Greek primary schools is 65/35 respectively and steadily decreases annually for male teachers, it will be wise to think about the future direction the design of the science textbook should follow. I do not advocate here a female-centered approach to science textbook design, but female teachers' preferences should be challenged during in-service training and within science courses at the Faculties of Education in Greek universities during the training of primary teachers. Textbook structure is of vital importance to teachers and students. Kress and Van Leeuwen (2001) advocate that science textbooks are multimodal and issues such as what mode to use for which segments of the curricular content, how to arrange the content, how to arrange the ensemble of modes in the structure affect teacher and student knowledge and thus the shaping of knowledge. The shaping of knowledge has far-reaching cultural, social and political consequences. Designers' decisions should be overtly articulated to the intended audiences. If Greek primary teachers have inadequacy perceiving science textbook structure, that may lead to ineffective adaptation of their teaching style. Furthermore, ineffective science textbook adaptation will affect students' knowledge and learning. In every stage of textbook design, designers have to make choices. These choices are related to what mode will be chosen to deliver the message. The message is communicated through science text, illustrations and page layout. Greek primary teachers' preferences opposing a "limited text" science textbook may arise from their visual illiteracy. They perceive science text as supplementary to illustrations rather than as a unique genre. Their perceptions are based on their knowledge from old linear science textbooks and they lack knowledge of current research into visual literacy. They are not aware of each mode's constraints to meaning making nor can they see science text from non linguistic perspectives (semiotics). The above have implications for science textbook selection. If the centralized educational system in Greece moves towards decentralized science textbook selection, Greek primary teachers should be well

prepared to proceed with the selection process. Urgent in-service training for teachers is needed in order to accomplish this task.

### **Recommendations**

1. To strongly emphasize teaching methods in science courses at the Faculties of Education in Greek Universities for the training of primary teachers.
2. Teaching science genre as a unique genre emphasizes its appearance in science evolution and its components.
3. Urgent needed “in-service” training for Greek primary teachers on the criteria used to select a science textbook.
4. “In-service” training on teaching writing in science for Greek primary teachers.
5. Revised science curriculum and balance of doing science as opposed to learning science with a reduction in science topics.
6. Strong opposition to a “limited-text” plus a lot of illustrations in a science textbook.

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# **A Critical Review of Textbook Authorization System in the Republic of Korea**

Chaechun Gim

## **An overview of the Korean textbook issuing system**

In Korea, three different categories of textbooks are allowed to be used in schools: Government-copyrighted textbooks, government-authorized textbooks, government-approved textbooks. Statute 29 of Primary and Secondary Education Law says "Schools shall use the textbooks whose authorship belongs to the national government or the textbooks which are officially authorized or approved by the Minister of Education and Human Resources Development (MOEHRD)" Government-copyrighted textbooks are the textbooks whose authorship belongs to the national government, government-authorized textbooks are the textbooks which private publishers have developed and got the authorization from the national government, and government-approved textbooks are the textbooks which have got the approval whose standard is lower than that of the authorization review. The scale of interference by the national government in the issuance of textbooks is largest in government-copyrighted textbooks, while it is smallest in government-approved textbooks. And government-authorized textbooks stand between them.

Most of Korean schools use government-copyrighted and government-authorized textbooks, because approved textbooks are allowed to be used only in exceptional cases. Article No. 3 code 1 in the Ordinances for the Use of Textbooks says "The principal of a school shall use the government-copyrighted textbooks when they are already published, and shall choose and use government-authorized textbooks when a specific subject does not have government-copyrighted textbooks for it". Approved textbooks are used only after a specific approval by the MOEHRD or by the Superintendent of Education when government-copyrighted or authorized textbooks are not published for a specific subject. As most subjects have their government-copyrighted or authorized textbooks, however, most of the Korean schools use government-copyrighted or government-authorized textbooks.

In Korean elementary schools, government-copyrighted textbooks are used in all subjects and in secondary schools, government-copyrighted textbooks are used in Korean, Moral, and Korean History and government-authorized textbooks are used in the other subjects. Now, Korean government plans to increase the number of government-authorized textbooks and to decrease the number of government-copyrighted textbooks. Thus, from 2009, when a newly revised National Curriculum will be implemented, government-authorized textbooks will be used in all subjects in the secondary schools and in some subjects such as Music, Arts, and Physical Education of the primary schools.

With this change, textbook authorization will be the key principle of Korean textbook issuance policy. In general, textbook authorization system, having less interference of the national government in the development of textbooks, is expected to enable to develop textbooks with more creativity than in the government-copyrighted system. Contrary to the general expectation, however, it is generally agreed that textbook authorization system in Korea has not succeeded in the development of more creative and more diverse textbooks. So this paper purports to suggest the improvement strategies in the hope of the expansion of textbook authorization system and establishment of a new textbook authorization system in Korea which will enable to develop textbooks with more creativity and more diversity.

### **Features of textbook authorization system in Korea**

Textbook authorization system is a system with which a government indirectly interferes in the authorship of textbooks. In textbook authorization system, private/commercial publishers conduct researches and develop textbooks strictly following the "guidelines in the writing of textbooks" suggested by the national government. When the textbooks get a "pass" in the review by the national government, the publishers can issue and provide them for schools. The national government's interference in the development of textbooks is made in a very obvious and direct manner although the private/commercial publishers are the agency of the issuance of textbooks: first of all, the textbooks are examined according to the "guidelines in the writing of textbooks" and the "checkpoints of government authorization", and secondly, if a need arises, the textbooks should be revised and re-examined for the "inappropriate" part in the textbook.

#### ***Stages of review for the government authorization***

Development of government-authorized textbooks goes through the following 4 stages: 1) preparation for government textbook authorization 2) writing of textbooks 3) review 4) selection, production and provision.

In the first stage of preparation for textbook authorization review, the MOEHRD announces the "guidelines in the writing of textbooks" and the "checkpoints of government authorization" after the official announcement of the National Curriculum. In the second stage, writers and publishers make a plan of writing, write textbooks and apply for government authorization. In the third stage, the national government examines candidates through two-step reviews and announces "pass" and "fail". In the final stage, schools choose one of the government-authorized textbooks and order them, and then publishers produce them and supply them for the schools.

#### ***Annual review***

The authorized textbooks which are now in use have been made through years according to an annual authorization review plan. Textbooks for junior high schools

were reviewed for three years, each year for each grade. Textbooks for senior high schools were examined for two years: in the first year, the textbooks of compulsory subjects for freshmen were reviewed; in the second year, textbooks of optional subjects were reviewed. The reason why annual review system was introduced instead of concurrent review was to uplift the quality of textbooks because it will reduce the burden of writing many textbooks at the same time and it also helps to review the textbooks more thorough and strictly.

**Table 1.** Flowchart of the making of government authorized textbooks in the 7th National Curriculum

preparation for government authorization	1. official announcement of the National Curriculum	2. announcement of review plan and the guidelines for the writing of textbooks	3. appointment of the agency for government authorization	4. announcement of the checkpoints for government authorization
writing of textbooks	8. applying for the government authorization	7. editing (publishers)	6. making a plan of writing (writers)	5. making a contract with writers (publishers)
review	9. appointment of the review committee (MOEHRD)	10. reception of the review copies and making a basic research (KICE)	11. review of textbooks (2-step reviews), review of teachers' manuals (2-step reviews) final judgment	12. announcement of pass and fail (MOEHRD)
selection, production and provision	16. provision	15. printing, bookbinding, publishing	14. selection and order (schools)	13. sending display copies to schools

#### ***Separate reviews of textbooks and teachers' manuals***

In Korea, review for government authorization is made of textbooks and teachers' manuals. Teachers' manuals are reviewed when their counterpart textbooks are accepted in the review. If teachers' manuals do not succeed in the review, the acceptance of the counterpart textbooks is cancelled. That is to say, the acceptance of textbooks is not complete until the counterpart teacher's manuals are accepted in the review. As a new system of separate review of textbooks and teachers' manuals was introduced for the 7th National Curriculum, a new set of standard for teachers' manuals for review was made. The review of teachers' manuals has the same procedure as in the review of government-authorized textbooks.

#### ***Checkpoints for the government authorization of textbooks and teachers' manuals***

The checkpoints which are newly introduced for the review of textbooks and teachers' manuals have three characteristics, when compared with the previous ones applied in Korea. Firstly, a new checkpoint of "originality" was introduced to encourage developing a new type of textbooks. Secondly, a standard for the form and style of textbooks was levelled up to encourage diversity in the overall design of

textbooks. Thirdly, separate checkpoints for the review of teachers' manuals were introduced for heightening of the quality of teachers' manuals.

Korean checkpoints for the review of textbook authorization have three sets: common checkpoints, subject-specific checkpoints, teachers' manual checkpoints.

**Common checkpoints** are made up of basic necessary conditions such as observance of law and regulation, compliance with copyright, and generality of content. Its judgement is made either of "yes" or "no". The review with common checkpoints is for the checking of observance, not for the judgement of the quality of content. So a textbook which has a negative evaluation even in only one head is eliminated in the review.

**Subject-specific checkpoints and teachers' manual checkpoints** are made firstly centring on the components which can be applied to all subjects and then the specific areas of judgement vary according to the characteristics of a subject. Subject-specific checkpoints are made up of six areas of judgement while teachers' manual checkpoints are made up of seven areas of judgement. Evaluation of a quality is made on the scale of A, B, C. If a textbook or a teachers' manual has earned more than two C's out of 15 items, it is judged as a failure in the review.

#### (1) Common checkpoints

judgement area	focus	judgement		remarks
		Yes	No	
I. agreement to the spirit of Constitution	1. Does it have any content which denies or disparages the national constitution of ROK? 2. Does it unjustifiably advertise or disparage any country, religion, organization or a class?			
II. agreement to the Education Law, and the National Curriculum	3. Does it have any content which does not agree to educational belief and goals?			
III. copyright	4. Does it have any content which is guilty of plagiarism and breach of copyright?			
IV. generality of content	5. Does it have any prejudice of a writer or an individual's private views which are not accepted in general?			

(2) Subject-specific checkpoints

judgement area	Focus	A	B	C
I. observance of the National Curriculum	1. Does it faithfully reflect the features, goals, content, teaching/learning methods, and evaluation suggested in the National Curriculum?			
II. selection and organization of content	2. Are the level and scope of content appropriate for the characteristics of the given grade? Is the content organized with a consideration of the interrelationship among the grades? 3. Does it have any wrong content, mistakes or prejudice? 4. Does it have any content which disparages, distorts, defends, or overestimates any specific person, gender, province or any article of commerce? 5. Does it reflect properly interdisciplinary educational content (democratic citizenship education, character education, environment education, economy education, energy education, work spirit education, consumer education, unification education, Korean culture identity education, international understanding education, marine knowledge education, information education, gender equity education) in a relevant chapter? 6. Is the amount of content appropriate? Is it organized so as to encourage further study?			
III. teaching/learning methods	7. Does it suggest teaching/learning methods appropriate for the achievement of subject educational goals? 8. Does it suggest appropriate methods of collecting, analyzing and utilizing information and educational materials? 9. Does it suggest appropriate methods and tasks of evaluation which agree to the goals, content and methods of the subject education?			
IV. orthography and transcription	10. Does it observe the spelling and transcription rules of "Korean orthography rules" "Standard language rules" "Loanword transcription rules" & "Roman alphabet transcription rules"?			
V. editing, form and setup	11. Do the form and setup (template, page number, colours) reflect the checkpoints in the writing of textbooks? 12. Is the overall design attractive? Does the design utilize the space effectively? 13. Are the illustrations and photographs clear and organized creatively?			
VI. originality	14. Is the overall design attractive? Does the design utilize the space effectively? 15. Are the teaching/learning methods original?			

## (3) Teachers' manual checkpoints

judgement area	Content	A	B	C
I. introduction to the textbook and its curriculum	1. Does it explain the subject curriculum faithfully? Does it introduce new trends of the subject curriculum? 2. Does it suggest teaching/learning/evaluation methods appropriate for the achievement of subject educational goals? 3. Does it suggest specifically the perspective, and the organization system of the given textbook? Does it explain the organization of the teachers' manual? Does it suggest annual lesson plan? 4. Does it suggest methods of flexible utilization of textbook and curriculum implementation?			
II. organization	5. Is it organically and conveniently organized using the overview, details, and appendix? 6. Is each lesson systematically organized so as to teach the content effectively? 7. Does it provide teaching plan and materials appropriate for tracking?			
III. teaching/learning methods	8. Does it suggest various teaching/learning methods to stimulate the interests of students? 9. Does it suggest teaching/learning activities appropriate for the goals, materials and educational content? 10. Does it suggest evaluation standard which agrees to the goals, content, teaching/learning methods? Does it give particular examples of evaluation?			
IV. introduction to the utilization of materials	11. Does it introduce cutting-edge materials which are helpful to the education and subject education research using both Korean and international resources? 12. Does it suggest the methods of utilization of a variety of reference points such as multi-media educational materials?			
V. orthography and transcription	13. Does it observe the spelling and transcription rules of "Korean orthography rules" "Standard language rules" "Loanword transcription rules" & Roman alphabet transcription rules"?			
VI. editing, form and setup	14. Is the overall design attractive? Does the design utilize the space effectively?			
VII. originality	15. Is the overall design attractive? Does the design utilize the space effectively?			

**Procedures**

The MORHRD organizes the Textbook Authorization Review Committee (TARC). The TARC is made up of researchers and reviewers who are appointed among teachers, professors, officials in the MOEHRD, and researchers in the Korea Institute of Curriculum and Evaluation (KICE).

Procedures of review for textbook authorization are as follows. Organization of the TARC (MOEHRD) → acceptance of the review copies (KICE) → introductory survey (researchers) → main review (committee members) → final judgement on textbooks & teachers' manuals (committee members) → announcement of the final results (MOEHRD)

**Table 2.** Procedures of textbook authorization in the Republic of Korea

Stages		area of judgement	details
organization of review committee			
acceptance of review copies			
Introductory survey		* content * orthography * vocabulary check * design	The report of the introductory investigation plays as an essential reference point to the main investigation
main review of textbooks <sup>1</sup>	1st	* application of the common checkpoints * application of the subject checkpoints	<Common checkpoints> The textbooks with one "yes" for any head are rejected. <subject checkpoints > * grading for each head (A, B, C) * The textbooks with more than 2 Cs are rejected.
	2nd	* checking the revised part	The textbooks which are not revised as required by the Committee are rejected.
main review of teachers' manuals	1st	* application of the common checkpoints * application of the subject checkpoints	The same with the main investigation of textbooks
	2nd	* checking the revised part	If teachers' manuals are rejected, the counterpart textbooks will be rejected.
final judgement		* pass/fail	Authorized only when both textbooks and teachers' manuals have passed
announcement of the final results		* by the MOEHRD	

### Problems and alternatives of the textbook authorization system in the Republic of Korea

Textbook authorization system in Korea has consistently evolved since 1945 when the Republic of Korea started. In particular, in the 1990s, many developments have been made including the expansion of government-authorized textbooks, annual review system, separate review of textbooks and teachers' manuals, and modification of the review checkpoints. However, the present textbook authorization system leaves much to be changed. This paper purports to investigate the problems and explore the solutions, focusing on the review cycle, the scope of review, review checkpoints, principles of review judgement, and the number of authorized textbooks per subject.

#### *Review cycle*

As there is no regular cycle of review for textbook authorization in Korea, it is impossible to discuss review cycle *per se*. Government authorization is effective until the next revision of the National Curriculum. But as the cycle of revision of the

<sup>1</sup> The number of the authorized textbooks is decided by the TARC

National Curriculum is not designated in the education-related law and regulation, revisions are made irregularly, depending on the politico-social changes in Korea. So there is no predicting the government-authorized textbook review cycle, as it is subordinate to the revision of the National Curriculum. It is a custom that without the revision of the National Curriculum, textbooks are not revised. It means that the review cycle of textbooks varies from 5 to 10 years.

Irregular review of the government-authorized textbooks brings about the following problems.

1) The difficulty of preparation for the review: Irregular review makes both the agency of review (MOEHRD & KICE) and the applicants (writers/publishers) it difficult to prepare for the review as the time of review is not predictable. It is not until the announcement of the date of review that agents and applicants can recruit personnel and secure budget for the preparation of the review. Irregularity of review makes it difficult for both agents and applicants to have specialty in this task.

2) Impossibility of issuance of new edition: Review of textbooks is made only once at each revision of the National Curriculum. Once authorized, the textbooks are used until a new revision of the National Curriculum. As the authorization review is made only once for each National Curriculum, it is impossible to make a new revised edition of authorized textbooks.

3) Irregularity of the valid term of authorized textbooks: As the revision cycle of the National Curriculum decides the authorization cycle of textbooks, the valid term of authorized textbooks varies unpredictably without a justifiable educational reason. The valid term of authorized textbook in use now is expected to extend to 9 years as the textbooks which will reflect the requirements of the current revision of the National Curriculum will be used gradually from the year 2009. The period of 9 years is almost as twice the length of the previous 5-year-valid term of authorized textbooks.

Thus it is necessary to introduce a four-year-cycle of textbook authorization.

An example of the plan of 4-year-cycle of textbook authorization is suggested in the following table. In primary schools, textbooks for some subjects will be authorized with the next implementation of the revised National Curriculum. So the following example includes the authorization of the textbooks ranging from grades 1 to 12.

**Table 3.** Annual review plan for textbook authorization in a four-year-cycle

Division	1st year	2nd year	3rd year	4th year
primary schools	grade 1-2	grade 3-4	grade 5-6	
junior high schools		grade 7	grade 8	grade 9
senior high schools			grade 10	grade 11-12

Expected results of the introduction of a four-year-review cycle are as follows.

- 1) A standing organization will be established which is in charge of the review for textbook authorization. It will result in the accumulation of experience and the specialization in textbook authorization which are expected to contribute to the enhancement of the quality of textbooks.
- 2) Continual revision and issuance of a new edition of textbooks will be made possible as the review will be made regardless of the revision cycle of the National Curriculum.
- 3) Systematic preparation and implementation of the review for textbook authorization will be made possible as the valid term of authorized textbooks is invariably 4 years. In particular, as the time of review is predictable, publishers can have enough time to research, develop, write, edit, revise and improve textbooks.

***Scope of review***

The review for government authorization is confined to textbooks and teachers' manuals. In the previous period of the National Curriculum, simultaneous review of textbooks and teachers' manuals are made. But now, the review of textbooks and teachers' manuals are made sequentially. And when teachers' manuals do not pass, the textbooks matching the rejected teachers' manuals which passed the review are cancelled.

This kind of separate review of textbooks and teachers' manuals has the following problems.

- 1) One fundamental question arises whether it is a rational decision to cancel the authorization of textbooks only because the counterpart teachers' manuals have some shortcomings.
- 2) Another fundamental question arises whether it is desirable to review teachers' manuals. One can argue that review should not be extended to teachers' manuals because teachers' manuals are not for students but for teachers.

The suggested alternatives are as follows.

- 1) Teachers' manuals may be excluded from the review for government authorization. As the quality of teachers' manuals will exert an influence upon the choice of textbooks by schools, national governments need not examine teachers' manuals themselves. When teachers' manuals are exempt from the review, originality of a writer or an editor will emerge clearly.
- 2) Teachers' manuals for primary schools are examined while teachers' manuals for secondary schools are exempt from the review because a teacher in primary schools who should teach all subjects tends to heavily depend on teachers' manuals.

### ***Review checkpoints***

Korean government takes control of authorized textbooks in two ways. First, it controls through guidelines in the writing of textbooks, and second, through the checkpoints of textbook authorization. These twofold controls decidedly influence the results of review.

But guidelines in the writing of textbooks and the checkpoints of government authorization have problems as follows.

- 1) There have been many complaints about the guidelines in the writing of textbooks. Some people even go far to saying that there is nothing worthy of attention except a reference to the number of pages, the number of colours, and template. This acrid criticism comes from the fact that "guidelines" are made up of very abstract and general statements and overlap with the checkpoints of review.
- 2) Detailed specifications of guidelines and checkpoints contribute to the uniformity of textbooks rather than to the enhancement of the quality of textbooks. It results in the negative interference in furtherance of originality and diversification.

Alternatives are as follows.

- 1) Guidelines in the writing of textbooks should be annulled and only checkpoints of textbook authorization should be suggested. If the number of pages, the number of colours, and template should be specified, the regulation concerning these points may be included in the checkpoints of government authorization.
- 2) Authorization checkpoints should be minimized and expressed in clear terms. And the textbooks meeting the requirements of the minimum standard should be authorized. Authority of judgement should be transferred from the national government to local schools so that teachers may compare a variety of textbooks and choose the best for themselves.

### ***Principles of review judgement***

The principles of review judgement of "pass" or "fail" have two stages.

First, in the first main review of textbooks by the common checkpoints, textbooks with one "yes" for any head will fail. Second, in the first main review of textbooks by the subject-specific checkpoints, textbooks with more than two Cs on the scale of A, B, C will fail.

This principle means that textbooks with only one "yes" among five heads by the common checkpoints will fail. For example, if a textbook has got "yes" to the question of "Does it include any prejudice of a writer or an individual's private view which is not accepted in general?" will fail without any opportunity of the elimination of the problematic statements or of revision, although the textbook has been developed for a long time and has good points in other areas. Sometimes, the standard of "academic fallacy" or an "established theory" is a moot question. So the need to relax the regulation or to give an opportunity of revision arises.

And there is another problem with the principle that a textbook with more than 2 Cs by the subject-specific checkpoints will fail. As there are 15 evaluation areas, a textbook with 12 As and only 3 Cs will fail, while a textbook with 15 Bs will pass.

Former review committee members pointed out the problem in the survey with regard to the appropriateness of the principle of review judgement. They respond that sometimes a textbook which has many problems pass just because it does not make a big mistake, while a textbook which is excellent in general will fail just because a mistake was found in a small part of the textbook.

Alternatives are as follows.

1) In the common checkpoints, the principle of review judgement should be changed from the present state of giving "yes" or "no" to giving A, B, & C. A better principle is suggested as the following. A textbook that has Bs in more than half of the evaluation areas, or which has one C should fail. Otherwise, we should encourage the revision of a textbook by giving an opportunity to change problematic parts for the improvement of the quality of a textbook.

2) In the subject-specific checkpoints, the principle of review judgement should be changed from the present state of giving A, B, & C to giving scores such as 3, 2, or 1. A textbook that has got less than some predetermined score in total should fail. Or it is better to reduce the evaluation areas from the present 15 ones to 7 or 8 ones, then it will be more reasonable for the textbooks getting three Cs to fail in the review.

#### ***Number of government-authorized textbooks per subject***

There has been much discussion on the number of the government-authorized textbooks per a subject of the same grade. Reflecting the content of the discussion, the number has been changed many times. Until 1980, the maximum number of government-authorized textbooks per subject was 5, between 1980 and 1990s, the number was 8, and now the limitation is eliminated. Now the number of the government-authorized textbooks per subject of the common curriculum is 7 to 16, while that of the government-authorized textbooks for optional subjects is 1 to 18. So the number of the government-authorized textbooks per subject varies greatly depending on subjects and grades. The number of the government-authorized textbooks for core subjects such as mathematics, social studies, science, and English is 8 to 16. Among optional advanced subjects, the number of the government-authorized textbooks for "literature" is 18, the largest, but the number of the government-authorized textbooks for "Law and Society", "Spanish II", and "Chinese Character and Classics" is only one.

Some people argue that textbook authorization without the limitation of maximum number of authorized textbooks per the same subject makes too many textbooks pass the review. Considering the fact that Japan which heavily depends on textbook authorization system, USA which depends on approval system or France which rather freely permits the publication of textbooks respectively has more or less 5

different kinds of textbooks per each subject, one can say that we have too many kinds of government-authorized textbooks per each subject.

Now the average number of government-authorized textbooks for each subject is 12. But the number of the government-authorized textbooks which occupies more than 10% of the market share is 5, which means that 5 different textbooks for each subject can make a profit in Korea and the market share of the top 5 ranked textbooks is more than 90%. This situation gives an occasion to the argument that there should be some regulation on the number of the government-authorized textbooks for each subject. But it is not desirable to confine the number of the government-authorized textbooks bureaucratically. Rather it would be recommendable to let the number of the government-authorized textbooks decided by the principle of market.

Alternatives are as follows.

1) In order to encourage publishers to develop higher-quality textbooks, the national government should judge only whether a textbook meets the minimum standard, let each school and teacher judge the quality of a textbook, and abolish the present system of an equal distribution among publishers of textbook sale profits. Now the system of an equal distribution of textbook sale profits is in force to prevent superheated competition and unfair bargain in textbook market. As the profits are equally distributed among the publishers regardless of the number of sold copies in the present system, publishers tend to have the strongest interest only in "pass or fail", and do not care for quality management and the volume of sales once they have their textbooks authorized.

2) Abolition of the system of an equal distribution of the textbook sale profits will lead publishers to compete with one another for quality. This will have another effect. That is to say, abolition of the system of an equal distribution of the textbook sale profits will prevent a publisher which does not have specialty in the development of textbooks from coming to the textbook market. And some publishers will transform themselves into subject-specialization publisher to influence a textbook market of a specific subject.

## **Textbook Evaluation in East Africa: some practical experiences**

James McCall

The author was an Adviser to the Kenyan Ministry of Education during the period of the Kenya Textbook Project.

The focus of the Strengthening of Primary Education Project (SPRED) which has operated in Kenya in recent years has been on budgetary support to provide learning materials to needy primary school pupils. The Project followed on from a previous programme of support, SPRED 2, and also adopted much of the basic methodology and principles of the Government of Kenya/Royal Netherlands Embassy programme of textbook support operational in the period 1997-1999.

Underlying all donor involvement in textbooks is the principle of a unified system of provision, designed to allow for the smooth and efficient disbursement of funds from a variety of sources, including both donor and government. A second central feature of textbook projects is that they must contain a comprehensive methodology for evaluating textbooks, whether that evaluation is carried out by a committee or by individual teachers in schools. Ideally, detailed Mark Sheets should be designed for this purpose. The Kenya Textbook Project closely followed these general principles.

### **Writing and editorial quality**

The single most significant criterion for evaluating submitted textbooks is whether or not they cover the curriculum in a satisfactory manner. The Mark Sheets should make allowance for the award of high marks if this criterion is met in an entirely satisfactory way. Similarly, submissions can receive a very low mark if the publisher has not dealt properly with the crucial issue of relevance to the curriculum.

Some of the books submitted by publishers may have been published originally for a country other than Kenya. If the book has been produced for Uganda, or for another country in the region, perhaps not many changes will be required. On the other hand, depending on the subject, many changes may be necessary. The evaluator's task is to assess how well the specific needs of the Kenyan curriculum have been fitted in to a textbook which may have had its origins elsewhere in the region.

The *writing style* is also a very important factor in evaluation. Every author has a different style, but every good author will modify his style to suit the needs of the reader. Some of the most significant questions to be asked are:

Is the level of writing acceptable for the average child in the grade for which the book is intended?

Is the level of writing consistent throughout, i.e. is there the same level of difficulty at the end of the book as there is at the beginning?

Is there a glossary, and if not should one be added or prepared by the teacher?

Are sentences of a suitable length?

Are there too many words on the average line, or is the average about right? This issue is of course closely connected to the question of design and presentation.

Is the vocabulary acceptable for the intended audience?

All publishers - and all authors too - want to establish a reputation for *attention to detail*. Grammatical errors, misprints and inconsistent spelling are perhaps less important in a novel where the primary purpose is to entertain rather than to educate (although even here a good publisher will insist on high standards). In a school textbook, accuracy and correctness are not just desirable but *essential*. So when evaluating a text evaluators should look out for spelling errors, inconsistency in the treatment of spelling or the treatment of the subject-matter of illustrations, and inconsistency in the use of chapter-headings, sub-headings and captions.

Other questions to ask include:

- is the text factually accurate, clear and unambiguous?
- has the author included all the latest statistics or current information available?
- has the author included all the latest developments in his subject?

As part of the Kenyan project, the Ministry of Education supported a detailed training programme which introduced publishers to the demands of competitive tenders. This was done partly to ensure that both larger more experienced publishers and smaller indigenous companies approached the project with similar knowledge and skills.

## **Design and presentation**

The assessment of presentation and design is a very important part of the textbook evaluation process because good presentation and design can have such a positive effect on readability - and bad design can make the textbook difficult or impossible to read and understand.

Good design is an aid to readability - bad design can make a book almost unreadable. Good design has to do with the use of space, the relationship between text and illustrations, and even the relationship between text and 'white space'. Good design is design which is above all sensitive to the reader's needs - not just attractive design for its own sake.

A book which is well-designed is easy to use and easy to handle. It does not put obstacles in the way of the reader, either by making too many demands on him (type which is small and difficult to read, or illustrations which are drawn to the wrong

scale) or too few demands (layout and type which are better suited to much younger readers).

Several of the most important criteria have to do with typeface and typesize, and general clarity of presentation. Consistency in design is also very significant. If one section of text is treated in a certain typographic style, all other examples of that kind of text should be treated in the same style - activities and experiments come in to this category, for example.

The quality of printing is also an important element in the presentation of the textbook. Whether the book is printed in black ink only, or in full colour, it should above all be clear and even, with the same consistency of ink on all pages. Where the book is in two colours (black plus one other), sensible use should be made of the second colour so that it serves as an aid to comprehension.

There should be a minimum amount of 'show-through' - illustrations on one side of the page should not be visible on the other side (they should not 'show through'). Where show-through does occur, the text can be difficult to read.

During the Kenyan Textbook Project there were several examples of pirated copies of textbooks appearing on the market. They were obviously pirated because the quality of the printing was poor. The lesson to be learnt was that teachers must return to the publisher books which are poorly printed and obviously pirated so that the publisher can take action to combat the piracy.

It is of course quite unusual to find a textbook which satisfies all these criteria in every single respect. The Mark Sheets are designed to help evaluators decide what positive characteristics they can identify in the textbooks under scrutiny, and to mark the textbook according to the number of positive features they can identify.

## **Illustrations**

Illustrations must be an integral part of the textbook, and must complement the text and make a real contribution to learning outcomes.

There are two basic types of illustration. First, line drawings - which can either be in colour or simply in black only. Secondly, photographs - which again can be in black and white or in full colour.

Publishers will sometimes use two colours rather than full colour if that is sufficient - and it also helps to make the book cheaper.

Every illustration, whether it is a drawing or a photograph, must be *clear and distinct*. The commonest fault to be found with illustrations is that they are too small, making comprehension impossible.

Illustrations can also serve to support the educational principles upon which the textbook is based. If the publisher has prepared his material carefully, the

illustrations ought to reflect gender equality, awareness of cultural norms and other factors. Illustrations should be checked for the following features:

- Boys and girls are shown in the illustrations in roughly equal proportion. Their activities are not simply stereotyped - for example, boys may be seen doing work around the house, and girls fixing a bicycle.
- The illustrations depict both the urban and the rural environment. Children who live in remote rural areas may not be familiar with life in the city and should feel that the textbook also caters for their particular locality.
- The scenes featured in the illustrations should have both a local and an international dimension. Modes of transport (buses are a good example) should include the types of buses which are familiar to children in their own country, as well as illustrations of transport systems from other countries which can help to widen the child's experience.

There are other types of illustrations, apart from line drawings and photographs, which can be used effectively in textbooks.

Charts of various kinds can be used, notably bar charts where information (usually statistical) can be incorporated into the text. The question to ask is: does this particular way of presenting the material make it easier to understand? Or could the information have been presented equally easily as straightforward text?

These considerations were of particular importance in the Kenyan context on account of the great variety of locations of the potential readers, ranging from arid desert to coastal towns and encompassing both remote rural communities and sophisticated city environments.

## **Methodology**

A textbook must be partly judged by the *methodology* which underlies its content and presentation. The methodology should be apparent in both the text and the illustrations, and in the activities and exercises as well as the main body of the text.

In the context of the textbook, the methodology employed has to do with the ways in which the authors achieve their teaching objectives. In the best textbooks, the authors will employ a variety of devices to ensure their objectives are met successfully.

The activities which are included in the text should always be relevant to the concerns of the reader. One of the most common weaknesses in this area is the inclusion of activities which do not relate to the pupil's everyday life. Another weakness is to pitch the content of the activity section at too high a level.

In response to the objectives of the revised curriculum, textbooks should encourage active learning, and should avoid learning by rote. Here the textbook should be seen as a vehicle for *interpreting* the curriculum, and for producing stimulating and

interesting avenues to learning. It should not simply reproduce facts, figures and formulae to be learnt by heart.

Rote learning from textbooks was a common phenomenon throughout East Africa (and in other parts of the continent also). The new generation of textbooks introduced by the Kenyan project was specifically designed to steer teachers and pupils away from rote learning and to encourage techniques of personal investigation and discovery and group activities.

The text should also introduce various *skills* in an appropriate way. These skills should include both individual and group skills, at a variety of levels of difficulty. Particular emphasis should be placed on the development of problem-solving, with examples of various kinds of problems and methods of finding solutions.

Any good textbook will reflect the conditions of the country for which it was written and the specific details of the curriculum. A publisher can do this in a number of ways.

First, he can write a textbook specifically for a given curriculum (in this case the Kenyan curriculum). If the publisher chooses this method, he has a free hand to interpret the curriculum as he thinks fit, in the most attractive way he can devise, without reference to any other textbook.

Alternatively, he can base his textbook on an existing textbook produced for a curriculum which is broadly similar to the Kenyan one, (the Ugandan one, perhaps) but replacing Ugandan material with Kenyan material where relevant to produce an end result which is Kenyan in its orientation and in its context.

### **Topical issues**

The main criteria for evaluation of content have to do with coverage of the curriculum, accuracy of content, suitability of the language for the intended reader and other significant issues.

When assessing the content, evaluators should however also take into account the success of the textbook in coping with other *emerging issues* - in particular those concerned with health, male and female roles in society (gender issues), civic education, teaching and learning methodology which maximises pupil involvement, and factors relating to the environment and the influence of environmental issues on the pupils' lives.

Textbooks will vary in the degree to which they cope with these challenges successfully, and evaluators should try to assess how well the publisher has managed to deal with them:

- How well does the textbook cover the problem of HIV/AIDS, and how clear are the explanations and commentary?

- Are there activities and examples which illustrate the dangers of pollution, both at a global level and in areas which directly concern the child, e.g. taking care not to leave litter, not to allow chemicals to discharge into rivers, and so on?
- Does the textbook include examples of both boys and girls involved in everyday activities?
- Does the textbook manage to avoid stereotyping, i.e. does it show boys carrying out tasks which may previously have been associated only with girls' work (perhaps around the home, for example)? Remember to allow for the context in which the book will be used - what is accurate in one country or society may not reflect the practices in another.
- Is the reader made aware of the importance of participating in decisions which affect him or her in daily life? Examples can be drawn from the family (are decisions made jointly, or only by the head of the family?) and also the local community (is there an emphasis on taking part in local government, perhaps by running for office in the council or community group?)
- Does the textbook encourage the pupil to take an active part in the learning experience, to relate to other learners and co-operate with them, and to develop group as well as individual skills?

In the Kenyan project, the evaluation criteria placed particular importance on content and conformity to the curriculum, requiring a high threshold for acceptability: that is, each submission by a publisher had to gain a reasonably high mark if it was to be accepted and allowed to go forward to the next assessment stage. The criteria included promotion of positive social/cultural values and/or diversity as well as positive attitudes towards environmental diversity and promotion of gender responsiveness in text and illustrations.

The Kenyan project was judged to be a success not only because it gave teachers a choice of quality textbooks and effectively liberalised the book trade, which had previously been dominated by a state centralist publishing system. It was also judged successful because the evaluation and selection of the textbooks was based on a fair and objective system which gave no publisher or textbook a significant advantage over any other. The Kenyan project was in that respect, and in others also, a model for other publishing industries to follow.

# **Comparison of Korean and Namibia School Curriculum with focus on Textbook Provision**

Byong-Sun Kwak

## **Introduction**

Considering the fact that Korean basic education with its national curriculum has contributed to the national economic development by supply of qualified man power during the past four decades, and has been identified as relatively competitive one in terms of students' achievement mostly in mathematics and science as well, Korea's curriculum sometimes becomes a subject of investigation at international agency like World Bank which has played active role in helping third world education. In connection with World Bank mission, the investigator had a chance to review the curriculum provision of Namibia with respect to Korea's curriculum.

A comparative review of curriculum provision between Korea and Namibia may shed a light for us to understand in a deeper level on how the two countries with many contrasting context differ from each other and how share common nature in curriculum policy, framework and provision for students with focus on textbook. This study is to investigate similarity and difference of curriculum provision between Namibia and Korea by reviewing 1) curriculum policy, 2) the whole school curriculum framework, 3) content structure of mathematics and science subject and 4) textbook provision. Finally based on the comparative analysis, an implication for Namibia curriculum policy is suggested. The reason to choose mathematics and science subject for comparison is that the two subjects are mostly connected to the development of students' scientific and logical thinking that is a substantial factor for a country to grow with the benefit of modern science and technology.

Considering the fact that Korean basic education with its national curriculum has contributed to the national economic development by supply of qualified man power during the past four decades, and has been identified as relatively competitive one in terms of students' achievement as well, Korea's curriculum will be overviewed first and Namibia's curriculum will be described. In the description of Namibia's curriculum, I add my own personal observation made through a field visit during 1-9 February 2003 in Namibia. And then, a comparative analysis will be made to identify commonality and difference between two countries' curriculum.

Comparison will be made at a broad and macro level of curriculum policy, curriculum framework, and curriculum material provision rather than specific and detailed level. In many ways, the discussion for comparison tends to be speculative and interpretative rather than data based analytic one.

## Korea's Curriculum: Framework and Textbook Provision

**Table 1.** The National Common Basic Curriculum of Korea

Schools Grades Subjects		Elementary School					Middle School			High	
		1	2	3	4	5	6	7	8	9	10 (*)
S U B J E C T  A R E A S	Korean Language	Korean Language		238	204	204	204	170	136	136	136
	Moral Education	210 238		34	34	34	34	68	68	34	34
	Social Studies	Mathematics		102	102	102	102	102	102	136	
	Mathematics	Disciplined Life		136	136	136	136	136	136	102	136
	Science	60 68		102	102	102	102	102	136	136	102
	Practical Arts	Intelligent Life				68	68	Technology & Home Economics 68 102 102 102			
	Physical Education	90 102		102	102	102	102	102	102	68	68
	Music	Pleasant Life		68	68	68	68	68	34	34	34
	Fine Arts	180 204		68	68	68	68	34	34	68	34
	Foreign Languages (English)	We are the first graders		34	34	68	68	102	102	136	136
		80									
Optional Activities		60	68	68	68	68	68	136	136	136	204
Extracurricular Activities		30	34	34	68	68	68	68	68	68	68
Grand Total		830	850	986	986	1,088	1,088	1,156	1,156	1,156	1,224

(\*) For grades 11 and 12: elective courses, 8 units for extracurricular activities, total: 44 units.

### *Current Curriculum Structure*

Korea has maintained centralized curriculum decision making structure with 6-10 years term cycle revision. In the cyclical revision of curriculum as a continual process, it has always been bounded by an ideal Korean education, so called "Hongik Ingan (Korean pronunciation)" literally meaning "being beneficial to all people", which was laid down as a national ideal by the founder of the nation forty centuries ago. This ideal seems so universal in nature that any explanation and specific goals can be drawn from it. However, it has played a fundamental role of

philosophical guideline, which sheds light on the human value as an overriding direction of education.

In connection to this ideal of Hongik Ingan, one persistent educational direction set by a series of curriculum revision is the development of whole person. The national curriculum continuously reflects this ideal in the following way: The well-educated person is defined in curriculum as a person who is healthy, independent, creative and moral.

The current curriculum has been implemented from 2000 as the 7th revised one. The new revision addresses 10 national common basic curriculum from grade 1 to 10, elective-centered curriculum for grade 11-12, differentiated program for individual difference and expansion of school-based program. In general, the school curriculum comprises subject matters and extra-curricula activities. Subject matters are divided into compulsory and selective subjects. The 10 national common basic curriculum consisting of 10 subject matters including Korean language, moral education, mathematics, social studies, science, physical education, music, fine arts, and practical arts are compulsory. For grades 11-12, elective courses are offered in a variety of individual interests. The following Table 1 shows the national common basic curriculum. For grade 1 and 2, subjects are taught in integrated programs as shown in the Table 1. The number of each subject matter by grade is the total instructional hours a year.

### ***Textbook Provision***

Curriculum development is finalized by textbook provision. Textbook provision includes compilation of students' textbooks and teachers' guides and its distribution to students and teachers. In Korea, curriculum revision incurs development of new school textbooks and teachers guides.

New curriculum framework and subjects syllabus provide the very standards and sources for the development of textbooks and teachers' guide for instruction. Textbooks are classified into three categories; the textbook in the first category is national textbook compiled under the copyright of the MOE, the textbook in second category is commercial textbook compiled by private publishing company under the review of MOE on the basis of open competition, and the textbook in the third category is approved book for school instruction by Local Education Authority or MOE, which is applied by school principal among books already published.

The first category textbook is mandatory for all teachers and students. Instructional materials for kindergarten, all textbooks for primary school and textbook of Korean language, national history, moral education and ethics of secondary school belong to the first category. The second category textbooks include textbooks of secondary school except the textbooks of Korean language, Korean history, moral education and ethics. For second category textbook, individual schools have to select one among several textbooks published for each subject instruction. For some high school subjects that have small number of students registered so that there is no

publishing company applying to compile textbook of that subjects, the MOE puts that subjects into the first category textbooks. In that case, the MOE develops the textbook of those subjects. Mostly textbooks consist of first category and second category books. The total number of textbooks from kindergarten through high school, developed in compliance with the seventh curriculum revision is 721.

In general, Korean textbooks have such characteristics:

First, the cost of textbook is relatively cheap. Reducing the cost of textbook associates two factors; one is the compacting way of organizing content of textbook, that is, textbooks are compiled with key concepts and essential components of subject knowledge, and the other one is the way of mass production. All textbooks are paperback.

Second, related to the first one, textbook is designed to convey the basic concepts and key structure of organized body of knowledge of each subject. That is why textbooks are main sources of learning and instruction and the content of textbook also serves as the absolute criteria for students' achievement tests.

Third, textbooks are possessed by individual students for their ultimate sources of learning. Textbooks are personal property. Textbooks are compact and easy to carry on, and used as consumer goods.

Forth, school instruction tends to be textbook-centered teaching and learning process. It has positive and negative aspect. In a positive side, it is clear for both teachers and students what to teach and to learn. In a negative side, the instruction can be oriented to memorization of textbook content that may hamper the development of creative thinking.

Fifth, due to the fact that textbooks do not provide detailed explanation, side books for explanation and supplement of the textbooks are proliferating in private book market. As a result, students become dependent upon the side books for looking for easy answers, which may hinder the development of inquiring mind. In addition, parents tend to buy their children the side book that is much expensive than textbooks.

Even with authoritative definition of subjects and one-sided, textbook-centered teaching style hindering educational diversity, this government controlled textbook policy constitutes equal opportunity for all students in the access to the legitimate body of knowledge and experiences.

### **Namibia's Curriculum**

Namibia's curriculum is well documented in materials of Ministry of Ministry of Basic Education, Sport and Culture such as; 1) Pilot Curriculum Guide for Formal Basic Education(1996), 2) Pilot Curriculum Guide for Formal Senior Secondary Education(1998), 3) Supplement to the Pilot Curriculum Guide for Formal Basic Education: Special Education(1999), 4) Towards Improving Continuous Assessment

in Schools: A Policy and Information Guide(1999), and 5) Syllabi for Namibia Higher General Certificate for Secondary Education/NHGCSE. Based on these documents, some characteristics of Namibia's curriculum are described in the following.

#### ***New Basic Education Curriculum in Document***

Namibia's basic education in formal education system is 10 years, and consists of three phases: Low Primary, Grades 1-4, Upper primary, Grades 5-7 and Junior Secondary, Grades 8-10.

According to the Constitution of the Republic of Namibia, education is free and compulsory from the age of 6 to the age of 16, or the end of primary education, whichever comes first. In order to provide 10 years basic education, the Ministry of Basic Education and Culture sets a Broad Curriculum guide providing the framework for devising subject syllabuses and materials to be used in various subjects and areas of learning so that the goals and aims will be put into practice in a consistent way. The basic education curriculum guide is based on the government responsibility of education by Constitution, "education for all" proclaimed as nation's ultimate goal at the World Conference for All in Jomtien, Thailand, 1990, and "First Call for Children" ideal appealed at the World Summit for Children in New York, 1990. By implementing these universal educational ideals, Namibia sets broad policy goals such as Access, Quality, Equity, Lifelong Learning and Democracy.

Based on these overall guidelines, Namibia's curriculum structure for formal basic education is depicted in the following Table 2. Table 2 shows time allocation of each subject per week by grade level. It is shown that instructional times for language, mathematics, and sciences are over 60% of the whole instructional hours throughout grade 1 to 10.

#### ***Namibia Curriculum Observed***

Even it was a very limited period of time and a limited number of regional offices and schools, the investigator had a chance for direct observation on Namibia school situation, which gives me a valuable opportunity to understand Namibia school curriculum practiced in schools for its own right. Also I was able to see students go to schools on the streets and discuss with teachers and students on their concerns through an occasional visit at a junior secondary school in Tsumeb.

Here is the overall conclusion drawn from my observation:

First, teachers are prepared for themselves to meet the requirement of curriculum implementation and to do their best in helping students learn better. Teachers discussed with me in-group or individual bases were aware well of their mission caring students to learn for themselves and had keen interests in keep growing their professional capacity through various in-service training programs. When I talked teachers at a junior secondary school in Tsumeb, they told me that they were

willingly staying at school to help students who need supplementary learning after regular teaching hours. Also they showed their keen interest on their continuing development for professional teaching capacity. They told me that they attended in-service training program organized by regional office of basic education or by teacher centers. Teachers' positive attitude and willingness in this kind was generally shown at all schools I visited regardless of school level.

**Table 2.** Pilot Curriculum Guide for Formal Basic Education (grades 5-10)

Area of Learning	Grades 5-7			Grades 8-10		
	Subject	P	%T	Subject	P	%T
Linguistic and Literary	English	6	15.4	English	6	15
	Another Language	6	15.4	Another language	6	15
	Basic Information Science	1	2.6	Basic Information Science	1	2.5
Mathematical	Mathematics	8	21	Mathematics	5	12.5
Natural Scientific	Natural Science and Health Education (Health Education and Environmental Awareness)			Life Science	4	10
		5	12.8	Physical Science	4	10
Social and Economic	Social Studies (History; Civics; Geography; Economics) (Guidance in Grade 7)	5	12.8	Geography	3	7.5
Aesthetic	Arts (Music; Dance; Drama; Art)			History	3	7.5
		4	12.8	Arts-in-Culture	1	2.5
Spiritual and Ethical	Religious Education Assembly			Religious and Moral Education	1	2.5
		2	5	Life Skills	1	2.5
Physical	Physical Education and Health Awareness	2	5	Physical Education	1	2.5
Technological	Options: One of: 1. Craft + Technology 2. Home Ecology (Needlework, Clothing + Home Science) 3. Elementary Agriculture			Pre-Vocational Option 1	4	10
		3	7.7	Or		
				Pre-Vocational Option 1	4	10
<b>Total</b>		26 hrs	39	100		
				26 hrs 40 mins	40	100
Co-Curricular Activities	1. School sport 2. Cultural activities 3. Involvement of community 4. Activities promoting the ethos of the school 5. Educational tours 6. Other			1. School sport 2. Cultural activities 3. Involvement of community 4. Activities promoting the ethos of the school 5. Educational tours 6. Other		

Second, students whom I met were motivated well for their learning. When I interviewed three students at a junior secondary school at the town of Tsumeb, they responded that they like to go to school and are interested in subjects in mathematics and social studies. On the questions about their own future, they have positive view that they will develop their own career with hard working throughout their school education. In the classroom, students pay keen attention to teachers' instruction. At

Collin High School, students were dictating what teacher wrote on the board for instruction.

Third, there was shortage of textbooks for primary and secondary students in the region where most of parents are relatively in a low socio-economic condition, which affects students' achievement in subject learning. This conclusion is drawn from various observations at school sites and discussions with local education authorities and school teachers. School cannot provide textbooks for all students. Local office of basic education cannot afford enough budgets for schools to buy textbooks for all students. With the government budget, roughly 20% of textbooks can be purchased for students. These textbooks soon run out before the year of expected life span. No textbooks for students were identified through many occasions; students going to schools without any learning materials; students dictating teacher's writing on the board where content of content was written down.

Forth, textbooks look thick and heavy hardbound with rich explanation or information. Their quality is compatible with that of textbooks in the western countries. They are designed being used for several years as loaned goods. Unfortunately, researcher is not able to provide a concrete data on the cost of textbook, however, it is certain that the cost of textbook is not reasonable enough for the government to provide them for all students.

Fifth, there was wide disparity in school facilities and instructional qualities according to different socio-economic status of parents. It was identified that a senior secondary school with background of parents of high socio-economic status relatively was enjoying competent outcomes of school program by high achievement in the admission to higher education in domestic and abroad as well while other equivalent school only produced students to pass C or D grade level of each subject lesson as the average achievement. Low students' achievement rampant mostly at native Namibian schools is caused by the lack of learning resource materials, at least the textbooks as the minimum learning resources.

Sixth, the damage of HIV/AIDS is real for some schools. It was identified that about 10% of students at a primary school are orphans due to parents' death for HIV/AIDS. This endemic situation is a very negative harmful factor for schools to be threatened not for educational reasons but for external formidable circumstance destroying human survival.

In general, as Mr. Mutorwa, the Minister of Basic Education, Sports and Culture mentioned in his opening address of MHETEC, how to ensure equitable access to quality general basic education for all Namibian schools seems to be the ultimate policy task for the successful implementation of the school curriculum documented in the country. There is a disparity between the proclaimed curriculum in the document and the implemented curriculum in the schools.

## Comparison

### *Similarity*

With different historical, cultural and geographical context, Korean school curriculum and Namibian one share several commonalities in their respective curriculum framework and educational goal directions. Those are similarities between Korean and Namibian school curriculum.

First, the two countries have centralized curriculum decision-making mechanism, that is, central office of respective country has authority to decide and control the whole curriculum. In Korea Ministry of Education and Human Resource Development is the legitimate body in making decisions on curriculum. In the same vein, the Ministry of Education, Sports and Culture has the authority for curriculum development in Namibia.

Second, the two countries run similar institute and curriculum deliberation body in making decisions on curriculum. In Korea, Korean Educational Development Institute in the past played a leading role to conduct curriculum research and development and now Korean Institute for Curriculum and Evaluation succeeds that role. In Namibia, National Institute for Educational Development has similar function.

Third, the two countries' curricula have similar educational goals and similar form of curriculum framework. The overall form of curriculum document is much similar in that respective document has educational goals, curriculum framework in terms of time allocations, managerial guidelines for teachers, guidelines for students achievement evaluation, etc.

**Table 3.** Subject Areas for 10 years' Basic Education of Korea and Namibia

<b>Korea</b>	<b>Namibia</b>
Korean Language Foreign language (English)	Linguistic and Literary
Moral education	Moral and Ethical Spiritual
Mathematics	Mathematical
Social Studies	Social and Economic
Science	Natural Scientific
Practical arts	Technological
Physical Education	Physical
Music / Arts	Aesthetic

Forth, the two countries have similar curriculum structure, that is, 10 years basic education curriculum, and two years learner centered curriculum for grades 11 and 12. It is same that the two countries set 10 years from grade 1-10 as the basic education period. In Korea, it is called as 10 years National Common Basic

Education Curriculum, while in Namibia 10 years' formal basic education is designed.

Fifth, the two countries have similar subject areas for 10 years basic education, even the name of subjects are slightly different. As the Table 3 shows, Korea offers 10 subjects and Namibia 9 subject areas, but they are identical in the nature of respective domain of knowledge or realm of meanings.

Sixth, the two countries' curricula give emphasis on balanced growth on the part of student achievement. Korean curriculum sets a whole person development as educational goal, while Namibian curriculum puts all round development.

Seventh, as a whole, the two countries emphasize language, mathematics and science subjects in the 10 years of basic education curriculum. The following Table 4 shows the portion of time allocation of language, mathematics and science subjects by grade. In Korea, language subjects include Korean language and English.

Eighth, the two countries have identical tendency that the time allocation of language and mathematics is gradually lessening with the grade higher up.

**Table 4.** Proportion of Time Allocation of Language, Mathematics and Science Subjects by Grade between Korea and Namibia

	Language				Mathematics		Science		Total	
	Korea		Namibia		Korea	Namibia	Korea	Namibia	Korea	Namibia
	Ko*	Ko+En*	En	En + AL*						
1	25.3	25.3	12.9	44.3	14.5	22.6	na	na	39.9*	66.9*
2	28.0	28.0	16.6	40.0	16.0	22.6	na	na	44.6*	66.6*
3	24.1	27.6	16.6	38.7	13.8	22.2	10.3	na	51.7	60.9*
4	20.7	27.6	17.9	35.7	13.8	17.9	10.3	12.8	51.7	66.4
5	18.8	25.0	15.4	30.8	12.5	21.0	9.4	12.8	46.9	64.6
6	18.8	25.0	15.4	30.8	12.5	21.0	9.4	12.8	46.9	64.9
7	14.7	23.5	15.4	30.8	11.8	21.0	8.8	12.8	44.1	64.9
8	11.8	20.5	15.0	30.0	11.8	12.5	11.8	20.0	44.1	61.8
9	11.8	23.5	15.0	30.0	8.8	12.5	11.8	20.0	44.1	61.8

Ninth, the two countries offer selective courses for grade 11-12 on the basis of learner-centered learning.

Tenth, the two countries' curricula share similar guidelines for implementation and students evaluation.

Eleventh, the two countries provide similar orientation program for the school beginner of first graders. In Korea, there is orientation program for the first graders called “we are the first graders”, while in Namibia, there is school readiness education program.

### ***Differences***

First, the first two grades from grade one and two in Korea are offered integrated programs such as “disciplined life”, “intelligent life”, “pleasant life” and “we are the first graders” beyond two traditional subjects Korean language and mathematics.

Two, Namibian curriculum gives heavy emphasis on linguistic and literary. As the Table 2 indicates, over 40% of time allocation for grade one and two and over 30% for rest of grades goes to language courses.

Third, Namibia has advantage in English than Korea by adopting English as the official language. In Korea, English is taught from grade 3 as the first foreign language. It gives a burden for students to master the English throughout the primary and secondary school.

Forth, the proportion of time allocation of Namibia science is sharply growing with the grade higher up. As the Table 3 indicates, Namibia students have two times more science instructional hours than Korean students between grade 8 and 10.

Fifth, Namibia curriculum seems more systematic than Korean curriculum in that it has relatively a consistent tendency in the articulation of time allocation while in Korean curriculum, the time allocation of Korean language, mathematics, and science by grade does not show a consistency.

Sixth, Korean curriculum includes school-based optional activities, which are expanding with the grade higher up. 68 hours for each grade of primary school, 136 hours for each grade of middle school and 204 hours for 10th grade of high school a year are given for optional activities.

Seventh, Korean MOE provides cheap textbooks for all students. Textbook is a minimum learning resources for students in Korea. It is highly uncertain in Namibia that how much content-specific learning resources of each subject matter in the curriculum are available to individual students. As far as textbook is concerned, Korean students are basically given textbooks as the basic learning resources.

### **Discussion**

The school curriculum of Namibia and Korea in the form of document share common aspects in respective framework, educational goals, subject areas, way of implementation, emphasis on language, mathematics and science, and selective courses for grade 11 and 12. With different socio-political, educational and cultural context, it seems striking thing that two countries have similar curriculum framework.

In terms of scientific development, Namibia's curriculum is more ambitious and intensive selection-oriented than Korean's. That is, the portion of time allocation of mathematics and science of Namibia is higher than that of Korean one. As far as documented curriculum is concerned, the curriculum of Korea and Namibia are compatible with each other.

In general, Namibia's curriculum seems very systematic and well structured for the development of disciplined capacity in coping with rapidly changing society. In order for this documented curriculum to affect the learning of growing generations, the content-specific learning resources should be arranged to all students in a equitable way. However well structured the documented curriculum may be, it can be a null curriculum for students who cannot reach the learning content for whatever reason. Null curriculum may affect students with a feeling of powerless or helplessness that is enemy of empowerment of learners. In researcher's perception, there are a few students in Namibia who do not possess textbooks. If students are deprived form learning resources, they are hardly to keep their learning as accumulative process.

The effectiveness of school education depends on many complicated variables. It is common conclusion that mostly students achievement in academic courses is largely relied on socio-economic status of family, that is, family background is more powerful factor than school education in prediction of students' academic achievement. However, in the situation where family cannot offer sufficient learning environment for their children, school must provide them with relevant learning experiences. Because school can be the only place for such culturally deprived students to get access to modern learning environment. The more students are exposed to learning environment, the greater their academic performance will be.

In this regard, Simmons, the World Bank staff, make it clear that 'Textbook availability at the primary level may be an important influence on performance. An associated factor is the availability and use of a library at primary and early secondary grades. The policy implications include supplying a minimum number of texts or reading materials to all students.

Provision of textbook for all students is likely the most urgent task for Namibia government. That is, provision of textbook available for any students should be the ultimate goal in curriculum policy. In Korea, when it was liberated from Japan, the first thing done by the government was the publishing of Korean language and Korean history textbooks for all students. Even during the Korean War, textbooks were published and distributed to all students. There was no learning without textbooks in Korean education.

Young students read textbooks loudly in front of their parents. When the parents are illiterate, they can learn from their children how to read and write. This thing really happened in Korea during the period between 1940s and 1950s. It was possible through the medium of textbooks. In a sense, Korea's educational competitiveness at basic education comes from textbook-centered instruction.

For most of native Namibian living in harmony with nature without abstract code culture, being literacy means a cultural revolution. Books represent code culture. Textbooks carry essential human knowledge and experiences regardless of space and time. Textbook provision is an indispensable precondition to the successful public education.

Textbook can be published in a cheaper way by compacting compilation and government monopoly policy. Cheap textbook without detailed explanation for all students seems educationally benefited better than expensive textbook with high quality for only limited number of student for the time being until the national economic development can afford high quality textbooks in a variety.

In order to ensure textbook provision for all students, priority is given to students of identified poor family. Equitable access to quality basic education can be realized by area specific project targeted for identified poor and aimed at providing them direct benefits.

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## **Workshop 4**

### **Design of learning materials**



# **“The answer is found in the history book”**

## **An analysis of the rhetoric of a textbook**

Tom Wikman

In the year 2001 I exchanged textbooks with a German researcher. My shear was a civics textbook, *Staatsbürgerkunde 7*, from the German Democratic Republic (GDR). This book really got me puzzled. On a superficial level the book seemed to be so well written, using rhetorical means seldom seen in the textbooks of my own country. On the opening page one finds a huge quote from the program of the socialistic unity party (SED) stating that our age is characterized by the transition from capitalism to socialism. The discrepancy between the rhetoric of the textbook and the later development in Eastern Germany, with a fast transition to capitalism and with youth extremist movements contradicting the core message of the book, facilitated my interest to analyze *Staatsbürgerkunde 7*. As the actual edition of the book was printed in 1986, just a few years before the fall of the Berlin wall and “die Wende”, the big change in the German post war history, the analysis grew even more interesting. My interest also was enhanced by a claimed low interest for social issues among pupils in Finland. Could we possibly learn something from the way the society was presented in this totalitarian context? The aim of the study was to analyze the text, the questions and the illustrations in *Staatsbürgerkunde 7* in order to find out how the secondary school students in GDR were supposed to understand the society in the end of the communistic era. In other words, how did the textbooks writers try to convince the reader of the benefits of the GDR.

### **Background**

Man is born indifferent to the aims of the society. The society is continually renewed through the development of its young members. Education therefore has to create appropriate knowledge about society and make the youth interested in it, if it is to survive. Communication is essential for society with school as the systematic transmitter of its resources and gains. As the society is too complex to be assimilated as such, the school has to create a simplified context by choosing the means for the transmission of the knowledge developed (Dewey, 1997). Textbooks are important rhetorical means in this process.

In Western views on the rhetoric of textbooks, the communication with a supposed reader has been emphasized. According to Crismore (1989) the author’s intentions and evaluation of the content could be shown so that readers could recognize the author’s plan and use it for constructing meaning. Good rhetorical texts, according to this view, illuminate a question thoroughly using different kinds of arguments and showing the authors’ intentions. In other words, the text should give the reader an opportunity to independent decisions. This has however apparently not been the

case, especially if the following description of textbooks is valid (Crismore, 1989, 144):

The corresponding role of student readers is to receive the facts passively from the truth-giving authority who wrote the text, and to memorize them, not to understand the facts or the author's attitude towards them and not to use the facts to build a larger picture or to think critically about what the author said or did in the textbook.

In this view the reader is considered an uncritical receiver of information. According to Väisänen (2005) the standpoint of the author seldom is made clear in the textbooks. If however, argumentative reasoning is seen as a fundament of the democratic society, also the textbooks should, according to Åhlberg (1991), give the reader a possibility to practice this ability. The enhancement of critical thinking could be made by dealing with controversial issues and by raising the degree of uncertainty in textbooks.

This claim for critical thinking and independent decisions of the reader points at two different conceptions of textbooks. The first one is the "traditional" textbook that states important facts about the society without a critical distance to the subject. The youth is supposed to be socialized to democracy by books that just describe the democratic institutions. An underlying assumption is that democracy is good and that a reader therefore automatically will understand its benefits. In the other conception of textbook, critical thinking as a democratic virtue is emphasized. Democracy is considered a process continually reconstructed by its members. Static societies valuing the established habits of a social group also transmit the deficiencies of the society (Dewey, 1997). A continuously changing society would therefore benefit from a critical approach also in the textbooks.

Communitistic theory considers man as a product of society. Educational literature from GDR shows that the aim of the education was not to socialize the individuals to an unchanged society (Berge, Klein & Salzwedel, 1975, 21):

(...) sondern die Erziehung aktiver, für den Sozialismus engagierter Persönlichkeiten, die in Gemeinschaften Gleichberechtigter die gesellschaftliche Entwicklung vorantreiben, sich dabei selbst entwickeln, die verantwortlich und kritisch in den verschiedensten Formen der sozialistischen Demokratie, im Arbeitsprozess usw. mitplanen, mitarbeiten und mitregieren und ein glückliches, erfülltes Leben führen.

In this view there is an urge for critical thinking, but a critical thinking *within* the *socialistic* democracy. The main focus is on developing "personalities engaged for socialism". The question arises how a textbook with this aim is positioned to the two types of textbooks loosely outlined earlier in this section, i.e. how the socialistic personalities were supposed to be created.

## Method

The questions in *Staatsbürgerkunde 7* were primarily analyzed by categorizations developed by different researchers. This analysis gave an overall view of the learning quality of the questions, but it did not capture their ideological content. The

same problem was encountered when trying to use an earlier developed categorization for learning texts (Wikman, 2004) on the text of *Staatsbürgerkunde 7*. To identify the rhetoric of the book I developed categories by a phenomenological reduction identifying core concepts in the questions, the illustrations and the text. As a background I also made quantitative descriptions of the questions and the illustrations. Some of them will be referred to in the next chapter.

### **Describing the ideal society**

*Staatsbürgerkunde 7* is divided into four chapters. The first one is an introduction positioning GDR within the socialistic world. The second describes the formation of GDR after the “liberation from the fascism”. The third chapter is the story of the “great achievements of the people” and the final fourth chapter deals with the “leading role of the working class and its Marxist-Leninist party”. The following categories were identified in the book: personification (1), communification (2), narrativation (3), enemification (4) and enthusiasm (5).

*1. Personification.* Personification is defined as the ambition of the textbook writers to include the reader by showing the potential of individuals to participate in the building of the country. An initial example is the front cover of *Staatsbürgerkunde 7* that welcomes the reader by a close up of glad and happy looking people waving with red handkerchiefs. The picture is well chosen as a symbol for the whole book. It combines the effort of the textbook authors to present GDR as a common effort of the individuals and the *Socialistic Unity Party* (SED). The youth on the picture are dressed in blue shirts demonstrating their membership in the youth organisation of SED, *Die Freie Deutsche Jugend* (FDJ).

As a vast majority<sup>1</sup> of the illustrations are dominated by males, the protagonists in the building of the socialistic society seem to have been males. Males taking space are politicians, from Lenin to Honecker, and workers. The miner Adolf Hennecke is taken as an example of the heroes of the working class. He is present both on photos, in questions and in narratives. The message is that the individual initiative is important and it is a patriotic deed to work (free) for the state. The social realistic male with well developed muscles is also present in posters and caricatures showing how militarism can be exterminated or why one should vote for the communists. The working class heroes are accompanied by statistics showing the importance of the working class and the growing amount of workers at the universities thus underlining the importance of workers and farmers just as communistic theory describes. Certain persons are considered especially important for the development of the country. They usually represent the SED.

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<sup>1</sup> Of all the illustrations 36 % were dominated by a male theme while 5 % showed women. Half of the illustrations were gender neutral and 12 % had an even proportion of women and men.

An example on personification from the text is a section where the authors are reasoning why one should consider it interesting to participate in political activities. The section is presented as a pretended discussion between two persons and gives voice to a problem with youngsters not interested in politics.

In the following question personification is connected to patriotism:

Was willst du einmal werden? Überlege, wie du denn dem Staat nutzen kannst!

Though this question emphasizes the importance of individual initiatives, personification could not develop to mere individualisation. Many of the photos in *Staatsbürgerkunde 7* show groups of people. One dominant character of the personification therefore is collectiveness. The message of the authors could be interpreted as “we are building this country together”. The collectiveness shown in the pictorial presentations is accompanied by questions:

Welche Vorzüge hat die sozialistische DDR, und was können wir Staatsbürger tun, um diese Vorzüge zu erweitern?

About 25 % of all illustrations had some kind of groups as motive. The ratio of photos showing just one person was 10 %. The individual initiative was considered important, but the aim was always to work for the collective.

2. *Communification*. The attempt to involve the reader to the communistic jargon and to the institutions of the communistic party nationally and internationally I label communification. Four quotes covering one page each dominate the beginnings of the chapters in *Staatsbürgerkunde 7*. By using four whole pages in this way to either quote the program of SED or to have leaders of the party to state the importance of SED, the presentation gets an institutionalized framing. The message seems to be that the development in GDR will happen with the party as the central tool. The SED is “a big force, which makes it possible for the working class to take the leading of the people”. Photos of important people in the party, both individuals and members gathered together on conferences, underline further the significance of SED.

A pupil reading the book was forced to use the communistic jargon. The following three questions could hardly be answered without using the concepts *imperialistic*, *communism* or *working class*:

Warum sind die aggressivsten imperialistischen Kreise unser aller Feind?  
Wie haben die Kommunisten den Weg in eine bessere Zukunft bewiesen?  
Warum ist die Arbeiterklasse die führende Kraft im Sozialismus?

The language is used in socializing the reader to communism. Another attempt in the same direction is the presentation of important dates in the development of the republic. The foundation of the SED is for instance highlighted with an illustration. Also different congresses in the history of the party are shown as icons.

Especially the final chapter about the “leading role of the working class and its Marxist - Leninist party” is a clear standpoint presenting the party as the most

important institution in GDR. The institutions usually found in textbooks of civics; president/king, parliament and legal institutions; seem to be substituted by the party.

The high, institutional perspective is further supplemented by the descriptions of the many contacts GDR had with other countries in the socialistic world. It starts in the historical background where the heroic efforts of the Soviet Union are underlined. A question indicating this importance is for instance the following:

Wie half die Sowjetunion dem deutschen Volk bei der Überwindung der Kriegsfolgen?

Another example is a photo showing Soviet soldiers giving food to starving post war Berliners. A later photo shows Erich Honecker shaking hand with Fidel Castro, a concrete example of the initial statement that “socialism already is developing on many continents”.

3. *Narrativation*. *Staatbürgerkunde 7* starts with emphasising the importance of “the last seventy years” thus pointing at the development of socialism that started with the Russian revolution in November 1917. The transition from the wartime Nazism to the righteous socialism is a constantly recurring theme throughout the book. An important “hero” in the stories is above all the Soviet Union, the army of which liberated Germany from the Nazis and helped with the initial food supply after the war.

Short narratives are put as excerpts into framed squares in the book. Prominent citizens tell their version of important historical events or accomplishments in their lives are highlighted. Also the foundation of SED in April 1946 is told as a story. All these small stories are parts of the main narrative with communism as the final goal.

Good stories also need villains.

4. *Enemification* means presenting capitalistic countries negatively and at the same time describing the own socialistic society as an idyll. Photos showing the Western world are, in contrast to the colour photos from GDR, in black and white. Also the themes, e.g. a queue at an employment office in West Germany and a NATO helicopter disembarking soldiers, build up the image of the enemy. The helicopter is followed by a close-up of a German biology teacher with her class standing under a blooming tree. Opposite the queue one finds a young kidney patient taken care of with modern equipment. Further a photo with flowers in the front shows an old folks home in Karl-Marx-Stadt.

In the text the contrasts between the idyllic socialism and the hard capitalism is described on various occasions. We can for instance read that in 1982 30 millions were unemployed in the capitalistic world while GDR assured the right to work for its inhabitants. Further a text is describing the free medical care of the citizens of GDR which is compared to the tremendously high costs for visiting a doctor in the USA.

Questions indicating enemification are for instance the following:

Informiere dich anhand der Tagespresse dieser Woche darüber, welche Konflikte es in imperialistischen Ländern gibt!

Warum versuchen die Ideologen des Kapitalismus, die SED anzugreifen und so den Werktätigen in der DDR zu schaden?

According to the authors of *Staatsbürgerkunde 7* there are forces in the imperialistic countries, especially in the USA, that have as goal to start a third world war because of the gains the military industry would get out of this. All development can thus be analyzed according to the economic forces in society. Where *we*, GDR, stand for peace and development, *they*, the imperialists, stand for aggression and war.

5. *Enthusiasmation*. Happy looking people meet the readers taking *Staatsbürgerkunde 7* in their hand. The same try to enthusiasm the reader continues through out the book. The inside cover shows Soviet soldiers raising the red flag and on the next spread young construction workers lay bricks in a new house. Workers build up the country under the wings of socialism.

For socialism nothing seems to be impossible. The first chapter of the book begins with a colour photo of the earth taken somewhere in the outer space with a “Multispektralkamera aus Jena”.

For socialism to reach success, struggle and power are essential. The struggle is initiated by Lenin as showed on a reproduction of a painting of the first steps of the Russian revolution in October 1917. The German after war history is exemplified by photos and charts showing the earth reform. The farms of the Nazis were divided between common people. Another type of photos in this field are those showing people marching for GDR under different kinds of slogans: “More workers and farmers to the universities” or “Away with the USA-Rockets – for a nuclear weapon free Europe”.

The enthusiasm has also infiltrated the statistics. All charts in the book, may it be about the production of potatoes or the amount of students with a master’s degree at universities, show a growing tendency. The message of the ever growing welfare can also be interpreted from the illustrations at large. A transparent but sure line goes from the post war poverty, when people got food from Russian soldiers, to the well organised very machine dense GDR of the eighties. Everything is developing and growing. This even applies to single photos. Photos with agricultural themes are framed in a way that gives the viewer a vision that the production is growing endlessly or that a portrayed machine is tremendously big.

The three main chapters of the book have headings giving signs of development and power: *the liberation*, *the big achievements* and *the leading role of the working class*. The texts demonstrate how the communists show the way into new times; they document the high level of the GDR-industry and encourage the young readers to act for the country. Questions accompanying the enthusiastic illustrations and plain text are for instance:

Nenne Beispiele aus deinem persönlichen Leben, in denen Errungenschaften des Sozialismus deutlich werden!  
Zeige an Beispielen, wie sich Jugendliche in der Produktion bewähren!

Sometimes enthusiasm for the achievements in the little socialistic country turns to plain nationalism. A final example is this first part of the third chapter:

Nimm eine Weltkarte zur Hand und zeige die DDR! Du hast Schwierigkeiten beim Finden? Ja, dieses kleine Land ist die DDR. Gemessen an der Größe des Territoriums steht die DDR an 92. Stelle, hinsichtlich der Anzahl der Einwohner an 38. Stelle. Hinsichtlich ihrer Wirtschaftskraft gehört die DDR aber zu den zehn bedeutendsten Industrieländern der Welt.

## Conclusion

A striking feature *Staatsbürgerkunde 7* is the enthusiasm exposed for the own country. Literature about the praxis of communistic teaching shows the ideological roots for a presentation like this. For instance Schkolnik (1976) underlines the need for developing an emotionally positive attitude towards the communistic idea. Schkolnik also gives examples of enemification when describing school projects that have been used to show the benefits of socialism compared to “imperialism”. The same source underlines the need to use revolutionaries as role models. Socialism needs heroes. My conclusion is that *Staatsbürgerkunde 7* is written according to communistic ideological guidelines and that these also were identified in the categories revealed in my analysis.

In the introduction I presented two conceptions of textbooks. The first one, which was object of the criticism of textbook researchers, is claimed mainly to focus on objective descriptions of the society. If the role of the reader here is to encompass the information selected by the authors, a central trait in the other one would be the aim to activate the reader to think critically about the message presented. *Staatsbürgerkunde 7* does not fit in to either of these categories. A third type of textbooks, the manipulative or persuasive textbook, is discerned. Here the message is clearly subordinated to the manipulation of the state. The aim is to inform about the issues of the state and by involving the reader, for instance through the use of communistic jargon, to convince her/him about the benefits of the actual society. The division between the three types of textbooks is however not clear cut. Also in an informative textbook the choice of content, in what is taken in and in what is left out, leads to manipulation. An argumentative presentation cannot either be totally relative. The choice of information and problems always encompasses manipulation, though not so clear as in *Staatsbürgerkunde 7*.

The persuasion of *Staatsbürgerkunde 7* is hovering between a *high* perspective and a *low* perspective, the first one presenting for instance leaders of the party and of the socialistic world at large. The dichotomy *we – them* is used consciously by the authors to convince the readers of the benefits of the East German interpretation of socialism.

Textbooks are written to influence the reader. The reader has however the ultimate decision of how to understand a text. My study does not give any final information about how the GDR-society really appeared to the readers. The extraordinary fast and peaceful reunion of the Western and Eastern parts of the country shows, despite of later “ostalgia”, that the manipulation was not as effective as the state had hoped for. One can only speculate on the actual effects of books like *Staatsbürgerkunde 7*. I have identified some of the efforts to convince the young reader of the benefits of the own society in a communistic period of a European country.

In a song about the native country in *Staatsbürgerkunde 7* there is a line telling that “the answer is found in the history book” and that in the country of “Einstein, Karl Marx and Bach” “each answer ends with a question mark”. Also in my analysis many questions remain to be answered. One is what elements from the enthusiastic presentation could be applied to textbooks trying to convince a reader about the benefits of democracy.

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# **Research on how innovative Geography multimedia textbooks incorporate transdisciplinary global education ‘perspectives’**

Susan Bliss

*“The Earth Is Flat: My Textbook Says So”* Garvy (1995)

Global education, a growing global movement in Asia, Europe, Australia and the USA, is defined in the Maastricht Global Education Declaration (2002) as ‘education that opens people’s eyes and minds to the realities of the world, and awakens them to bring about a world of greater justice, equity and human rights for all’. In Australia educating for a global perspective, generally termed ‘global education’, is treated as a transdisciplinary subject that aims to integrate global knowledge and understandings, skills and processes and values and attitudes, within subject disciplines. It also aims to equip students with critical skills and supports a future focused, transformative, curriculum that contributes to an ‘educational paradigm which stresses unity and interdependence of human society, empowerment, social progress for all, a sustainable and just world and active participation’ (Curriculum Corporation 2002, 1).

As global education is new in Australia, Bliss the co-author of the geography textbooks *Geoactives 1* (1998, 2005) and *Geoactives 2* (2000, 2005), had the unique task of integrating global education within the geography curricula. Today this infusion has resulted in the publication of innovative, transdisciplinary textbooks that have captured the largest market share of geography textbooks in Australia. Also contributing to their market success has been the movement from a single textbook in the first editions to a multimedia package in the second editions that includes photocopiable worksheets, CD Rom, Internet links, e-flash cards and websheets. These diverse resources aim to raise students’ awareness and understanding of contemporary, contentious global issues, such as poverty, human rights abuses, social injustice, terrorism, refugees and environmental degradation, from a diversity of frequently conflicting perspectives.

## **Global and geographical perspectives**

Humans possess a diversity of conflicting perspectives on global and geographical contentious issues such as human rights abuses in Guantanamo Bay and the war in Iraq. These issues require sensitive handling by textbook writers to ensure they receive balanced and critical appraisal (Curriculum Corporation, 2002, 20), as no single perspective has universal endorsement.

It is important for textbook writers to be aware of how knowledge about the world is organised and understood from different viewpoints as there are different ways of looking, thinking and writing about these things. The priority given in textbooks to thinking about different parts of the world in textbooks often reflects culturally dominant values, and determines how the world appears to the most powerful groups and nations. For example Europeans considered themselves at the world's centre during the era of colonialism and Australian textbooks described the world as a series of empires. These views were supported by eurocentric textbooks that included map projections, such as the Mercator projection, that misrepresented the relative size of the continents. For example Europe and North America were exaggerated in comparison to Africa and Australia. Today other map projections referred to in *Geoactives*, such as the Peters and Macarthur projections, represents a different perspective on the world.

In the past, old geography textbooks reflected racism, ethnocentrism, sexism and paternalism (Marsden, 1989) and it was not until the late 1970s and 1980s that efforts were made to counter stereotyping. The political swing in the late 20<sup>th</sup> century towards social justice (human rights) and the empowerment of individuals (civics and citizenship) through collective action was supported by the growth of non-government organisations (NGO) and the production of a wide variety of curriculum material with a global education focus (Hicks and Fisher, 1985; Huckle, 1993; Pike and Selby, 1988). These textbooks with cross-curricular themes influenced geography teaching often embracing competing liberal, radical and utopian agendas. There was also increased attention to critical theory and the ideas of Jurgen Habermas (Gibson, 1986; Young, 1989).

### **Author as researcher**

The textbook-driven education system defines knowledge, as textbooks are an integral part of most education systems and serve as bridges between teachers and students. Zevin (2000) stated that teachers depend on the textbook as their main source of ideas without much enrichment or supplementation from other sources. He also stated that they are used as part of a nearly closed system of assignments, reading, questions, homework and tests that provide security but little imagination. This is because of time-scarce teachers' need for quick, easy, readily available material.

Obviously authors aim for reliability, validity, consistency and truth in textbooks as they serve as a vital resource for both students and teachers. But it must be noted that textbooks incorporate a condensed overview of a subject where bias, distortion and omission are unsolvable problems. Also authors' views are subject to overview by the editor and publisher who together control the selection and presentation of content and images.

To overcome biased views and determine the so called 'truth' a variety of perspectives is essential so students understand that textbooks are written by people,

with their own agendas, interests and attitudes. Also researchers point out that content is subject to historical milieu reflecting national concerns and attitudes of the times (Yeager and Davis, 1996). For example in the past there was a reliance on a single source of information, such as a textbook. This led to the acceptance of biased perspectives with minority groups overlooked or poorly treated. To ensure teachers are aware of these problems they must look for inconsistencies and bias in texts. They can do this by recognising fallacious reasoning or unsupported viewpoints, so students can make 'better judgments, draw more reasoned conclusions, read more carefully, and understand why questions must often remain open or unanswerable' (Zevin, 2000, 322).

The problem with an over reliance on textbooks is that authors can consciously or unconsciously incorporate bias both for what is written and for what is omitted. Textbooks also have mistakes but ethical writers have a responsibility to the students to tell the truth. Garvy (1995), in *The Earth is Flat: My Textbook Says So*, states that teachers may fall into the same problem expressed in a Peanuts comic strip. Here Lucy held forth with great authority that the palm tree was named because 'the palm of the ordinary human hand could fit snugly around the trunk of the tree'. Today with increasing links in the *Geoactives* to primary and secondary sources, such as the Internet, these mistakes can hopefully be minimised.

A key underlying assumption of the qualitative research paradigm is the subjective nature of the researcher's role. In terms of personal factors, Denzin and Lincoln (1994, 12) note that the researcher's 'gaze' is always 'filtered through the lenses of language, gender, social class, race and ethnicity. There are no objective observations, only observations socially situated in the worlds of the observer and the observed'. As suggested by Bogdan and Biklen (1998, 34) and Janesick (1994, 212), it is the responsibility of qualitative researchers to locate themselves in terms of their subjectivity and positioning. Obviously this author's background and the perspectives it engenders have impacted on her writing and this research.

### **Research A: University student teachers**

Little research exists on textbooks. The problem is the hybridity of the subject-matter and that literature crosses national, disciplinary and methodological boundaries. One of the few authors on textbook research is Johnsen (1993) who noted that textbook research has sprung from a concern with racial and nationalist stereotypes. He noted that the problem is that books have been studied as repositories of attitudes and that research into textbooks covers a vast field, from textual authority, through syntax to 'meta discourse' and illustrations. He deals with the development of textbooks and the relation of texts to curricula and teaching. His work was an important source of information for the author as exposure to alternative ways of knowing and interpretation is essential in global and geographical education. Also considered were the inherently subjective nature of academic inquiry and the importance of exposure to competing perspectives.

Also, limited research has been conducted on how teachers use textbooks in teaching and learning. Most have studied textbook content (Zahorik, 1991) while Horsley and Laws (1990) developed an observational instrument, TEXTOR (2005), to examine textbook use in teaching and learning in secondary social science classrooms. Their model was applied to Bliss's research on *Geoactives*.

Bliss conducted research on fifty students studying geography with a global education perspective in their final year of their Master of Teaching, Bachelor of Education or Diploma of Education course at the University of Sydney (30 students - 2004) and Macquarie University (20 students - 2005). These students completed a simple, open ended questionnaire on the use of *Geoactives* during their practicum in public and private schools in New South Wales. Bliss's aim, as researcher of her published textbooks, was to reflect on students responses to a questionnaire so as to improve future editions (Question 4) and its use in teaching and learning (Questions 3, 6). It was important from a perspectives focus to find out whether substantive knowledge contained in these textbooks was supported by a diversity of other resources (Question 2). Also to be considered from a marketing aspect was the availability of textbooks and their use in lessons (Question 5).

The following six open ended questions were given to students with an option for comments:

1. Did you use *Geoactives* during your practicum? If not, which books?
2. Did you support your lessons with other resources?
3. When did you use *Geoactives*?
4. What are the advantages and disadvantages of *Geoactives*?
5. What are the textbook problems in schools?
6. While observing teachers during your practicum, describe their use of textbooks.

Student's feedback from the first question noted that 80% used *Geoactives* in the classroom. (This high percentage should be viewed in the context that the author of *Geoactives* was also the respondents' lecturer). The other 19% referred to the excellent textbooks by Kleeman (Heinemann), a notable author and leader in geographical education and only 1% to the Macmillan publication. Unfortunately, the answer to the second question found only 42% used other texts for balanced, comparative analysis. Results from research on the third question found 62% used *Geoactives* for class discussion; 44% as an alternative to teacher talk; 72% for student activities. Advantages listed in the fourth question included: 82% liked the double page concept; 76% found the Internet sites as an invaluable resource but had difficulty accessing computers during lessons; 90% valued the integration of geographical tools, saving the purchase of an extra book; 62% favoured suggestions for group work and empathy exercises; 85% used it for homework but only 70% regularly. The disadvantages stated included: 22% of respondents that some concepts are too difficult, especially for ESL (English as a Second Language) students, and 15% that the double page concept increased breadth at the expense of depth. This lighter coverage of many topics in fact reflected changes to the curricula

(Board of Studies, 2003), and was supported by the editor who restricted the size of texts, limiting subject depth. To overcome the problem texts included links to the Internet and via a teaching program, other relevant resources.

The fifth question opened up Pandora's Box as most respondents stated that they were concerned about lack of textbooks in most public schools. Reasons given included inadequate funding in public schools leading to unequal provision of textbooks and priority given to senior classes. They also found more Mathematics, English and Science classes had textbooks than junior geography (years 7-10) classes, despite the mandatory external School Certificate Test in Geography, History and Civics and Citizenship at the end of year 10. These school students generally shared books and were unable to take them home. Some books were battered and disfigured with graffiti. Learning time was wasted on handing out and collecting textbooks. This was in contrast to the wealthier private and selective, public schools where students' parents generally purchased the textbooks from a variety of publishers, enabling a broader perspective of the course. Also these students were more fortunate as most had access to the Internet and other resources such as videos, compared to most students attending socio-economically disadvantaged public schools. These findings supported by Laws and Horsley's (1992) study on Educational Equity between 1987 and 1990 which found students in non-government schools had access to six times more text resources in the classroom than students in government schools.

Respondents also noted that inadequate textbook resources meant students used libraries. Again an equity issue arose as better supplied libraries were supported by wealthier parent associations financed by the 'Old Boys' private schools network. Some respondents mentioned that the Internet had become an increasing source of global geographical knowledge but that there was a digital divide between those who had access to computers and those who could not afford them. In some private schools each student had his or her own laptop for every geography lesson and could follow Internet activities in *Geoactives*. In contrast other schools, with few computers, limited the students' use of information and communications technology (ICT). Obviously these are some equity issues in New South Wales schools that need to be addressed at the beginning of the 21<sup>st</sup> century, for improved student global learning and understanding.

University students' response to the sixth question noted that most teachers (95%) adhered closely to a geography textbook that followed the curricula as it provided structure for the course. However the way teachers used the textbooks varied with the amount of teaching experience (less experienced greater use) and degree of geography training (less training greater use). Clearly, a variable to be considered is whether teachers are self motivated to provide different perspectives and activities that engage the curiosity and interests of mixed ability classes. All teachers used a textbook but acknowledged that a single textbook did not adequately cover all aspects of the geography course. With the implementation of the new syllabus in 2005, even experienced geography teachers relied on textbooks to structure their

lessons. Hopefully with experience and confidence this dependence will decrease allowing expanded perspectives and achieving more balanced, substantive knowledge.

Respondents also noted that 81% of teachers rearranged the materials in the textbooks, to construct knowledge for themselves and students. A few older teachers in private schools, who had a traditional training in 'chalk and talk' teaching methodologies, used the books didactically, as students worked methodically through each page of *Geoactives*. After reading the texts the students completed the set activities at the end of each topic, for homework. The teachers followed the program designed by Bliss, on the web, with no alterations to accommodate student's interests and abilities. This teaching style ensured students were able to absorb and recall information in tests. Unfortunately there was little analysis and critical examination of information from a diversity of perspectives. The acquisition of predigested information, with no other source of information, ensured students' perspectives and understandings of topics were limited.

Despite what curriculum developers and teacher educators think about textbooks most students and their parents think they are important. Parents refer to textbooks to provide assistance when students have been sick or absent from school; if they performed poorly in an exam; to supervise their homework; as well as a check on the teacher, especially in selective public and private schools. This dependence on a textbook was reinforced by Laws and Horsley (1990) who noted that the absence of a textbook could diminish the value of a subject in the eyes of students and their parents.

### **Research B: Geography teachers**

The second research conducted by Bliss in 2004 was on twenty experienced geography teachers who were members of the Geography Teachers' Association of New South Wales (GTANSW). These teachers were given five questions with an option for comments:

1. What textbook did you select for the Stage 4/5 geography course?
2. Do you support your lessons with other resources?
3. When do you rely on a textbook?
4. What are the textbook issues in your school?
5. If you selected *Geoactives*, what were the reasons?

Responses:

1. All stated that they had selected a geography textbook for their students. Ninety percent had selected *Geoactives*.
2. All said they also used a diversity of other resources.
3. Most relied on the textbook when they were busy (80%), for homework (90%) or when they were absent (95%). Most stated it was easier for casual inexperienced teachers to follow the texts when taking over their lessons, especially in the middle of a topic.

4. Ten percent noted that parents complained that textbooks were rarely used making it hard to justify their expense. This comment came from experienced teachers who only used a text as a guide. Others stated that their school 'could not afford textbooks for all students and were using outdated resources' (5%). This had an 'adverse impact on student's external results' (5%). A few stated that the 'quality of education is threatened because of lack of textbooks' and 'textbooks are a security blanket for an increasing number of untrained geography teachers'. Most agreed that there was a 'need for a wide range of resources to provide breadth of coverage to meet the range of abilities and interests in mixed ability classes' and the 'Internet the future textbook'. All teachers mentioned the limitations of textbooks from a teaching-learning perspective and some cited language difficulties as many students have learning disabilities and English problems. A few teachers had misgivings because they purchased the first text to be released after the launch of the new syllabus. These texts 'did not adequately cover the course'. Others advocated that they trialled different texts after the release of a new curricula, as a 'stop gap', until they had time to examine the texts in greater detail. A wise educational decision.
5. Bliss found similar results to Lambert (1996) who surveyed teachers in their selection of geography books in the United Kingdom. For example most teachers stated that their selection of the new revised editions of *Geoactives* was based on previous merits of the first editions. Other responses included: followed revised syllabus outcomes and content; presentation was colourful and easy to follow; writing at a good literacy level; variety of relevant case studies; included challenging tasks for the more able students; issues were topical; key concepts and themes clearly signposted; excellent quality of photographs and graphics; contents well organised and clearly expressed; sensitive and balanced handling of contentious issues; and good quality of writing that was relevant and accurate. Most loved the 'double page' concept linked to each lesson that reduced preparation time. Most teachers were pleased with its emphasis on the School Certificate with more pages allocated to the examinable Focus Areas 5A3 and 5A4. They were also reassured of its credibility as the writer had a record of students achieving first place in the Higher School Certificate in geography and provided professional development for teachers. Most understood that a textbook has difficulties serving all ability levels, all teachers' needs and all students' interests. Most teachers used a range of criteria derived from their own pedagogical content knowledge in evaluating the recently published *Geoactives*. The majority indicated that the texts had adequately encompassed curricula change and the new global and geographical education focus.

Thirty years ago a single geography textbook dominated each lesson. No longer do textbooks form the total structure of a course of study. Instead they are viewed as one of the numerous resources available to students. This change is supported in

Geography Years 7-10 Syllabuses (1998, 2003) requirements that 'teachers should make reference to a variety of information sources, including professional journals, television documentaries, a variety of newspapers and magazines, CD-ROMs, the Internet, databases, library information services, government departments and non-government agencies' (Board of Studies, 2003, 17).

## Conclusion

Today there is increasing global controversy based on content, values and perspectives in textbooks. According to the newsletter from the American Library Association's Office for Intellectual Freedom's (OIF) there are endless disputes involving geography and global education topics such as, environmentalism, politics and portrayals of women and minority groups. But ideological challenges to instructional materials are not new with supporters for the status quo conflicting with protesters, pressing for greater inclusion of nontraditional perspectives. As countries become more multicultural the perspectives of the eurocentric dominant culture are questioned with protests against viewpoints in textbooks leading to the establishment of new rules to govern the selection of curricula material. A new orthodoxy then evolves leading to protests between 'traditionalists who liked the books the way they were' and 'progressives who do not believe that the changes have gone far enough' (Department of English University of Delaware, 2005).

With a plethora of books, films and primary and secondary source materials available from libraries and on the Internet, textbooks should be used as a supplement in the classroom to achieve a diversity of perspectives. Educators are aware that textbooks have a key place in teaching and learning and wonder if the narrow perspectives in textbooks is yesterday's technology for yesterday's schools or if textbooks will continue to evolve particularly in the context of the wider resource environment including the digital information explosion. As we look into the future will the heavy geography textbook be replaced by a new, light, small, current 'textbook on a CD-ROM', promoting a diversity of global perspectives?

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# Literary Film Adaptations as Educational Texts

Arne Engelstad

The purpose of this paper is to discuss the interesting process of transforming a work of literature into film. What happens when narratives expressed through the written word are to be told in a language of sound and moving pictures? And, most important in this context, to what extent are literary film adaptations useful as educational texts?

## Literature becomes film

*Lord of the Rings*, *City of God*, *Chocolat*, *La Pianiste*, *Girl With a Pearl Earring*, *The Constant Gardener*, *Brokeback Mountain* – these are well-known film titles from the past years. They have one thing in common: All of them have literary sources, they are film adaptations of novels or short-stories.

Adaptation is not a new phenomenon at all. Intertextual studies show that stories always seem to derive from other stories. Even the ancient Greek playwrights, like Sophocles and Euripides, based their plays in most cases on myths and stories that had already been told. The British scholar Christopher Booker recently published a very thorough piece of research in which he showed, and in fact proved, that most stories of the world – from myths and fairy-tales, novels and plays to Hollywood films and TV soap operas can structurally and thematically be reduced to “seven basic plots” – which is also the title of his study (Booker, 2004).

But the adaptation proper, when a specific work of literature is retold in a multimodal medium – a film, or perhaps a video game – is a relatively modern feature. My studies of film adaptations in Norway show that between 40 and 50 per cent of all full length fiction films have direct literary sources – the number depending on whether to include an already performative and multimodal genre as the theatre play, or – as I prefer – to concentrate on literary epic sources, like novels and short-stories. The hunt for literary narratives to base a film on seems to increase for each year. In Norway, as in most other film producing countries of the Western world, film makers race to buy options of any new novel that seems to have adaptation possibilities.

## Three major reasons for adaptation

Why, then, do movie makers to such an extent search their book-shelves for material? There are at least three obvious reasons to be mentioned:

First, there is the bestseller argument. Film making is an expensive and very risky business. To base one's film on an already well-known bestselling book is a guarantee that the adaptation will benefit from this and attract numerous readers. Even if the film turns out to be a disappointment, it will still avoid becoming a disastrous financial flop.

Secondly, there is the prestige involved in the film's close relationship to literature, especially literature by authors of high standing. Nearly from the very beginning of film history, the young medium tried to get away from the label of light and superficial entertainment by making alliances with the far more respectable medium of the written word. In Norway, one of the first real successes on the silver screen was a Swedish film adaptation from 1916 of Henrik Ibsen's epic poem *Terje Vigen*. Two of the first Norwegian full-length movies from the beginning of the 1920s were based on novels by Knut Hamsun – *Growth of the Soil* (*Markens grøde*) (1921) and *Pan* (1922).

Last, but not least: One major reason why films are based on books is simply that the best story often is to be found between the covers of a novel. In spite of numerous classes and courses and a vast production of manuals and handbooks in screenplay writing, there are still far too few top quality screenplays originally written for film. The film industry will most probably have to depend on novels and short-stories in times to come. For those among us who work with the book-into-film process in educational contexts, this is a very comforting fact. It means that also in the future there will be produced a lot of useful material for adaptation studies.

In addition, the development of several theories of literature and the media through the past decades seems to have created a positive climate, as it were, for adaptation studies. By this I refer to theories and methods that do not involve any hidden and implied concepts of a hierarchy between different genres and media, and I shall mention some of them in a moment. To adaptation studies, it is of vital importance that the two discourses, the novel and the film, can be compared on equal terms of quality, regardless of their semiotically different ways of expression.

### **Logophilia and film scepticism**

A joke attributed to Alfred Hitchcock, who was renowned for turning mediocre novels into film master pieces, tells about two donkeys eating scrapped film reels in the backyard of a Hollywood film production company. "Is it any good?" one donkey asks the other, who is in the process of eating a film. "Yes", the gobbling donkey answers, "but the book was much better!" The deeper meaning of this joke is probably that only a donkey would claim an adaptation's loyalty to its literary source in such a way.

In some academic circles, though, one can still observe, after more than a 100 years of film art, an attitude to the film medium as being inferior in itself to the written word. One could with film theorist Robert Stam speak of a certain logophilia, and an often corresponding iconophobia (Stam, 2005).

This involves a notion, perhaps derived from the inevitably physical nature of the film, that it is unable to transform the telling modus of the book successfully into the showing modus of the moving pictures, that the thoughts and the conceptual nature of the novel is simply not transformable into film action and dialogue. This is all the more surprising since the same persons would not dream of hinting at such

limitations when speaking about the theatrical stage and the range of expression available for playwrights: Shakespeare, say, or Ibsen.

Most certainly there exists also still a certain kind of social class distinction associated with the book and the film respectively, the first having as it were a certain bouquet of good wine associated with it, the second, however, a rather distinct smell of popcorn.

But the main reason for scepticism is perhaps that the film is still the younger medium, and although it has been the dominant narrative medium for the past decades, it is still suffering from an inferior complex towards the book, the dominant narrative medium of centuries before. One is reminded of Socrates and his scepticism and fear facing the new medium of his life and times – the written word. What would happen to people's heads and their ability to memorize, Socrates asked, when thoughts from now on could be expressed and preserved in writing? He had a point, of course. On the other hand the written word and the book as a medium certainly soon compensated for the reduction it imposed on oral culture. Perhaps we can look at the relationship between book and film in much the same way: the written word is certainly unbeatable in many respects, but the film undoubtedly has its means of compensating. Thus, we should treat them not as rivals or each other's parasites, but as forms of expression that may complement each other, for example in the case of literary film adaptation.

### **Theories in favour of adaptation studies**

Luckily, the tolerant view expressed above, is supported, directly or indirectly, by several recent theories and methods.

- Narratology, to mention one, describes the nature and the elements of a narrative – regardless of its form of expression being verbal, visual or multimodal.
- Intertextual studies have showed us that even the seemingly original story has its precursors, a fact that somehow reduces the absolute authority of the source text in an adaptation process.
- Interart and intermedia studies search for the equivalents of expression across the different arts and across the media. The research into correspondences between the specific languages of novel and film is a natural part of such cultural studies.
- Reception theories – reader-response and viewer-response – maintain that there is no standard, no ideal interpretation of any text or any artefact. Following this view, the often heard accusation against a film adaptation for not being true to or loyal to the book it is based on, falls to the ground. Besides, a critic's claim for such a loyalty or fidelity to the source novel, in most cases seems to be about the fidelity to the critic's own interpretation of the book.

Summing it up so far: Literary science in many ways encourages the relevance and the importance of adaptation studies. We have also seen that there is no shortage of material for those who want to work within this field. Two major questions remain for me to discuss: *Why* should we study film adaptations in school? And *how* could we do it, using what method or study model?

### **Why study film adaptations in class?**

The study of film, its specific language and specific codes, is in itself important, not only to our pupils and students, but also to ourselves. We are all great consumers of moving pictures, but learning to read films is another matter than just consuming them. The study of the adaptation process from novel to film in addition offers an insight into the nature of expression through words and through pictures, respectively. In what contexts do the seducing powers and the suggestiveness of the film really unfold? And when is one word capable of saying more than a thousand pictures?

Another very good reason for novels-into-film studies in school is that such studies clearly stimulate the interest for literature, for reading. Through my own teaching I experience this, and there are numerous examples of film adaptations causing a demand for the books they are based on. Frequently, old and little known novels experience a revival. After successful Norwegian film adaptations, long forgotten novels like Knut Hamsuns *Sværmere* and Bjørnstjerne Bjørnsons *Fiskerjenten* have been reprinted, published in paperback with pictures from the film on their covers and sold in newsstands along with magazines, papers and comic books. Even an author with a more limited accessibility, like Virginia Woolf, gained a considerably enlarged circle of readers after the adaptation of her own *Mrs. Dalloway* (1997) and of Michael Cunninghams *The Hours* (2002).

There is also the new phenomenon of novelization. When Charles Dickens' *Great Expectations* was filmed for the last time so far in 1998, lots of people wanted, as usual, to read the book on which the film based itself. For a number of inexperienced young readers, however, Dickens' original was too much of a challenge. Instead they chose to read a light version of the story, based on the film screenplay – a so called novelization. Naturally, this is a controversial type of novel, but some people maintain that sometimes it is a good thing that young people read books at all, and that a light version is far better than no version. In any case, the reading of the novel is stimulated by the film adaptation.

### **Novels into film. A model for classroom work**

There are undoubtedly a lot of ways to work with film adaptations in an educational setting. I have made a model that I follow more or less in my own teaching, and that very often leads to interesting discussions in class. I will finish this introduction to the subject by giving a brief outline of this model. It consists of four steps after we have read the novel and seen the film adaptation of it.

First, we concentrate on comparing the two discourses on a strictly narrative level. This direct comparison is possible because the film manuscript basically is comparable to literary genres. The synopsis and the treatment, for example, that represent stages towards the screenplay, are in fact very much like the short-story. In this part of the process we try to answer questions like: What has been kept of the novel's narrative? What has been reduced – and why? What has been changed from novel to film narrative? What has been added – and why?

Secondly, we study the apparent results of the transformation from verbal to visual representation, from telling to showing. What happens when words become flesh, so to speak? Do we get a different impression of the characters of the plot and the relationship between them when we can watch the situations for ourselves, than, for example, when we are forced to rely on the novel's first person narrator?

Thirdly, perhaps the most interesting part of the analysis: Has the film adaptation tried to develop film equivalents to elements in the novel that are not directly transferable? What has for example happened to the interior monologues, to the shifting point of view of the novel, to the poetic language of the book? Has the film used some of its specific elements like music, light, colour, camera movements, film editing to compensate or perhaps even to create new aspects?

Finally we collect all our observations in an overview of the film's main theme or themes compared with the novel's. How has the film in question interpreted the novel? What may be the reasons for this choice? Has it perhaps to do with a modern reading of an old story? Has gender anything to do with it – female author, male director, for example?

Film and television and the part they play in our lives, not least in the lives of our pupils and students, represent big changes in the learning environment. Naturally, this must have consequences for the textbooks and the educational media that are produced now and in the future. Through this brief presentation of literary adaptation work in education, I have suggested a method which deals with not alone the modern multimodal texts, but also offers a possibility of building bridges between the traditional and the modern, between literature and film.

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# **Designing a Textbook for Effective Learning in Developing Countries**

Micheline Ravelonahary

## **Introduction**

In this paper I would like to appeal to textbook writers to consider problems specific to developing countries when they design textbooks. As an English teacher-trainer for primary and secondary schools, I am interested in textbooks for the teaching of English, although it may be that some of the suggestions raised in this paper could be applied to the teaching of other school subjects.

Many excellent resources have been written for EFL teachers but most of them have been written for schools in the industrialised world because this is where the money is. As a result, they are designed for a teaching environment where certain facilities are normally available, such as photocopying and cassette players, where teachers are well trained and have a reasonable level of English, and where it is assumed that money is available to provide the students with books.

As I will describe in the first part of this paper, this is very different from the everyday reality that teachers face in developing countries, with the result that even those books supposedly aimed at poorer countries are at best of limited use and therefore ineffective.

The emphasis is then how to make textbooks accessible to all learners. In the second part of this paper I will outline some ideas which I and my colleagues in Madagascar have developed which I feel would help to meet some of these challenges.

## **Part I: Problems of ELT in Developing Countries**

### ***ELT in Malagasy classrooms – general constraints***

Madagascar is the world's fourth largest island. It is two and a half times the size of Great Britain with a population of about 15 million. It should be noted that this makes Madagascar relatively small compared to many other developing countries, such as the Sudan which is the size of Western Europe.

What my country has in common with many other developing countries is extremely poor infrastructure. There are six provinces linked by national roads from the capital city Antananarivo. However, communication within regions is extremely difficult, with some areas about the size of Normandy having no vehicular access at all. Eighty per cent of the population lives several hours or even several days walk from the nearest road. Access to clean drinking water is a luxury even in the towns and it goes without saying that most of the rural population is not connected to electricity.

Malnutrition and diseases such as malaria are a serious problem and child mortality in some areas can reach 40 %.

Concerning education, primary education is compulsory in theory (new figures show 87% attendance) and free of charge in state schools. However, the reality is that the government budget for education is so small that many teachers even at secondary level are recruited and paid by the parents, sometimes with sacks of rice.

Investment for teacher training is so limited that many teachers have received no training at all and those that are qualified receive no follow-up because there is no regular budget allocated to training. As a regional teacher trainer myself, I have not been able to work with any teachers outside the capital city for the last two years.

Teachers of English in Madagascar as in other developing countries face the problem of insufficient or non-existent textbooks, the problem of trying to work from out-dated books or materials that require modern equipment. Many EFL books include activities on cassettes or CDs and as I mentioned, most of the country is not connected to electricity and even when schools do have power they certainly do not have the money to buy cassette players.

The only equipment available in the classrooms is a blackboard. Students are lucky if they have a book to use because the government simply cannot afford to buy enough copies. Even when available the textbooks are inappropriate to the learning environment because the teachers do not have the professional competency to use them properly. In such a limited resource situation and because of their lack of confidence and training, teachers are tempted to fall back on teacher-centred "Chalk and talk" lessons which is common in a traditional classroom because this is how they were taught themselves.

The lack of teachers leads to other problems. The most obvious is very large classes: teachers can expect to have a minimum of fifty students in one class, and in some cases up to 150 or more, with the resulting overcrowding. However, a less obvious problem is the wide range of ages in one class, with 11 year-olds studying with 18 year-olds because children start secondary school at very different ages depending on the resources available in their area.

Lastly, it should be remembered that the classroom is generally the only place the students get to hear or use English: there are no English language newspapers or television, films are dubbed into French, and the BBC and Voice of America are only available in the capital.

### ***Students***

Students generally start to learn English in secondary school, usually from the age of 11, although it is now being introduced in the last two years of primary school. English is a compulsory subject in secondary school but it is still optional at the national exams.

Students have a strong personal motivation to learn English and they like innovation. Many children in fact look forward to going to secondary school because they know they will start English lessons there. Unfortunately, despite the objective of the syllabus which is to make students able to express themselves in real situations, the majority of them can hardly hold a simple conversation in English after seven years of study.

They could do better but the lack of textbooks and the teacher-centred teaching style discourages them. In rural areas conditions are worse. Classrooms are more crowded so students literally cannot move and teachers cannot monitor them. This further discourages teachers from doing any communicative activities. Instead, the students typically respond to closed questions. In many cases, they are used to teachers who use drills and choral repetition as a means of teaching large classes. These techniques are good to keep students busy but their effectiveness as a learning tool is limited because of the lack of interaction. Consequently, the students get bored and lose concentration when they have nothing to use (this is made worse by the fact that many children suffer from malnutrition). Because of the lack of books many one-hour lessons consist only of the teacher writing a text onto the blackboard and the students copying it into their notebooks. Even when they do have books, these are only available to the students while they are in class and so they cannot use them to do any exercises or reading for homework. Furthermore, there is no school library to support their learning.

The situation is worse when the topics covered are dealt with from a western point of view which the students are not familiar with. Often they simply cannot understand texts and vocabulary because they have no visual supports, but also when they do they feel frustrated because the books present a world which they simply do not have access to, particularly for students in isolated rural areas.

### ***Teachers***

The current government has announced that English will be an official language and is taking measures to have English taught in every primary and secondary school. Those of us who work with teachers realise that there are considerable obstacles to this plan. Probably the biggest of these is the issue of teachers.

It is impossible to say for sure exactly how many English teachers there are in state schools in Madagascar. Firstly, many teachers of other subjects, such as Geography and History, are told by their directors that they have to teach English despite the fact that they are untrained, have never taught a language before, and may not even be able to speak English themselves. Some 'English' teachers at secondary level are unable to count to ten and pronunciation is particularly a problem: some teachers think that "one" is pronounced /on/ or that "take" is pronounced /tAk/.

Secondly, as mentioned before, many teachers are recruited and paid by the parents. The government is currently taking steps to train these teachers and 300 are at the

moment following a six-week course in the capital. But again, the problem is that the vast majority of them cannot speak English at all.

Those teachers who can speak English and who do receive training are taught a great deal of theory but are not given the kind of practical skills that would enable them to deal with the limited resources available in almost all schools. They do not know how to adapt supplementary materials to make them usable for large classes; they are not able to adapt a course book to suit their learner's needs; many teachers think that asking three students out of a class of eighty to come to the front and act out a dialogue means that they have done group work and given their students speaking practice.

Not only is initial training limited but there is very little follow up training from the Ministry of Education. I myself was never once observed during my 15 years as a teacher, nor did I ever get the opportunity to observe anyone else.

In remote areas, teachers are even more professionally isolated: they may have no resources at all and have no contact not only with trainers but even with colleagues. In some very remote areas, teachers have to take one week off work every month just to go to the nearest town to collect their salary.

### **Materials**

The two textbooks chosen by the Ministry of Education to be used in secondary schools are *Go For English* by Ken Cripwell et al for lower secondary level (CEG) and the first three books of *The New Cambridge English Course* by Michael Swan and Catherine Walter for upper secondary level (Lycee).

*Go For English* is a course for African children and therefore for developing countries and was chosen because the context was considered to be closer to the Malagasy reality. However, feedback from teachers has shown that they have problems using the book.

The input texts exploit the learner's previous knowledge, what they know in the African world. Many teachers do not have the time or skills to adapt the materials. They have also commented that they have difficulty understanding the instructions given in the book because even teachers with upper intermediate English do not have the language proficiency or the methodological repertoire to execute the directions given in the teacher's book (if they have one), for example the introduction suggests using modified cloze passages. This indicates to me that the writers of the book have no awareness of the limited knowledge of the teachers who are expected to use their book.

Although the book has been designed for Africa, it follows the same design as books for a western audience. This means that pronunciation is not dealt with at all, I presume because it is assumed that this can only be taught with a cassette.

Lastly, there is no indication of how many hours of classroom contact each book is supposed to cover. The level of difficulty in the language content of each book

accelerates so fast that I almost suspect that it was originally designed for English-speaking African countries as some reading passages for 4<sup>e</sup> (grade 8) are more suitable for native speaker children than for learners of a foreign language whose total exposure to English may come to no more than 100 hours.

Teachers also face problems with the *New Cambridge English Course*. Its western design and sophisticated materials make teachers and learners frustrated. Because of the problems at CEG level, teachers find that even the beginner book is too difficult for the students in the 10<sup>th</sup> grade.

Because it is designed for Western countries it is assumed that teachers have been trained in the communicative approach, and that they have modern equipment available. The content is also a problem. Topics describe how people live in the western world... which is very different from the students' environment. Although it is good for students to learn about life in other countries and alternative cultures and traditions to improve their knowledge as this is part of language learning, these books assume the students already have this knowledge because a Western lifestyle is "normal".

So texts need to be culturally accessible, particularly as the teachers do not know how to adapt a text which talks about life in the western world. For example, texts which talk about choosing where to go on holiday in the US are completely unusable in a country where many people cannot afford to travel to the nearest town and whose only experience of tourism consists of seeing wealthy foreigners. This problem is not limited to NCEC so even if teachers try to use other materials, they still describe children having cornflakes for breakfast, and putting on their boots on rainy days and so on. In many cases, especially in rural areas, children do not have breakfast and many of them do not own shoes. Even if teachers can transfer these lessons into a cultural context that students can understand, it is an additional barrier for the students to overcome. Their reaction to something outside their interest area will be that of closing the books if they have one or they just do not listen.

Books designed for language schools also tend to assume that students will be given workbooks or photocopied exercises to provide them with enough homework practice, or that they will have access to libraries or bookshops where they can get grammar and vocabulary practice books. Obviously this is not the case in Madagascar.

In schools with good resources, teachers will often have access to supplementary activity books, such as the Cambridge Handbooks for Language Teachers or to the many books of photocopiable games that have been published. It is in these books that one can often find the most innovative activities, many of which do not require materials. Indeed, *Lessons From Nothing* by Bruce Marsland is specifically aimed at teachers working with limited resources. Unfortunately the book costs more than a primary school teacher earns in a month. Some of these books are available at the Teachers' Resource Centres, set up in 1990 with the help of the British Council, with materials donated by Embassies or by individuals. However, there are only six in the

whole country (in the capital of each of the regions), and they receive no government funding but are financed by teachers paying a membership fee. This means that the range of materials varies and is often inadequate. Furthermore, the centre can only provide support for teachers working in or near the regional capitals so those most in need of help are the ones who do not receive it, which only makes the division between rural and urban education worse.

## **Part II: An Alternative Approach to Textbook Design**

As I have shown, teachers in developing countries face enormous challenges which course book designers must take into account if effective learning is to take place. In this section I will take each point and propose suggestions for how these obstacles could be overcome or at least lessened.

### ***1. There is no point designing a course book if the government cannot afford to buy it***

The biggest expense is providing student books. This means the student book must be AS CHEAP AS POSSIBLE. Glossy paper, colour printing and photographs may make the book more enjoyable to use but they are a luxury we simply cannot afford. But what really increases the price of a book is the number of pages. We need books which are as small as possible. Although the page layout needs to be clear and easy to read, we do not have the money to pay for pages which have only a few words on them, or a large picture when a smaller one would do.

The general layout of student books has changes remarkably little in the last 50 years. It has always been assumed that all activities done in class must appear in the student book, even if they only consist of a list of 10 words which can easily be written on the board. Writers also assume that all instructions must appear in the book, such as *Listen and answer the questions*. Teachers always have to give instructions anyway, and this gives the students important listening practice. By cutting out all unnecessary text and all instructions except those for homework exercises, course book size could be reduced by as much as 80 %.

I am suggesting that designers imagine that they are teaching large classes with no textbooks and only limited photocopying for handouts. What would they write on the board? What would they put on the handouts? Obviously with reading texts, long exercises and homework, students need their own copies because it takes too long to copy off the board or because they need it at home. These things, and *only* these things, should be put in the student book. Everything else should go in the teacher's book.

### ***2. The content needs to be relevant to developing countries all over the world***

In the west, public transport may consist usually of trains, large buses, metros, etc. In developing countries it often consists of rickshaws, mini-vans, bullock carts and so on. Some teachers may feel that it is only appropriate to teach transport which the

students are familiar with, and the teacher's book should give them that option, but if students are going to learn about life in other countries, why does the emphasis have to be on rich countries which the students cannot relate to? A student in a village in Madagascar could more easily relate to the concept of going to work by rickshaw than they could to the idea of a metro.

Writers also need to be careful about geographical differences. This is not technically a developed/developing difference, although it often is in practice, but a north/south difference. In Madagascar, and in Australia, July and August are not the summer but the winter. « Grandes vacances » is usually translated as “summer holidays” and yet for us the reality is different. Similarly, a south-facing house is dark and cold, while a north-facing house is sunny. Even something as basic as learning the four seasons is not universal. In south-east Asia there are three seasons: a rainy season, a hot dry season and a hot humid season.

Although *Go For English* tries to address these problems, by referring only to African cultures it excludes everyone else, whereas if it referred to Cameroon and India and Equator for example, no one would feel excluded, students would learn about other parts of the world, and it would make the book more economically feasible to publish because it could be sold in more countries.

***3. There is no point giving teachers pedagogical advice and instructions if they cannot understand them***

This means that the teacher's book must be written in a *very* simple language. It might even be an idea, now that publishers and Ministries of Education have access to computers, to sell the teacher's book on CD so that the government can have it translated into the local language and then have it printed locally. This would also cut down on shipping costs.

***4. Books that are designed for a specific academic year do not correspond to the students' level of English***

Secondary school course books have traditionally been designed for a specific academic year because they need to appeal to a specific age group. So a book in the 6<sup>th</sup> grade would be for 11-12 year-olds and a book in the 9<sup>th</sup> grade would be for 15-16 year-olds. However, in developing countries classes may in any case have students of very different ages. What concerns teachers is that the book should correspond to the level of the students rather than the age group. The level of a student in their second year of English will vary greatly in different countries depending, for example, on whether they use a different alphabet in their L1, on how much they are exposed to English outside the classroom, and on how many hours of English they get a week. The publishers have to make it very clear to governments that each book is aimed at a specific level of English so a book could be used over two or even three academic years depending on how fast the students can be expected to learn. This would actually be cheaper for governments as they would not need to buy so many copies.

**5. Lessons that do not require materials are more suitable than lessons that do**

Lessons need to be designed in such a way that more priority is given to the kind of activities that appear in books like *Lessons From Nothing*. Also, teachers need to be shown how to exploit texts to the maximum, using activities such as back and forth translation or Mario Rinvoluceri's Silent Sentence activity.

**6. Teachers do not have cassette players or photocopiers**

The teacher's book needs to give practical instructions on how to teach pronunciation and listening without a cassette player (supplementary books contain a great many of these activities), and also how to use scrap paper and cardboard to make teaching games and other materials which teachers in richer countries would probably use photocopiers for.

**7. Most classes are very large and crowded**

The teacher's book needs to include extensive classroom management suggestions, including alternative ways of organising activities where necessary. For example, in some classes it would not be possible to do activities which involve students changing groups as they cannot actually move. In some cases alternative activities may need to be suggested.

**8. Teachers have not been trained in even the most basic teaching skills**

Teachers need explicit advice on how to do things like correct students, check understanding, when to translate and when to explain vocabulary using pictures or miming.

**9. Teachers do not have the confidence or skill to adapt the course book**

The lesson plans given in the teacher's book need to be flexible, with alternative activities to suit different learner styles and also to take into account that students have problems with different aspects of English depending on their L1. It may seem obvious that you do not have to teach something in a course book if your students do not have a problem with it, but this is exactly the problem many teachers face: they do not feel confident enough to make pedagogical decisions like this on their own initiative but they would do it if the book told them to.

It is very important that ALL the lessons should be piloted in the kind of conditions that the book will be used in as most teachers will not have the skill to adapt it if there are any problems. Basically, the publishers need to be absolutely sure that every single activity and lesson plan works before the book goes into circulation.

**10. Many teachers do not master the language they are supposed to be teaching**

Obviously no one can expect a teacher's book to help teachers with only elementary English to totally master the language and writers do try to give pronunciation and language help to non-native teachers. However, I would like them to be more aware

of the actual level of the teacher's English. So the teacher's book needs to include not only a guide to the target structure (which needs to be more than a simple overview), but also an extensive glossary and a very thorough pronunciation guide.

## **Conclusion**

As you will have noticed, almost all of the suggestions concern the teacher's book. Traditionally, course book writers have written a student book, which contains the course, and then a teacher's book is written, sometimes by someone completely different, as a guide on how to use the student book. It is not surprising, therefore, that they are often seen as an optional "extra" and are often not used. We are suggesting that the teacher's book should be the main focus for the writers and should contain all the necessary information to teach the course. The student book should simply consist of any texts and exercises to be used in class which would take too long to copy off the board, plus a lot of extra exercises or texts that students can do for homework.

The old idea of what a teacher's book is, that is to say, a guide to the student book, needs to be completely revised. Teachers in developing countries need a book that contains not only the course and the lesson plans, but also supplementary activities, and which can be used as a teaching manual and a language guide.

The obvious question is if teachers need to be trained in basic skills and improve their English, why aren't the trainers doing that? Why should it be the concern of course book designers? It is true that governments need to take steps to improve teaching standards. However, there is no point designing a course book for developing countries that ignores the reality that is happening on the ground, and that is that the course would be taught by teachers who are untrained or poorly trained, have little English, teach with no resources and are physically and professionally isolated. Publishers need to start working with people who have hands-on experience.

Of course a book like this would be extremely difficult for publishers to have written, but with current text book design it is the students and the teachers who are having their work made extremely difficult.

Education is essential to pull countries out of poverty. This has been recognised in the millennium development goals which call for universal primary education by 2015. However, effective learning will not be achieved unless teachers and students have access to materials that cater to the reality in which they live.

### **Reference material**

*Go for English* by Kenneth Gripwell *et al.*, MacMillan

*The New Cambridge English Course* by Michael Swan, Catherine Walter, CUP

*Keep Talking* by Friederike Klippel, Cambridge Handbooks for language teachers

*Lessons from Nothing* by Bruce Marsland, CUP

*Index Card Games for ESL* by Raymond C. Clark, Pro Lingua Associates

*Grammar Games* by Mario Rinvoluceri, CUP

I would appreciate any comments or suggestions you have, especially from teachers or trainers working in other developing countries. email: [raked@wanadoo.mg](mailto:raked@wanadoo.mg)

# What Lithuanian Pupils Learn about Disability: Analysis of Attitudes and Content of Textbooks

Jonas Ruškus and Rasa Pocevičienė

## Introduction

The representation of disability in textbooks is often a subject of research. The form and content of representation of disability in textbooks can refer to the latent subjects of educational curriculum. If, according to Schubert (1989), curriculum is conveying and interiorization of cultural values and relations of a society, representation of disability in textbooks shows not only what and how something is conveyed to students, but at the same time the meanings of disability introduced by the authors of textbooks in their turn shape behavioural models with the disabled. From this perspective, textbooks are treated as an aid of social and cultural reproduction and a definition of social diversity (McKinney, 2005). In other words, textbook content analysis can disclose a reproduced collective understanding of disability at school. Brantlinger (2004) points out, *“how textbook content is based on (and reinforces) the medical model of disability that posits deficiencies in classified children [...] text narratives conveyed that schools are neutral and “kids with disabilities” are the problem”*. Nansy’s (2001) research shows, that representation in textbooks mirrored representations of disability in the wider culture: *“They directed readers towards a negative view of disability through false dichotomies that universalize, totalize, make static and inferiorize [...] Despite the promise of a climate that values diversity, the hegemonic negativity of disability as a singular embodiment of Other was not resisted”*.

In this research school curriculum is evaluated from the perspective of integrated education of children with special educational needs (SEN). Changes in curriculum are happening in two directions. Firstly, in terms of concrete organizational activities, the school should be ready to admit children with different disorders and integrate them into mainstream classrooms. This means that it is necessary to be prepared to design modified and adapted programmes for these children, to realize principles of individualization and differentiation of the teaching/learning process. Secondly, changes are necessary not only in the technological, but also in the ideological, i.e. collective consciousness area. The concept of collective consciousness refers to people’s beliefs, attitudes, myths and stereotypes, which in one way or another influence concrete daily activities (Abric, 1994; Deschamps, Beauvois, 1996). The two forms of curriculum - one formal, documented, the other - informal, conceived, cultural, are investigated in this research.

The following questions have been posed: do school textbooks in Lithuania promote tolerance towards children with different disorders; do they teach them construing positive relations, co-operation, inclusion of students with special educational needs

into different forms of social participation at school? What are the means of integrating information about different children in textbooks; what information is given and what are the means of its representation; what kind of message about such children is sent to students? What is the real discourse – that of participation or of exclusion – formed by the textbooks? What is the intentional learning curriculum of children with special needs, i.e. how do the participants of curriculum – teachers and students – describe it?

The aim of this paper is to reveal how stereotyped representations of disability are manifested in school curriculum through the textbook content and the attitudes of participants of education. In carrying out the content analysis, texts and pictures of textbooks were analyzed. 27 Lithuanian language and literature textbooks and 9 Ethics textbooks for Years 1 to 10 were examined, in total 36 textbooks. The same content analysis of oral and written opinions of teachers and students was performed. Semi-open, oral, individual and group interviews among 70 teachers from two districts were conducted. Additionally, the same type of group interviews and discussions were conducted with 231 students from 45 schools.

## Research Results

### *Text Content Analysis*

Textbook content often contributes to the formation of negative stereotypes about disability by attributing negative features to children with special needs. Pessimistic social and educational roles of children with special needs are implied.

A very clear stereotype, which is found in the textbooks, is the negative stereotype of the person with a mental disorder. The behaviour of such a person is presented as inadequate, inappropriate to common norms; the strangeness of behaviour is emphasized, e.g., *what a stupid girl – when she cooks pancakes she mixes starch with butter.*

Another very frequent stereotype presented in the textbooks is a preconceived opinion about the lack of possibilities of people with mental disorders to take part in community life and education. For example, *only a stupid person could fall into a trap. She is blind from birth, so she doesn't know what yellow or green looks like. She doesn't know what colour is at all.*

The definition of disability in the textbooks is neutral and informative. However, in the texts this informational, cognitive definition is accompanied by an indirect feeling of misfortune, especially when acquired disabilities are discussed. For example, *In hospital he was diagnosed with an inflammation of the brain. It is possible to treat, but he will be mentally disabled for the rest of his life.* When inherent disabilities are discussed, the semantics is somewhat different, but the pessimistic mood remains, for example, *He was born such. He doesn't know why. And nobody knows.*

There are some texts, fewer than those described above, where the disabled person is recognised, as being disabled, and where support for the disabled is emphasized, where people are encouraged to care about disabled people, and to include disabled persons in different forms of social participation, for example, *Please behave with us, as friendly, as you do with others. Please include us in your life, too.*

There are quite a few texts where disability is presented as a difference, a peculiarity; where disabled people are labelled, stigmatised and ridiculed, for example *...but he stutters so terribly, ha- ha, – said the boy. – What could we do together?*

There are texts, where irresponsibility is almost consciously evoked. It means that we are not responsible for caring about disabled people. These texts indirectly indicate to the readers not to care about a disabled person, not to pay attention to his/her needs and opportunities, e.g., *she has a mental disorder, that is why her other sisters mistreated her and called her a fool.*

In some texts the feelings and experiences linked with disability are presented. There is an appeal to the reader's feelings with respect to a disabled person. The reader is invited to empathise with the disabled, for example, *I am not an empty place or a rare animal in the zoo. Why do so many people notice my body, but nobody sees ME?*

In other texts aspirations of disabled people to be active are presented. The message sent to the reader is, as follows: disabled people can and would like to make their contribution to society. For example, *The optimism came step by step, the wish to enjoy life, too; she again began to communicate with other people.*

Analysis of categories, according to the frequency in textbooks of different years, has shown that such semantic category of disability, as strange behaviour, as a consequence of a mental disability is the most frequently encountered category in the textbooks. It is found in textbooks of all years, but most often in the textbooks of Year 6. Inadequate (bad, ignorant) behaviour because of a mental disorder – this category takes 2<sup>nd</sup>-3<sup>rd</sup> place in our rating – is very often presented in the textbooks of Year 6 and 7. Making a fool of somebody, calling in anger somebody disabled – this category also takes 2<sup>nd</sup>-3<sup>rd</sup> place in our rating – this category is most frequently presented in the textbooks of Year 6. A mental disorder, as a cause of poor opportunities (4<sup>th</sup> place in the ratings scale) is more often found in Year 4 to Year 7. Decrease of the person's possibilities because of the disability (the 4<sup>th</sup> place in the ratings scale) is more often found from Year 5 to Year 7. It is obvious that the presentation of disability in the investigated textbooks is very negative; unconsciously pupils are ascribed to the category of disabled people because of the difference in their personality and behaviour and because of no prospects for their educational and social participation. It is important to mention that in Year 6 that negative stereotypes of disability are being instilled in the most intensive way.

There are only a few texts in the analyzed textbooks where positive attitudes towards disability are presented. Positive semantic categories, such as mutual help among disabled people; offering (trying) to stand in the shoes of a disabled person, aiming at compensating disability are presented only a few times during the 10 years of schooling.

The greatest differences in stereotypes are in those semantic categories where disability is described negatively. The most negative stereotypes are presented in the Lithuanian language textbooks. In these textbooks mental disability is identified, as a reason for weak social and educational opportunities. This semantic category is the one, which mostly distinguishes Lithuanian language and Ethics textbooks. In the Lithuanian language textbooks, the inadequate (bad, ignorant) behaviour because of mental disability, disability as punishment, decreasing expectations for activity of a disabled person and the inadequate attitude of a disabled person towards him/herself are mostly emphasized.

Mystical and mythological stereotypes of disability are more often presented in Lithuanian language textbooks than in Ethics textbooks. In the first group of textbooks, disabled people are presented in tales, in the other group information about famous disabled people is given. In both cases, it is not usual, traditional and normal situations that are described, but rather more exceptional, and a special context of disability is given.

The Ethics textbooks are more oriented towards positive stereotypes of disability than Lithuanian language textbooks. Inclusion of disabled people in activities at the initiative of non-disabled people, recognition of a disabled person as s/he is, rights of disabled people guaranteed by the law (are not at all presented in Lithuanian language textbooks), teaching that it is bad to ridicule a disabled person, mutual help among disabled people, offering (trying) to stand in the shoes of a disabled person (are not at all presented in the Lithuanian language textbooks), care about disabled people – these categories are emphasized in the Ethics textbooks.

However, negative stereotypes of disability are also not avoided in the Ethics textbooks. In these textbooks, even more than in the Lithuanian language, the descriptions of strange behaviour of mentally disabled people can be found. A similar frequency of such categories, as a decrease of a person's possibilities because of disability, disability as a stigma, a burden, making a fool of somebody, in anger calling somebody disabled, inadequate (bad, ignorant) behaviour because of the mental disorder, are presented in both Lithuanian language and Ethics textbooks.

Most often negative stereotypes of disability are presented in the textbooks of Lithuanian authors. A mental disorder is a reason for poor opportunities, strange behaviour as a consequence of a mental disorder, inadequate (bad, ignorant) behaviour because of a mental disorder, making a fool of somebody, in anger calling somebody disabled, reduced opportunities because of the person's disability, ridicule of disabled people, disability as a punishment, a decrease of expectations for

activities of a disabled person (mental disorders) – all these are the negative images of disability, which are clearly evident in the textbooks of Lithuanian authors.

Negative stereotypes of disability could also be found in the textbooks of foreign authors, but, of course, much fewer. There are much more positive images of disability in the texts of foreign authors, than in the texts of Lithuanian authors. As an example, we could give such semantic categories, which are characteristic for foreign authors: inclusion of disabled people in activities at the initiative of non-disabled people, offering (trying) to stand in the shoes of a disabled person, rights of disabled people guaranteed by the law.

In the texts of Lithuanian authors, disability is presented, as a reason for poor opportunities, making a fool of somebody, and in anger calling somebody disabled. In these texts disabled people are often described, as unhappy people who have very high aspirations to change the state of their disability, to no longer have a disability. In other words, the negative moment of disability, the description of disability, as evil is emphasized here. In the texts of foreign authors, more than in those of Lithuanian authors, an attempt at care for a disabled person is shown. The semantics of presentation of a disability in the texts of Lithuanian and foreign authors is essentially the same; only a slight tendency to give a more negative, strange image of a disabled person in the texts of Lithuanian authors can be mentioned.

#### ***Analysis of the content of pictures***

A visually impaired person (a child or an adult) is most often presented in the pictures. They show such a person together with other people. People with other kinds of disabilities are very rarely presented. A visually impaired person together with other people is more often presented in the Lithuanian language textbooks, but not in Ethics textbooks. It is interesting to note that the textbooks of Lithuanian authors present an image of an active child with visual disorders together with other people, while a visually impaired adult is passive.

Thus, the pictures in the textbooks, contrary to the texts, form a positive image of a disabled person. Other semantic categories of pictures were rarely found. Pictures with disabled people in them are most often found in primary school textbooks and in those for Year 5 and Year 6.

#### ***Data of a semi-standard survey of teachers***

Data of a semi-standard survey of teachers was processed by using the content analysis method. Lexical-semantic units were grouped into semantic categories. Semantic categories show the informal, hidden components of the curriculum. Teachers, more than other groups, emphasized that a child with special needs is an equal member of the class and school community: *He is the same, as other class members. Usually these children are not very different from the others.* These answers and tendencies point out that integrated education of children with special needs is understood, as a value and practical reality. On the other hand, as soon as

reality of integration is considered, a great scepticism, pessimism and tendencies of segregation are strongly evident. In the 2<sup>nd</sup> and 3<sup>rd</sup> place of the rating scale of categories we can find such categories, as “to teach children with special needs is a teacher’s obligation and the children themselves are a burden” (teachers said: *it is a big burden for a teacher and a minimum profit for the child*), “the segregation of children with special needs in the common activities of the class and school” (teachers said: *the best we can do in this case is to leave such a child in peace in upper high school*); “the aim is to remove and segregate a child with special needs from the class” (teachers said: *we should teach them in special classes. Such children should feel better among others like themselves. It is necessary to teach them in special schools*). *The learning programmes are suitable to their abilities; While designing a learning programme I am planning what the pupil would be able to learn with all pupils and also the variants of other tasks; I am adapting textbooks and curriculum to their possibilities* – such are the thoughts of teachers. These propositions belong to the category “learning programmes, as an educational resource for pupils with special educational needs”. This category emphasizes the idea that one of the most important elements of a curriculum is well designed learning programmes, appropriate to the educational needs of children. An emotional-relational aspect of educating children with special needs is very strongly expressed in the structure of teachers’ attitudes. Categories of curriculum “Emotional disposition for working with SEN pupils and giving time to this” and “Close co-operation with colleagues, specialists, institutions of pedagogical-psychological service” show that it is important to regulate emotions and relations if we are looking for a positive aspect of quality of education: *I understood that it would be necessary to give more attention to him, as a human being, and to more accurately observe his progress*. Competencies of regulating emotions and relations became one of the preconditions of quality of education. Pedagogical pessimism is expressed in the structure of teachers’ attitudes. Teachers do not believe in educational abilities of pupils, depreciate them, do not see any inner resources of the child: *the work is usually futile. They are not able to say anything. They absolutely can’t work independently. They are not even able to copy from a book*. Such tendencies are more evident in the responses of teachers from basic schools in the country.

#### **Data of a semi-standard survey of pupils**

As well as teachers, pupils were questioned with the aim of finding out about their images of disability, their experience in communicating with disabled people and SEN children, and projections of their behaviour. In this research the images of pupils were treated, as the reflection and result of their curriculum (in pupil’s consciousness). In essence, pupils’ images about disability and communication experience are very positive. Children told about their experiences of friendship with disabled people (*I made friends with my neighbour; I call him; we often go for walks; it is interesting and fun to be with him*). They are projecting helpful and good behaviour with them (*I will not leave my friend in need; they need our help, because*

*their life is not the best*). From conversations with pupils it is clear that teachers play a special role in this case. Pupils give them the functions of mediation. They need explanation and advice, they observe teachers' behaviour and create their own models of action (*Quite often nobody talks about this. The teachers and the pupils are afraid to talk*).

## Discussion

Information about disabled people and SEN children conveyed to students at school is essentially negative. Textbook texts are often discriminating. They don't develop students' tolerance and understanding of disabled people and SEN children. The problem is more serious because the writings of Lithuanian authors are more negatively stereotyped towards disabled people and SEN children, than those of foreign authors. In other words, it is obvious that the authors of Lithuanian textbooks are not sufficiently aware, not only about the problems of discrimination of disabled people, but the hidden (indirect, latent) educational meanings of the given information. In Lithuania today there are no regulations of latent learning content. It seems that the authors of the textbooks understand only one, i.e. direct, open educational side of the text, while not enough attention is paid to the indirect essence of the text. Because of this, negative information about disabled people can be contained in the texts. In the textbooks disabled people are presented, as behaving in a strange way, looking different, they are being ridiculed and on the whole bad features are ascribed to them.

Tolerance could and probably should be taught, as a separate school subject in Lithuania today (for example, a program for development of tolerance), but it is also obvious that tolerance towards different people and respect for human beings could be developed consistently through the existing school curriculum. In the Lithuanian language and literature textbooks and the Ethics textbooks, the disabled person is seldom presented, as an active and equal member of society. It is noted that more often such a person is excluded from joint activities and ascribed some negative features. In the pictures, which also send a message about disabled people, almost all of them are presented with visual disorders. In our society many people have visual disorders; glasses are not an element of exception, but more a generality. People wearing glasses are presented in standard social situations. People with other disorders are very rarely presented in the pictures. Thus, the pictures do not perform an educational function of tolerance, social and educational participation of disabled people. Research results evidently show that the authors of the textbooks do not realise enough the hidden content of texts in the textbooks. Tolerance of other people in the process of textbook writing should be organized and purposeful, and only sometimes left to the authors' will.

The role of the teacher, as an educational mediator between the meaning (semantics) of disability and the student (the receiver of the meaning) is also very important. In this case it is not only the teachers' professional competence in teaching a subject that is important, their attitudes towards disability, i.e. how teachers themselves treat

disability, special needs, how they evaluate such a person's (disabled and SEN children's) perspectives for social and educational participation, which are also of great importance. It is evident that if the teacher has a negative image of disability, the same information is given to the students. Even more so, this information will have a stronger negative character. If a teacher has a positive image of disability and SEN children, the negative information of the textbooks could be oriented in a more positive way. In this case, pupils will have a positive understanding about disabled and SEN children and their participation. The research has shown that teachers' attitudes towards disabled people are different. They recognize the integration of disabled and SEN children into mainstream schools. On the other hand, teachers' negative, discriminating attitudes are also very evident. The work with SEN children is viewed as an obligation, a burden; there is a wish to separate such children from the others; teachers have quite a lot of arguments for separation. Nevertheless, teachers are looking for resources, which could facilitate the integrated education of SEN children, such as co-operation with other specialists, individualized curricula, attention and time for the child.

Students construct their own discourse of disability. It was interesting to discover that students' discourse of disability and SEN children is different from the quite negative discourse of the textbooks and teachers. Students are construing a positive discourse of disability: they actualized the positive experience of communication, friendship, joint leisure activities with disabled people and SEN children; they notice educational possibilities for such children. According to the research results, the inadequacy between mediators of the meanings of disability (the content of textbooks and teachers' consciousness) and receivers (the content of students' consciousness) could be explained this way: students have construed their own opinion, their own subjective discourse not on the basis of official materials of meanings (textbook content and teachers' explanations), but on the basis of their own individual experience. An educational problem is that most often students' positive experience is not stimulated by official materials (textbook content) and authority (teachers' opinion).

On the basis of the research results, the authors have recommended to the Ministry of Education and Science and to other responsible institutions to design methodological recommendations for the authors of textbooks. Recommendations should mention exactly how (with what frequency, what kind of disorders, in what situations) disabled people should be presented in textbooks. We also recommend to carry out research into different experiences of European countries; their experience should be evaluated, their textbooks analyzed, the opinion of experts of social integration should be sought. Such investigation would help to prepare detailed and clear methodological recommendations, not only for the authors of textbooks, but also for teachers. They should receive recommendations how to explain and discuss the texts with students. Such methodological recommendations would help in forming a positive discourse of disability at school. This in turn would contribute to a better realization of the principles of "school for everybody", and towards achieving real inclusion of SEN children at school.

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# **Comparing Different Types of Expenditure on Teaching and Learning Materials: An emerging project**

Mike Horsley

## **Introduction**

This paper will compare national and international spending on teaching and learning materials, focusing on comparing expenditure on textbooks and Information and Communication Technologies (ICT). It is part of a wider project to develop benchmarks for resourcing teaching and learning.

Generally there is little data on spending and investment in textbooks and ICT. OECD data, for example, shows that costs and spending attributed to instruction and school materials are aggregated, making international and national comparisons problematic. As well, it has not been possible to compare spending on textbooks and newer ICT investments. Since it has not been possible to compare such investments it has been difficult to evaluate the effectiveness of spending on different ways of supporting teaching and learning. This paper will present new data on national spending on textbooks and on national and international investment on ICT. The data will be used to make preliminary evaluations of the different types of educational spending that support teaching and learning in classrooms.

## **Background**

Recent trends in school management have featured a devolution of decision making in school budgeting and the introduction of global school budgets. However, schools face multiple and increasing financial demands, mostly mandated by government. As a result there is diminished disposable income to spend on teaching and learning resources for the classroom and to support learning. In the UK for example, the publishers association has produced a guide to *Recommended Spending on Books in Schools* to overcome this problem, but the methodology developed to provide the recommended quantum of spending is comparative benchmarking because no data has been developed that links spending on teaching and learning materials to learning outcomes. In US, the national textbook surveys (completed by the state of Indiana) has also revealed comparative benchmarking data on Government spending on textbooks and associated teaching and learning materials in schools.

## **Expenditure and Achievement**

Previous research on key factors influencing student outcomes has focused on teacher quality and socioeconomic (SES) student characteristics (Rowe, 2003). More recent analysis of the performance of students on the Third International Mathematics and Science Study (in the US) analysed curriculum and school

textbooks as factors in explaining student performance (Schmidt, McKnight, Raizen, 1997; Stigler, Gallimore, Heibert, 2000). Earlier research in the third world showed that investment in teaching and learning materials had significant impact on student outcomes (Heynemann, 1980). In the context of diminishing discretionary financial resources in schools, and the challenges for school investment decision in teaching and learning resources that technology presents, there is a need to conduct systematic research investigating the level and pattern of spending on teaching and learning resources and their impact on student outcomes.

Preliminary studies on the adequacy and equity of school resources in the United States (National Research Council, 2001) have shown that current inequitable investment patterns and levels in resourcing schools are major factors in the decision making processes and the culture of decision making processes within schools. As well, a number of studies have shown that the reallocation of resources within and between schools can have significant impacts on student achievement (Miles and Darling-Hammond, 1998). This paper develops three key hypotheses on the relationship between different types of expenditure on teaching and learning resources and student achievement. It then examines these hypothesis by using data generated from research in Australia and internationally.

### **Hypothesis One**

*The impact of falling real sales of teaching and learning materials overall will be magnified in low socioeconomic government schools; leading to a marked increase in inequity in access to teaching and learning materials that impact on student achievement.*

Studies on equity in the provision of access to teaching and learning materials in private and government schools in NSW in the 1990's showed students had access to six times the teaching and learning resources in many private schools than in Government schools. Furthermore these studies demonstrated that differential access to teaching and learning materials constricted teachers' choice of teaching and learning strategies, and could explain student learning achievement (Laws and Horsley, 1992). In addition this differential and inequitable access had implications for setting homework, classroom management, academic engaged time and the provision of appropriate teaching and learning resources for students in Government schools. We know from limited studies of sales data from Australian educational publishers (Horsley, 2004) of total expenditures on textbooks, teaching and learning materials by Australian schools that the real value of educational materials purchased by the entire school sector is falling. These expenditures are closely linked to curriculum change rather than attempts to improve access to teaching and learning resources. It is hypothesised that this fall in the availability of teaching and materials is magnified in Government schools thus increasing previous inequity. Earlier studies showed that teachers and schools denied access to teaching and learning materials developed a culture of low expectations and making do with

inadequate resources (NSW DET Report Into Mt. Druitt High School, 1996; Horsley and Walker, 2003).

***Linking learning outcomes to spending on teaching and learning materials:  
Preliminary Findings***

A research project has been commenced with a preliminary study of student achievement and per capita spending on teaching and learning materials identified in annual publicly available school reports. The following table provides an overview of the research methodology that will allow for the first time such direct links to be made.

**Table 1.** Primary school comparisons:  
teaching and learning materials and student outcomes

Indicator	School A City Poor Multicultural	School B Wealthy City	School C Poor Rural
Size in Students	725	363	15
Per student spending on Teaching and Learning materials	\$180	\$517	\$409
Proportion of global budget funds spent	60%	150%	20%
Proportion of total budget spent	18%	43%	7%
Literacy Basic Skills Test Results Year 3 Year 5	47% top 3 bands  77%	90% top 3 bands  98%	30% top 3 bands  86%

Australian Educational Publishing Sales Data

The following tables show key features of the Australian educational publishing industry. Australia has about 220 educational publishers and in 2004 these publishers sold about \$140 million AUD of textbooks and teaching and learning materials. Spending per student in real terms has been falling as teachers and schools change the way that they resource and support teaching and learning for students, and as a result of reduced government funding for teaching and learning support. The table shows nominal prices and costs.

**Table 2.** Secondary Textbook and Teaching Resources Sales,  
Enrolments and Spending per student in Australia 2002-4

	Year 2004	Year 2003	Year 2002
Secondary (SEC) enrol	1 400 173	1 389 450	1 370 403
Sales	78 232 430	76 882 585	74 109 399
Av. sales per student	55.87	55.33	54.07

**Table 3.** Primary Textbook and Teaching Resources Sales, Enrolments and Spending per student in Australia 2002-1999

	2002	2001	2000	1999
Primary (PRI) enrol	1 931 346	1 912 541	1 903 881	1 885 358
Sales	58 312 450	55 975 271	56 422 55	59 029 744
Av. sales per student	30.19	29.26	29.63	31.3

## Hypothesis Two

*Spending on computer technologies is crowding out funding of other teaching and learning materials.*

Currently Government, educational systems and schools are investing heavily in computer technology (Information and Communication Technology: ICT). However, there is a considerable literature (NSW Audit Office, 1999; Western Australia Audit Office, 2003) on the limited use by teachers, of technology in their teaching. Despite the unprecedented level of investment in technology, technology education and the professional development of teachers, evidence on the actual level and scale of integration of ICT and embedding of ICT into teaching and learning has been problematic. A major OECD study (2004) of technology use in schools in fourteen countries found that despite significant investment in computers and professional development, use of computers in the classroom is limited and disappointing. Computer expenditures are not supporting teaching and learning. A study by the NSW Audit Office (1999) reported that although hundreds of millions of dollars had been spent on equipping schools with technology, very few teachers used technology in their teaching and learning. Teachers and students used technology, especially for research, but technology plays only a minor role in supporting teaching and learning within classrooms.

Cuban and others (2001) have forcefully claimed that the reason for the failure of schools to take up the technology challenge is that technology in the curriculum ignores the real information needs of learners. In particular, they argue that unquestioning acceptance of new technologies that influence school outcomes and pedagogy is both foolish and dangerous.

It may be tempting to imagine that technology, especially the internet, is revolutionising teaching and learning, changing teaching practice and student learning, and allowing students to improve their learning outcomes. However, the picture emerging from research studies contradicts some of the claims made for educational use of technology and the internet (OECD, 2004). Limited sales figures by schools for information and communication software is further evidence that schools are not using investments in computer technology to support teaching and learning in the classroom. A number of studies by Twining (2002) have raised the issue of increased investment in computer technology crowding out spending in other more, immediate, practical and appropriate teaching and learning resources.

ICT expenditure has entered school costing and funding arrangements in a different way to textbooks and other teaching learning materials. Although ICT spending has not been isolated in school budgets in the past increasingly schools need to make separate allocations due to accountability measures for funding agencies and to predict future investment as the rapid depreciation of hardware and software creates pressures for continual increases in spending. Although calculated as non-salary costs, ICT spending also generates considerable professional development and specialised teaching expenditures.

Despite the tidal wave of investment in education few studies have sought to quantify the costs of ICT in education and subject these costs to the effectiveness and efficiency and cost benefits of other forms of educational spending.

Twining (2002 ICT in Schools: measuring the level of investment) noted that the UK government had spent 1.6 billion pounds between 1985 and 2001 on ICT in primary and secondary schools and recurrent expenditure was in the order of 400 million pounds per year 2000-2003. Twining compared such investments internationally. Between 1995 and 2000 the US Federal Government spent 8 Billion US dollars on supporting ICT in education. Twining's research showed that many countries spent more than the UK and US on technology and ICT in primary and secondary schools.

In 1999 The NSW Auditor General conducted a performance review of the Computers in Schools Policy of the NSW Government. The report noted that *expenditure on the Computers in Schools Program (for public schools) in its first four years was \$170.6m, and the budget for the Program in 1999-2000 is \$92.8m. Expenditure by the NSW Government on school education in 1999-2000 will be approximately \$4 billion. In 1999-2000, the Program as a proportion of overall spending on public schools will be more than 2% (1999, Audit Report).* The major thrust of the report was that although the program provided funds for hardware, software and professional development – little ICT use in teaching and learning was observed in the case based methodology used in the performance management investigation.

Furthermore, current explorations of investment and spending on ICT in education is revealing costs around 150 000 to 300 000 per annum in a non-government secondary school approaching 1000 students. Purchasing and replacing a computer for one in five students is a significant opportunity cost.

Schools are facing continuing growth in capital and recurrent expenditure related to ICT. Data developed in Australia show that for a school of 1000 students, with a computer to student ratio 1:5, this will require 400 computers with replacement cycle of five years necessitating the replacement of 80 computers per year.

### **Hypothesis Three**

*Photocopying increasingly provides teaching and learning resources as a result of cost shifting processes within school budgets.*

It is often not recognised that teachers, librarians, head teachers and senior teachers such as principals, select teaching and learning resources that are used by students in classes. Indeed the planning of instruction and location of suitable resources are one of the main functions of teachers. Due to the way that schools allocate funds and manage budgets, much of this teaching and learning material constitute photocopied pages – often of low reading quality.

Each year Copyright Agency Limited (CAL) commissions an independent copyright survey in 120 schools in three states in Australia. The survey is representative of urban and rural, private and government schools and is conducted throughout the entire year. In 2001 the survey showed that on average 243 pages per secondary student and 203 pages for primary students were copied each year mostly from textbooks. These records are used to assign the funds that are collected by CAL to the authors and publishers of the photocopied works (\$16 million AUD in 2002). There is some evidence that the CAL surveys under-represent the amount of photocopying conducted in Australia's 10 000 schools. Studies undertaken by Horsley (1994, 2002), showed that typically teachers copy 2 pages per student per lesson. Nevertheless the photocopying data collected by CAL provide a rich source of data on the selection and use of resources in teaching and learning.

The photocopying data showed that for the most copied 50 titles, the majority were primary titles. This reflected the situation existing in NSW where primary Government and Non-Government schools are not allocated funds specifically for teaching and learning materials. The majority of the copying of these titles was class sets of photocopied pages. The class sets were mostly activities and tasks for lessons, and possibly for homework. Much photocopying was undertaken due to resource constraints. In the absence of investment in teaching and learning materials teachers felt that they needed to photocopy vast numbers of pages for their students – often more expensive than purchasing entire book titles or teaching and learning kits. However, photocopying usually is provided by the entire school global budget whereas investment in other teaching learning materials is sourced from very limited Faculty budgets and stage budgets. Thus the resource allocation process within school contributes to the development of low quality and ineffective resources. More needs to be understood about how within school budgeting processes influence the type of teaching and learning resources (and thus their impact on learning). Photocopying increasingly provides teaching and learning resources (often of low quality) as a result of cost shifting processes within school budgets.

### **Comparing ICT to other forms of spending**

It is possible to make some rough and ready calculations between ICT spending and spending on other teaching and learning materials. The state of Victoria was chosen

for this comparison. Between 1994 and 2004 the Victorian Government alone spend 1 billion Australian dollars in providing ICT resources for schools, excluding professional development for teachers. This figure also excludes all spending by non-Government sources. Victoria has the highest spending on textbooks per student than any other Australian State. At the same time (1994-2004) the total sales of textbooks and other teaching and learning resources reported to the Australian Publishers Association by its member publishers amounted to \$178 million Australian dollars. Expenditure on ICT in schools by the state Government alone exceeds expenditure on other forms of teaching and learning support by 5 to 1. Of particular concern is the way that recurrent and capital spending is being considered. Whereas once textbooks were seen as a recurrent expenditure, increasingly they are seen by schools and school systems as capital expenditures. At the same time whereas once ICT was seen as capital expenditure the increases in investment in ICT has come to be seen in schools, more as recurrent expenditure.

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# **Information on the Economic – Social Environment as Didactic Material for Bachelor’s or Master’s Thesis**

Teodoras Tamošiūnas

## **Introduction**

*Problem and relevance of the research.* The relation between theory and practice is a relevant problem of scientific social research in Lithuanian universities. The number of publications in scientific literature and the Internet is increasing. Collections of researchers’ theses are rapidly expanding; their electronic storage is easily accessible. This makes it possible to more easily model theoretical theses of students more easily. On the other hand, theoretical theses of students are usually of paper type and have doubtful scientific value. Therefore the importance of collecting empirical information from the environment and scientific analysis is increasingly more accentuated to students. It is required to process empirical information by high level scientific methods, summarize it down to theoretical conclusions, and relate it to respective theoretical models and form a common conception of theory and practice.

*The aim of the research* is to investigate how particular information from the environment serves as didactic material for students of Šiauliai University Faculty of Social Sciences in learning to carry out scientific analysis and theoretical generalization of data in their theses.

*Subject of the research* is the thesis of students of Masters of Management defended in 2004 at Šiauliai University; examples of analysis of empirical data in this thesis.

*The environment of the research in the Faculty of Social Sciences.* Šiauliai University, Faculty of Social Sciences, is attended by approximately 3600 students undertaking bachelor’s and master’s degree study programmes in Economics and Management.

In the faculty, the cluster idea is being implemented: it is being sought that studies, science, and economic-social environment go hand in hand. The lecturers of this faculty have prepared strategic plans of Šiauliai County and Šiauliai, and the majority of them are publishing scientific articles about the economic and social situation in Šiauliai region, as well as in Lithuania. Consequently, it is obvious that students are also being engaged in regional research.

Studies are completed by writing a final Bachelor’s or Master’s work. In these works, an analysis of research results must make up the larger part of the work. The theoretical part of the work constitutes only 30 – 40 percent of all the work and has a tendency to decline. It is necessary that research data be collected from a real environment, concrete enterprises and institutions, or from the town, as well as, from the region. It is also important that research data reflect essential information about

the problem under investigation. Empirical data is being processed by statistical computer methods, and the analysis of secondary data is being carried out. Conclusions, corresponding to reality, as well as, applied recommendations are also of great importance. Novelty and practical relevance must be characteristic of research results.

Regional activity is being grounded on the idea of development: economics, society, and the environment develop together with the principal of a balanced development. In Bachelor's and Master's works of students, the following spheres of regional activity are being analysed: in economics – industry and small and medium enterprises, energetic, agriculture, transport, housing construction, and tourism; in society – employment, the standard and quality of life, health services, education and science, and culture; in the environment – the quality of air, water, and soil, the variety of landscape and biodiversity, natural resources, and waste disposal. Lithuanian regional policy, as well as, the irregularity of regional development is being discussed, and the comparative analysis of the main economic and social indexes of arba of ten Lithuanian counties is being carried out.

The main sources – Internet databases, Department of Statistics of the Republic of Lithuania, and the municipalities of towns and regions. Many students collect data at concrete enterprises and institutions, and investigate real economic and social problems during their practice.

Consequently, concrete social and economic information of the regions together with theoretical publications are of service to students. They serve as didactic material not only for the extraction of information but also for its processing and mastery as well as for the solution of concrete regional problems. Reading a live book of regional activity, students are accustomed to applying theoretical methods to solving practical problems, and to incorporate science, studies and economic-social environment into a single cluster.

*Methods of the research.* The students, in their theses, are motivated to investigate basic managerial or economical problems in their theses from their closest environment: current or future job. Thus the tasks correspond with *L. Vygotsky's Theory, Zone of Proximal Development*, which suggests that it is significant for a student to analyze a relevant sphere in his studies. Otherwise, new knowledge and skills look incoherent to the student and not encouraging to be mastered.

According to the methods of *Grounded theory* priority is given to the analysis of empirical data: firstly empirical data is collected and analyzed and generalized into theory describing the solution of the analyzed problem. Only then the student looks for classical scientific theory and results of investigations of other authors. In the end, first and other theories are generalized into a final theory, suitable for solving the chosen problem. Thus the students are accustomed to finding the theory suitable for solving their problem independently and applying it efficiently instead of formally assimilating the indicated theory.

The widely applied method is *case study* – a particular practical case is analyzed, results of the investigation and student's work environment are generalized into a theory, applicable to all similar cases.

In investigating the work environment of the student a *conception of specialist-researcher* is implemented – educating a specialist, who would be able to carry out scientific research in his working environment professionally.

## **The analysis of student research: case study**

### ***The basics of student research***

The Master's degree student Edita Minkuvienė investigated the subject "The Indicators of Gytariai Secondary School Teachers' Qualification in the Context of the Restructure of the Lithuanian and Šiauliai Region Educational System". Being the deputy principal of this school she was solving the most relevant question for the School: what type of school to choose – gymnasium or general school? Many scientific research questions were raised: what criteria to follow when choosing the type of school, how to select the key criteria, how to measure conformity to the chosen criteria and how to justify that the solution is optimal?

*Relevancy of the student research.* In the second stage of Lithuanian education reform on 1998 the Ministry of Education and Science ratified the harmonization of the educational system as one of the top priorities. Since 1999 optimization of a network of general education schools has been taking place in Lithuania. 12-year secondary schools have been reformed to general schools for 1 – 10 forms and gymnasiums for 9 – 12 forms. However, full diagnostics of institutional status of the school, which would help the school to decide to change the status, has not yet been created.

*General scientific problem.* The investigations are intended to answer two main questions of school status prognosis: 1) what criteria should be followed when choosing the status of the school? 2) by what empirical indicators and how should meeting of these criteria be measured?

*Aim of the student research* – to investigate the indicators of Gytariai secondary school teachers' qualifications in the context of restructuring the Lithuanian and Šiauliai region's education system.

*Object of the research* – the indicators of Lithuania secondary school teachers' qualification.

*Methods of the research* – an analysis of the documents.

*Methodology of the research* – the restructuring policy of the Lithuanian education system.

### ***The theoretical basics of student research***

In the theoretical part of the Master's thesis the student has analyzed the theoretical basis of the reorganization of school and theories of management of strategic change.

#### *Conception of process of reorganizing network of schools and institutional status*

M. Wallace and K. Pocklington (2002, p. 3) claim that reorganization of the network of schools is only one manifestation of many changes. According to R. Stacey (1996, p. 37) change is an uncontrollable, complicated and in most cases "unfamiliar" process. M. Fullan using P. Pascale's and R. Stacey's conception of change, defines the change as the entirety of "forces of unknown attraction", which creates systemic images out of chaotic states. In the process of "force of unknown attraction" the most important is the aim as searching and purifying the sense systemizes complicated phenomena. "Forces of unknown attraction" do not imply a direction of the process, but highlight the process (Fullan, 2001, p. 35).

The provided definitions of the process of change reveal one of the features of change – complexity. P. Senge when describing complexity of change has distinguished two notions:

*Detailed complexity* – system of all variables that can influence the issue.

*Dynamic complexity* – space of change, defined as entirety of causes and consequences, distant in time and with dynamically interrupting unpredicted factors. If "dynamic complexity" of changes dominates, direct intervention usually does not give the expected result (Senge, 1990, p. 365).

M. Wallace and K. Pocklington (*op.cit.*, p. 39 – 41) when analyzing reorganization of the network of schools have distinguished five factors influencing complexity of change: large volume, activity disassembling, systemization, differentiated impact and dependence on the circumstances.

#### *Process of reorganization from the point of view of strategic theories of change control*

Balance of opposite forces is necessary for the reorganization of the network of schools. E.F. Huse and T.G. Cummings (1985, p. 73) have supplemented K. Lewin's theory of "field of force" by the model of interaction of these forces.

Providing the model of "field of force" theory, K. Lewin has classified the sources of opposition to change into three groups: culture of organization, personal interests and individual understanding of the aims and strategies of the organization (Stoner *et al.*, 1995, p. 408 – 409).

E. Schein has called the second stage a transformation through change of cognition. In this stage the way of seeing, evaluating and feeling the reality and reaction to new status of organization is formed. Organization members must identify themselves in the new situation and get adequate information from the environment. The third

stage “freezes”, stabilizes the achieved state for evaluation of efficiency of performed actions (Schein, 1987, p. 128). R.L. Daft (1995, p. 416) has claimed that the primary stage of change of institutional status must be the setting of need to change the status of the organization.

***The context of the restructure of the Lithuanian and Šiauliai city educational system***

The research of the student consisted of three parts: 1. Theoretical basis of the research; 2. Analysis of the environment situation (country and city); 3. Analysis of school situation and strategy of activity. When analyzing the situation of the environment of the school the student focused on the analysis of reorganization of network of schools in the country and in the city.

*The restructure of the Lithuanian educational system*

In 1998, during the second stage of the Lithuanian educational system's reform, the Board of Education confirmed the harmonization of the educational system, as one of the most important priorities. It showed the necessity for the formation of a permanent educational system in Lithuania, which conditioned the development and improvement of the educational institutional network.

*The restructure of the Šiauliai city educational system*

The reform of the general education school network was started in Šiauliai in 2000, according to the act entitled “The establishment of the profiled education into the general education institutions third level” which states that profiled classes shall be formed in general education schools, that fulfill the requirements of the Secretary of State for Education. This document caused some changes in the general education school structure. Within the Šiauliai school network appeared some profiled schools, which planned in the future to become either gymnasium or basic school (after accreditation), and secondary schools without profiled teaching at once reorganized into basic ones.

***Teacher's qualification – the criteria of institutional structure. The importance of qualification for the diagnostics of school type***

In the Master's thesis the student has analyzed the influence of three criteria on choosing the type of school: the teachers' qualification, the number of students and the educational environment. However, due to the lack of space this article is limited to the analysis of the teacher's qualification.

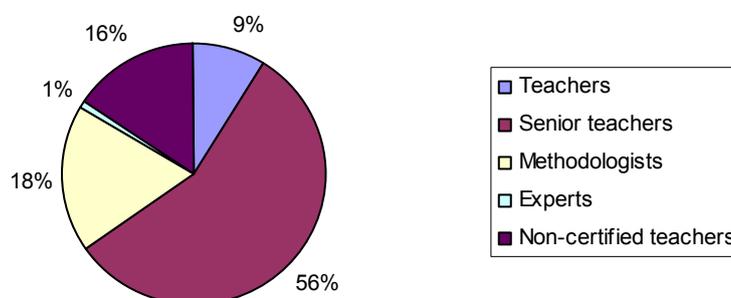
In the context of reorganization of the general education school network, while diagnosing the institutional status one of the priorities is the qualification of the pedagogical staff. This is related to the organization of teachers' training, the in-service training, and the preparation of a new pedagogue competence evaluation system. The indicator for a qualified teacher was determined, as the qualification category obtained by the attestation. Thus, this indicator can be essential in meeting

the changes in the educational institution (either gymnasium or basic school) and planning its development strategies.

*Teacher's qualification characteristics in the general education schools of Lithuanian*

The Lithuanian Municipality Educational Digest statistical data of 2002-2003 and 2003-2004 year were chosen for the analysis of general education schoolteachers' qualification indicator.

General education schoolteachers' distribution according to their qualification categories in 2004-2005 is shown in figure 1.

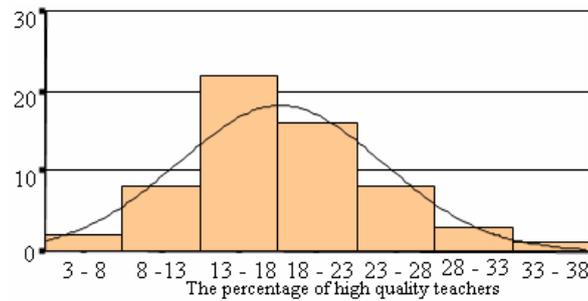


**Figure 1.** Distribution of general education school teachers, according to their qualification categories at the beginning of 2004-2005 (%) (the data source: Lithuanian Municipality Educational Digest of 2003-2004)

It can be noticed from this chart that the majority of Lithuanian general school teachers' have senior teacher's qualification category i.e. 56 % (having more than 4-year pedagogue's experience) are qualified specialists. Almost one-fifth (18 %) of teachers possess a methodologist's qualification category.

While diagnosing the suitability of a secondary school for the status of either basic school or gymnasium, from the teachers' occupational and subject competence perspective, the number of pedagogues, possessing high qualification categories (methodologist and expert teachers) is important. From the research of statistical data taken from the Lithuanian municipality educational digest of 2003-2004 it is evident that the number of high quality teachers (methodologist and expert teachers) varies in different general education schools (figure 2).

The data shows, that the number of high quality teachers (methodologists and experts) in different general education schools (kindergarten, primary, basic, secondary school and gymnasium) differs from 13 % to 18 %. From the data of the picture 2 it can be seen, that only in a few municipalities the number of high qualified teachers in general education schools is either as low as 3-8 % or as big as 28-33 %.



**Figure 2.** Distribution of Lithuanian municipalities according to the number of high quality teachers (methodologists and experts) (the data source: Lithuanian Municipality Educational Digest of 2003-2004)

*The characteristics of teacher's qualifications in Šiauliai municipality's general education schools*

In order to evaluate the qualifications of Šiauliai general education school teachers the information was taken from the digest of Šiauliai municipality statistical data for 2002-2003 and 2003-2004.

The comparison between the qualifications of Šiauliai city and State teachers showed that the results were quite similar. The concentration of teachers (possessing different qualification categories) in different types of Šiauliai city general education schools is shown in the table 1.

**Table 1.** The distribution of teachers possessing different qualification categories in different types of Šiauliai city general education schools at the beginning of 2004-2005 (%)

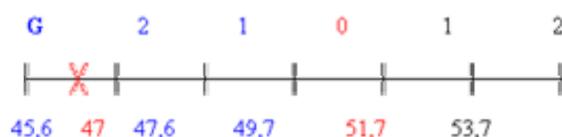
Qualification category The type of school	Teacher		Senior teacher		Methodologist		Expert		Non-certified teacher	
	In sum:	%	In sum:	%	In sum:	%	In sum:	%	In sum:	%
Kindergarten	4	13,3	16	53,3	2	6,7	0	0	8	26,7
Primary school	15	12,1	78	62,9	26	21,0	0	0	5	4,0
Basic school	47	8,2	323	56,1	105	18,2	6	1,0	95	16,5
Secondary school	16	1,7	490	51,4	272	28,5	13	1,4	162	17,0
Gymnasium	3	1,8	48	28,9	69	41,6	8	4,8	38	22,9

Šiauliai municipality according to the number of methodologists and experts in all types of its general education schools (kindergartens, primary, basic, secondary schools and gymnasiums) belong to the type of municipalities having quite a high rate of methodologists and experts.

### *Characteristics of teachers' qualification in Šiauliai Gytariai secondary school*

Analyzing Šiauliai Gytariai secondary school's possibilities from its teachers' qualifications point of view (in the context of optimized general education school network) scales of five scores, in which zero point is understood as an unimportant indicator, are proposed. The meaningful indicators are 1 and 2 scale meanings, which are divided in the scale into two groups. 1 and 2 score meanings are calculated according to the numbers of all categories of teachers in State's basic schools and gymnasiums.

The evaluation of Šiauliai Gytariai secondary school teachers' qualifications is given in the State's basic schools' and gymnasiums' senior teachers' scale (refer to picture 3).



**Figure 3.** The evaluation of Šiauliai Gytariai secondary school teachers' qualifications in the State's basic schools and gymnasiums senior teachers' scale

It is seen from the scale that the institutional senior teacher's qualification category's meaning is close to the State's gymnasiums' senior teacher's qualification category's meaning. This meaningful indicator is bigger than two scores in the gymnasiums' indicator scale, thus it can be partially viewed as meaningful for Šiauliai Gytariai secondary school when choosing the status of a gymnasium.

When the school is choosing the status of a gymnasium the number of experts looking from statistical perspective is especially meaningful. In the scale, the institutional level is fixed outside the scale of gymnasium indicators.

### ***Conclusions from the student research***

Having carried out research on the qualitative composition of Gytariai secondary school teachers, we may state that:

1. The proportion of experts differs widely from the results of the country and region (the experts at school constitute 5%, while in the country and region – 1%).
2. More than a fifth (23%) of school teachers are not certified.
3. The dominant of the qualifying category of senior teacher prevails (47% of all school teachers).
4. The statistical value of supervisors belongs to the corresponding interval of the region (20 – 30% interval).
5. According to the proportion of high qualification teachers the school is classified as a national gymnasium where the proportion of supervisors and

- experts is twice the proportion of supervisors and experts at secondary schools of the country.
6. The indicators of the statistical value of the school's senior teacher, teacher, supervisor and expert qualifying categories fall into the scale of the corresponding categories of the gymnasiums of the country.
  7. The value of the teachers without assessment is unrelated to the diagnostics of institutional status.
  8. We have found the basis for the following propositions:
    - At Lithuanian comprehensive schools the number of teachers with assessment is growing; pedagogues with senior teacher qualification prevail at 56%; the number of high qualification teachers markedly differs at comprehensive schools of the country (from 3% to 38%); there are more teachers with higher qualification at gymnasiums than at secondary schools.
    - According to the proportion of high qualification teachers gymnasiums of the town fall into the group of gymnasiums of the country, where supervisors and experts constitute 43 – 48%; the proportion of high qualification teachers at secondary schools is twice the proportion of high qualification teachers at lower secondary schools; the proportion of supervisors and experts at gymnasiums is twice the proportion of supervisors and experts at secondary schools.
    - The qualification of teachers enables Gytariai secondary school to choose the type of gymnasium.

## Conclusions

1. In the investigated Master's thesis a wide analysis of country, city and school documents has been carried out, statistical methods of computer quantitative analysis have been applied and qualitative interpretation of statistical data has been carried out.
2. In the thesis analysis of empirical data dominates theoretical part, which amounts to about 20 percent.
3. The theory analyzed in the thesis indicates that restructuring of network of schools in the country is an integral part of the theory of management of strategic change.
4. The Master's thesis meets the requirements of research methods: the student has carried out the research of the main problem in her working place and formed the basis for the solution of this problem with research results and generalizations. Thus the student has proved that she met the qualification of postgraduate level specialist – researcher of management.
5. This article was prepared based on the *case study* method: several aspects of one Master's thesis were analyzed. The aim of the article was achieved – it was shown that information from the environment serves as didactic material for students' theses.

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# **Development of textual competence during students' work with multimodal learning material**

Marie Falkesgaard Slot

## **Introduction**

The purpose of this article is to discuss *text* and *textual competence* seen from the perspective of development of concepts for description and understanding interaction between pupils, teacher and learning materials related to development of textual competence in the subject Danish in upper secondary education. My field of research is, thereby, in between development of textual competence and learning material development. A catalogue of learning materials will investigate questions like which combinations suits different kinds of learning goals best. Theoretically the project is based on Nordic research on learning material and pedagogical texts (Selander, Skjeldbred, Wikmann, Skyum Nielsen) and research on text- and media pedagogy by English researchers (Kress, Van Leeuwen, Buckingham). The two traditions build up a double perspective on the domain of research: pedagogic questions are to be asked related to pupils processes of work and text pedagogic questions are to be asked related to concepts of texts- and media types presented in different kinds of learning materials.

## **A catalogue of learning materials**

One agenda is the necessity to put different kinds of learning materials on the educational agenda in mother tongue agenda in Denmark and the Nordic countries. To teach multimodal texts and assign a high priority to a broad textual competence development, it is necessary to choose learning materials that facilitate these visions, that is, at a minimum to choose learning materials that facilitate multimodal textual competence development as well. The catalogue covers a wide range of competence, relevant for textual competence development in the subject of Danish; a textbook focusing on the four main areas in the subject of Danish, oral- writing- reading- and rhetoric competence, a cd-Rom focusing on textual openings based on both a linguistic and hermeneutic approach to text work but mostly training grammatical and linguistic competence. The third material is an interactive film, constructed in a way that gives the pupil possibility to develop narrative and digital competence (Tyner, 1998), and then finally I am working with a web-based learning material related to the textbook. The chosen learning materials are available designs, in the sense that I did not combine materials which are difficult to attach, or extremely hard to use.

## What is a text?

What I want to discuss first are some definitions of text. Humans have always been questioning what characterises a text. The answers that have been given differ, because our text conceptions are changing through time and space. At the same rate as we indeed face a lot of new electronic texts, facilitated by new technology, we see a very fruitful recasting between new and old texts like hypertexts, intertextuality and so on. These new text types broaden our understanding of text, and also change the common understanding of textual competence. Theoreticians build up discussions about what consequence new text- and media types have for the production of new narratives (Ryan, 2004).

Selander and Skjeldbred (2004) go back to Ricœur's essay: "What is a text". Ricœur discusses the relation between speak and text, and concludes that texts, in one way or another, are spoken or written texts. But today it is a narrow definition, because it makes it difficult to study the boundary surface between for instance literature and media types as they occur in a wealth of new text types these days. But of course text in Ricœur's optic in 1973 could not have been an internet web side, a computer game or an interactive narrative. Social, cultural and economic factors and new kinds of artefacts mean that we must give different answers to Ricœur's question: What is a text? It seems that we need a flexible and broad definition. I find that in the understanding of text that Gunter Kress and Theo Van Leeuwen expose because they are aware of discussing mode and multimodality (Kress, Van Leeuwen, 2001). Nevertheless, it will be too much of an effort to refer the semiotic and sociocultural theories which covers the foundation behind Kress and Van Leeuwen's thinking. Therefore I will only pick out a small fragment on what is said about the concept of text. According to Kress and Van Leeuwen a text is a result of a social action and is always in a context, somebody does something in social, economic and cultural ways with texts. The discourses under which texts are constructed must therefore be analysed to see how a current text occurs:

*"There is an important question of naming and definition to be dealt with around the term text. Does it refer to linguistically realised entities alone? Or only to those realised in Writing? Can it include entities which consist of image and writing? And if it can, do we then refer to the written part of the text differently than we do the visual?"* (Kress and Van Leeuwen, 2001)

Understood as a broad definition, I find the statement useful, but also traditional. We have made use of definitions like this since it became clear that an "old" text concept like the one Ricoeur stands for no longer can stand alone. Most text books was earlier carried by writing – today textbooks communicate via images of different kinds and appear in multimodal forms, and it gives opportunity to broadcast new affordances and constraint's – in schools also.

### **Texts in schools**

Many possibilities have emerged. Electronic texts establish new forms of meaning-making processes, and researchers are talking innovatively about possibilities when

putting electronic texts on the school agenda. But in spite of the arise of for instance interactive narratives which shift the framework for literary production in schools, one becomes a bit exhausted, taking a look at formal learning contexts “in situ”. Schools do not have money to buy learning materials, they do not necessarily have the equipment, or money to buy re-education. Also, didactic questions stress out that not all texts are relevant just because they exist, and therefore it must be questioned how to work progressively with different text types in learning setting. In a critique on the concept of text Swedish professor Caroline Liberg points out the importance in discussion which types of texts can be considered as relevant in the subject of Danish. She also pinpoint the potential in pupils and teachers work with complex and dynamic text concepts because it shows realistic types of processes and products can be developed. Altogether, Liberg discusses the concept of text concept but also the possibility for development of textual competence more broadly. (Liberg, 2003) We have to consider how we want these different kinds of texts to be used, which role they should play, speaking in the terms of competence.

#### ***Development of textual competence***

The textual competence development is a goal in the subject of Danish at every level of the educational system. You find research on the domain in all levels of the educational system, while the ground steps have been taken in the research field of primary school since the 1980's in Denmark. Research on textual competence in upper secondary Education in Denmark is by contrast a newly established research field.

In the Nordic countries you only find one book in the field: *Textual Competence* (Hetmar, 2001). It covers a wide range of projects done by Nordic researchers in the year 2001. You find research on reading competence, text pedagogy, text linguistic competence etc. When reading this collection of suggestions of what textual competence might be in the 21<sup>st</sup> Century, it strikes me that these articles define text and textual competence in quite a traditional way. The development of textual competence means writing and reading letters on paper. However, to study different approaches to the development of textual competence, when the concept of text is a moving target is rare. Even though I find the definition a bit narrow, the book is a starting point in finding some kind of state of the art on the research done on the development of textual competence in the Nordic countries. I am interested in defining a broad frame discussing which kind of textual competence development in the future. We need broad terms to decide the kind of readers we do wish, and which repertoires of textual capacities citizens need within the next twenty or thirty years. In my opinion, we have to deal with text- and media types in the future, and point towards educate textual readers, who have a lot of different competences which they can activate at the same time – gathered in the term textual competence.

Colleges in Denmark and abroad have for several years done research on different kinds of competence related to the subject of Danish, and thereby an increasing

amount of knowledge about reading and writing competence or literacy is available. (Knobel and Lankshaire, 2003) Vibeke Hetmar defines textual competence:

*Textual competence is at one time a designation concerning a general, cultural anchored resource and a specialization that puts the subject in a position to respond appropriately in specific textual actions / literacy events (my translation, Hetmar, 2001, 17)*

Hetmar understands textual competence as reading competence and the ability to choose a reading strategy. She also argues that the development of textual competence is a development of working methods. Hetmar's research in the 1990s also meant that literature teaching and text pedagogy gradually became a confront with a certain kind of "correct" reading, and a new inspiration to practice a subject oriented text pedagogic inspired by American reader-response theories raised. *Reception* became a buzz-word, and teachers talked on conferences and in classrooms about "holes in the texts" presented by Umberto Eco and "reading for plots" presented by Peter Brooks. Gun Malmgren concludes on this development:

*"One of the conclusions in this Danish - Swedish cooperation has been that it is no longer interesting to play theories of competences out against theories of socialising. Our experiences from research cruises tell us that instead of going apart we have everything to win if we do cooperate. Will we be able to get more knowledge about the room of reading as Vibeke Hetmar has been studied, we are another step along the road. I memorise when Birthe Sørensen introduced the concept teacher's text and pupil's text to show how problematic it can be when a text is preformed in a classroom" (Malmgren, 1999).*

I call on this review because the consistency of what was said experienced an enormous reaction in the Nordic way of defining textual competence. Textual competence surely became an issue, an ability that pupils already were in possession of and moreover; their readings and interpretations were taken seriously on equal terms as the teachers' readings. Text pedagogy became a work between professionals, not considering that teachers and pupils had the same professional qualifications, but the pupil was looked upon as a recipient just as the teacher. In that way the theories of reader-response inspired a generation of teachers and researchers to focus on pupils' development of textual competence and pointed out the importance of the parallel between textual competence and methods of works. In the late 1990s, we saw, in Denmark, a rising research field related to upper secondary education. The contribution of this work means that we have some knowledge about pupils' and teachers' way of thinking of competence with texts. These reflections were split into a lot of different kinds of competences; to comprehend and analyse literature, to have reading competence, to have linguistic competence. These studies form my starting point. But on the other hand, research domains, in which textual competence in the subject of Danish studied as separate units challenge my understanding of the subject of Danish and stimulate my curiosity towards finding different ways in study patterns of pupils' learning processes and progression related to learning materials.

## Textual competence in my optic

Textual competence is not a neutral, but a normative concept which actors of any part of the education system negotiate and struggle for. The discussions of textual competence are about which kind of readers we want to educate in the future, and related to the more generally discussion of competences now and in the future. It is decisive who is defining textual competence and in what contexts it is done. In my opinion textual development has to be discussed in relation related to the practices in which learning processes take place. My own position is biased as well; because I studying textual competence between pupils, teachers and learning materials, I consider my catalogue of learning material built on a bottom-up view. To study textual competence in school settings “in situ”, in different kinds of texts, with different kinds of modes and media, facilitated in different kinds of technologies, is the aim of my PhD project, because I claim that it is of major importance to look broadly at competence development in learning settings. Textual competence is the ability to comprehend and use different kinds of multimodal texts which we meet and interact with in every day life. Textual competence is the ability to read multimodality aspects into a text - like a weather forecast, interactive contests on TV, and instructional texts on hair dying products etc. When it comes to education in mother tongue, you put the concept of textual competence into a systematic work with texts. Therefore I define textual competence related to the subject of Danish as:

*Textual competence in the subject of Danish is the ability to use a broad set of dynamic and changeable textual assumptions that allow one receptive and productive to glide through multimodal texts with an understanding, commitment and critical distance.*

With this socio cultural definition of what it is to be competent with texts I will analyze my data and give answers to the following questions related to development of textual competence:

- What are the affordances and limits expressed in the learning material catalogue which I have constructed, when it is about students possibilities to develop textual competence in the subject of Danish?
- To what extend is it possible to bring innovative working processes related to textual competence development into the learning material catalogue?
- What specific modes in learning materials have a learning potential of a particular kind in textual competence development in the subject of Danish?

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