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Globalisation and Historiography of National Leaders

Symbolic Representations in School Textbooks

Springer

Globalisation, Comparative Education and Policy Research

Volume 18

Series Editor
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Aims and Scope

The *Globalisation, Comparative Education and Policy Research* series (Vols. 13–24) aims to present a global overview of strategic comparative and international education policy statements on recent reforms and shifts in education globally and offers new approaches to further exploration, development and improvement of comparative education and policy research globally. In general, the book series seeks to address the nexus between comparative education, policy, reforms and forces of globalisation.

The series will present up-to-date scholarly research on global trends in comparative education and policy research. The idea is to advance research and scholarship by providing an easily accessible, practical yet scholarly source of information for researchers, policy-makers, college academics and practitioners in the field. Different volumes will provide substantive contributions to knowledge and understanding of comparative education and policy research globally. This new book series will offer major disciplinary perspectives from all world regions.

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To Rea, Nikolai, Sophie, Imogen, Belinda, Paulina and Dorothy

Foreword

The major aim of *Globalisation and Historiography of National Leaders: Symbolic Representations in School Textbooks*, which is volume 18 in the 24-volume book series *Globalisation, Comparative Education and Policy Research*, edited by Joseph Zajda, Tatyana Tsyrlina-Spady and Michael Lovorn, is to present a global overview of selected scholarly research on the social, cultural and political constructs of national leaders and their symbolic representation in school history textbooks. The book critiques dominant historical narratives and the 'hero' concept. The book argued that meanings derived from text and image alike, of course, impact how students perceive their country's history and their active role within it. By employing critical discourse analysis, multimodal analysis and social semiotics, this approach is likely to make an innovative contribution to the critical analysis of language and signs used in the history classroom. Above all, the book offers the latest findings on discourses surrounding trends on the construction of national heroes in school textbooks in the global culture.

The book explores the ambivalent and problematic relationship between the state, globalisation and history education discourses. Using a number of diverse paradigms, ranging from critical theory to globalisation, the authors, by focusing on globalisation, ideology and history education, attempt to examine critically recent trends in the political constructs of national leaders in school history textbooks and their impact on identity politics.

The authors focus on major and dominant discourses surrounding three major dimensions affecting the construction of national heroes in school textbooks: *national identity*, *democracy* and *ideology*. These are among the most critical and significant dimensions defining and contextualising the processes surrounding the nation-building and identity politics globally. Furthermore, the perception of globalisation as dynamic and multifaceted processes clearly necessitates a multiple-perspective approach in the study of national leaders and their symbolic representation in school history textbooks, and this book provides that perspective commendably. In the book, the authors, who come from diverse backgrounds and

regions, attempt insightfully to provide a worldview of current developments in research concerning national leaders and citizenship education globally. The book contributes, in a very scholarly way, to a more holistic understanding of the nexus between nation-state, school history textbooks and national identity globally.

Melbourne, VIC, Australia   Joseph Zajda

Preface

Globalisation and Historiography of National Leaders: Symbolic Representations in School Textbooks, which is **Vol. 18** in the 24-volume book series *Globalisation, Comparative Education and Policy Research*, edited by Joseph Zajda, Tatyana Tsyrlina-Spady and Michael Lovorn, presents a global overview of the nexus between nation-building, national leaders and history education globally and implication for democracy, cultural diversity and social justice.

History education and history textbooks have attracted a great deal of debate recently. Recent research on globalisation and education policy has indicated that forces of globalisation and accountability have affected the nature and the value of prescribed school textbooks in Russia and elsewhere. Since 2006, teaching 'national history' featured high on the agenda in many European countries. Recent and continuing public and political debates in countries around the world, dealing with understandings of the use of national leaders in the nation-building and national identity, point out to parallels between the political significance of school history and the history debates globally. Due to these ongoing debates concerning the role of history teaching in schools and its content and delivery, history education has become a high-profile topic of national and global significance.

The 'Europeanisation' of history textbooks in the EU is an example of Western-dominated grand narrative of pluralist democracy, multiculturalism and history textbooks, according to the canon of a particularly European dimension. Both the 'Europeanisation' of history textbooks and politically motivated reforms in history curricula and textbooks demonstrate a new dimension of political socialisation, by preferred portrayal of national leaders, and the nation-building process, currently taking place in the global culture.

The impact of globalisation on education policy and reforms, and history textbooks in particular, is a strategically significant issue for us all. The volume focuses on the importance of national leaders, nation-building and patriotism in history textbooks globally. It presents an up-to-date scholarly research on *global* trends in historiography of national leaders and their symbolic representations in school history textbooks. It provides an easily accessible, practical, yet scholarly, source of information about the international concerns in the field of globalisation and history

textbook research. The volume, as a sourcebook of ideas for researchers, practitioners and policy-makers in globalisation and history education, provides a timely overview of current changes in dominant historical narratives depicting national leaders.

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Editorial by Series Editor

Volume 18 is a further publication in the Springer Series of books on *Globalisation, Comparative Education and Policy Research*, edited by Joseph Zajda.

The major aim of *Globalisation and Historiography of National Leaders: Symbolic Representations in School Textbooks*, which is Vol. 18 in the 24-volume book series *Globalisation, Comparative Education and Policy Research*, edited by Joseph Zajda, Tatyana Tsyrlina-Spady and Michael Lovorn, is to present a global overview of selected scholarly research on the social, cultural and political constructs of national leaders and their symbolic representation in school history textbooks. The book critiques dominant historical narratives and the 'hero' concept. The book argues that meanings derived from text and image alike impact how students perceive their country's history and their active role within it. By employing critical discourse analysis, multimodal analysis and social semiotics, this approach is likely to make an innovative contribution to the critical analysis of language and signs used in the history classroom. Above all, the book offers the latest findings on discourses surrounding trends on the construction of national heroes in school textbooks in the global culture.

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The authors focus on major and dominant discourses surrounding three major dimensions affecting the construction of national heroes in school textbooks: *national identity*, *democracy* and *ideology*. These are among the most critical and significant dimensions defining and contextualising the processes surrounding the nation-building and identity politics globally. Furthermore, the perception of globalisation as dynamic and multifaceted processes clearly necessitates a multiple-perspective approach in the study of national leaders and their symbolic representation in school history textbooks, and this book provides that perspective commendably. In the book, the authors, who come from diverse backgrounds and

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We thank the anonymous international reviewers, who have reviewed and assessed the proposal for the continuation of the series (Vols. 13–24), and other anonymous reviewers, who reviewed the chapters in the final manuscript.

Globalisation, Comparative Education and Policy Research Series Volumes 13–24

Series Editor

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Zajda, J. (2016) (Ed.). *Globalisation, ideology and politics of education reforms.* Dordrecht: Springer. http://www.springer.com/gp/book/9783319195056
Zajda, J. & Rust, V. (Ed.) (2016). *Globalisation and Higher Education Reforms.* Dordrecht: Springer. http://www.springer.com/gp/book/9783319281902

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Classroom. Zajda (2011), *Educational Practice and Theory*, *33*(1), 83–96; Zajda (2008). *Schooling the New Russians* (James Nicholas Publishers (2008).

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Chapter 1
Globalisation and Historiography of National Leaders

Joseph Zajda, Tatyana Tsyrlina-Spady, and Michael Lovorn

Globalisation and Historiography of National Leaders

In researching the construct of national leaders and their symbolic representation in school history textbooks we examine some of the taken-for-granted assumptions concerning nations, nationalism, and national identity. This will explain forces defining and constructing national leaders, and their perceived necessity in the nation-building process, both locally and globally. As Smith (1991) explained it is the image of the nation, in which 'nationalism creates national identity' (p. 71). This idea was developed further by Bourdieu (1984), where he analyses the nexus between the state and its power, and authority, to create national identities:

> …the state moulds *mental structures* and imposes common principles of vision…And thereby contributes to the construction of what is commonly designated as national identity (or, in a more traditional language, national character) (Bourdieu, 1984, p. 7).

From a sociological and cultural theory perspective, the construction of national identity is grounded in culture, historical narratives, and memory. As a sociologist, Hall (1996) stressed the significance of culture, and its major role in the construction of nations and national identities (Hall 1992). He described nations as 'systems of cultural representations' (Hall 1996, p. 200). On the other hand, Halbwachs

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(1980) argues that the construction of national identity, not only relies on a common history, but also on 'collective memory' (Halbwachs 1980). Furthermore, according to Assmann (1995), various types of collective memory, which Halbwachs 'gathered and analyzed under the concept of collective memory', represent the field of oral history (Assmann 1995, p. 126).

A number of researchers, working in the area of history textbooks education, have written on the necessity and importance of teaching national history in order to deepen the younger generation's understanding of their national roots and develop their sense of belonging to a certain society, state, and people (Anderson 1991; Smith 1998; Nash et al. 2000; Smith 2001; Kress & van Leeuwen 2001; Nicholls 2006; Janmaat and Vickers 2007; Campbell 2008; Allison and Goethals 2011; Lovorn and Tsyrlina-Spady 2015; Tsyrlina-Spady and Lovorn 2015; Zajda 2015). Progressive educators believe that history education in schools should provide students with a valuable critical thinking skillset and countless opportunities to involve in substantive conversation, to make real world connections, and to practice engaged citizenship (Rapoport 2012; Whitehouse 2015), and prevent them from being "handicapped by history" (Loewen 2007, p. 11). Traditionalists, on the other hand, argue that the primary purpose of history education is to foster patriotism and national identity among younger generations (Filippov 2007). Recently, Russian philologist and historian Marietta Chudakova (2014) expressed this idea in a generalized and emotional form, stating that the fate of Russia is in the hands of history teachers. Perhaps not in such a radical way as it has been in her home country where the himself oversees the process of composing history teaching standards and textbooks, As a result, it puts the analysis of current history textbooks into the range of very demanding and critical research subjects.

In researching and analysing the nexus between nationalism, national identity, and ideology, it is necessary to explain the current usage of these key concepts, which are subject to 'multiple definitions' (Hutchins 2016, p. 4).

Nationalism, as one the most dominant ideologies, refers to the belief that the sovereign nation-state represents a 'group of people who consider themselves as belonging to one nation and who share a territory (Hutchins 2016; see also Gellner 1983; Smith 1991, 1998).

National identity represents a specific cultural community, whose members are united by 'common historical memories, myths, symbols and traditions'. It denotes such elements as 'historic territory, legal-political community, legal political equality of members, and common civic culture and ideology' (Smith 1991, p. 11).

The term 'ideology' has numerous meanings and interpretations. On the face, it may be defined as a system of ideals that forms the basis of economic or political theory and policy. Ideology can also describe a set of ideas, beliefs, or values used to justify a particular social or political system. It can even refer to the hegemonic power or control of a dominant group (Zajda 2014).

While there exists a notable amount of data and publications that analyse the concept of a textbook itself, its role and place in the instruction and overall educational process (Altbach 1991; Braslavsky 2008; Hickman and Porfilio 2012; Johnsen 1993; Korostelina 2013; Woodward et al. 1993), there are also enough analytical studies, which examine the goals and content of national history textbooks

employing either a single country approach or a comparative analysis (Barnard 2003; Katsva 2013; Loewen 2007; Wineburg 2001; Zajda and Smith 2013; Zajda 2015).

Despite this wealth and wide variety of recent textbook-related research, relatively few studies have been published with a specific focus on the emphasis placed on heroification of political and military leaders. Representation of heroes in history textbooks has ideological, cultural, and pedagogical significance. Apart from preferred historical narratives and particular language employed, illustrations and visual images are also used to reinforce the cult of a hero (see also Voloshinov 1930, on the role of dialogical imagination in deconstructing the language). National heroes tend to be celebrated for the important roles they played in history. This is associated, at times, with a 'vision of national identity grounded in pride in a culture' (Hutchins 2016, p. 14).

We are critiquing the *choices*, as to who is and is not heroified in different cultures, and how such heroification impacts history education – be it political leaders, military heroes, or historical figures from the past – and the *ways* they are portrayed in these books, both verbally and visually. In this regard we are especially interested in examining the following questions:

1. How are heroes shown and described in national history textbooks? Specific foci on: (a) accuracy and objectivity of these presentations and descriptions; (b) perceived differences in amount and depth of information given about each individual; and (c) types and tone of vocabulary and descriptors.
2. What are graphic representations of each national hero? Specific foci on: (a) image make up, color, prominence, size, etc.; (b) airbrushing, falsification, and symbolism represented in graphics; and (c) use of caricatures, cartoons, satire.
    What ideological and moral agendas are involved in the descriptions of leaders and heroes? Specific foci on: (a) displays of leaders/heroes as moral exemplars; (b) hyper-nationalist or patriotic tones; and (c) differences in textual attention to more recent and/or current leaders/heroes.

The unpacking of ideological agendas embedded in choice and presentation (or silencing) of preferred national heroes allows researchers to decipher the imposition of a certain vision and version of history coming from the current political leadership of a particular country (be it directly or indirectly through federal guidelines or prescriptions). Or perhaps there are subtler yet more elaborate ways in which the people are coerced into "choosing" their own history textbooks. Either way, we observe that textbook selection or adoption committees often take advantage of their authority and do not hesitate to select textbooks based on their construct of heroes, role models, or moral exemplars for students.

We ground some of our understanding of heroes on innovative works by Carl Jung and his followers who did not only describe and prove that human beings immanently need heroes (Jung 1959), but also showed that constructing a hero who might have *a thousand faces* (Campbell 2008) is a never-ending job of myth-creation. The concept of a hero is unquestionably multilayered and consists of a number of important social, cultural and political dimensions defining a given master narrative and the choice of a particular hero. These affect our perceptions of who

chooses heroes; what are the criteria for this choice; what kind of cultural and historical biases exist in this regard, and which political and other circumstances are especially inclined to make the state rely on its national heroes in the process of educating younger generations.

This dilemma, surrounding the place and the need for heroes, was already eloquently expressed by Bertold Brecht in the American version of his play, *The Life of Galileo*, when one of the students speaking to the scientist exclaims, 'Unhappy is the land that breeds no hero.' Galileo replies: 'No, Andrea… Unhappy is the land that needs a hero' (Brecht 1971). Although in the present volume we do not go deeper into this discussion which might qualify for a separate book but we do keep it in mind trying to find out what kind of heroes, their numbers and qualities, different nations prefer to introduce to their younger generations – be it ordinary people, political leaders, or famous historical figures from centuries ago.

When a nation all of a sudden becomes particularly interested in searching for and bringing to the surface a number of its formerly forgotten or never remembered (or existed) heroes, it inevitably falls into a nationalistic trap of false memories and unreliable facts. As a result, historical accounts become embellished beyond recognition, creating an image that is far from being realistic but mostly apologetic and biased. This phenomenon is perhaps even more readily observable when nations prefer to create national heroes out of their political leaders who are still in place, and whose lives and reputations are shown as eminently spotless. One clear example here would be the image of President Vladimir Putin in Russia. At one of his Kremlin meetings with the members of the All-Russian historical assembly, Putin (June 22, 2016) addressed the issue of the importance of national "history as the basis of the national worldview" (kremlin.ru 2016), and received a unanimous support, with the writer Sergey Shargunov specifically emphasizing "that history also means *heroes*. And this is what our younger generation very often lacks – the knowledge about heroes including both – our glorious ancestors and the heroes of the present era."

Regarding teaching situations and required textbooks, which seem to become a frequent trend, heroes are represented as 'perfect creatures without conflicts, pain, credibility, or human interest' (Loewen 2007, p. 11). Loewen calls this process of 'heroification' degenerative and compares it to 'calcification' (p. 11) although he also concludes that depending on 'who our heroes are and whether they are presented in a way that makes them lifelike, hence usable as role models, could have a significant bearing on our conduct in the world' (p. 30). Psychologists Scott Allison and George Goethals (2011) enforce this idea with their research on heroes claiming, 'Heroes fulfil us emotionally… Heroes inspire us to aim higher. They make us feel good to be a member of the group or society in which they do their heroic work' (p. 188). This conclusion is even more powerful when applied to teenagers and young adults who qualify as the major recipients of this information about heroes. Thus, when current or recent political leaders are represented as national heroes, this supposedly blinds their critical thinking and triggers the feeling of patriotism in younger generations, and in this way often does the job of shaping them into true patriots of their land.

As discussed above, students around the world have long been instilled with a sense of national identity from the very onset of their academic careers. For well over a century, seeds of nationalist fervour have been sown as early as primary grades when students are commonly taught the lyrics of their national anthem or expected to mimic appropriate demonstrations of respect for national holidays, symbols, historical figures and events, and political officials. As those schoolchildren mature, prescribed and often mandated educational measures deepen and intensify through the heroification of past (and even present) political and military leaders and movements. Ideological frameworks and concepts that promote a sense of national pride and identity, particularly those involving hero constructs, continue to be implemented in various educational contexts as a means of advancing nationalist agendas. Such initiatives often compromise or even undermine the very historical thinking and historiographical analysis skills they claim to champion.

It is this seemingly paradoxical observation – that historical heroification in its many textual iterations increases ideological bias in the history classroom – that prompted this book. This collection of studies – authored by noted and emerging history education scholars from around the world – intends to present the reader with unique, contemporary, dynamic, and transnational lenses with which to view the many focal facets of this observation, and to make a bold, globalized contribution to what is known in this field of study. As expected, authors grounded their work in or utilized a wide variety of qualitative theoretical frameworks in the collection and analysis of their data and in reporting their findings. We discuss each of these frameworks briefly in our methodology section.

Methodology

In our approach towards the analysis of the social, cultural and political constructs of national leaders and their symbolic representation in school history textbooks, we combine and integrate both textual and visual approaches in history textbooks. We analyse and critique dominant historical narratives and the 'hero' concept. In our methodology, we employ critical discourse analysis, including multimodal analysis, critical theory, and social semiotics. This inter-disciplinary methodology can be more effective in analysing the complexity of social and political discourses, dealing with the national identity, and its resultant representation in dominant historical narrative in school history textbooks.

Theoretical Constructs and Assumptions

The constructs of the 'nation-state', 'national identity', 'nation-building', 'collective memory', and 'culture' are all interrelated in their role of constructing a collective sense of historical consciousness (Anderson 1991, Bourdieu and Passeron

1990; Fuchs 2011; Halbwachs 1980; Hall 1997; Wodak et al. 1999). We need to recognize that these are all mental constructs, defined and made meaningful by our own subjectivities, space (location and place), and the prevailing political and socio-cultural context. Furthermore, it is necessary to understand the way these social, political and cultural constructs are defined, and used in history textbooks. There is also a need to examine the use of language to communicate a new perception surrounding the discourse of identity politics, national identity as a sense of national belonging, and nation-building in various countries.

The Use of Critical Discourse Analysis (CDA) in Analysing Historical Narratives

Critical Discourse Analysis (CDA) means 'not taking things for granted, opening up complexity, challenging reductionism, dogmatism and dichotomies, being self-reflective in my research, and through these processes, making opaque structures of power relations and ideologies manifest' (Wodak 2007). Using CDA approach in analysing historical knowledge and understanding, the textbook is defined through a particular way of writing about the past. In the analysis of discourse of national identity (DNI), we will demonstrate how nations are engaged today in their attempt to construct the new national identity.

Critical discourse analysis (CDA) provides a theoretical framework through which researchers can critique intersections of society and culture (in this case, history education, national and gender identity) by examining uses of language in social or sociopolitical dynamics (Rogers 2011). Following one of the major theorists of CDA, Fairclough (2015), we employ his understanding of language as "*discourse*… [and] as social practice determined by social structures" (Fairclough, p. 51). CDA provides scholars with a tested design through which they may investigate how language creates inequality or injustice, and many use this theory to analyse relationships between dominant social, political, economic interests and other hegemonies (Darder et al. 2016; Fairclough 1995, 2015).

Deconstruction

Deciphering textual and visual approaches towards the construction of national leaders and their symbolic representation in school history textbooks, can also help us to understand the **symbiotic** (a biological metaphor) relationship between power, knowledge and stake-holders (an economic metaphor). It was Foucault who alerted us, in a post-structuralist sense, to the politics of the text and the knowledge-power connection. According to Foucault (1980), once knowledge can be analysed in terms of 'region, domain, implantation, displacement, transposition, one is able to

capture the process by which knowledge functions as a form of power and disseminates the effects of power' (Foucault 1980, p. 69).

Close-Reading

One of the favourite metaphors used by deconstructionists is that of the **palimpsest**—reading the text resembles the X-raying of pictures, which reveals, under the surface, another hidden layer. Derrida's method of 'close-reading' a 'text' uncovers a set of binary opposition and a number of taken-for-granted assumptions that are found 'inscribed' within the text. As Sarup (1993, pp. 50–1?) explains:

> In each of the pairs, private/public, masculine/feminine, rational/irrational, true/false, central/peripheral, etc, the first term is preferred.

Content Analysis

Content analysis was also a popular framework among our contributing authors. We surmised this was because, according to theorists, while it is a favoured qualitative methodology in studies of this nature, content analysis is also deemed an effective and efficient approach to identifying themes in and across textbook passages (Clandinnin and Connelly 2000), and because it is especially well designed for comparisons of narrative and historical text (Neuendorf 2002). Authors' identification of recurrent threads, themes, and omissions across textbook passages and accounts fit exceptionally well within the theoretical frame of content analysis.

Social Semiotics

Social semiotics focuses on how various sign systems communicate both explicit and implicit meanings to readers and viewers of these signs (Chandler 2007; Bakhtin 1981). According to experts Kress (2010), and Machin and Mayr (2012), the signing that occurs in diverse forms of human communication relies on semiotic codes that trigger recognizable cognitive and emotional associations by those who experience them, and then emphasizes how signs and their use in communication actually 'constitute' the world rather than merely represent it. Some of the volume's authors made a special effort to analyse the language of the textbooks with an explicit emphasis on *metaphors*, keeping in mind that the latter, particularly when they have a political nature, often 'hide aspects of reality', and help ideology remain 'dehumanizing' as described in the seminal work by George Lakoff and Mark Johnson (1980, p. 236).

Social Constructivist Transitiology

This theory of change was employed by Van der Walt, Potgieterand, & Wolhuter in their analysis of textual representation of two South African leaders – former State President F. W. de Klerk and his successor President Nelson Mandela. It is a relatively new theoretical framework, originally introduced by political scientists in the 1970s (for further details see De Wet and Wolhuter 2009) that allows scholars to concentrate on the analysis of changes. Cowen defines transitiology as:

> … the more or less simultaneous collapse and reconstruction of (a) state apparatuses; (b) social and economic stratification systems; and (c) political visions of the future; in which (d) education is given a major symbolic and deconstructionist role in these social processes of destroying the past and redefining the future" (cited in De Wet and Wolhuter 2009, p. 361).

Regardless of the critique of this theory and its obvious imperfections, it, nevertheless, provides a solid basis for analyzing textbooks especially for those nations that are undergoing political transition.

Memory of the Past in History

If we are to follow Nietzsche's and Foucault's notions of 'heritage' and 'genealogy' of relevance to 'truth in memory' of the past we could argue that the duty of 'Kundera's paradigm' (the term was coined by Richard Esbenshade in 1995 to explain the relationship in Eastern Europe between the State that erases and the memory that resists)—one of memory against forgetting (referring to Milan's Kundera's sentence 'The struggle of man against power is the struggle of memory against forgetting' in his *Book of Laughter and Forgetting*, 1981, p. 3) is to 'maintain passing events in their proper dispersions', where heritage is seen as 'an unstable assemblage of faults, fissures, and heterogeneous layers that threaten to fragile inheritor', rather than being 'an acquisition, a possession that grows and solidifies' (Foucault 1977, p. 146). Consequently, re-writing history could become destabilising rather than stabilising. The politically correct 'Grand Narrative' of nationalism and patriotism as a means of state's control of the citizen's historical memory can be subverted by plurality of endless and ideologically and culturally ever-changing narratives.

Conclusion

The theoretical approaches and frameworks employed in this collection of studies provide various lenses through which readers can deepen their understanding of the implications of heroification and uber-nationalism in history textbooks. Many of the

chapters also offer insights into the impacts of heroifying text and images on students' perceptions of national history, and their own identity. Understanding these dynamics is critical to a scholarly investigation and accurate description of factors that influence history education in the 21st century. A lateral investigation of heroification in history textbooks from around the world tens to be a unique, dynamic, and globalized way to pursue this deeper understanding.

These multiple frameworks also provide theoretical grounding that informs each chapter; contextualizes history text so as to foster the reader's unpacking of complex ideological and loaded meanings, and sets the tone for the book. Meanings derived from text and image alike, of course, impact how students perceive their country's history and their active role within it. We argue that this approach, where we employ critical discourse analysis, multimodal analysis, and social semiotics, is likely to make an innovative contribution to the critical analysis of language and signs used in the history classroom.

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Part I
Research Trends in Globalisation and Historiography of National Leaders: Symbolic Representations in School Textbooks: Europe and Russia

Chapter 2
Russian History Textbooks in the Putin Era: Heroic Leaders Demand Loyal Citizens

Tatyana Tsyrlina-Spady and Alan Stoskopf

Russian History Textbooks in the Putin Era: Heroic Leaders Demand Loyal Citizens

Heroic Leaders: Introduction

In the history of Soviet Russia and its post-perestroika period two leaders, Stalin and Putin, stand out as the most influential figures in reshaping the image of the nation and winning the hearts and minds of millions of Russians. The nostalgic revival of Stalin and the elevation of Vladimir Putin as a national hero in the state controlled media have affected all spheres of Russian society, especially history and civic education. This chapter examines how current day Russian history textbooks have become a critical instrument in promoting a valorized and uncritical representation of Stalin and Putin.

Playing an ultra-nationalistic card and using the concept of an unique Russian destiny and its special mission in the world, Putin has promoted anti-democratic tendencies by establishing personal control over virtually every sphere of life: economy, culture, education, sciences, mass media, and sports. This control also depends upon his ability to reconstruct and rewrite the past through a manipulation of patriotic language and imagery. The national history curriculum in the Soviet times and today has been oriented towards fulfilling its major social goal of developing pride in Russia' past and present and shaping school students into loyal Russian citizens,

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especially by utilizing the Russian notion of *hero* to achieve this type of loyalty to the state.

The use of the Russian cultural concept of *hero* is therefore of particular interest to us in our examination of Russian high school history textbooks today. Through a critical analysis of how language and visual imagery are used to construct the heroic identities of Stalin and Putin in textbooks we argue that these discursive practices aim to create faithful citizens in the present.

Literature Review

Our analysis of Russian textbook representations of Stalin and Putin is informed in part by Western and Russian scholarly research about these two political figures. There have been numerous studies about Stalin. Our own research has built upon those studies that focused on his rise to power and the brutal methods he used to maintain absolute control over the Soviet society. Grounding his book in statistical and archival materials Khlevniuk (2016) highlights Stalin's personal role in mass murders and the expansion of the vast GULAG network of slave labor camps across the Soviet Union. Kotkin's research (2014) has provided valuable insights about the effects of absolute power on Stalin's public and private self. Graham's work (1993) shed light on Stalin's infusion of Marxist ideology into Soviet research and in the process retarded Soviet advances in the biological sciences through his support of Lysenko and also purging those researchers who did not sufficiently espouse a Soviet party line.

Recent scholarship has also expanded our understanding of the ways Stalin was able to exercise control over Soviet life. His manipulation of religious symbols to enhance his control over Soviet life was the focus of research conducted by Ilizarov (2013) and Kurlyandskii (2011). The work of Khaustov and Samuelson (2010), and Conquest (2008) uncovered new archival sources documenting the scale of mass murder during the Stalinist era as well as the legacies of these crimes for Russia today.

The scholarship about Vladimir Putin continues to grow every year, especially relating to his actions aimed at suppressing civil liberties and human rights. Several researchers have examined how Putin has been able to create an authoritarian regime while often employing the rhetoric of democratic reform (Chebankova 2013; Dawisha 2014; Zygar' 2016). Malinova's (2015) examination of Putin's state decrees, official documents, and speeches reveals his attempts to suppress discussions about events in Russian history that draw attention to abuses of power and violations of human rights by Soviet and contemporary Russian political leaders. In a similar vein Goscilo's work on the creation of President Putin as a national symbol and an iconic figure in Russian society directly pertains to our own examination of Russian history textbooks.

Research into national history textbook narratives has provided an important foundation for our own study. In this regard Wertsch's work (2002, 2004) on the role

of schematic narrative templates has been instrumental in how we have approached the representations of Stalin and Putin in Russian textbooks. His recognition of the role national cultural motifs play in shaping collective memories has direct bearing on our own examination of the hero concept in relation to Stalin and Putin. Similarly, more recent research into how national history textbooks attempt to shape students' understandings of the past through the use of dominant cultural narratives (Barton and Levstik 2008; Carretero 2011; Foster and Crawford 2006) have been relevant to our own work, especially in how national myths are used to construct loyalty to the nation state in the present. In the field of Russian history textbook analysis similar studies about engendering loyalty to the state have been conducted by Korostelina (2013), Nelson (2015), Volodina (2005), and Zajda (2013, 2015).

Our own research has laid the groundwork for the study we discuss in this chapter. In the Russian context Tatyana Tsyrlina-Spady has examined the role patriotism and nationalism play in the development of Russian history textbooks (Tsyrlina-Spady and Lovorn 2015; Lovorn and Tsyrlina-Spady 2015). Alan Stoskopf has explored the ways political violence has been embedded in the dominant narratives of American history textbooks (Stoskopf and Bermudez 2016). This present study builds on this previous work in new ways through a critical discourse and visual analysis of the heroic depictions of Stalin and Putin in current day Russian history textbooks.

Research Design

Research Question and Purposeful Sample

Our interest in the ways Russian history textbooks attempt to exert social control of its citizenry is guided by the following research question: How do the lexical and visual representations of Stalin and Putin as heroes in current Russian history textbooks attempt to shape loyal citizens in the present? We have chosen two textbooks to conduct this examination. Both textbooks have practically the same title: *History of Russia: Beginning of the 20th Century to the Beginning of the 21st Century*. Grade 10 (2016) but have two different teams of authors led by A.V. Torkunov and O.V. Volobuev respectively and published by separate publishing houses.[1]

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[1] In keeping with Russian state policy approved books in school subjects for assigned grade levels have the same title.

Theoretical Framework

Critical theory and social semiotic perspectives inform our examination of the two textbooks. Critical theory's attention to how dominant socio/political/economic interests structure and maintain their privileged status (Darder et al. 2016; Felluga 2015; Tyson 2014) is particularly relevant to our inquiry. The processes by which powerful elites exert domination over subordinate groups are both multifaceted and vary in how they are expressed in different cultural contexts (Ashcroft et al. 2013). In our own work we seek to better understand how the social messaging embedded in Russian history textbooks perform ideological[2] functions that serve to enhance and solidify the centralization of power for the present day government of Vladimir Putin. The ability of a political regime or any dominant center of power to achieve compliance among a wider population often relies on methods of persuasion found in discourses[3] familiar to a particular society (Billig 1987). Therefore, for our analysis this means closely parsing through the language and imagery of persuasion, which often is presented as 'benign' or 'neutral' but in fact seeks very specific social and self-aggrandizing ends.

With our focus on the lexical and visual representations of *hero* in Russian textbooks, we make use of social semiotic theories. Semiotics as a field of inquiry has focused on how sign systems communicate both explicit and implicit meanings to readers and viewers of these signs (Chandler 2007; Rogers 2011). Signs are embedded in all forms of human communication from speech, written text, visual imagery, sounds, postures, etc. Depending on a particular cultural context the signing that occurs in diverse forms of human communication relies on semiotic codes that trigger recognizable cognitive and emotional associations by those who experience them (Kress 2010; Kress and van Leeuwen 1996). The field of social semiotics emphasizes how signs and their use in communication "do not just represent the world, but constitute it" (Machin and Mayr, p. 19).

We draw upon social semiotic perspectives when examining the symbolic and coded importance of language and visual imagery surrounding the Russian concept of *hero* in Russian history textbooks. The use of particular metaphors, word choices, and visual design elements in the construction of the hero concept represent semiotic resources employed for a social purpose. The semiotic choices made by the authors in the textbook accounts representing the past regime of Stalin and the current administration of Putin therefore help the reader place these figures into a recognizable discourse that triggers familiar associations by the reader. Our work

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[2] Our use of the term *ideological* refers in the broad sense to worldviews on how society should be organized. In this article it is associated with how dominant views of the ruling regime communicate what the natural order of Russian society should be.

[3] The term *discourse* has been defined in multiple ways by researchers in the social sciences and humanities. In this article we employ the term to mean "a particular representation of the world" (Machin and Mayr 2012, p. 219) done through "the social activity of making meanings with language and other symbolic systems" (Lemke 1995, p. 7).

examines how these representations occur and their possible meanings for Russian high school students today.

Critical theoretical and social semiotic perspectives enable a precise analytic approach for our work. Their respective emphases on understanding the ideological uses of power in dominant discourses and the ways text and image communicate culturally laden messages to readers of Russian textbook narratives go to the heart of our investigation.

Data Analysis

We have utilized a qualitative data analytic approach (Denzin and Lincoln 2011; Maxwell 2013) to the lexical and visual textbook data pertaining to the concept of the Russian *hero*. Applying a multimodal critical discourse analysis (MCDA)[4] sequence of *emic* and *etic* coding has allowed us to unpack and lift up for critical examination the social and political purposes of language and image. With our analytic focus on the Russian concept of *hero* we have employed the semiotic codes of *savior, unifier,* and *leader* to analyze how this concept is discursively used to arrange words and images to accomplish socio/political purposes. We base on the following code descriptions:

- *Hero as Savior***:** The hero revives the spiritual mission of the Russian people through the hero's defense of religion in the daily lives of its citizens and the promotion of culture and science in the society at large.
- *Hero as Unifier:* The hero promises to maintain the unity of the people in the face of internal and external enemies who seek to sow discord and doubt toward the authority of the state.
- *Hero as Leader:* The hero always reveals firm and absolute leadership in order to safeguard timeless Russian virtues and to protect the health of nation, and steer a course toward greater Russian glory in the world today and the future.

In this chapter we demonstrate how the above analytic approach has taken place, the central findings that arose from that approach, and the implications of this work for educational research and pedagogical practice.

Findings

Three findings emerged from our analysis of the textbook representations of Stalin and Putin as national heroes. They are:

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[4] MCDA recognizes that the analysis of communicative acts is not applied to only words but also includes visual, aural, and gesturing data. It still is rooted in a critical discourse tradition that is concerned with the linkages between symbolic expressions, cultural context, and power relations.

1. Alternating depictions of Stalin's heroic stature in the two textbooks enhance loyalty to Putin's heroic leadership in the present.
2. The two textbook representations of Stalin's policies of state sanctioned murder and false imprisonment serve to justify and obscure Putin's own violations of civil liberties and human rights today.
3. Opposition to the leadership of Stalin and Putin is portrayed as unpatriotic and injurious to the strength and welfare of the Russian nation.

We will now explain how the semiotic codes of *leader, unifier,* and *savior* were discursively employed in both textbook accounts to promote a particular ideological agenda. While we draw attention to the similarities and differences in the heroic depictions of Stalin and Putin in the two accounts, we emphasize in our summative comments that both books attempt to remake the past in order to insure compliance to the political regime of Vladimir Putin in the present.

Textbook 1. Torkunov (Ed.), 2016

Stalin

Throughout the textbook Stalin is portrayed as a strong leader who amassed power while Lenin's health declined. The very unconvincing statement that "Stalin was one of those who Lenin relied on in his struggle for leadership" (Part 1, p. 111) is supported by an undated photo of the meeting of the Council of People's Commissars (Part 1, p. 47). Here, Stalin is shown directly behind Lenin as if his closest ally, looking more alert and powerful than practically anyone else. However, the accompanying textbook account does not even mention his name, although it provides a detailed description of the importance of Trotsky and Dzerzhinsky (p. 46–49). As Khlevniuk (2016) indicates, "Stalin was not a leader of the revolution. But as one of the Bolshevik executives… he had important responsibilities. He followed Lenin, and this defined his role in the revolution" (p. 86).

The account argues that the Party almost immediately experienced "a regime of the sole power of Stalin, called 'Master' by every member of the Political Bureau," "a coryphaeus and a strategist," and "a teacher and a friend of the youth" (Part 1, p. 144). As a result, "in press, over the radio and during mass public events there was formed a cult of Stalin" (p. 144). However, the blame for this cult creation is shifted from the leader to the bureaucracy, stating only that Stalin "did not prohibit [it] when his name was given to cities, squares and streets…" (p. 144).

The most positive depiction of Stalin as a heroic leader is revealed in the description of his role in World War II. In fact, the Red Army was unprepared for war due to Stalin's decision "not to provide [Germany] any reason to accuse Russia of [violating the] non-aggression treaty" (Part 2, p. 12). That decision cost the nation hundreds of thousands of military and civilian deaths during just the first days of the war, and 4 473,820 during the first six months, according to the latest published

research data (Krivosheev et al. 2010) but this is downplayed in the text. The account is silent about Stalin's disappearance from public view for the first critical days of the invasion but acknowledges that he "became Supreme Commander" (Part 2, p. 12) soon afterwards, and brought the nation to its triumphant victory in the war that "on the part of the USSR was *just, liberating*, and *anti-fascist*" (Part 2, p. 13).

Besides his depiction as a victorious military leader Stalin also is represented as a leader who nurtured his people and their physical health through the development of a national sports system. The textbook recalls the story when, in 1936, tens of thousands of athletic young people, appearing in the largest annual sports parade at Red Square "simultaneously demonstrated the basic elements of popular USSR sports," chanting, "Thank you, Comrade Stalin, for our happy childhood!" (Part 1, p. 163).

Such a glorification of the national hero is not only lexically shaped but is also visually constructed. The textbook includes more illustrations of Stalin than of any other Soviet or Russian political leader during the last hundred years of the nation's history. To enhance the image of Stalin as a heroic unifier, the textbook mixes fact and fiction. For example, the account rightly names Lenin as the one who "initiated the resolution," which "in reality became a weapon against the dissent in the Party" (Part 1, p. 110). The text asserts that Stalin, preoccupied with maintaining the unity of the nation, applied this resolution in November 1927, and as a result, "over 2,000 active oppositionists were expelled from the Party. Many of them were sent into exile" (Part 1, p. 112).

However, the textbook also claims that it was due to Stalin that,

> Many [oppositionists] managed to receive forgiveness after they announced their readiness to subordinate to the party majority. Only Trotsky and his closest allies remained the most uncompromising. At the beginning of 1928 Trotsky was exiled to Kazakhstan and some-time later he was kicked out of the USSR (Part 1, p. 112).

The textbook fails to mention that Stalin had many of the "oppositionists" arrested again, as well as ordered the assassination of Trotsky in Mexico in 1940. Clearly, including such facts in the textbook account might have allowed student readers to question the dominant narrative.

While touching upon state sanctioned arrests and murders, the textbook discursively evades the human ordeal of those who were victims of these crimes. For example, it states, "Tens of thousands [of] participants [in] anti-Soviet meetings, representatives of the bourgeois and petty bourgeois, were deported to Siberia and other remote areas of the USSR" (Part 1, p. 145). The paragraph that comes next is even more illustrative, acknowledging, "After the period of mass repressions was over, Stalin did not claim himself guilty but accused the NKVD officers [of] violating the law. The executors of his criminal orders were punished" (p.145). One gets no sense of the degree and scale of human suffering in this use of language. The focus is instead shifted to Stalin as a hero-unifier, ready to protect the people in the face of enemies seeking to sow discord and doubt the authority of the state.

Another role ascribed to Stalin is that of the hero-savior before, during, and after World War II, who revived the sense of a spiritual destiny in the Russian people

through his defense of religion in the daily lives of Russians and the promotion of culture and science in the broader society. The textbook does not only proclaim that the rebirth of religious beliefs during the war was a very positive trend but also identifies Stalin as the one who initiated the process, giving no explanation of the actual reasons and simply ignoring the fact that in his youth Stalin himself was trained to become a priest, which contributed the usage of the terms *creato*r and *father* when he is referred to as the savior of the Soviet people.

In his particular role as a father figure for the country Stalin is literally the face behind a cultural revolution. This revolution is defined, on the one hand, as "a significant increase in the educational level of the populace and its exposure to the cultural achievements," and, on the other, as "the undivided dominance of Marxism-Leninism in the spiritual life of the society" (Part 1, p. 156). The textbook uses the term *spiritual* multiple times, intermixing Marxist and religious meanings without offering the reader any explanations, which solidifies the image of Stalin as a hero-savior of the nation. Furthermore, the textbook shows Stalin as a figure who helped revive the Russian Orthodox Church in Soviet society, which once again contradicts the historical record.

This textbook employs a more positive, less informative, and a significantly reduced critical approach in its portrayal of Stalin, who is represented as the Party unifier, a spiritual savior, and a powerful leader of a new and mighty nation. When mentioning Stalin's crimes and atrocities, the account uses neutral and banal language that serves to create a more positive response to Stalin's actions. Overall, the account underscores the sense that Stalin had no other choice but to take power into his own hands in order to steer Soviet Russia towards a more glorious future. This depiction of Stalin skillfully lays the groundwork for Putin's imminent arrival.

Putin

The portrayal of Vladimir Putin starts with a quote from President Yeltsin's resignation speech on December 31, 1999 stating, "Russia should enter the new millennium with new politicians, new faces, and new, smart, strong, and energetic people" (Part 3, p. 76). This description introduces the reader to why Yeltsin chose Putin,

> In [the] summer [of] 1999, V.V. Putin was approved in the position of Prime Minister of the Russian Federation. The decisive measures to keep Constitutional order in Chechnya, his fight with terrorists, his visits to the hot spots, his consistent and firm position in defending the unity of the country made him the most popular national politician in a very short period of time (Part 3, p. 77).

From his first steps on the national stage, Putin is shown to be a firm and resolute leader, one who can "reinforce Russian statehood" through introducing his own plenipotentiary representatives in the federal districts, reforming the Federation Council and creating the "United Russia" political party (Part 3, pp. 77–78). He is depicted as a hero-unifier who can protect the State from its enemies, such as terrorists and separatists, in order to safeguard enduring Russian principles and values.

The account acknowledges that the President's actions are almost unanimously supported among "the State Duma political forces" and "federal troops" (Part 3, p. 78), "new regional bodies of governance," and even "the Chechen population" (Part 3, p. 79).

In his role as a unifier, Putin is portrayed as making every effort to create a civic society in Russia by bringing together all public groups to establish a dialogue. For example, while delivering his keynote address at the Moscow Civic Forum in 2001, Putin praised the efforts of non-governmental organizations (NGOs) affirming that the "voice of the citizens should be one of the most decisive" (Part 3, p. 86). The textbook further states that one of goals "of the President's activities was to provide for the public unity and accord. Without splitting the society into "ours" and "theirs," – supporters and opponents of reforms – [Putin] managed to implement a number of measures that helped to consolidate the society" (Part 3, p. 78).

Mentioning "ours" and "theirs" and describing Putin's attempts to keep the nation together sends a subtle and powerful message that implies previous leaders, such as Stalin, fabricated enemies, as compared to Putin who made every effort to embrace different social circles. The image of Putin created by the textbook stands in stark contrast to what we know about the many Russians who have been forced into exile, imprisoned for criticizing his policies, and murdered (Browder 2015; Dawisha 2014; Hill and Gaddy 2015; Roxburgh 2012). All of these acts of repression are not mentioned in the text.

This silencing of dissent is also illustrated in how the textbook tries to explain the harassment of NGOs, "which happened to receive financial support from private corporations and from abroad" (Part 3, pp. 86–87). They are officially labeled as "foreign agents" and many have been banned from working in Russia. The textbook chooses to simply describe such organizations as those who "preferred to criticize power instead of establishing a dialogue with its representatives and build joint activities to find and satisfy people's needs" (Part 3, p. 87). Again, this is a sanitization of the truth and a whitewashing of reality. The account never calls attention to the 2012 law, which reintroduced the term "foreign agent," and as a result significantly reduced humanitarian assistance coming from the West.

The apotheosis of the presidential fame and glory and his readiness to safeguard timeless Russian virtues is demonstrated in the textbook through the account of the political situation in the Crimea. A long quote from Putin's Address to the Federal Assembly on March 18, 2014, completes the last chapter of this history textbook and is supposed to serve as a solid proof of his role as a national hero-unifier and leader:

> Practically everything in the Crimea is permeated with the shared history and pride. It is the ancient Chersoneses where Holy Prince Vladimir was baptized. Vladimir' spiritual heroism – a shift towards Christianity – predestined common cultural, values', and civilizational basis which unites the peoples of Russia, Ukraine, and Belarus. … Each of these places is holy for us; they are symbols of the Russian military glory and unprecedented prowess (Part 3, p. 106).

The religious tone and language of this passage is introduced earlier in the chapter when Putin is depicted as a hero-savior; the message is supported both textually and visually. For example, the textbook states, "at the beginning of the 21st century the relationship between the Power and the Church was built on the mutual desire to revive the greatness of Russia" (Part 3, p. 89). This statement is well illustrated by a photo of the President's meeting with the Patriarch of Moscow and all Russia Kirill (Part 3, p. 103). Putin's smiling face and body language, together with a relaxed posture of the Patriarch, demonstrate a very positive and friendly atmosphere of this meeting. Although placing Putin in the left corner of the picture – closer to the reader – and separating the Patriarch from the viewer by the table, leaves no doubt who, in fact, holds the power.

Putin also is represented numerous times as the leader who cares deeply about the promotion of culture and science and the development of such critical social spheres as education, "affordable housing," and "the agrarian and industrial complex" (Part 3, p. 84). Again, his efforts in this regard are unanimously supported by all segments of the population – "best teachers and teachers' teams" and "working mothers" (p. 84), and also by "philanthropic foundations, scientific, cultural and ethnic communities, environmentalists and human rights activists, staffing schools and business associations, women's and youth organizations, trade unions…" (Part 3, p. 86).

There is no critical representation of President Putin in the textbook. Instead, it reinforces his image as a strong leader, unifier, and savior, one that strengthens traditional Russian values of Orthodoxy, protects the national unity, encourages patriotism, promotes culture and science, and enables the Russian people to move forward into a greater Russian glory.

Stalin and Putin as Russian Heroes

The representation of both leaders in Torkunov's textbook includes a number of similarities and differences. Stalin is shown as a strong leader, savior, and unifier of all the Soviet people. Although cruel and unrestrained in his words and actions, Stalin is portrayed as acting under the pressure of severe circumstances; this is accomplished through the vague and understated language when referring to his crimes. This reasoning prepares the way for Putin to appear as the next powerful authority figure, who also is surrounded by enemies. Unlike Stalin he remains a force for good and does not commit any mistakes or crimes. Putin strives to secure national borders and protect ethnic Russians. Shifting his attention to the spiritual revival of the nation and enhancing its international reputation marks him as an ideal national hero worthy of veneration.

Textbook 2. Volobuev et al. (2016)

Stalin

Volobuev's textbook depicts Stalin's rise to power in a less flattering light than Torkunov's account. This is first evidenced when the text attributes Stalin's accession to power as largely due to Lenin's illness. At the same time the textbook emphasizes how Stalin was able to use the popular image of Lenin to advance his own consolidation of power. By skillfully manipulating Lenin's ideas, even coining the term "Leninism" and declaring that "socialism could win in one individual country" (p. 95), Stalin managed to destroy all opposition and gained the reputation of "a strong-willed, goal-oriented, and dangerous politician" (p. 95) who would stop at nothing to defeat his enemies and secure control of the Party and the nation.

While the textbook points out that Stalin developed a cult of personality, it also acknowledges that he was a powerful leader, reiterating the famous quote from his official biography, "Stalin is a worthy follower of Lenin's deeds, or as it is said in the Party today, Stalin is Lenin today" (p. 113). Among the multiple antagonists who Stalin had to defeat, imprison, and/or eliminate were not only individuals but also disparate groups such as "Krondstadt sailors" (p. 90), "anti-Soviet elements" (p. 91), "the kulaks" (p. 100), "NEP men and new bourgeoisie" (p. 118), "unreliable intelligentsia" (p. 126), and "Western enemies" (p. 100). As in the Torkunov's account, much of the text here uses some familiar Soviet era phrases, such as *enemies of the people* who worked at the direct instructions of *foreign intelligence services*, which is almost identical to Putin's use of *foreign agents*. Thus, the textbook subtlety sets the stage for Putin who is depicted as successful in restoring power and prestige to the country but without his negative qualities and destructive actions of Stalin.

The visual images that accompany textbook representations of Stalin appear to create a more positive depiction of him in contrast to the written text. For example, two posters are placed side by side (p. 88) in the textbook. Lenin's hand is pointing toward Stalin, as if indicating he will inherit his power. At the same time the figure of Stalin holding the wheel of the U.S.S.R. ship of state supports his overall image as a hero leader who is able to steer a course toward greater Russian glory.

Another representation of Stalin as an established and powerful leader is a photo of Lenin and Stalin in 1922 in Gorky (p. 91). Soviet censors have probably altered this photo and the textbook uses its cropped version. Stalin and Lenin are in fact sitting on different chairs but in the cropped version it is impossible to see. By doing this the censors emphasized how close Lenin and Stalin were to one another. As David King argues in *The Commissar Vanishes* (2014), Stalin was just inserted and his image was 'improved' in many officially promoted photos, which could also be the case here. Stalin's well-lit white jacket projects him as a strong and energetic leader, while Lenin appears more passive and restrained.

The textbook goes on to depict Stalin's political genius for unifying the country when he suggested, "Ukraine, Belorussia, and the Transcaucasia [should be brought]

into the RSFSR as autonomous republics… and in this way build an unitary state which would narrow down their rights… Lenin called the idea of … autonomy fundamentally misguided, insisting on the equal union of republics" (p. 92). Thus, with the absence of an explanation into Lenin's reasoning the textbook prepares the reader for a transition to modern Russian leadership, implying how different the course of history could have been if the nation had only followed Stalin's strategy to keep the Russian central government's dominance over all the Soviet republics.

As much as the symbolism of a strong leader and the nation's unifier runs throughout the entire book in text and images, Stalin's heroic stature always comes with flaws. For example, when discussing World War II, the authors make clear that "Stalin is guilty before the country and the people for the repressions against the Army management, for [what happened in] 1941–42, and for the tremendous human losses during the war" (p. 203). Describing the suppression of the 1956 Hungarian uprising, the textbook account uses a photo of a demolished monument to Stalin lying on the ground.

While portraying Stalin as a savior who promoted science and culture in society at large, the textbook again juxtaposes his great achievements and his faults. For example, the work of the Soviet people, primarily workers and engineers, in their efforts to achieve a high level of industrial progress, is characterized as an enormous success that then triggered "labor enthusiasm" (p. 120). The account quotes Stalin, who used to say labor in the USSR became "a matter of honor, glory, valor, and heroism" (p. 120). Even more 'heroic' was the work of Soviet physicists who successfully created a nuclear bomb, thermonuclear weapons, and ballistic missiles (p. 212), although it is never mentioned that most of them were special prisoners held in secret research and development laboratories within the Soviet Gulag labor camp system (Ozerov 1971). The textbook account only acknowledges that "the atmosphere in a number of research fields remained extremely difficult" (pp. 212–213), and creates a very negative description of the activities of Trofim Lysenko who set back Russian research in the field of genetics.

In relation to Stalin's stance toward religion and spirituality, the textbook provides only a muted criticism of his policies. It states that under Stalin the arts "glorified the heroism of the Soviet people, their high moral principles, and spiritual richness" (p. 214) but it does not fully portray the role that Stalin himself had in the oppression of religion. While only briefly mentioning the negativity towards religion during Stalinist times, the tone of the textbook changes and becomes much more accusatory when describing the forceful and cruel persecutions of church and religion during the Khrushchev regime.

The language of this textbook represents a more elaborate and, on the surface, a more critical account of Stalin, whose negative character traits and historical mistakes are mentioned, while at the same time emphasizing his tremendous achievements in the building the power of the Communist Party, creating a greater sense of national unity, and demonstrating his absolute leadership in Soviet domestic and foreign policy. However, the textbook's visual portrayal of Stalin is, on the whole, favorable. While the favorable images blunt the impact of the text's depiction, this

paradox becomes more understandable when we examine how the heroic image of Putin is constructed in relation to Stalin.

Putin

As in Torkunov's textbook, Volobuev also provides an uncritical and celebratory account of Putin as a heroic leader. He is presented as a strong authority figure and a hero-unifier whose mission is to protect his people from internal and external enemies. Putin is shown as a hero capable of holding together the nation by strengthening the "United Russia" Party (p. 319), being respectful to war veterans, being mindful of the younger generation, and taking care of the State Duma (Russian Parliament). Putin furthermore is depicted as the embodiment of energy and power, under whose leadership the Russian army "ousted the fighters from Dagestan and defeated separatists on the territory of Chechnya" (p. 319).

The image of President Putin driving a new Russian Lada-Kalina automobile in 2010 (p. 328) symbolized his leading and unifying position among his people. It is reinforced a few pages later by another driving experience. This time it is with President George W. Bush at the wheel of an old Russian Gas-21. Putin is in the passenger seat (p. 337). While demonstrating informal and friendly relations between the two superpowers' leaders, the textbook, nevertheless, cautions the reader about the existence of "the tough competition – for markets, for investments, and for political and economic influence. So in this fight, Russia should remain strong and competitive" (p. 336).

The account leaves no doubt that only President Putin can keep Russia united and strong. This impression is reaffirmed by the contrasted representation of the current Prime Minister and former President Dmitry Medvedev together in an undated photo (p. 318). Here, Putin's body language and his gloomy expression of discontent and mistrust, as well as an obvious desire to draw away from the table, while Medvedev bends towards him, signal how the current President feels about his closest political ally. Putin is visually strong while Medvedev is weak, conveying a clear choice to the reader about who is more suitable to lead the country.

The textbook also portrays Putin as a hero-savior of the Russian people. During his presidency the nation witnessed "a religious revival as a spiritual phenomenon in the life of the country" (p. 345). It emphasizes that "the State needs to have a firm foundation in the moral requirements that are reassured in the minds and behavior of the believers" (p. 345). The account indicates a positive role of religion in the social education of today's youth, omitting any reference to Article 14 of the RF Constitution proclaiming Russia as a secular state.

The President also is shown as the one who returned democratic freedoms to the nation, especially in culture and sciences, demonstrating that every sphere of life in modern Russia is unaffected by ideology and that this should be considered an important achievement of Putin's policy. The textbook recounts, "if, during the Soviet time science was squeezed into the narrow frame of dialectic-materialistic theory" (p. 348), then now there exists a "pluralism of opinions" and "a number of

competing research theories or hypotheses" (p. 347). As a result, social sciences, education, and Russian culture remain free from their "ideological shackles" (p. 350). Yet, in actual Russian society today these shackles still seem apparent when textbooks in mathematics are banned for being unpatriotic (Gazeta 2014) or books are burned because they have been published with funds from foreign foundations (Obozrevatel 2016).

This image of an enlightened modern hero-savior and powerful leader ignore unpleasant realities in Russian society today, such as the censorship of Russian mass media or the political murders of journalists, human rights activists, and representatives of the opposition (Gessen 2012; Zygar', 2016). None of these events ever appear in the textbook. Although some previously concealed abuses from earlier Soviet history are now admitted, such as the mass murder of over 20,000 Polish military and intelligentsia in 1940, it highlights the recurring tendency of Russian textbooks during the Stalin era and today to suppress the authoritarian nature of the current regime in power. That is clearly the case in both Volobuev's and Torkunov's accounts, where President Putin is depicted as a powerful heroic leader capable not only of rejuvenating the spiritual mission of the Russian people but also of reviving former Russian glory and restoring its position as a world superpower.

Stalin and Putin as Russian Heroes

Once again this textbook's coverage of Stalin and Putin serves to orient the reader to the primacy of Putin as the heroic leader most important for student readers to remember. Stalin's depiction is used to highlight the new and improved version of a Russian hero. As noted, both leaders share positive qualities of the archetypal Russian hero as a leader, unifier, and savior of the country. Stalin, though, is lacking; he uses power to aggrandize himself at the expense of the best interests of the nation, whether it be his mistakes in managing the economy or his heavy-handed approach in dealing with opposition to his leadership. Putin has no such flaws. By constructing a somewhat flawed heroic figure in Stalin it allows the reader to appreciate even more fully a newer hero and one who also is a steward of eternal Russian virtues.

Summative Perspectives on the Findings

As noted in our analysis above, both Stalin and Putin are depicted as powerful leaders, saviors, and unifiers of the Russian state and its people. While the portrayal of Stalin varies from positive and uncritical in Torkunov's textbook to a somewhat more critical representation in Volobuev's textbook, both accounts still use their respective portrayals of Stalin to enhance an unblemished depiction of President Putin as the heroic leader Russia needs and deserves in the twenty-first century.

Both textbooks characterize the opposition in Soviet times as injurious to the political regime and national stability. Current day opposition is similarly represented as unpatriotic and weakening the glorious Russian nation, which justifies violations of civil liberties and human rights occurring in the present. Altering historical data and deliberately falsifying the description of Stalin's fight against the opposition, the accounts use different lexical and visual devices to sanitize the human suffering and scale of abuses during the Soviet era. If Stalin makes political mistakes and needlessly incurs the loss of many lives while making the Russian nation strong and secure, Putin is a hero who does not make mistakes or commit crimes against the people.

It is clear both textbooks are unanimous in representing the political trajectory of the current Russian president as moving from one success to another. This type of ideological messaging has important implications for history and civic education in an increasingly intercultural and transnational world.

Discussion

The traditional Russian cultural trope of hero, emerging in early mythology and further developed during Czarist times, gradually moved to the Soviet reality and finally segued into the post-perestroika era. With the hero concept came the enemy. People always fight against demons and they cannot live without gods and heroes (Jung 1959). This discourse of demons and gods, national heroes and enemies, lives on in contemporary, Russian history textbooks.

By employing the semiotic codes of *savior, unifier,* and *leader* we analyzed how this concept of a hero was constructed lexically and visually to accomplish political purposes. Our study identified the discursive practices employed by the textbooks' authors to convey powerful ideological messages to the reader. When applied to the representations of Stalin and Putin, these practices attempted to shape current day students into faithful and loyal citizens.

When Stalin and Putin are portrayed as hero-leaders, they are turned into mythic monuments, as if they were fated to revive the Russian religious spirit, restore the country's military and cultural glory, protect the nation from internal and external enemies, and secure the physical health of its people. The size and significance of these heroic goals and the hubris of national pride justifies any crime against individuals and groups in order to protect the greater public good; this is one of the most important ideological messages conveyed to students.

This messaging is first seen in the heroic representation of Stalin in both textbook accounts. The vast amount of peer reviewed research, memoirs, archival materials, documentaries, and direct access to the Internet make it impossible to keep Stalin's massive atrocities a secret, but that is what is being done in both textbooks. The veneration of Stalin and the textbook emphasis on heroic sacrifices during World War II deflect attention from the policy mistakes and crimes against humanity perpetrated by the Soviet regime. It is no wonder then that the Kremlin recently

made it illegal to publically "infringe the historical memory of the WWII events" (President of Russia 2014, par.3). As Orwell predicted, the one "who controls the present controls the past" (Orwell 1950, p. 34).

To control the present, textbook authors use different ways to control perceptions of the past. This is most striking in the silencing and sanitizing of massive crimes against humanity during the Stalin era and also with the consolidation of a dictatorial state by Putin's regime today. To appeal to young minds, the books also utilize familiar modern terminology as seen in the depiction of Stalin's achievements in industrialization found in Torkunov's book. Occasionally, there are rhetorical questions asked about the cost of the war victory and other achievements, but there is no attempt to develop critical thinking skills among student readers. In both textbooks Stalin emerges as a hero of significant value who preserved the nation, put an end to all its internal and external enemies, and forced the world to respect Russia; he is a leader, a unifier, and a savior. To different degrees both textbooks mention his mistakes and allude to crimes, which make him somewhat of a wounded hero.

This depiction of Stalin sets up the reader for a new hero of a different caliber. President Putin possesses the positive qualities attributed to Stalin, but he is free from any of Stalin's crimes or atrocities. He is a true moral exemplar, a savior of Russian physical and spiritual health, and a modernizer of sciences, an expert in culture, and an athletic icon of today's generation.

A characteristic feature of both textbooks is the uncritical description of Putin as a powerful leader worthy of veneration. Each account includes an exhaustive chapter about Russia during the first fourteen years of the twenty-first century. This by itself raises a number of questions for the educational and academic community as to whether the aforementioned period can be considered history, or whether placing a description of a current national leader and his politics into the federal curriculum and textbooks is even appropriate.

What is occurring in officially sanctioned Russian history textbooks is reminiscent of the Soviet era when Stalin authored and edited the *History of the Communist Party* textbook. While not a direct author, it is clear Putin oversees what is permissible content in Russian history textbooks today. In April 2013, while responding to questions in his direct TV line with the nation, Putin stated that the younger generation should have a feeling of "connection with the heroes from the past" (mir24.tv, April 25, 2013). He might have added that a connection to heroes of the past would solidify an appreciation of his own heroic stature in the Russia of today.

Both history accounts remind educational researchers and practitioners of the ideological intent behind the silencing of historical events for adolescent readers. Many key events that are widely known and still actively discussed at national and international levels are left unstated, such as the military crimes by the Soviet Army in Europe in 1944 and 1945, the inhumane conditions of GULAG prisoners, the sadism and torture used in the Lubyanka prison to extract confessions, the lives of numerous children taken during the Beslan school siege, and the political murders of the renowned oppositionists like Galina Starovoitova or Boris Nemtsov. These are only some of the events that have been excised from both of the Russian

textbooks. To have included them in the accounts would have undermined the legitimacy and heroic stature of both Stalin and Putin.

Conclusion

As the above findings demonstrate, the significance of this research extends beyond a critical examination of Russian history textbooks. Certainly, greater attention being paid to what is occurring in the remaking of the past and present in Russian textbooks is needed. While this might not have an immediate impact on opening up an honest and sober discussion by teachers, students, and the general public in Russia, more investigations into how national narratives operate to shape civic identities in the present lay the foundation for a more informed Russian citizenry in the future.

At the same time our analytic approach and the findings from our study of these two Russian textbooks offer a cautionary note for all researchers and educators in history and civic education. The tendency to construct simplified and valorized national narratives is not unique to Russian history textbooks. All too often textbooks around the world serve to legitimize national institutions and centers of power by constructing a past that leads to an uncritical acceptance of the nation state in the present. This is done through the skillful use of a nation's semiotic codes that are familiar to contemporary readers in a particular country. For our study we focused on the Russian concept of *hero* through the use of semiotic codes familiar to Russian citizens today: leader, unifier, and savior. Other nations have their own time honored cultural tropes. As researchers, we have both an educational and an ethical obligation to illuminate how those semiotic codes can be manipulated to obscure and romanticize a past in order to create a compliant citizenry today.

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Chapter 3
Political Leaders in Russian History Textbooks Between the Rise and Fall of the Cult of Personality (1938–1962)

Dorena Caroli

Political Leaders in Russian History Textbooks: Introduction

The depiction of Lenin and Stalin in Soviet schoolbooks as the authority figures who changed the course of Russian and world history through the transnational spread of socialism and the culture of revolution – particularly between the two World Wars – reflects a highly ideological view, a propaganda instrument that played a major role, nationally and internationally (Oganovskaya 2011; Ferro 2003). While in general, school textbooks can be described as a form of mass education designed to transmit knowledge of academic disciplines, including that of history (Fuchs et al. 2014), in the case of the Soviet regime, they mostly set out to instill culture, rules, and values based on the canons of Marxist-Leninist interpretations of history. The method followed a process closely resembling that of the *socialist realism* style in Soviet literature (Günther 2000).

As political changes came about, the view of history in the Soviet Union underwent constant adjustment in the period between the October Revolution and the late 1950s. Consequently, textbooks were, until very recently, subjected to frequent revision. When examined after the end of the regime, these revisions have revealed multiple historical falsifications introduced during the different phases of rewriting history, falsifications not confined to the numbers of victims of Stalinism and the Second World War (Oganovskaya 2011). In these history textbooks, the progressive falsification of the role of prominent revolutionaries close to Lenin and Stalin – such as Trotsky and others who were to be victims of Stalin's purges – is also clearly noticeable, an aspect that opens up further research possibilities.

The iconography of political leaders, particularly Lenin and Stalin, represented one of the major changes in Communist visual culture (alongside the hammer and

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sickle, red star and heroic images of workers and the proletariat masses). These figures were used in monuments, posters, and pictures to symbolize the October Revolution, the victory of the Red Army over the Whites, the Five-Year Plan and the Second World War and defeat of fascism (Bonnell 1999).

The process that led to the creation of a kind of mythology around these two political figures – and eventually a fully-fledged cult of personality where they became the objects of veneration – was a complex one, beginning even before the death of Lenin. His image as the leader (Russian *vozhd'*) of the October Revolution was already well defined by the time of his 50th birthday (April 22, 1920), consisting of "the superhuman qualities of the *vozhd'*, his simplicity and humaneness, the popular essence (*narodnost'*) of the *vozhd'*, and his power (*moshch'*). These attributes were later transferred to Stalin, with whom they acquired unprecedented proportions" (Bonnell 1999, p. 142). After Lenin's death in 1924, the above qualities underwent a change, since the adulation of the dead leader had a celebratory intent marking "the beginning of the development of the 'leader's two bodies' in visual representation of the *vozhd'* […] and created a system of visual signs for expressing these concepts in images" (Ibid., p. 149).

This image as a manifestation of power made sacred, took on a dual nature symbolic of the leader's mortality and immortality, offering a model for Stalin's own personality cult that had become increasingly intense by the time of his 60th birthday in 1939. "According to the Bolshevik 'mystic fiction', Stalin the *vozhd'* inherited superhuman qualities of immortality, infallibility, and perfectibility from Lenin. Words and images connecting Stalin to Lenin served to reinforce this connection" (Bonnell 1999, pp. 156, 161, 168).

Research Design

Research Question and Textbooks Under Analysis

The aim of this chapter is to analyze the portrayal of Lenin and Stalin in Soviet history textbooks for Grades 3 and 4 by Shestakov (1938), and for Grade 10 edited by Pankratova (1940), tracing the development of these leaders' political influence on the chief historical events taking place in the period between 1917 and the early 1950s and uncovering ideological messages sent to student readers. The research question that guided our study was: How do the textual and visual representations of Lenin and Stalin in Soviet textbooks help support the cult of personality and promulgate the concept of the 'new man' to Soviet school children?

School History Textbooks for the Soviet 'New Man'd

The first Soviet textbooks were published by the regime in the late 1930s and introduced all events in relation to the class struggle and dialectical materialism, situating Russian history in the context of world history and placing great emphasis on patriotism. The process leading to the publication of the first so-called "definitive" (*stabil'nye*) history textbooks with the reintroduction of school subjects that were abolished in 1923 took place during the 1930s following the official discrediting of the views of the eminent Marxist historian Mikhail Pokrovsky in the post-revolutionary period (Asher 1972; Kudryashov 2008; Caroli 2009).

The complex motives behind this ideological move were linked to internal and external historical causes that appeared contrary to the Party line on "(1) the theoretical justification and policies of the Five Year Plan, (2) the cult of Stalin and the great leader of the people, (3) the new positive appraisal of the Russian state as a basis for building Soviet society, (4) the support of those aspects of tsarist diplomacy which strengthened the state, and (5) the new emphasis on Soviet patriotism in response to the tense situation created by Hitler's rise to power" (Asher 1972, p. 54).

This process of revision and rewriting – very prolonged compared to that in Fascist Italy and approximately coinciding with that in Nazi Germany – continued for almost ten years (Kudryashov 2008; Lässig and Pohl 2009) and, as far as the accompanying images are concerned, the textbooks reflect the development of visual propaganda and its stylistic changes between the 1920s and 30s, particularly using a series of signs related to the characteristics of the portrait (mainly reproduced from photographs), with poses, expressions, gestures, and clothes used to reinforce the cult of personality, defined by Victoria Bonnell as "Leniniana" and "Staliniana". The "aesthetization of power", apparent particularly in propaganda posters, can be seen with a number of important, although sometimes hardly perceptible, differences in the various different editions brought out before and after Stalin's 60th birthday (1939) (Bonnell 1999).

For my analysis I used two Soviet history textbooks for primary schools. The first is *History of the Soviet Union. A brief course,* Grades III and IV, written by Andrey Shestakov (1938), published in conjunction with Stalin's *History of the Communist Party of the Soviet Union (Bolsheviks): Short Course* – the papers on dialectical materialism that laid the foundations of Marxist-Leninist interpretation after a complex period of rewriting history. The second is the textbook on Russian history for Grade X (1940) edited by Anna Pankratova, a famous historian and a specialist in the history of the workers' movement, and compiled by Bazivelich, Bakhrushin, Pankratova, & Fokht. This book consists of three volumes setting out Russia's history from its beginning to about 1938. The third volume in this series – The *History of the Soviet Union* was edited by A.M. Pankratova (in collaboration with A.V. Fokht) and covers the contemporary history of Russia in the context of European and Soviet history. It is divided into six phases and organized chronologically (Buschik 1961; Caroli 2009). Additionally, I studied different editions (those

of 1951 and 1948/1962) of the same book, which served as a supplementary source for contrasting leaders' depictions in the context of historical changes from the Revolution until the aftermath of the Second World War.

Compared to Shestakov's textbook for Grades III and IV, in the one for Grade X the description of the role of the leaders and events is interwoven with frequent quotations from the works of Lenin (both in the Russian version and in the English version of this textbook produced in Moscow and based on the 1934 translation of Lenin's works and the 1945 translation of Stalin's works), as if an authoritative voice would lend weight to the book's assertions and awaken the conscience of the Soviet citizens, calling on them to emulate the class struggle of the recent past so as to be ready for new imminent and future battles.

The analysis of the textbooks shows not only how Lenin and Stalin are made the central theme in the account of the class struggle but also how they became the source of the ultimate truth and model for "a new man", a true symbol of all Soviet workers. Characterized by their highly symbolic nature, the images accompanying the narration of historical facts played an important role in the construction of a mythology around the two political leaders, revealing a semiotic aesthetic in constant evolution.

Theoretical Framework

A comparative hermeneutic discourse analysis was used to analyze how Soviet leaders were portrayed in textbooks, (Nicolls n.d; Pingel 2010). A qualitative method of textbook analysis emphasizes the depth of information that can be obtained from textbooks. As a very specific type of narrative, a textbook is full of signs, symbols, and markers that create very special imagery. Hermeneutic analysis helps to "unearth hidden meaning and messages in the textbook" (Nicolls n.d, p. 3); it provides rich interpretations of textbook symbols that in turn signify the ideas that the authors intended to convey. By the same token, a textbook narrative is a dialogue between the author and the reader. The dialogical nature of the text is an important prerequisite for discourse analysis. Discourse theory is about seeing interactions, including the author/reader dialogue, through the lens of socially meaningful symbols and identities (Gee 2014).

Historical, political, ideological, or cultural discourses are created in textbooks, particularly history textbooks, with the help of author's text, excerpts from carefully selected primary sources, maps, pictures, photos, graphs, and other devices. Although language plays the most critical role in creating a discourse because "we use language to build things …to engage in world building, and to keep the social world going" (Gee 2014, p. 31), other elements of discourse help deconstruct the author's intentions and meanings. One of the purposes of this study is to demonstrate the mechanism used by textbook authors for creating realities that would reflect the ideological concepts and constructs at various steps of the development

of the Soviet Union, as well as characteristics of leaders personifying those created realities.

In this study I compare the depiction of Soviet leaders' in relation to historical narratives of their political actions contributing to the shaping of the stereotypes of their human and public images, and serving as symbols of the Soviet regime and as examples inspiring the new generations to class struggle. Indeed the rise of the leader cult transformed the leaders into heroic figures to be adulated and venerated as liberators from the bourgeois regime. I also demonstrate how, on the one hand, the ideological representations varied in levels of difficulty (relating to the ages of the schoolchildren) and, on the other, how the ideological vision of history changed, depending on the gradual development of the cult of personality, something that reached its peak in 1939.

From this emerges a picture not only of Lenin and Stalin and their political symbolism but also an ideologically manipulated representation of some other leaders of significance in the period between the October Revolution and the 1950s, at the end of Stalin's cult of personality (Rees 2004). A comparison of the different editions of 1940, 1948 (in English) and 1962 reveals the ideological manipulation of the actions of Lenin and Stalin, who are never described as dictators but just as leaders, and reflects also the process of de-Stalinization in history textbooks edited by Pankratova signaling the end of the personality cult of Stalin (Caroli 2011).

Findings

Political Leaders in the Land of Socialism: Textbooks for Grades III and IV by A.V. Shestakov (1938 and 1951)

The textbook by Shestakov (1938) for Grades III and IV was heavily ideological. The author presented events and political actions in terms of the opposition of the bourgeoisie and the proletariat, comrades and traitors, friends and enemies of socialism, regardless of the complexity and contradictions of history and social change. Lenin and Stalin's actions were described faithfully enough despite the rhetorical style idealizing and identifying them with a new mystique of a class struggle. An account of Lenin's life, in particular, is almost always accompanied by images of the "two bodies", one mortal, one immortal, of the leader (Bonnell 1999, p. 149), at different ages and in a series of moments in his public life (in reproductions of photographs).

The depiction of the leaders presents a series of symbolic elements belonging to the political semiotics that resulted in the proletariat becoming the dominant class: style of dress, pose, and the arrangement of the two leaders together. The image of Lenin is almost always taken from the canon of "Leniniana", seated at a table with a pile of books or papers or standing, wearing a jacket, a white shirt, and tie, sometimes with or without a hat, the intention being to show, as in the posters, "the image

Picture 3.1 Lenin

of a soft intellectual", always reading or holding papers or books that symbolize the historical laws reinterpreted by Marxism. Stalin, by contrast, is shown as the "steely man of action" (Picture 3.1).

Shestakov's textbook relates the political actions of the leaders in a very simple style, suited to the level of understanding of elementary schoolchildren. The descriptions in the texts and pictures of the two leaders' struggles are very similar of those of the legendary heroes, appealing to the imagination of younger students steeped in an oral culture filled with brave warriors confronting a thousand perils to defeat evil – the bourgeoisie and the monarchy – and let good – the proletariat – triumph.

To tell the story of the rise of the proletariat and the Bolshevik revolution, the textbook uses a detailed biography of the main protagonist, Lenin, illustrating it with pictures of him when a schoolboy and when older, but with no signs of ill health and in a picture standing side by side with Stalin, neither person taking precedence over the other. The textbook goes on to describe the parallel activities of the two men, Lenin's revolutionary struggle and Stalin's exploits in the Caucasus, united in a single intent to overthrow the monarchy and the bourgeoisie in the name of the revolutionary laws. The narrative emphasizes the character traits of the two leaders with the intention of creating an almost sanctified model to hold up to the new generations, inspiring them with the values of their fathers and grandfathers. These values should be handed on from father to son as in a large family, the importance of which became something almost mythical in the period of the 1930s (Clark 1981).

The first edition of the textbook by Shestakov, anticipating Stalin's 60th birthday celebration by a year, differed from that published in 1951. The latter has an expanded section on the modern period and a papers on Stalin's role in the Second World War. Both books credit the October Revolution almost entirely to Lenin and Stalin, minimizing the role of other Bolsheviks and revolutionaries. Lenin is praised for his ability to set up groups in the workers' movement where the writings of Marx were read. He "organized the Bolshevik party and led the working classes and peasants in the struggle against the tsarist regime, the landowners, and the bourgeoisie" (Shestakov 1938, pp. 114–115, 1951, pp. 143–144).

The model of a great political personality, the life of Lenin is described as a series of trials overcome by a triumphant hero. Revolutionary activities of other political figures – and Stalin in particular – are gradually introduced into the account of Lenin's life and described as comrades united in the revolutionary struggle against the proletariat's enemies. The detailed biography of Lenin features three illustrations. The first shows Lenin, looking attentive, sitting at his school desk before his books. Here Lenin, as a model student, shows the studiousness of a future revolutionary, a model to follow for generations of Soviet schoolchildren. The description of his revolutionary activities emphasizes the bravery required to live a clandestine life and his spirit of sacrifice and strength of character at difficult moments (such as his expulsion from the University of Kazan) (Ibid.).

The textbook continues with a description of Lenin's role in the 1890s in the workers' group in St. Petersburg. He arrived there in 1893 with the intention of uniting all the workers' groups into a "League of Struggle for the Emancipation of the Working Class" and to prepare for the creation of a "truly revolutionary" workers' party. The second picture of Lenin shows him wearing a jacket, white shirt and tie, standing at a table with eight other comrades. Sitting apart to one side is his future wife, Nadezhda Krupskaya. The third image is a portrait of Lenin when about 20 years old, dressed in his usual way. This accompanies the description of the period leading to the decision to embark on an armed struggle ("League of Struggle", three Congresses of the Russian Social-Democratic Workers' Party, and the newspaper *Iskra*) (1938).

At this point, the figure of Stalin appears for the first time. While Lenin represents the heart of the political struggle of the time, leading "the struggle for the triumph of the Revolution", Stalin is described as dedicating himself to the intensive work in the Caucasus where he supported the Bolshevik committees on behalf of the common good, and "was tireless in his efforts to unite the workers and people of Transcaucasia and all of Russia into a single family" (1938, p. 127, 1951, p. 159). The meeting that was to seal the collaboration between the two leaders, Lenin and Stalin, took place for the first time at the Bolshevik conference in December 1905 (1938).

There are no illustrations for the section covering the parallel revolutionary lives pursued by Stalin, working clandestinely in Russia while Lenin was in exile. The textbook states that Lenin's right-hand man and companion in struggle, Comrade Stalin, remained in Russia. His boundless energy inspired the Bolsheviks in their difficult and determined struggle. In 1908 Stalin was once again arrested and sent to jail in Siberia. But prison and deportation could not destroy Stalin's iron will and the following year Stalin escaped from Siberia and returned to Baku. They arrested Stalin again… But the great revolutionary did not give up. Lenin, from abroad, and Stalin, clandestinely in Russia, continued the great work of the struggle for socialism, ready "to shed every last drop of their blood for the workers' cause" (1938, p. 139, 1951, p. 175).

With his habitual determination, Lenin ran the newspaper *Pravda* from abroad, contributors being Stalin, Molotov and other Bolsheviks including Dzerzhinsky (1938). The textbook gives a compelling description of Lenin's return to Petrograd

on April 3, 1917, as he steps down from the train, raising his hat, greeted by workers and revolutionary soldiers, waving and shouting, "Long live the world socialist revolution!" Together with Stalin "he unmasked the provisional government, revealing the deceit of the Mensheviks and Socialist Revolutionaries" (1938, p. 150, 1951, p. 188).

The section devoted to the October 1917 Revolution when Lenin arrived describes the conference in Petrograd called by Lenin and Stalin, and also attended by Molotov, Voroshilov, Sverdlov, Kuybyshev, and Dzerzhinsky. During the conference, both leaders explained that, after defeating the Russian autocracy, the socialist revolution must be achieved by calling on the support of the masses, acknowledging their role in a way that the cult of personality was to attempt to remove from political iconography: "They called on the Bolsheviks to organize the masses in their struggle for the socialist revolution." The conference resolved "to overthrow the power of the bourgeoisie through the unity of the working class and the poor peasants, to give land to the peasants, liberty to oppressed peoples and peace for all" (1938, pp. 151–152, 1951, p. 191).

Three more images illustrate the description of the Revolution itself. The first, a striking example of Lenin's "two bodies", is a full-page portrait showing him looking to the viewer's left, wearing a jacket and tie with a waistcoat and white shirt. The following two illustrations relate to key moments in the organization of the October Revolution and present Lenin sitting at the table. In the first he holds a sheet of paper while Stalin, in a military jacket, stands next to him surrounded by Red Army soldiers. In the second, still seated, he is seen planning the operations of the Revolution. These illustrations are unchanged in the 1951 edition (1951, pp. 196–199).

The textbook falsifies the roles of Kamenev, Zinov'ev and Trotsky who are described here as traitors, having "furnished the bourgeoisie with the plans and timing of the uprising. Learning of the uprising from the traitors, the provisional government quickly mustered its most trusted soldiers to fight against the insurrection" (1938, pp. 157–158, 1951, pp. 198–199). Stalin took control of the Central Committee of the Bolshevik Party's military operations that, following the sign from Lenin, initiated the uprising on October 24, 1917. With the triumph of the Revolution, the new executive committee elected Lenin as head of the Council of People's Commissars, Stalin as Commissar of Nationalities, and Sverdlov as President of the All-Russian Central Executive Committee. Sverdlov is the only one whose picture is included (1938, p. 160, 1951, pp. 202–203).

The textbook continues the story of Lenin and Stalin who, from the very first days of the Revolution "set to work organizing the Soviet State, seeing it as a fraternal union of all peoples" (1938, pp. 161–162, 1951, p. 205). There is a description of Felix Dzerzhinsky (1877–1926), founder of the infamous secret police, and a picture of him as head of Cheka (All-Russia Extraordinary Commission to Combat Counter-revolution and Sabotage), the organization set up to "liquidate all the plots of the Socialist Revolutionaries, Mensheviks, and their allies" (1938, p. 164, 1951, pp. 206–207). Next comes an episode from the autumn of 1918 recounting the attempted assassination of Lenin by followers of Bukharin and Trotsky (1938). No

mention is made of the essential military role played by "the armed prophet" Trotsky who led the Red Army during the Civil War (June 1918 - autumn 1920). Neither edition of the textbook alludes to the terrible famines of 1921 and 1932, events that provided fodder for anti-communist propaganda. Among the examples of Lenin's infallibility, the book cites the strategy, known as the New Economic Policy, which brought in some economic advantages. According to Stalin, "Lenin was a mountain eagle […] seeing from a great distance. He said that workers and peasants could overcome the ruins of war and live happy lives" (1938, p. 187, 1951, p. 234). The section on the creation of the Soviet Union (1922) is accompanied by a portrait of Lenin and Stalin together in Gorky. They are both smiling, Lenin, shown in three-quarters' profile and Stalin full-face, wearing a black jacket with his arms behind his back, against a background of trees. In the 1951 edition the faces in this same picture were slightly altered (1938, p. 189, 1951, pp. 237) (Picture 3.2).

After Lenin's death, the oath made by Stalin in tribute to the leader of the October Revolution is accompanied by a portrait of Stalin that hints at a jacket of a similar style as that worn by Lenin (in the preceding picture), along with the list of the commandments, a kind of Leninist Decalogue to guide future generations, "… Comrade Lenin ordained us to strengthen with all our might the alliance of workers and peasants. We vow to thee, Comrade Lenin, that we shall fulfill honorably thy commandment, too…" (1938, pp. 191–192, 194, 1951, pp. 240–241).

In the section on Stalin's Five Year Plans, Trotsky, Zinov'ev and Kamenev are once again represented as traitors who attempted to "sabotage the construction of socialist industry," although for Trotsky it was a question of political opposition based on his view of the revolutionary process (Daniels 1991, pp. 11–24). Portraits of Molotov, Ordzhonikidze, Kalinin, and Kuybyshev are included instead, immor-

Picture 3.2 Lenin and Stalin in 1922
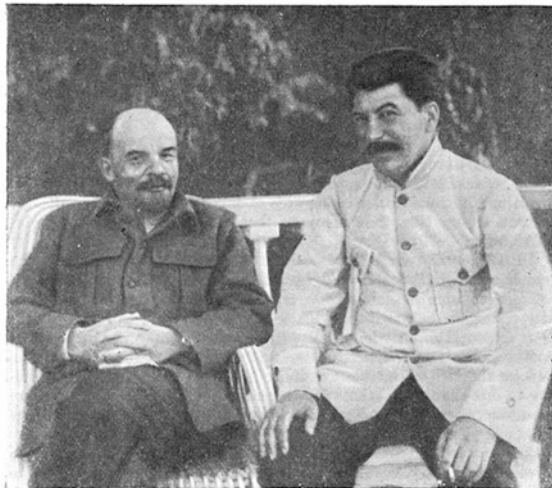
V. I. Lenin and J. V. Stalin in the Summer of 1922

talized also by having some cities renamed after them. The year 1938 ends with a section setting out the ideological division of the world into two parts in the 1930s (Davies 1997): the people of the land of socialism and the capitalists, the friends and enemies of the Soviet Union, with an illustration of a detachment of the Red Army with helmeted soldiers aiming their guns alongside the paragraph on the Union and our friends outside the Soviet Union, Stalin's Constitution and the Soviet Republics (1938). The infallibility of the two leaders obviously leads the book to omit any reference to the political purges of 1935–1937 when political figures identified as the left opposition – Bukharin, Kamenev and Zinov'ev – were described as traitors.

In the 1951 edition of the textbook, the role of Stalin in the Second World War is celebrated with a three-quarter-length portrait. He gazes intently into the distance to the viewer's left. He is dressed in the military uniform with five medals on his chest that carried him to "victory against the fascists." The textbook (1951) states,

> He [Stalin] understood the strength of the Soviet people and was convinced we would be victorious. Comrade Stalin has inspired us all in the struggle against a cruel enemy […] Called upon by Comrade Stalin, the whole Soviet people, to a man, rose up in the struggle for the homeland. …We all know it: if we win then we shall be free, but if we do not win – then we shall become the slaves of the German princes and barons. (pp. 271–273).

The price paid for this victory – millions of victims – was concealed for many years by the regime.

Political Leaders for the "Soviet Citizen" in the Textbook for Grade X Edited by A.M. Pankratova (1940, 1948 and 1962).

The representation of the roles of Lenin, Stalin and other revolutionary leaders in this textbook is less straightforward from the interpretative point of view and is much more detailed in its treatment of different historical phases (Bonnell 1999). From the iconographic point of view, it is interesting to note the inclusion not only of photograph portraits of leaders but also reproductions of paintings and sculptures in *socialist realism* style. Most of the images showing significant scenes in the political careers of Lenin, Stalin and a few other faithful old Bolsheviks are composed with a "concentric" iconographical style where the contents or figures of the spatial composition are arranged in concentric circles around the leader, a composition harking back to religious imagery (Plamper 2003), and offering a mystical vision of the revolutionary rebirth of the new regime for the masses to venerate, worship, and adore.

The proclamation of Lenin's infallibility, an essential basis for Stalin's cult of the personality after 1929 (Bonnell 1999), pervades a description of events through the lens of Marxist-Leninism that had brought the proletariat to power in a classless society. Almost all of Lenin's actions are qualified in the textbook with the adjective

genial'nyi (genius). Stalin is depicted as the principal heir and disciple of this infallibility – political superiority, absolute power, and the immortality of the leader. Counterposed to this is pure evil, represented by the class enemies and a still strongly held hostility towards the traitor par excellence, Trotsky.

In this textbook too, the description of the first revolutionary activities of Lenin and Stalin creates around both leaders a fully-fledged cult of memory flowing over into mythology: the two heroes transform the spark of political struggle into "the burning flame of socialism", thanks to the political lessons of the masses (1940, p. 6; 1948, pp. 19–20). Their sacrifice should be seen as a model of patriotic selflessness for following generations, particularly in relation to the defense of the homeland against foreign attacks.

The textbook attributes the building of a Marxist party not only to Lenin and Stalin but also to their comrades, a tight group of revolutionaries supporting the Bolshevik views on armed struggle put forward by them at the Second Congress of the Russian Social Democratic Labor Party in Brussels, 1903 (1940). All the other positions taken by the Socialist Revolutionaries and the Mensheviks were gradually discredited since the Bolsheviks condemned the "deceitful tactics" of the Mensheviks and of Trotsky whom Lenin called "Judas" because he betrayed the workers by supporting the so-called "liquidators" of the revolutionary party – a faction understood to be synonymous with the Mensheviks.

Both Lenin and Stalin are described as protagonists not only in the victory of the Bolshevik position over that of the Mensheviks and in the armed uprising – decided upon during their first meeting in December 1905 – but also in a view of tsarist policies on nationalities expressed by Lenin in the slogan as the "right of nations to self-determination, including secession." This also had a bearing on the First World War and Lenin's *Imperialism, the Highest Stage of Capitalism* (1916). Lenin is represented as the champion of the new Third International replacing the Second International "which had suffered a shameful collapse" (1940, pp. 113–114, 1948, pp. 114, 124). This interpretation is illustrated by a reproduction of the painting by M. Sokolov showing Krupskaya visiting Lenin in the prison in Novy Tagil in 1914. They are depicted standing, their hands joined (1940), symbolizing the sharing of a sacrifice made all the more unjust by tsarist autocracy.

Lenin's *April Theses* are accompanied by illustrations of Lenin and Stalin who symbolically represent the inevitable historical truth of the *Theses* that were to constitute the basis for the Seventh All-Russian Conference of the Bolshevik Party (April 1917) (1940). In the accompanying illustration taken from a work by M. Moravov, Lenin, on his return to Petrograd (April 1917) is depicted seated, in his usual revolutionary style of dress, jacket, tie and hat. A portrait of Stalin shows him studying the *April Theses*, leaning against a table and dressed in a light-colored jacket (1940, pp. 138–139; 1948, p. 154–155).

Lenin's absence from the Sixth Congress of the Bolshevik Party, presided over by Stalin while Lenin was in hiding, is illustrated with a picture of the latter's hiding place in a shack near Razliv Station (1940, pp. 154–155; 1948, pp. 172–174), yet another indication of the courage to inspire the revolutionary struggle. The fundamental role of Lenin and Stalin as leaders in the period that paved the way to the

armed uprising and the victory of the October Revolution is reinforced, rather than diminished, by the collaboration with faithful Bolsheviks such as Ordzhonikidze, Kalinin, and Voroshilov.

During the so-called "Bolshevization of the masses" Lenin's management skills and his ability to "interpret the conditions" that would make the struggle successful are strongly emphasized. His view of the revolution was not limited to a change of regime but went beyond it with the goal of bringing Russia to the level of other advanced countries. The most significant moments of the uprising and October Revolution are accompanied by a full-page portrait of Lenin and pictures of Stalin with soldiers in the Smolny Institute (a reproduction of a work by V. Vasil'ev) and Lenin on the podium at the Second All-Russian Congress of Soviets (1940, pp. 169–173). This last illustration (a reproduction of a work by S. Serebriany) has a concentric composition showing a rear view of Lenin in a room with columns, the center of the picture filled with light that seems to irradiate from the spot where Lenin is speaking as if his words were rays falling onto the surrounding revolutionaries (1940; 172b; 1948, p. 192b).

Concluding this section on the October Revolution, Lenin and Stalin are presented as liberating Russia from the centuries-long yoke with the "Declaration of the Rights of the People of Russia", signed by the two men on November 2(15), 1917. Also included is a picture of Dzerzhinsky, "Lenin and Stalin's closest comrade in the struggle, a firm Bolshevik […] Iron Felix, the terror of the bourgeoisie" (1940, p. 184). Lenin is praised for giving the masses the decrees on peace and land, and workers' control while Stalin is credited with establishing a spontaneous union of free nations, the Federation of Soviet Republics. Lenin is described as the author of the peace treaty signed on March 3, 1918 and to which the 'enemy' Trotsky objected, and Stalin as the advocate of the nation's self-determination.

This constant need to be on the defensive against internal and external enemies contributed to the formation of the bond between the two leaders and nourished the personality cult of both. This, however, was beginning to rely ever more heavily on the manipulation of historical facts. While, during the Civil War, Lenin embarked on a fight against the kulaks to obtain bread for the army, Stalin was discovering plots and is presented as the founder, along with Voroshilov, of the cavalry division led by Budenny. It is followed by a reproduction of the painting by Avilov showing Stalin saluting the 1st Cavalry Army soldiers who respond to him with raised swords (1940, p. 238b; 1948, p. 272). Stalin is also described as overseeing the victory of the Red Army over Denikin in November 1919 and the defeat of the White Poles, keeping silent about the strategic, and in many ways legendary, role played by Trotsky during the Civil War (1940). The description of the defeat of Kolchak (1919) is accompanied by a photograph of Stalin, Lenin, and Mikhail Kalinin together (1940, p. 231; 1948, p. 262b). Elected as President of the Executive All-Russian Committee on March 30, 1919, Kalinin is painted in glowing terms, since he "united with great coherence the methods of the revolutionary struggle of workers and peasants" (1940, p. 231).

These victories led by the Bolshevik party and its "inspired guides Stalin and Lenin" are the first in a long series, the results of great sacrifice, as illustrated by a

Picture 3.3 Lenin and
Stalin

В. И. Ленин и И. В. Сталин в Горках во время болезни
В. И. Ленина.

picture of Lenin taking part in a *subbotnik*[1] on May 1, 1920, helping carry a log of wood in the Kremlin grounds. The dark colors of his clothes and the position of his body, leaning back slightly, give both weight and dynamism to the image (reproduced from a work by M. Sokolov) (1940, p. 246b; 1948, p. 280b). Lenin is described as equally inspired in his plans for electrification (accompanied by a picture of him in jacket, tie and hat watching the testing of an electric plough), the New Economic Policy being seen as a step on the route to socialism and opposed to the policies of the supporters of Trotsky and Bukharin (1940, pp. 274, 277). The image of the two leaders sitting together, Lenin in a black jacket with folded hands and Stalin in a white jacket, is used to symbolize a further victory, in the area of diplomacy of this time, with the signing of the Treaty of Rapallo (April 1922) (1940, p. 274; 1948, p. 315b) (Picture 3.3).

Stalin's merits multiply with the promises made in the name of Lenin on the occasion of the latter's death, the drawing up of the first Soviet Constitution in 1924 and the economic reforms initiated at the end of the 1920s aimed at transforming national agriculture and industry. Stalin's speech served as a crucial moment in his ascent to power. "Stalin's great vow became the program of action of the Party and the Soviet State which ensured our country's victorious progress along the road to socialism" (1940, pp. 286–292; 1948, pp. 331–332).

From here onwards, Soviet history between the second half of the 1920s and the Second World War is reduced to a list of successes, concealing the high price paid by the population during the Five Year Plans thanks to the short-sightedness of Stalin and the Politburo. Examples given of Stalin's skillful internal policy during

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[1] *Subbotnik* is derived from the word Saturday (*subbota*) and refers to the obligatory military conscription during the Civil War (1918–1920) requiring all citizens to work seven days a week.

the 1930s include the elimination of the kulaks as a political class and the so-called "liquidation of the remains of the Trotskyist-Bukharinite spies, attackers, and traitors of the homeland" (1940, p. 329). To counter these figures are magnificent examples of loyalty such as the worker Stakhanov or the newly elected members of the Supreme Soviet who are exhorted to see themselves as "servants of the people". Among the successes in external policy included are Russia's joining of the League of Nations (1934) and the new peace treaty with Germany (1939), crowned with the entry of the Baltic republics into the Soviet Union (1940).

The 1940 edition of the textbook concludes with portraits of Stalin (full-page) and the leaders of the Politburo making up the Bolshevik pantheon and whose official memories Marxist historians deemed worthy to be handed down to the next generation as examples of revolutionaries faithful to the cause of socialism and communism. Bukharin, Zinov'ev and Kamenev, by contrast, only reappear in the public memory in 1988, after the political rehabilitation campaign of the perestroika.

In the English edition printed in Moscow in 1948, the depiction of Stalin in the papers on the Great Patriotic War – a new addition to the otherwise unchanged version (1948) – is that of a leader who organized the defense of the country and of Europe from fascism, appealing to the patriotic spirit of the people, the memories of the glorious episodes of the past and the historic role before them, stating,

> Comrade Stalin pointed out that the war against Hitler's Germany must not be regarded as an ordinary war. It was not only a war between two armies, he said. It was a nation-wide patriotic war against the fascist oppressors, the goal of which was not only to remove the danger that was hovering over our country, but also to help all the people of Europe who were groaning under the yoke of German fascism. (p. 397)

This victory gave an immortal glory to Stalin's cult of personality just at the moment when it on the wane on account of the enormous human cost of the war. The illustration of Stalin in military uniform as the Supreme Commander-in-Chief seems to reflect this, showing him looking pensively into the distance (1948). Many words are dedicated to a description of the deeds of the army as a whole, the heroic defense by the people behind the front and the partisan movement, crowning the Stalin cult and giving it worldwide status (Picture 3.4):

> The victory of the Soviet armed forces was also ensured by the Soviet military art and a wise strategy of Stalin, Generalissimo of the Soviet Union. Comrade Stalin trained splendid generals of a new type like Zhukov, Konev, Vasilyevsky, Tolbukhin, Govorov, Vatutin, Antonov, and others […]. (p. 421)

A major change in the 1962 edition of the textbook is the absence of quotations from Lenin and Stalin. Stalin's name has disappeared. He is never mentioned – neither in relation to the 1936 Constitution, nor the non-aggression pact with Germany (1962). The only aspects of the war to be described in detail are the defense of Stalingrad and the heroism of the Red Army and the Soviet people – although making no mention of the human cost of the victory – still the chief elements of identity and Soviet collective memory. Stalin's personality cult is transformed into a new cult, that of culture and scientific successes, and of peace and friendship between

Picture 3.4 Stalin as the
Supreme Commander-
in-Chief

Supreme Commander-in-Chief,
Generalissimo of the Soviet Union,
JOSEPH VISSARIONOVICH STALIN

the Soviet people and those world over (1962). This was driven by the political need
to set in motion a new plan for communism in the aftermath of WWII.

Discussion and Concluding Remarks

The analysis of the representation of Lenin and Stalin in the context of events that
led to them becoming political leaders shows a process of ideological construction
of the historical facts, an ideologization of that element of them concerning the role
of the two leaders, omitting that of other political leaders, accused of treachery, and
neglecting that of the masses who are gradually written out of the story.

   The cult of the two leaders' personalities is clearly shown through the description
of their mortal and immortal nature, lavishing praise on their qualities, and their role
as interpreters of Marxism and the communist view of the class struggle. The same
re-writing of history through the lens of Marxism-Leninism meant to prove the
infallibility of Stalin's actions, presenting him as worthy of veneration, and as the
best interpreter of the supreme laws of history, Marxism, and the legacy of Lenin.

   Thus history textbooks became an important instrument in the indoctrination of
the new generation. Through a combination of events based on historical laws and
an iconographical canon emphasizing the "sacred" aspect of the cult of personality,
the rise of a triumphant regime is shown, with leaders that could guide the masses
to a classless society. The veneration with which the new generation should regard
the immortal teaching of Stalin as well as the whole communist system derived
from the presumed greatness and superiority of the actions that had led, through the
class struggle, to the victory of the proletariat.

The cult of personality was destined to come to an end for a number of reasons: the suppression of the role of the other leaders, the outlawing of any political opposition, the disappearance of the masses from accounts of the victory of socialism and, above all, the human cost of the social changes introduced by Stalin's reforms and of the Great Patriotic War were all elements that contributed to an exposure of the contradictions of Stalinism.

The manipulation of historical facts – something that is characteristic for textbooks in many countries when attempting to render the study of history appropriate for schoolchildren, sometimes simplifying or generalizing – came about in totalitarian regimes through a desire to indoctrinate succeeding generations.

This analysis of the various editions of the two main history textbooks used in schools until the beginning of the 1960s shows the process of ideologization of history with inevitable falsifications relating to descriptions of the leaders and their political actions. They reveal the strength of the personality cult that was to be abandoned after 1956. While the different editions of the book for Grades III and IV recount the political struggles of the leaders, particularly Lenin and Stalin, in a quasi-mythological style, glossing over the roles of the others who are essentially marginalized, the textbook for Grade X describes the political actions of the leaders and the historical events, paying most attention to the role of Lenin and Stalin, the authors of peace, of major social change and defenders of the country from enemies, both internal and external.

The study of the imagery used in these textbooks could be pursued further if analyzed alongside books designed for children and adolescents such as *Children about Stalin* (1939) published on the occasion of Stalin's 60th birthday, presenting Stalin as a father figure surrounded by adoring children, or the stories published in the magazine *The Pioneer* where the same iconography is used in the accompanying illustrations as that in the textbooks.

The year in which Stalin died, 1953, also marked the end of Lenin's personality cult with the publication of *The Childhood and Schooldays of Il'ich* (Lenin) with its warning to "millions of workers throughout the world" not to forget the leader, transforming him into a symbol of the might of the proletariat against the imperial politics of tsarism (Ul'ianova 1953, p. 38b). The cult of Stalin gradually weakened in the course of the following years and, while remaining a symbol of dictatorship, violence and persecution after the fall of Communism, it has continued to feed into the political metanarrative with its constantly evolving symbology.

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Chapter 4
How Do Czech Children Remember Their 'Father'? Visual Representations of the First Czechoslovak President, T. G. Masaryk, in Czech History Textbooks in Communist and Post-communist Times

Andrea Průchová

How Do Czech Children Remember Their 'Father'?: Introduction

The current democratic state of the Czech Republic has its historical predecessor in the territorial unit of Czechoslovakia. The first autonomous modern state with its own constitution, independent borders, state symbols and parliamentary system was founded on the ruins of the Austro-Hungarian Empire after the end of World War I in 1918. The foundation of Czechoslovakia represented the realization of a long-cherished dream of the Czech nation of achieving political independence from bigger political projects. The unique political victory, which shifted Czechoslovakia towards Western democracies, gave rise to the new national icon of the first president of Czechoslovakia, Tomáš Garrigue Masaryk. In the eyes of local inhabitants he became a symbol of the young democratic state and has achieved the status of a national hero. During his lifetime the official title of "President-Liberator" was conferred on him and to this day he is associated with the colloquial name of "father" Masaryk in Czech society.

This chapter focuses on the analysis of visual representations of President Masaryk in the Czech history textbooks.[1] It works with schoolbooks coming from two political periods of modern Czech history. It uses history textbooks produced and published during the communist (1968–1989) and the post-communist eras (1989 to the present), which offer a significantly different image of the first president. While post-communist textbooks depict Masaryk as the symbol and the cause of the successful foundation of Czechoslovakia, communist textbooks avoid displaying any pictures of Masaryk. The text explores this striking difference further and tries to explain it. The aim is to analyse how the heroic image of Masaryk was

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constituted in post-communist textbooks and how his absence has been replaced by other images in the communist schoolbooks. By combining quantitative and qualitative methods of visual analysis, this chapter explains this difference in terms of means of visual communication (visual media, genre, motifs, etc.) derived from the visual content analysis as well as in terms of signs, which constitute the meaning of Masaryk's pictures based on application of the semiotic and social semiotic analysis. It attempts to explain how history textbooks communicate essential ideological, social and political messages to student readers through visual images. Finally, it aims to make a significant contribution to an ongoing discussion on the importance of the use of visual materials and methods in historical and memory research.

Literature Review

Pictorial Turn

Despite the irreplaceable role of images in history textbooks, only a few authors have paid attention to them (e.g., LaSpina 1998). Illustrations, photographic portraits, maps or graphs represent important channels for reproducing historical knowledge. Visual communication is many times faster than reading a text (Levie 1987). An image is capable of significant simplification of complex content (Kukkonen 2011). Moreover, an image can be interestingly used as a metaphor for the conceptualization of how we understand the memory itself. History textbooks represent a specific medium of memory, where collective and individual memories meet and the negotiation of their meanings takes place (Falk 2010). From the perspective of collective memory, history textbooks take on the form of series of images providing us with the official narratives of national history. "Such a 'pack' of mandatory topics [history textbooks] can be seen as a code indicating that the pack, in a certain sense, dictates the mode of remembering in a given culture". The complex of individual memory, on the other hand, resembles a personal photo album, including clear, blurred and found photographs as well as empty spaces. As will be demonstrated later (e.g., in the discussion of the visual tropes of memory), in many respects this chapter draws upon the concept of the *pictorial turn* and applies it innovatively to research into social and historical material.

History textbooks are part of our social environment which influences what will be remembered and how. Zerubavel calls this process *mnemonic socialization* (1996). He points out, "The extent to which our social environment affects the way we remember the past becomes even clearer when we realize that much of what we 'remember' is actually filtered (and therefore inevitably distorted) through a process of interpretation that usually takes place within particular social surroundings" (2011, p. 222). Any particular environment and group to which an individual belongs, acts according to a certain mnemonic tradition. This consists of a set of *social rules of remembrance* (norms, filters) based on which it is decided what will

become part of memory and what will be forgotten. School represents one of the most influential mnemonic environments. It provides students with an officially approved set of rules of remembrance, which are manifested by the plots and narratives depicted in textbooks. This chapter enriches this area of research by focusing on images as visual manifestations of social rules of remembrance. The research presented helps to critically analyze further the process of mnemonic socialization, which has been heretofore predominantly interested in textual material and social practices.

Media of Memory

As mentioned above, history textbooks represent a platform where collective and individual memory meet under the permanent influence of a social environment. This enviroment, in our case created by schools and textbooks, connects them. It links personal and collective memory and produces the *collective-semantic memory*. This is the specific type of memory which Manier and Hirst (2008) depict as a field where the negotiation of what will be remembered by an individual out of the common history takes place. The role of textbooks as well as other educational institutions, such as museums and archives, is crucial in this process. If the way we remember represents the social as well as the semantic process, then the relationship between individual and collective memory must be dialectical in character, as hybrid models of cultural memory suggest. History textbooks are a subset of all the dimensions of the three-dimensional concept of cultural memory proposed by Erll (2011): *mental, material, and social*. The *mental dimension* is constituted by norms, values, and stereotypes that are shared by a particular *mnemonic community* in which an individual belongs. The *material dimension* consists of the media, artifacts, and technologies producing objects of memory and thus providing memory with a physical existence. The *social dimension* is represented by the users of objects and codes of memory, who reproduce specific mnemonic practices. History textbooks represent the source of codes of memory (norms, values), which reflect the official politics of memory and the environment of school and education; that is why Assmann considers them to be one of the significant *texts of memory* (2011). They have the physical form of a paper book and their users are primarily students and teachers, then authors, editors, and publishers.

Focusing on the social dimension, history textbooks can also be described by the terms *mnemonic products and practices* (Olick 2010). "Media [history textbooks] not only connect the three dimensions of memory culture; they are also the interface between the *collected* and *collective*, the cognitive and the social/media level of memory" (Erll 2011, p. 104). Erll emphasizes the importance of the media-oriented approach as well as the need for a dialectical point of view on the relationship of individual and collective memory. Her view is supported by Olick, who understands cultural memory as a dynamic process, which is a result of the simultaneous

interaction of collective representations, deep cultural structures, social frames of interaction and culturally and socially framed individual memories. Olick suggests that only through the perspective of a direct interaction with mnemonic products, which reflects and evaluates how these products have been used, we can reach a new theoretical framework allowing us to see individualist and collectivist approaches to memory not as opposite, but as dialectical conceptions in a dynamic process of remembering. He defines two levels of memory - *collected* and *collective* memory - which communicate and interact with each other (2011). Collected memory represents shared norms and values adopted by an individual in his or her social environment. Collective memory is constituted by the symbols, media, institutions, and practices that further form the memories of individuals. Olick emphasizes the influence of *mnemonic technologies* too. He defines them as media and objects that actively aid the creation and preservation of memories, and thus serve as a kind of *prosthetics of memory* (2011). History textbooks fit into this category, along with many other media, such as diaries, archives or photographs.

Placing the analysis of Masaryk's visual representations in the context of the pictorial turn can be regarded as an innovative step that brings the study of visual materials and the employment of visual methods into the current research on memory. It also helps to manifest the use of the image as a metaphor for conceptualizing the idea of memory itself. Linking our research with the process of mnemonic socialization offers the opportunity to define Masaryk's pictures as manifestations of certain mnemonic rules which have been reproduced in the environment of the school and education. Further analysis, which will be conducted now, will allow us to describe a different set of such rules which are embedded in communist and post-communist textbooks. Drawing upon hybrid models of cultural memory anchors the chapter to the recent academic interest in the study of media of memory, which is based on the idea of the interconnectivity of individual and collective memory. The application of selected models to the medium of history textbooks enables us to show them as one of the crucial platforms of the dynamic process of creating memory.

Research Design

Research Question

The following research question guides our analysis of the textbook visual data: Which ideological purposes are revealed in visual representations of Masaryk in communist and post-communist textbooks? This research question emphasizes the critical analysis of *ideological filters* (Wodak 2011), which constitute these differences and have been applied to narratives related to Masaryk during the communist and post-communist eras. As Pingel reminds, the effort to develop and present positive self-concepts, which correspond to a period self-image of the society and

its political leaders, is an important part of textbook production. Some events and periods of time are celebrated, whereas others are overlooked or even erased. Based on the analysis of ideological filters, we explain, why a heroic narrative has been build around Masaryk's figure in the post-communist textbooks, while Masaryk's visual representations have been eliminated in the communist ones. In order to describe the post-communist heroic narrative in details, the concept of *visual tropes of memory* will be used. This concept was first defined by Marianne Hirsch (2001), who discussed repeating visual motifs representing significant historical events. In the example of photographs connected to the Holocaust, she speaks of visual tropes that start to "iconically and emblematically signal this event" (2001, p. 217) by repeating themselves. Hirsch thus arrives at the contention that "our memory does not consist of events, but of representations" (2001, p. 218).[2] By application of this concept, several post-communist visual tropes in relation to Masaryk will be defined. Finally, our research question allows us to understand how differently the social concept of history has been presented in communist and post-communist textbooks and how significant role images do play in it.

Theoretical Framework

The ideological purposes achieved by Masaryk's visual representations in communist and post-communist textbooks have been framed by the theoretical perspective of social constructivism as defined by Berger and Luckmann (1966). Coming from this theoretical background, the research emphasizes the importance of a permanent process of interaction and communication based on which the social reality has been constructed and the meanings of its phenomena, included the meanings of visual representations of cultural memory, have been negotiated. From this perspective, the dynamic and dialectical character of the politics of memory, reproduction of historical knowledge, and mnemonic socialization, becomes visible and the importance of media of communication, in this case of visuals in history textbooks, is recognized. Whereas a traditional application of this theoretical framework tends to work with the language as the prefered system of communication, in this research, the chosen theoretical approach has been enriched by our primary focus on means of visual communication. Secondly, our research question and methodological tools have been informed by the theoretical perspective of social semiotics. Social semiotics allows us to regard Masaryk's visual representations as sets of codes and signs, which are embedded in the visual material of history textbooks, constituting its complex meaning on a higher level, while being inseparable from social practices connected with this material (Hodge and Kress 1988). In our research, the interest in analysis of higher, complex meanings corresponds to the analysis of ideological purposes of Masaryk's visual representations.

Data Collection

Two sets of history textbooks have been analyzed. The first one includes textbooks published by Státní pedagogické nakladatelství (The State Publishing House) between 1968 and 1989. In this period, the Státní pedagogické nakladatelství was the exclusive producer of local schoolbooks and was controlled by the Ministry of Education. The latter set consists of textbooks published between 1989 and 2010 after the Velvet Revolution and the fall of the communist regime. The textbooks from two private publishing houses, SPN and ALBRA, which were founded in the early 1990s, have been chosen here. In all the textbooks the chapters describing the formation of Czechoslovakia have been analyzed. In the first set these chapters were found in textbooks from 1973, 1976, and 1983. In the second set the textbooks from 1996, 2002, 2009, and 2010 have been examined (two books were always taken from each decade). In total, the analysis has been applied to seven history textbooks and 55 images, out of which 11 came from the communist and 44 from the post-communist production. The figure of President Masaryk was found in 12 particular representations.

Data Analysis

In order to analyze the visual material coming from two different political periods of one country, the method of vertical comparative analysis has been used. It allows us to apply the same analytical process to two sets of data coming from different periods of time on one timeline and thus is very suitable for a comparison of textbooks produced in communist and post-communist times. A mixed method approach has been chosen. This way Masaryk's pictures can be defined quantitatively in terms of means of visual communication as well as qualitatively in terms of ideological meanings which they bear.

From quantitative set of methods, the visual content analysis has been applied. It helps to quantify the presence of Masaryk's representations in communist and post-communist schoolbooks, and it gives us an opportunity to describe these pictures according to objective categories, in our case according to the categories of media, genre, motif, gender, modality, date, and narrative.

Specific communication qualities of Masaryk's pictures have been revealed by application of the qualitative approach of semiotic and social semiotic analysis. These two methods help to articulate the meaning of particular pictures and enable us to follow the process of production of connotations as well as the process of construction of higher, complex narratives. They also make visible specific signs which have been repetitively displayed in relation to Masaryk and which create an established set of visual tropes based on which the president has been depicted. These particular visual tropes, then, occur not only in history textbooks, but widely circulate in other media of memory like television, documentary film, or museum exhibitions.

Table 4.1 Visual content analysis

Variables	Values				
Visual media	Illustration	Reproduction	Photography	Hybrid	
Genre	Documentary photo	Reproduced print	Reproduced artwork	Comics	Diagram
Motif	Portrait	Object	Particular event	General action	
Gender	Man	Woman	Impossible to determine		
Modality	High	Middle	Low		
Date	Dated	Partially dated	Undated		
Narrative	Dynamic	Static			

Notes

1. Despite its one author, the text has been written in the plural according to the academic convention used in the Czech Republic
2. Hirsch's suggestion directly supports the use of the image as a metaphorical conceptual tool for further critical thinking about the memory itself, as mentioned in the subchapter *Literature Review*

Visual content analysis (Bell 2001) was based on determining seven variables to which at least two values were assigned (See Table 4.1).

The basic variables included the following categories: *visual medium, genre, motif, gender, modality, date* and *narrative*. The category of visual medium was described by the values of illustration (drawn pictures), reproduction (reproduction of materials such as artworks and period printed material), photography and hybrid media (representations based on the cooperation of text and image, e.g. maps with a legend). The variable of genre was connected with the values of documentary photography, reproduction of a print, reproduction of an artwork, comics and diagrams (primarily maps and charts). The category of motif was analyzed by means of the values of portrait, object, particular historical event (depiction of the day of a particular significant event, such as the founding of Czechoslovakia on October 28, 1918) and general action (images displaying the social, economic and political context of particular historical events).

The variable of gender was defined by the variables man, woman or impossible to determine in case of a depiction of an anonymous crowd of persons. The category of modality was segmented by the values high, middle and low. The modality of visual representations expresses the degree of similarity with the perception of the surrounding world by the human eye (Kress and van Leeuwen 2006). In other words, modality expresses to what degree we are aware of the mediated character of an image. For example, photography has a high modality due to its indexical character, which makes it an imaginary "window to reality". The students thus perceive it as unmediated or unmanipulated visual information, which can gain a purely documentary character. Middle modality can be found in photographs of low quality. Low modality is connected with illustrations, comics and diagrams. The variable of date was differentiated by means of the values dated (statement of the

author and date when the image was created), partially dated (statement of the author or the date when the image was created) and undated (none of this information is stated). The category of narrative (Kress and van Leeuwen 2006) was related to the values of dynamic narrative (the representation renders movement of a person) and static narrative (the expression of movement is lacking, e.g. official group photographs, individual portraits, diagrams). Each of the 55 images was coded based on the above mentioned variables and values. Each of the representations was assigned a single value. A coding book was created as part of the research.

The application of visual content analysis allowed us to reveal objective differences in Masaryk's visual representations, which were of a formal (visual medium, modality, date) as well as of a content character (genre, motif, gender, narrative). In the first step, the analysis helped us to create the useful basic categories based on which two different sets of schoolbooks were comparable. In the second step, it provided us with tool for describing and showing this difference, which represents a necessary basis for a further qualitative interpretation of ideological purposes lying behind it.

The visual content analysis was accompanied by the qualitative method of semiotic analysis (Barthes 1972; van Leeuwen 2001; Rose 2012) and social semiotic analysis (Hodge and Kress 1988; Jewitt and Oyama 2001). In the primary step of semiotic analysis, the individual signs of visual representations were described on the denotative level. These signs were subsequently analyzed on the level of connotations, where they were enriched by their arbitrary and culturally conditioned meaning. In the next step, the syntagmatic and paradigmatic signs were determined. Lastly, a secondary semiotic analysis was conducted, which resulted in the articulation of a broadly shared and reproduced myth. The significant signs included the clothing and gestures of persons, the position of their bodies, the mutual interaction of these bodies, environments and objects, the represented environment, objects included in it as well as the formal and aesthetic signs of pictures. The signs in relation to the visual technologies used were analyzed too: the stylistic character of a drawing, the quality of a photograph, the colour scheme, the composition of the image, the accentuation of objects and persons in the foreground and the background.

The social semiotic analysis enabled the interpretation of the relationship between the recipient and the image. It examined aspects including the distance between the position of the viewer and the image based on the classic typology of film images, differentiating between close shot, medium shot and long shot. In the case of a close shot, a participative relationship is established between the viewer and the image, while the viewer can observe and analyze subtle signs, frequently indicating the emotions. The medium shot allows the viewer to distinguish the mutual relations between the represented signs and in this way to follow the dynamics between the individual persons and objects. The long shot situates the viewer in the position of a neutral observer. Also, the three types of perspective were analyzed: top view, bottom view and direct perspective. By means of the top view the viewer can perceive the individual signs as a whole. They are situated in a position where they have all the information mediated by the image at their disposal. The

bottom view, on the contrary, provides a section of a broader event, which can only be deduced by the viewer. Direct perspective is defined by an undeformed perspective. The situation can be labelled an "eye-to-eye" view. Last but not least, an analytical reflection of the framing of the image was conducted too. In the case of a textbook, it is possible to explore the ways in which the image is delimited from the rest of the page or from the informative captions.

By application of qualitative methods, the ideological dimension was added into the previous quantitative description of the difference in Masaryk's pictures displayed in communist and post-communist textbooks. Social semiotic analysis helped to examine the process of production of meanings hidden behind visual representations, which is informed by our theoretical lens of social constructivism, allowing us to consider the ideological purposes of images. The semiotic approach helped us to detect the sets of signs which were repeatedly present in Masaryk's pictures. By defining these sets of signs, visual tropes of memory in relation to Masaryk were named.

Findings

Findings Derived from the Quantitative Research

The communist textbooks do not display any pictures of Masaryk and, in general, they are characterized by the absence of political elites. Instead of politicians, anonymous crowds of persons are depicted who take the formation of the republic into their own hands. Most of the images have a dynamic character which supports the revolutionary atmosphere of the foundation of the new state. The dominant use of the medium of photography with a high level of modality and the lack of information about their authors and dates enhance the perception of these pictures and of the history textbook itself as an objective, official document of memory.

The absence of political figures and their substitution with pictures of anonymous crowds represents a significant feature of the ideological filter applied by the communist regime to a historical narrative of the foundation of Czechoslovakia. Instead of one important political representative like Masaryk or a group of politicians like Masaryk's government, there is a mass of people displayed, who gain the power to change the history. From the perspective of this filter, an individual cannot play a significant role in the creation of history. It is the revolution led by people, which can cause the transformation and establish a new political order. The communist ideological filter, which is shaped by Marxism-Leninism and by the philosophical tradition of historical materialism considers Masaryk to be an icon of the bourgeois-oriented society, which is run by social elites, who exploit the lower social class. Masaryk's political exile in the USA, his academic position as a university professor and the role of the public intellectual were thus perceived as standing in counterposition to the political beliefs of the regime. The independent

Czechoslovakia, then, was seen as a political project significantly supported by Western capitalist states, which, at that time, represented the direct political opposition to the local government connected with the Soviet Union. Therefore, the lack of images of Czechoslovak national symbols, which were replaced with symbols of the Soviet political ideology, can serve as a great example of another visual strategy employed by the communist ideological filter in the schoolbooks.

Figures 4.1 and 4.2 represent the only two visual elements which are shared by communist and post-communist textbooks. They capture two specific dates and events, which led to the foundation of Czechoslovakia.

In post-communist textbooks the depiction of anonymous crowds is substituted for pictures of particular or unknown male figures, among them Masaryk enjoys the exclusive position of a political leader and a national hero. Women are almost


Fig. 4.1 General strike on October 14, 1918, [photograph] (From Miloň Dohnal 1973)

Fig. 4.2 Formation of the Czechoslovak state on October 28, 1918, [photograph] (From Ibid. (p. 34))

entirely absent. Unlike the communist textbooks, there is a distinct dominance of state-forming documents and illustrations of new national symbols. Masaryk is often displayed next to these symbols or his name is presented on important documents, mostly in the form of a signature. Post-communist textbooks present images of a static character more often than did the materials in previous decades. The increase in static images reflects the increase in portraits of politicians (such as Masaryk) and of objects (of national symbols presented, including in relation to Masaryk). Masaryk's representations use the media of photography and illustration equally. The greater variety of visual media is one of the significant features of materials from the post-communist era.

Based on the above mentioned findings, we have found two significant features of the ideological filter, which has been applied to the foundation of Czechoslovakia after 1989. Firstly, the filter focuses on the role of political elites and individuals in the history and loses the previous interest in dynamic representations of masses of people. This shift could be interpreted as a sign of a democratic political transformation, which the Czech Republic went under in 1989. The Velvet Revolution not only restored democracy, but also the bourgeious-oriented perspective on history, which has been significantly represented by the figure of Masaryk. The understanding of history from the perspective of Marxism-Leninism has been left out, however, the representations of political elites has caused a new problem. Today, the whole story of Czechoslovakia has been depicted exclusively from the perspective of successful male politicians, while there is no place left for women in history textbooks. Secondly, the post-communist filter emphasizes the pictures of national symbols and state-forming documents. In this case, we might assume, that it uses them as direct references to the renewed democratic tradition of the independent state. Lastly, the variety of visual media used in post-communist textbooks could be explained by the technological development of the print as well as by the creation of a free market of private publishing houses, which have found the inspiration in heavily illustrated and colourful Western textbooks.

Findings Derived from the Qualitative Research

The qualitative approach of semiotic and social semiotic analysis allowed us to understand what kind of meaning was produceed in the widely shared visual tropes relating to the representation of Masaryk.

The visual representations of Masaryk can be found exclusively in the textbooks published after 1989. Twelve pictures can be divided into six visuals of a direct and six of an indirect character. The number of these images is equally divided between the textbooks from the 1990s and the new millennium. The direct ones show Masaryk's face or whole figure. The indirect ones display Masaryk's name on important state-forming documents or mention him in the text accompanying a picture. A comparison of the direct and indirect representations can be made on the basis of Figs. 4.3 and 4.4.

Fig. 4.3 President Masaryk is arriving in the new republic upon his return from exile, [photograph]. From Vošáhlíková 1996)

Prezident T. G. Masaryk (spolu s dcerou Olgou a synem Janem) v prosinci 1918 při návratu z exilu do Prahy.

For the purpose of semiotic analysis, Masaryk's representations were grouped into five thematic categories: official portraits of the president, Masaryk in his daily presidential routine, Masaryk and state symbols, Masaryk in documents, and Masaryk in a special context. On the official portraits the viewer can notice the facial features, haircut, and clothing of Masaryk (Fig. 4.6). It is these very signs that strikingly repeat themselves. Masaryk is portrayed with oval glasses, a long white moustache, and a beard, clothed in a black-and-white combination of a white shirt collar, black suit, and black tie. His overall appearance, dominated by his high forehead, glasses, and black tie on a white collar corresponds to that of a teacher rather than that of the highest statesman. It is this very moment that is significant for the interpretation of the figure of Masaryk in post-communist textbooks. These texts frequently allude to the original profession of Masaryk, who had been a university teacher and respected intellectual. The depiction of Masaryk as a teacher also appears in a series of the most popular photographic portraits of the president taken by the renowned Czechoslovak photographer František Drtikol in 1920.

The representations capturing Masaryk in his daily presidential routine show the president in three situations. Figure 4.3 depicts Masaryk in the company of his daughter Olga and son Jan upon their return from exile in 1918. The president adopts a calm pose with his hands clasped in front of him. His daughter, Olga, is flanked by the male figures of her father and brother. The middle distance of the person of the photographer, in which several figures standing in front of the photographer are captured as well, reminds one of the category of a "fan" photograph, the kind where a popular personality is photographed by a person who has been waiting for his or her arrival in a crowd of other persons. The fact that it is one of a few colorized photographs gives rise to the question whether the use of color could be designed to intensify the emotional experience of the viewer looking at the president returning to the new republic in the company of his family.

The second example provides the black-and-white photograph capturing the president during his visit to a military airport outside the capital Prague. Masaryk is

První symboly našeho státu: 1. Československá bílo-
červená státní vlajka. Poprvé byla oficiálně vztyčena 18.
října 1918 ve Washingtonu (USA) na domě, ve kterém
tehdy bydlel T. G. Masaryk. 2. Znak Národní rady česko-
slovenské ze září 1918. Tvořil jej čtvercový štít s historic-
kými znaky Čech, Moravy, Slezska a Slovenska, půlený
svazkem Svatoplukových prutů symbolizujících jednotu
všech zemí republiky. 3. Prapor Národní rady českoslo-
venské.

Fig. 4.4 Depiction of the national symbols of the new republic, where Masaryk's name is part of the accompanying text, [collage of illustrations] (From Ibid. (p. 23))

on horseback. He is wearing a riding outfit with the attributes of a military uniform. On his left there are soldiers with straight backs, while another soldier is approaching in the background. The soldiers are fixing their eyes on their leader, who is looking in a different direction. Because of Masaryk's elevated position, there is only a clear day sky rather than the airport environment behind him. These signs, as well as the situating of the president's figure in the center of the image, make Masaryk's image reminiscent of the representation in a monument, an equestrian statue of a leader who is paid tribute to.

The third black-and-white photograph of this category captures Masaryk before delivering a political speech from the balcony of Prague Castle (Fig. 4.5). This place has become synonymous with key speeches suggesting a change in the political

Fig. 4.5 President
Masaryk delivering a
political speech from the
balcony of Prague Castle,
[photograph] (From Ibid.
(p. 24))

Vlastní armádu budovalo Československo především
podle francouzského vzoru. Součinnost s brannými si-
lami této mocnosti zajišťovala od února 1919 francouz-
ská vojenská mise v ČSR, jejím prvním představitelem
byl generál Maurice César Joseph Pellé (na snímku
z Pražského hradu, vpředu – první zprava; uprostřed
T. G. Masaryk).

direction of the country. Here, too, Masaryk is positioned in the center of the image
and in the middle distance from the photographer. Again, the viewer can observe the
environment of the scene, which enables the analysis of the relations between the
individual persons. The president is surrounded by prominent male politicians.
Masaryk, unlike the French army general standing on his left, is wearing the modest
black-and-white outfit familiar from his official portraits. He lacks the military hat
he wore in the photograph of the military airport. Unlike the French general, who is
standing with his hands crossed in front of him, Masaryk has his hands behind his
back. He is slightly bent forward, which might suggest his openness to the crowds
of people waiting for his speech.

An interesting category of visuals is constituted by the connection of Masaryk
and state symbols. This moment is most explicit in Fig. 4.6, juxtaposing Masaryk's
official portrait and the new presidential standard, reading "Truth prevails." The
photograph and the illustration overlap in the upper right corner, while the standard
is partially covered by the president's portrait. The mutual connection of the two
representations is supported by the feature of a blue frame. Although the informa-
tion about the presidential standard is mentioned first in the accompanying text and
its illustration bears the number one, Masaryk's photograph assumes visual domi-
nance. The official presidential portrait with Masaryk's visual features is also found
on the illustration capturing Czechoslovak banknotes and coins. The coin with the
president's profile occupies a central position among the others and the president's
profile also appears on the banknotes depicted, where it is situated as the first face
which can be recognized by the viewer.
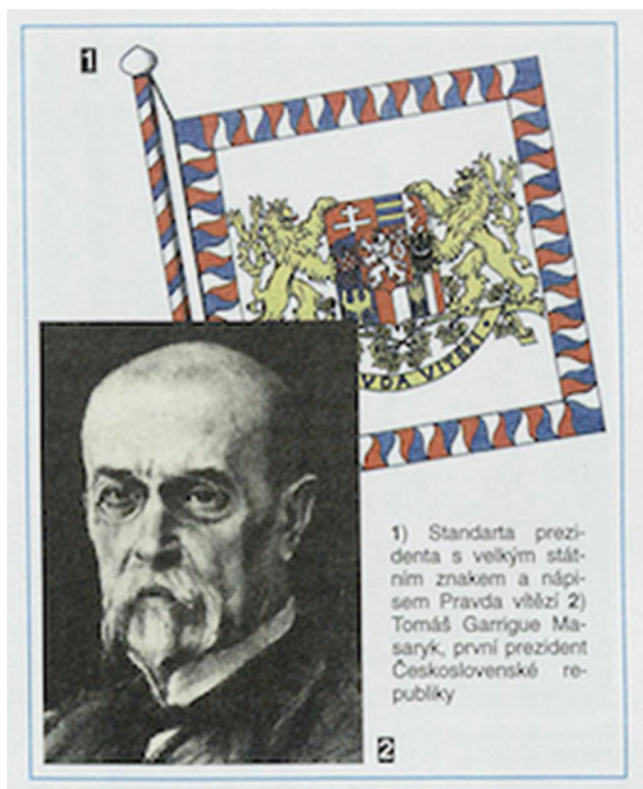
Fig. 4.6 The connection of Masaryk with state symbols, [collage of photograph and illustration] (From Kuklík 2010)

The indirect representations of Masaryk in documents concern primarily the connection of the president and the key document of the Washington Declaration, where the principles of the functioning of the Czechoslovak state are articulated. In a textual analysis of the wording of the declaration, the key words linked to the document, and thus also to the president, are as follows: *freedom of speech, religion, science and art; equal position of women; equal position of national minorities; equal society* and *parliamentary democracy*.

In a special indirect context, Masaryk is represented in an informative text accompanying the photographic portrait of the prominent Czechoslovak politician, Karel Kramář. The text accentuates the overambitious nature of Kramář, which prevented him from attaining the highest political success achieved by Masaryk. That, too, supports the representation of Masaryk as a cultivated and modest personality as suggested by his official portraits. Another special representation is that of a black-and-white documentary photograph capturing Masaryk's funeral held in 1937. Taken from the gallery of a building, the photograph captures a long, winding procession of anonymous citizens in the courtyard of Prague Castle who are waiting to bid their last goodbyes to the popular president.

Visual Tropes Related to Masaryk

The semiotic and social semiotic analysis allowed us to interpret meanings hidden behind particular Masaryk's pictures grouped into five categories. From this conducted analysis, it is possible to indicate the existence of some repetitive signs, which create complex patterns in which Masaryk has been displayed. These repetitive patterns, called visual tropes of memory, will be now described in the context of the network of other media of memory. In relation to the figure of Masaryk, we distinguish four visual tropes: the figure of absence, the figure of a father, the figure of a rider-military leader and the figure of a teacher.

The first visual trope of memory, the figure of absence, can be found exclusively in communist textbooks. The absence of Masaryk's pictures constitutes a specific type of non-representation which might be regarded as an outcome of the effect of the specific communist ideological filter on textbooks. This filter sees the historical transformation as driven by mass of people, while completely refusing to acknowledge any significance or positive effect of bourgeious elites on the historical trajectory of the Czech Republic. Masaryk, on the contrary, represents the iconic figure of bourgeious elites and the foundation of Czechoslovakia, an act driven by the power of individuals. When looking at the *plurimedial network* of the period's media, through which the history of Czechoslovakia was spread from 1968 until 1989 (e.g., historical expositions, films, TV programmes), the figure of absence can be found there as well; Masaryk, along with other significant politicians of Czechoslovakia, has been eliminated from the period's history. This fact might lead us to the assumption, that the just described communist ideological filter was not applied only to the textbooks, but it had an extensive effect on the highest level of politics of memory.

Also, three other visual tropes related to Masaryk in the post-communist era can be found in a wider context of the period plurimedial network. Within the analyzed sample, the figure of a father is represented by the colourized photograph of Masaryk's return from exile (Fig. 4.3). In the plurimedial network, it is supplemented by abundant photographs of Masaryk in the company of anonymnous children or his own grandchildren. In these photographs, Masaryk is smiling, holding the children in his hands, kissing them or playing with them, always being captured in very informal moments. The figure of a rider-military leader is represented by the photograph of the president at the airport. Period archives contain a remarkable amount of paintings and photographs of Masaryk on horseback, both in his free time and during official military parades. This figure is also repeated in the form of several equestrian statues situated in various places around the Czech Republic. Lastly, the figure of a teacher is derived from the official portraits of the president, in which he is wearing a simple black-and-white outfit and his typical oval glasses (Fig. 4.6). He wears the same clothing on the occasion of an important political speech delivered from the balcony of Prague Castle (Fig. 4.5). As also supported with materials from period archives, the given outfit has become a certain iconic sign associated with Masaryk. In this case, however, the immense popularity of the

above-mentioned series of portraits by photographer František Drtikol, which captured this appearance of the president, must be taken into account.

As just described, even in the post-communist era, a broader effect of the period ideological filter might be assumed, reaching outside the field of history textbooks. By the perspective of the post-communist filter, the figure of Masaryk is celebrated as a role model of the democratic president, who is a strong military leader (the figure of a rider), a public intellectual (the figure of a teacher) as well as a loving person (the figure of a father), whose love belongs equally to his family and to the country (until today the Czech citizens call Masaryk their "father"). The ideological purposes achieved by Masaryk's pictures in the communist and post-communist times thus seem to be opposite, since the communist era excludes Masaryk's visuals from the examined tetxbooks and on the contrary, the post-communist era includes and emphasizes them. Both ideological filters, however, seem to be equally powerful in terms of their range beyond history textbooks, affecting the whole period plurimedial network.

In the final step of our analysis, we argue, what is the common basis of all three post-communist visual tropes of Masaryk and thus we define, what is the main ideological communication delivered by his visuals today. We suggest, that the post-communist visual tropes represent Masaryk as a national symbol and a monument. In the case of a national symbol, Masaryk is displayed in the context of real national symbols, as seen in Figs. 4.4 and 4.6, in which the flag and the standard play an important role, or in the description of his presence on banknotes and coins. Depictions of Masaryk as a monument, on which other persons are fixing their eyes, can be found in photographs of the president as a rider, a political leader ready to give a speech (Fig. 4.5) as well as a famous personality photographed by an anonymous admirer (Fig. 4.3). This suggestion might also be intrestingly supported by a fact ascertained during content analysis: in most cases, representations of Masaryk are of a static nature.

Discussion

After defining, what kind of differences and ideological purposes have been related to Masaryk's visual representations in communist and post-communist textbooks, the general contribution of the research has to be evaluated and its further application in the field of theory and practice elaborated. On the most general level, we hope that the main research topic of our chapter, the heroic visual representations of political leaders, could resonate outside the study of textbooks in the wider field of history education. The system of political visual communication represents a universal phenomenon, which can be found all around the world. Despite the cultural differences, it draws upon a specific character of communication through images. In its persuasive techniques, it uses the ability of images to simplify complex information in a few seconds and to appeal to our emotions and memories, while we are absorbing the meaning of the information. The political communication is aware of

these specific features of visual communication and has developed effective strategies how to apply them. We as researchers and teachers, therefore, should try to understand the basics of critical visual literacy in order to be able to decode the meanings and purposes of such a carefully planned political communication as well as to teach our students this critical skill.

The history has demonstrated to us many times how powerful political propaganda is, and as our research suggests that the effect of particular period ideological filter can be very extensive. It can reach the public discourse in which, for all the above mentioned reasons, the visual media play a crucial role. There exists traditional means of political visual communication like billboard campaigns, postcards, advertisiment in printed and broadcasted media and a whole range of new digital tools of political marketing rise, e.g., social media profiles, videogames or interactive websites. The academic research and the critical analysis of visual communication should therefore pursue a better understanding of the production and circulation of ideological meanings in the society, in which the institution of school and the media of textbooks represent the crucial platforms for their reproduction. From this perspective, we hope that our research might serve as an important reading in two ways. Firstly, it can serve as an example of how significant and useful the application of the knowledge of critical visual literacy can be in the field of history education. Secondly, it can be understood as a timely reminder, that despite the best efforts of the textbooks' producers and teachers to reproduce history as transparently as possible, the educational materials always remain part of cultural memory, which has been permanently created, negoatited, and reinterpreted.

Conclusion

The chapter points, as demonstastrated above, to the lack of systematic academic interest in the study of the visual media of memory. Despite the efforts of some researchers, such as Zelizer (1998, 2001), Hirsch (2001) or Sturken (2007), the visual material dimension of memory has not been fully explored yet in the same way as textual materials have. Even if attention is being paid to visual media, it is mostly the media of photography and film which are examined. Meanwhile, the educational media of memory remain overlooked. History textbooks should be regarded as one of the most complex sites of the media of memory, providing a platform for dynamic interaction among the official producers of memory, diverse mnemonic groups, individual memories, mnemonic technologies, and particular mnemonic practices.

Lastly, we would wish to present our use of the image as a conceptual as well as a methodological tool in the critical analysis of history textbooks as a new promising approach into how to examine the whole process of the creation, preservation, and reproduction of memory from a new and, until recently, little used perspective. The image is not a silent witness of historical events or their passive illustration. It is a powerful and complex medium which has to be critically interpreted based on

strict methodological procedures. The findings achieved by visual analysis in this study, are not definite claims. They call for a complementary analysis of the textual part of the textbooks, since the medium of history textbooks, in the first place, is a hybrid medium which works with both, the text and the image.

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Chapter 5
Benito Mussolini in Italian High School Textbooks

Anne M. Wingenter

Benito Mussolini in Italian High School Textbooks

This chapter examines the treatment of Benito Mussolini in five history textbooks currently in wide use in Italian *licei*. Ultimately, it will assess whether recent revisionist tendencies are visible in – or perhaps fostered by – the textbook narratives young Italians are presented with in high school. Although the place of fascism and its leader in Italian history has been hotly debated since fascism's first arrival on the scene, the two decades since the end of the Cold War and subsequent political crisis in Italy[1] have seen a new "recasting" of Mussolini described by Anthony Cardoza as "an ever more bitterly contested terrain … shaped as much by contemporary political considerations and enduring ideological conflicts as by new research findings" (2005, p. 722). One trend has been a call for examining fascism "on its own terms" in an alleged attempt to overcome ideological bias. While a number of scholars have taken up this call and contributed serious, close examinations of fascist rhetoric, ritual and iconography, some of the work coming from this perspective simply conflates the regime's vision with lived experience, dismissing or downplaying the elements of coercion and opportunism underlying that vision as well as the complex

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[1] The *Tangentopoli* (Bribesville) scandals and *Mani Pulite* (Clean Hands) investigations of the early 1990s resulted in the collapse of the Christian Democratic party (DC), which had been the leading political player throughout the Cold War. The Italian Socialist party (PSI), a coalition partner of the DC, likewise disintegrated as a result of the revealed corruption. Since the Italian Communist party (PCI), which had been the main opposition party, had already transformed itself into the Democratic Party of the Left (PdS), this meant that none of the major parties that had founded the Italian Republic and dominated the political and cultural scene since WWII remained intact after 1994.

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and often contradictory ways that Italians negotiated their lives under the dictatorship (Cardoza 2005; Bosworth 2006).

Alongside and sometimes overlapping with this more scholarly debate, there has been a variety of popular histories, television productions, films and biographies of Mussolini that focus on his personal life and/or often paint a rosy, sympathetic, even nostalgic image of the fascist *ventennio* and of Mussolini himself (Cardoza 2005; 2006; Gundle 2013; Mattioli 2011[2]). Such views are further fostered by frequent recourse to a framework measuring fascism alongside Nazism and Stalinism with the result that fascist violence is downplayed or made to seem insignificant by comparison. A number of scholars have pointed out that this framing draws on and perpetuates what Filippo Focardi (2013) calls the longstanding myth of the "evil German and good Italian," a narrative that works to remove any responsibility from Italians for fascist violence, instead positing them almost entirely as victims. In an environment where direct memory of fascism and anti-fascism is quite literally dying out, and where ideological reshuffling has been ongoing on both the political left and right, such a characterization increasingly creeps into Italian "public memory" of the regime. This in turn, has raised concerns that revisionist views misrepresent fascism as essentially benign, and in distorting official memory of the regime, provide a dangerous rehabilitation and normalization of dictatorship (Ben-Ghiat 2004; Mammone 2006; Bosworth 2006). The political dominance in the first decade of the twenty-first century of Silvio Berlusconi and a coalition including both a self-identified "post-fascist" party, the National Alliance, and a party, the Northern League, that called into question the very existence of Italy as a nation, meant that revisionist views and even explicit calls to re-consider the history of fascism and antifascism, got frequent play both on state television channels and on Berlusconi's private networks, and in the press and popular magazines (Mattioli 2011). Perhaps the most infamous example of this was then-Prime Minister Berlusconi's 2003 statement to the press that "Mussolini never killed anyone," and that the fascist leader's banishment of political prisoners was akin to sending them "on holiday" (Hooper 2003). A decade later he defended Mussolini to reporters on the occasion of International Holocaust Remembrance Day, insisting that Italy did not bear the "same responsibility" as Germany for the Holocaust, since "combatting and exterminating Jews" was one of the "impositions" placed on Italy due to the alliance with Hitler – an alliance that Mussolini entered "out of fear" (Bone 2013, p. 29).

School history textbooks are an ideal source for investigating the effects of the political and academic struggles over the place of Mussolini in Italian history because they are both reflective and constitutive of the dominant national narrative. That is, they work to transmit the ideology of the political elite while simultaneously being viewed by – or at least presented to – students as repositories of the "true" narrative of the past (Nelson 2015). Together with other forms of propaganda, this helps cement "homogenizing political myths and symbols" (Bottici

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[2] To be clear the cited works discuss some of the material produced in recent decades and address the trend toward revision/rehabilitation of Mussolini. They are not examples of that genre.

2010, p. 336) and create social cohesion across the body politic (Jonker 2009). People, events, ideas that are omitted from the narrative are at best considered superfluous to "what really matters" and at worst disappear entirely from the official story. Conversely, those included take on the weight of agents of change (Crawford 2003). The result is a kind of teleology of "how we got from then to now" that quite often becomes the framework through which individuals will process later knowledge and even their own identity within the national story. It is little wonder that debates about how to represent controversial figures or events of national importance invariably elicit strong reactions across a wide range of political and historical contexts (Fuchs 2010; Inuzuka 2013; von Borries 2003). Moreover, as Silvana Patriarca points out in her examination of contemporary contestations of the figure of Garibaldi, "today's media landscape provides an unprecedented echo chamber" for even – or perhaps especially – the most extremist views (2010, p. 478). This makes it more imperative than ever that high school students receive a solid grounding in contemporary history complete with the tools to evaluate narratives and judge the revisions that inevitably emerge from a changing political landscape.

Research Goals, Questions, and Methodology

This chapter approaches current portrayals of Mussolini in high school textbooks with two basic questions in mind: 1) Has the recent trend toward more benign assessments of the fascist regime and more admiring characterizations of its leader affected the account of the fascist *ventennio* being given to Italian students? and 2) Does the basic history education most Italians receive give them the tools to evaluate critically the variety of views of Mussolini advanced by historians, politicians, journalists, filmmakers and popular writers?

Freedom of instruction is guaranteed by article 33 of the Italian constitution, in a clear refusal of previous fascist policies that had subjected teachers and didactic material to government scrutiny. Although there have been some recent proposals (in 2001 and again in 2011) from politicians affiliated with right-wing political parties to create state or local committees to vet didactic materials (Bertilotti 2003; Pozzoli 2011), these have been unsuccessful, and there are no national or regional governmental bodies that oversee textbook production and content in Italy. Instead, the Education Ministry (MIUR - official title: *Ministero dell'Istruzione, dell'Università e della Ricerca)* sets learning objectives for each grade; publishing houses produce textbooks in conformity with those basic guidelines, and a committee of teachers, parents and student representatives selects the texts in use in each school.

Currently, if the committee so chooses, teachers can even decide to avoid textbooks altogether in favor of other didactic materials, although considerations of cost and the need to prepare students for the state leaving exam both seem to favor the use of a textbook and also to impede frequent changes. At the high school level

individual families are responsible for purchasing books. As of the most recent school reforms, "fascism" and "Italy from fascism to the resistance and the stages of construction of the democratic republic" are specifically mentioned among the themes to be covered during the fifth and final year of high school, within a syllabus that covers from the origins of the First World War to the present. This history syllabus is the same for all types of *licei* - scientific, classical, artistic, etc. (Guida alla riforma dei licei 2014, p. 28). All students have history class two hours each week, except for students attending classical high schools, who have three hours a week (p. 26). The only other time that Italian schoolchildren study the history of twentieth and twenty-first centuries is in the final year of middle school.

This chapter examines five textbooks that are frequently assigned for fifth-year students. They are: *New dialog with history* by Antonio Brancati and Trebi Pagliarani (2007); *Inside history 3A* by Zeffiro Ciuffoletti, Umberto Baldocchi, Stefano Bucciarell and Stefano Sodi (2012); *The times and the ideas*, 3A by Francesco Feltri, M. Manuela Bertazzoni and Franca Neri (2010); *New historic profiles* by Andrea Giardina, Giovanni Sabbatucci and Vittorio Vidotto (2008); and *History, scenarios, documents, methods by* Marco Manzoni and Francesca Occhipinti (2012). Given the heterogeneity of resources available to history teachers in Italy, the textbooks under consideration here were chosen by reviewing the booklists provided by 40 different Italian high schools, located in the major cities of Rome, Milan, Naples and Florence. The most frequently assigned titles in those schools were then checked against 15 more lists from high schools in smaller towns in the north, center and south of the country to verify that the chosen titles appeared there as well. The schools included classical, scientific and social science designations, and texts selected were assigned in each of the three. The book lists of a number of linguistic and artistic high schools were then examined to confirm the usage of the texts under consideration in schools of each type.

Once selected, the materials were reviewed for overall content, organization and methodology before proceeding to an examination of the chapters covering the first half of the twentieth century in Italy, as well as any mention of Mussolini in other sections of the text. To assess the degree to which the textbook authors and editors conformed to the trends of assessing fascism "on its own terms" and/or focusing on Mussolini's personal life, particular attention was paid to the choice of images used, to the presence and treatment of first-hand accounts or other primary sources, and to the language adopted when describing Mussolini's actions or policies. Areas noted by scholars as specifically controversial (see review of literature) or that have been the subject of particular interest for revisionist accounts (as noted in the introduction), like the degree of fascist violence during the regime, Italian colonialism, the anti-Semitic persecutions, relations with Nazi Germany, war and resistance were scrutinized with an eye toward how Mussolini specifically was associated or disassociated with each.

Teaching the *Duce* in Italy: Background and Review of Literature

Luigi Cajani has suggested that "a discomfort with contemporary history" has been a central feature of the teaching of history in Italy since the beginning of the republic (2005, p. 38). Debates surrounding Italian school textbooks as tools for providing an "authentic education in the spirit and values of democracy" began soon after the fall of fascism (Ascenzi 2004, p. 63). Recognizing that public education had been the object of intense intervention and manipulation by the regime and that textbooks and curricula had to be purged of fascist influence, the Allied Control Commission and the new Ministry of Public Instruction adopted an initial solution for history education that relied on selective omission. Without the time or resources to commission entirely new materials, a committee reviewed existing textbooks, eliminating elements considered tainted by fascist propaganda – in some cases by literally excising the offending references. The curriculum regarding contemporary history simply concluded in 1919 with the immediate aftermath of the First World War. Although this was meant to be a temporary solution, it was only in 1960 that the curriculum was extended to cover through 1945, and the primary motive for doing so was not to examine critically the fascist period, but rather to teach students about the Italian Resistance movement as a kind of foundational moment for the birth of the Italian Republic (Genovesi 2009; Cajani 2005, 2013; Ascenzi 2004; Belardelli 2004; Di Pietro 1991; Allemann-Ghionda 2000).

It should be noted here that the decisions about whether and how to teach the fascist past were rendered even more difficult in the post-WWII era, by the weak and contested nature of Italian national identity. The degree to which the fascists had associated themselves with the iconography of nationalism meant that the two entities that dominated Cold War culture and politics in Italy, the *Democrazia Cristiana* (DC), on the one hand and the *Partito Communista Italiano* (PC) on the other had difficulty evoking patriotism and cementing identity around the usual national symbols – the flag, national heroes, etc. The competing subcultures that emerged in association with these two main parties presented themselves as explicitly Italian entities, but each at the same time drew on ideals that were decidedly supranational in nature – Catholicism in the case of the DC and international communism for the PC. They were each also influenced by the Cold War models put forward by the U.S. and by the Soviet Union, respectively (Duggan 2007). In order to coexist and work together despite their obvious political differences these two subcultures both fostered what is commonly referred to as the "anti-fascist paradigm." The Italian Republic had of course been founded on the principal of antifascism, which is inscribed in its constitution; nonetheless, the "anti-fascist paradigm" went beyond a statement of values to which the nation aspired to assert a general character of Italians and their recent history. As Robert Ventresca describes, it referred to a "'myth' of Italy as the anti-Fascist nation par excellence…. a particular construction of the memory of the Second World War and the fight against

Fascism," through which Italy's leaders, "propagated the idea of anti-Fascism as a political and moral virtue shared by the whole of the Italian people" (2006b, p. 95).

The first textbooks and teacher's manuals to take on the task of presenting the fascist *ventennio* to young Italians thus might differ in their interpretations of the regime, its origins and nature, depending on the political leanings of their authors, but they all shared at least an official commitment to anti-fascism (Baldissara 2004; Belardelli 2004). This meant that textbook authors of varying political views all had reasons to insist upon the ultimately superficial nature of fascism. Within the anti-fascist paradigm, the figure of Mussolini might be presented in a variety of ways – as a great buffoon, a pure villain, a Machiavellian manipulator, a megalomaniac, a ruthless dictator, a mesmerist. More sympathetic authors might present him as an authoritarian whose leadership got Italy through a difficult time before he made the fatal mistake of allying with Hitler – thereby giving an opening to the real source of Italy's suffering in the Second World War. Despite the diversity of these character-izations, however, they most often agreed in an important element: Benito Mussolini alone (or nearly alone) was responsible for fascism. Identifying fascism narrowly with Mussolini and his closest collaborators helped maintain the idea of the innate anti-fascism of the Italian population; it obviated the need for any sustained attempt to purge the Italian republic of fascist taint, perpetuating the notion that fascism had been "killed" along with its leader. For varying reasons, this view worked for the main political players during the early Cold War, the Atlantic Allies included (Duggan 2007, pp. 538–547). Ironically it could also draw on the fascist era cult of personality surrounding Mussolini that had first made the man himself a symbol of the "new Italy" promised by fascist propaganda – this time to dismiss or even mock, instead of celebrate (Ventresca 2006a).

A number of scholars have examined the treatment of the fascist period in Italian post-war textbooks, though none have specifically focused on the figure of Mussolini. A full accounting of the changing and competing views of fascism and the resistance during the years of the Italian "First Republic" is beyond the scope of this chapter, but a few key points are necessary for evaluating the textbooks in use today. Gianni Di Pietro (1991) traces history programs in Italian schools from the early nineteenth century through the 1960s. He convincingly demonstrates that his-tory instruction was "exquisitely political" (p. 38) even prior to unification and designed to reinforce a political orientation receptive to the needs of the ruling classes. The fascists thus were able to build on well-established patterns in their use of national history,[3] and post-WWII pedagogues had greater difficulty combatting this passive political mindset than they did eliminating overtly fascist propaganda from school manuals. Piergiovanni Genovesi's monograph (2009) reinforces this view, but focuses more specifically on the years of transition between fascism and republic. He reveals a de-fascistization effort unfolding even as the war was

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[3] There is, of course, a vast bibliography that looks at history education in Italy during the liberal and fascist periods and on the continuities and ruptures between them. Given this chapter's focus on twenty-first-century textbooks, only works that focus on or include discussion of the post-WWII period are taken into consideration here.

continuing. Superficial and contested, (or perhaps superficial *because* contested) the process can be read as a kind of microcosm of the search for salvageable identity in the wake of Mussolini's fall.

On the question of fascism in school manuals in use during the latter half of the twentieth century, Giovanni Belardelli (2004) discusses the reluctance to confront fascism in the wake of the Second World War and then demonstrates the "divided memory" of fascism visible in six textbooks adopted in the 1960s, when the history syllabus for high schools was first extended to include the fascist period and the resistance, and revised over the course of the following decades. He looks at three books by authors adopting a clear left-wing perspective and three by "moderate" authors demonstrating that while all assessments condemned the regime as dictatorial, they differed markedly when it came to assessing the origins of the regime, its social base, and the specific policies adopted. Of particular interest is his tracing of various editions, showing how new scholarship on the regime might be recognized and incorporated into the texts but often without fundamentally changing the overall assessment offered.

In the same article, Belardelli notes the "near complete" (p. 78) absence of any discussion of the regime's anti-Semitic policies, and the tendency in some of the textbooks toward favorable accounts of fascist imperialism. Grazia De Michele (2011) and Luigi Cajani (2013) have each examined more narrowly the question of Italian colonialism in high school history textbooks and found that fascist characterizations of their colonial wars remained nearly intact in a wide variety of textbooks during the first years of the republic. Only in the 1970s did accounts begin to offer more self-critical assessments, though De Michele notes that even then the subject was usually "discussed briefly as something of little importance" (2011, p. 115) as a kind of "brief parenthesis in Italian history" (p. 116). Cajani, who carries his examination through 2009, is a bit more optimistic that nostalgia for empire and the downplaying of fascist crimes are becoming a thing of the past, but he still describes an account of Italian colonialism that varies widely even in more recent textbooks.

Cristina Allemann-Ghionda (2000), Luca Baldissara (2004) and Luigi Cajani (2005) have all traced the evolution of the history textbook since the 1940s, demonstrating how methodological and didactic innovations, and demands from below like those of the 1968 student movements, have influenced the transformation of textbooks from repositories of continuous, teleological narratives to works incorporating activities, interdisciplinary primary sources and workshops in not always successful attempts to facilitate views of history as a profession and a process. Particularly critical is Elvira Valleri (2014), who has argued that pedagogical and epistemological innovation has actually been poorly applied in the Italian classroom, reconfirming old mainstream narratives while also resulting in a weakened and more opaque sense of history. Genovesi, too, notes that demands that textbook authors present multiple aspects and points of view have sometimes resulted in "a pluralism of stockpiling, not a pluralism of explanation/selection" (2009, p. 34) with the result that the reader is left with density substituting for inclusion.

In addition to the above-described works dealing specifically with textbooks and pedagogy in the Italian case, the research here is further influenced by the theoretical

frameworks and methodologies adopted by a number of authors working across a variety of national contexts. The work of Eckhardt Fuchs on textbook revision and identity (2010, 2012) has been helpful for bringing into focus the multitude of actors involved and interests at stake in preparing school texts. Especially useful have been studies that look at textbook controversies over the portrayal of interwar dictators or dictatorships, like Todd Nelson's recent examination of portrayals of Stalin and Peter Cave's and Ako Inuzuka's (2013) studies of Japanese militarism and colonialism and the controversy over how they should be accounted for in national textbooks. Bodo von Borries, in his treatment of the Third Reich in German textbooks (2003), warns that generally accepted didactic principals, for example that teachers should take care not to overwhelm their students with moral authority and always to present multiple viewpoints of controversial subjects, "run into severe problems" (p. 61) when dealing with a subject like National Socialism – a warning that informs the following analysis.

Major Research Findings and Discussion

In their most reductive form contemporary revisionist views of Mussolini can be read as a kind of absurd culmination of the longstanding myth of the "good Italian and evil German." This myth has proved more enduring and elastic than the "anti-fascist paradigm," extending to include the Italian military and fascist bureaucracy by removing memory of the brutality perpetrated by Italian forces and privileging accounts of rescue, rule bending and benevolence (Del Boca 2009a, b; Focardi 2013; Ben-Ghiat 2004; Perra 2010). In such accounts, Mussolini and the supporters of the Salò Republic (RSI)[4] have traditionally been cast as the exception that proves the rule, the only representatives of "genuine evil" – and that mostly due to their association with Nazi Germany (Ben-Ghiat. 2004. p. 140). Undoubtedly such a delineation was inadequate and self-exculpatory for almost everyone, and historians have rightly challenged it. Public memory, however, rather than taking a harder look at the twenty years of the regime *before* Salò and incorporating scholarship that has begun to document fascist violence and Italian-perpetrated war crimes, seems to be moving in the opposite direction – that is, towards a further extension of the "good Italian" myth to include the *repubblichini* and even Mussolini himself. Berlusconi's aforementioned comments are the most blatant example of this, but the nostalgic films, television docu-dramas, and memoirs of recent years all contribute. Do high school history textbooks?

The answer to this question is in some ways made complicated by the very complexity of the modern textbook. None of those under consideration offer narratives that describe fascism narrowly in terms of its founder, nor do any of them blatantly perpetuate a nostalgic or overtly admiring treatment of Mussolini. Indeed the focus

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[4]The government headed by Mussolini in Nazi-occupied Northern Italy from September 1943 until the end of the war.

is largely elsewhere, on structures, institutions, mentalities. All the books adopt similar methods, pairing lengthy descriptive and interpretive secondary text with primary sources – documents, eyewitness testimony, excerpted memoirs, images, and photographs of the era. All ask the student to interact with and analyze at least some of these primary sources for themselves, though of course the secondary accounts seek to shape that analysis through the choice, organization and weighting of information included, and through the inclusion of questions that are designed to call attention to specific elements or interpretations. All of them show clear engagement with the historiographical debates about fascism and include excerpts from the work of leading historians to introduce key arguments highlighting how historians privilege different kinds of evidence and interpret them in often contrasting ways. One of the textbooks includes an appendix which directly confronts the "good Italian" myth and presents excerpts from historians who have challenged it (Ciuffoletti et al. 2012 p. 574–581). In contrast with the rising popularity of "intimate" portraits and memoirs, none of the texts under examination includes discussion, images or primary sources focused on Mussolini's home or personal life; indeed two of the texts include no biographical information at all beyond his date of birth and death (Manzoni and Occhipinti 2012; Brancati and Pagliarani 2007). The others provide brief biographical sketches, keeping the focus on his political formation and evolution (Giardina et al. 2008; Ciuffoletti et al. 2012).

All of that said though, closer examination of the organization, use of language and choice of reinforcing images or sources reveals technically correct but potentially confusing and sometimes vague accounts of the more violent aspects of the regime, and of Mussolini's role in instigating or perpetuating them. In particular, the treatment of the regime's anti-Semitic persecution and of the relations between Italy and Nazi Germany both before and during the Second World War are treated by some texts in ways that can serve to reinforce the myth of the "good Italian" and provide a base of information open to revisionist views seeking to "normalize" and rehabilitate the dictatorship, and in some cases, the dictator himself. These will be examined in detail below.

The different periodization choices of the authors further affect the reading of fascism that they give. All of the manuals divide the fascist period roughly along the same lines, the rise to power in the aftermath of World War One, the consolidated regime, and the years of World War Two are each treated in separate chapters. In three of the texts, coverage of these periods is interspersed with chapters on other European and wider world developments (Manzoni and Occhipinti 2012; Brancati and Pagliarani 2007; Giardina et al. 2008). The other two place chapters on the rise of fascism and the regime in power back to back and then deal with the war years several chapters later (Ciuffoletti et al. 2012). The organizational decisions have been made to highlight particular political and economic themes and to emphasize a common European experience, but they lend themselves to a contradictory reading of fascist violence both as something mild – in comparison to the flanking chapters on Stalinism and Nazism – and something that anyway was happening "everywhere" – attested to by interspersed chapters on fascisms that emerged as movements in all European countries. Just viewed from the perspective of Italian

history the periodization can impede understanding of continuities within the twenty years of the regime and contribute to the view of fascist violence as something extraordinary – present during the rise to power because of a general climate of unrest provoked by war and economic crisis, and present, again due to war, at the end, but largely missing from the fascist "middle period" from the mid-1920s to the outbreak of the Second World War. The degree to which Mussolini's agency is emphasized likewise varies according to the period under discussion. He is a protagonist during the rise to power and regime in all of the texts under consideration and then begins to disappear from consideration in all but one of the texts as the country transitions to war. This is in keeping with the greater focus that most of the texts place on the wider war, of course, but has implications for the view of Mussolini that emerges.

Anti-Semitic Persecutions: Who, What and Why?

The passing of racial laws and the persecution of Italian Jews under fascism is an aspect that was long ignored or downplayed in histories of the regime and especially in public memory of the period (Visani 2009; Mammone 2006). While all five textbooks include some discussion of the legislation, the amount of space they dedicate to it, the context they place it in and the kinds of supporting documents they include differ significantly. Three of the texts (Manzoni and Occhipinti 2012; Brancati and Pagliarani 2007; Giardina et al. 2008) place the discussion in the context of foreign policy and the relations between Italy and Germany. Manzoni and Occhipinti include three short paragraphs which make no mention of Mussolini and which directly follow a section on the Rome-Berlin axis. The language is rather distancing; "In parallel with the new course of foreign policy," they write "laws of racial discrimination entered into force also in Italy, as they already had in Germany." The policies "dropped on an Italy where there did not exist a rooted anti-Semitic tradition" (p. 301). The authors include two related documents in the appendix following the unit, an excerpt of the laws themselves, (p. 345–6) and an excerpt on race from a fascist schoolbook (p. 346–8), but include no accounts of or from victims of persecution. Brancati and Pagliarani likewise move from the axis agreement to discussion of the race laws, and make the connection explicit. "The new Rome-Berlin axis was reinforced two years later by a series of provisions persecuting the Jews, with which Italy aligned itself with the racist and anti-Semitic politics of Hitler." They describe it as a "particularly sad and controversial page" of fascism "about which the historical debate is still open" (p. 263), but do not clarify what that debate is about. When they mention Mussolini, they do so in ways that distance him from the persecution, quoting him denouncing racism and denying the existence of races. The *Manifesto of the Race*, they point out, "was signed by 180 scientists… even if some historians claim that it was drafted almost entirely by Mussolini" (p. 263). There is nothing here that is false, of course, relations with Nazi Germany were one of the reasons for the timing of the anti-Semitic laws, and Mussolini was on record

denouncing racism. Raising those points in the same section which is about the proclamations that stripped Italian Jews of their citizenship is confusing, however. Students learn that to reinforce relations with Hitler, a racial hierarchy was asserted even though Mussolini did not believe in it and that laws were passed – facts that are open to a reading that displaces blame for the anti-Semitic persecutions from the latter onto the former.

The use of the same image across all three of the above-mentioned textbooks offers an interesting point of comparison into the ways that images can reinforce a particular reading of the text while closing off alternative understandings. All of them use the same photograph, of Hitler and Mussolini together in an open car on the occasion of Hitler's 1938 visit to Florence, either on the facing or on the same page as they begin discussion of the reasons and responsibility for the anti-Semitic legislation. In all cases the photograph is ostensibly to illustrate the discussion of the 1936 Rome-Berlin axis covered just before the discussion of the anti-Semitic laws. The effect however is to reinforce the idea that those laws were *primarily* a result of the relations with Nazi Germany

In contrast, the other two texts under consideration discuss the evolution of race policy in terms internal to Italian fascism and explicitly reject the claim that it was merely a by-product of the Rome-Berlin axis, though they recognize relations with Nazi Germany as a factor. Ciuffoletti et al. connect "state anti-Semitism" to colonial racial policy and describe both as "having taken shape at the direct instigation of Mussolini" (p. 254) – a judgement shared by Feltri et al. who assert that Mussolini "lucidly and cynically" applied racial laws to the Jews because doing so helped forge a sense of racial superiority he believed necessary for an Imperial power (p. 188–9). Though both texts take care to underline that racial anti-Semitism had no longstanding tradition in Italian society – a contention that is increasingly meeting with skepticism in contemporary scholarship (Visani 2009) – they also make explicit connections between the anti-Semitic laws and the later deportation of Jews from Italy to extermination camps. Rather than something foreign to fascism, race policy emerges in these accounts as revelatory of fascism's fundamental inhumanity, or as one of the texts puts it, "In different forms and dimensions, fascism, communism and… Nazism arrived at a common outcome, ideologically justified: an attack on the person and the cancelation of the personality up to and including – in extreme cases – the physical elimination of the presumed enemy" (Ciuffoletti et al. 2012, p. 254).

Fascist Italy and Nazi Germany: The Road to War

Many of the more benevolent views of fascism stem from the assertion that going to war was Mussolini's main mistake and that it represented a departure – not necessarily desired by the fascist leader. This view finds support in the language choices of some of the texts. One, for example, describes Mussolini as "letting himself be dragged into the Second World War" (Ciuffoletti et al. 2012, p. 253) and in another

place as being "induced" to enter the war (p. 412). Another suggests that Italy invaded France because "Mussolini did not know how to resist the temptation of being able to sit as a victor at the peace talks" (Brancati & Paglierani, 2007, p. 292). Giardina et al. and Ciuffoletti et al. include excerpts in separate historiographical sections and in online expansions that raise the issue of Italian war crimes, but none of the authors make any mention of them in their main narrative overviews. Most of the texts use no photos of Mussolini in the period after his initial declaration of war.

The lack of photographs parallels what comes through in some of the texts as a lack of agency on the part of the fascist leader. Brancati and Pagliarani, especially, present a particularly passive duce. In a paragraph titled "Hitler's approach to Mussolini" they emphasize Mussolini's initial "hostility" to Germany and describe the increasingly close relations between the two countries as coming entirely at the initiative of the German leader (2007, p. 270–1). Some pages later the text of the Pact of Steel is presented for analysis, but placed on the same page (the text is arranged around it) is an English political cartoon of the period showing Hitler holding a helpless Mussolini by the throat. The caption reads: "In the English cartoon, the duce is squeezed in the grasp of Hitler: an emblematic representation of the role awaiting Italy in the Pact of Steel" (p. 284). The questions that accompany the document all address the obligations of both signatories, but the accompanying image and description functions to reinforce the idea that Mussolini had lost any agency in the signing, and to close off any alternative view. Later, a similar tactic is used to again suggest the idea of a helpless Mussolini. A caricature shows Göring leading a bent and limping Mussolini in chains while Death accompanies them. Although the drawing is from a 1942 edition of *Esquire* magazine, a fact the authors note accurately in the accompanying caption, it is placed above text describing the 1945 liberation of Italy and the capture and execution of Mussolini by Italian partisans (p. 307). The two cartoons are the only images of Mussolini that are used in this textbook's coverage of the years between 1939 and 1945. Taken together they seem to suggest that the duce went out of the war the same way that he came into it: as a victim of the Germans.

In contrast, Feltri et al. do not deny Nazi dominance within the Axis but describe Mussolini as fully present and responsible for the decision to go to war and for all of the resulting tragedies. Theirs is the only text that places the Ethiopian war[5] in the same section as World War Two, thus making Mussolini a protagonist of the hostilities that would engulf the world. He was "aware of the extremely serious unpreparedness" (2006, p. 360) of the country when he declared war on France. He declared war on Greece "demonstrating that he did not have even a minimum of awareness regarding Italy's real chances" (p. 361). After describing his refusal to listen to his foreign minister (and son-in-law), Galeazzo Ciano's advice that Mussolini ask Hitler for a change in strategy to alleviate the pressures on the Mediterranean front, the authors write, "The dismissal of Ciano… meant the

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[5] To be clear, all of the texts discuss the Ethiopian war; the others all cover it at the end of their chapters on the 1930s. All address the brutality of fascist imperialism, and all but one mention the use of poison gas.

umpteenth alignment of Mussolini with the will and logic of Hitler, of which he accepted all of the consequences" (p. 366). In their description of the period between 1943 and 1945, they, like all of the other authors, emphasize the hardships of the Nazi occupation, the organization of the anti-fascist resistance, and the reprisals and massacres committed by the Germans; however, they also make a point of indicating that the reformed fascist party "that Mussolini intended to guide the Italian Social Republic" explicitly established racism as a core belief and offered "complete collaboration" to the Nazis in the roundup and deportation of Italy's Jews (p. 370). Theirs is the only text to include a photograph of Mussolini with the soldiers of the RSI.

Conclusions

The preceding discussion has argued that although contemporary textbooks do not necessarily reflect or perpetuate a benign view of Mussolini, some of them do provide narratives that work to distance him from the most violent and criminal aspects of the regime, in particular the persecution of Italian Jews and the involvement of Italy in the Second World War. However, the complexity of the textbooks under consideration here and the variety of materials they incorporate make multiple "lessons" about the past (and the present) possible. A textbook is not the same as a history class. We need to know much more about how teachers use and, more importantly, how students comprehend the materials they encounter in their studies. Do they privilege image over text? How much of the historical debate that most texts present in appendices are they assigned to read? (And how much do they actually read?) How do they apply what they learn in school to the many other sources of information available to them, (and vice versa)?

Giuseppe Bosco has observed that the "exact same history program, in different contexts (type of school, teacher, student, didactic method, tools, socio-economic-cultural character of the territory, etc.) can become a *different* program" (Bosco 2004, p. 216). In a similar fashion, the examination of a textbook by a historian who is familiar with the period and its related historiographical arguments and who can recognize the elisions and simplifications that are necessarily present in any narrative is probably in almost all ways a *different* reading than that of a student approaching the period after having studied it once, as a thirteen-year-old, five years earlier. Finding out what that reading is and teaching young people how to interrogate and evaluate it along with their other sources of knowledge is key both to inform them and form them as citizens.

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Chapter 6
History of Spain Textbooks: Diversity in the Portrayal of National Leaders

Ramón Cózar Gutiérrez and Manuel Roblizo Colmenero

History of Spain Textbooks: Diversity in the Portrayal of National Leaders

Spanish history is particularly significant when it comes to the portrayal of national leaders in recent history textbooks. This is due to the wide diversity of different historical periods. Compared to those countries that have enjoyed long, stable periods of democratic life, Spain has undergone some moments in which dictatorships ruled the country, and even when Spaniards from rival political sides killed one another. Indeed, in the previous century Spain suffered through a dictatorship that ended in a civil war, and finally brought the nation to the creation of a republic. In contrast to many nations that have maintained a steady political regime for long periods of time, the profound diversity that characterizes the politically complex history of Spain is marked by the succession of kings, presidents of the Republic, and even, a "Caudillo" as head of the State. Spanish history is also defined by different episodes of expansion that extended Spain beyond its frontiers. Quite probably, the most significant exploration for expansion is the discovery of America in 1492, but Spain has also been involved in colonial wars and has had numerous territorial conquests on a variety of different continents.

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Research Goals and Methodology

Within the above background, some figures – many of them well known all around the world – turn out to be intensely loaded with a plurality of connotations that are well reflected in the high school history textbooks. In recent years, the figure of the Spanish "Caudillo" Francisco Franco, who ruled the country during the years of 1939–1975, provides a suggestive contrasting point with those leaders who are incarnating the present day democratic life. In this sense, former president Adolfo Suárez and King Juan Carlos I stand for the democratic values now prevailing in Spanish society, as also happens with the incumbent King Felipe VI. However, going beyond these contemporary years, another prominent figure is represented by the so-called Catholic Monarchs Isabel and Fernando, who ruled the country when Christopher Columbus discovered America. In addition to this highly relevant historical moment, the Catholic Kings were protagonists of the unification of the country – as much in the territorial as in the cultural sense, due to their responsibility for the expulsion of Muslims and Jews. Also, the figure of King Charles I (who also reigned at the same time as Charles V in Germany as Holy Roman emperor) can be thought of as a particularly important leader, due to his vast domain over a wide territory and his corresponding influence.

The focus of this study, however, is not oriented only on political leaders or policymakers. Some other related figures are covered on the basis of their relevance in different fields. Thus, the purpose is to provide the reader with an approach that highlights, in a comparative manner, how the different leaders are represented, while emphasizing the links of their profile with the corresponding context. The aim of the chapter is to outline the most characteristic features in the portrayal of every leader or hero.

As for the promulgation of educational legal norms in Spain, the last 45 years have been very bewildering. Since 1970, the enforcement of the Ley General de Educación (or General Act of Education), and until recently, the nation went through four more fundamental laws (LODE, LOGSE, LOCE, LOE, and LOMCE). Also, additional regulations to determine the syllabus that responds to specific traits of social and cultural context where citizens live have been enforced in the autonomous communities.

Currently, Spaniards are involved again in a process of change in the legal framework that regulates the educational system in the so-called Compulsory Secondary Education and the Baccalaureate (ages 12–18). All through the academic year 2015/2016 the Ley Orgánica de Educación (LOE), passed in 2006 during José Luis Rodríguez Zapatero's mandate, coexists with the Ley Orgánica de Mejora de la Calidad Educativa (LOMCE, or Fundamental Law for Improvement in Educational Quality), that was elaborated by Mariano Rajoy's *popular* government in 2013. LOMCE's implementation in the Spanish educational system is being developed in a gradual manner. That is why years 1 and 3 in Compulsory Secondary Education and year 1 in the Baccalaureate are currently regulated by LOMCE and years 2 and 4 in Compulsory Secondary Education and year 2 in Baccalaureate by LOE. This is

something that has also strongly conditioned this study and defined our choice of the unit for analysis. We had to focus on the textbooks for the second year of the Baccalaureate because this is the only year when the class *History of Spain* is being taught nowadays. In subsequent years, publishing houses will circulate new textbooks fully adapted to the new legal framework. Therefore, the syllabus development of this subject is legally regulated by Royal Decree 1467/2007, issued on November 2, which defines the structure and minimum contents of the Baccalaureate as a consequence of the LOE implementation.

Literature Review: The History Portrayed by Textbooks

Research on history education has become very fruitful in the last few years. In Europe, the analysis of school handbooks has focused mainly on the understanding of the tensions in the teaching of history, its relation to power, the syllabi, and the historical, social, and cultural context (Cajani 2006; Pingel 2000; Stöber 2013). In the United States (Giordano 2003; Marsden 2001; Moreau 2003) emphasis has been placed on the construction of the nation and the values transmitted in history textbooks around prominent figures like Abraham Lincoln, Martin Luther King or John Kennedy (Avery and Simmons 2001). Whereas in Latin America, research on school history textbooks has highlighted the identity message transmitted through key issues such as the Independence processes and the arrival of Columbus (Carretero et al. 2006).

In Spain, research on textbooks and historical pedagogy has not been indifferent to these international lines and projects. One of the pioneering authors in addressing textbooks in a rigorous and systematic manner has been Rafael Valls and from his studies, a wide range of themes related to the use of handbooks in historical pedagogy have been developed in the last twenty years. In these handbooks, particular focus has been paid to the sociocultural perspective within selected contents of the textbooks. Other research fields have been, to name just a few, the analysis of the historical contents' assessment or the study of the activities, their cognitive complexity, and their relation with the basic skills and the development of historical thought (Gómez et al. 2014).

In short, there is great depth and range of themes that can be addressed through textbooks in order to understand and improve the historical pedagogy. The links between power, the syllabi reforms, the politically biased use of the historical past by institutions, the role of history in the construction of social and cultural identities, and its reproduction in handbooks play a big part in how textbooks are written. Also, the stereotypes about historical contents, their reproduction in the conception of history by students, the careful selection and strategic omission of knowledge from the past and its links with academic research help to create a particular narrative. The overall treatment of educational skills, the development of complex cognitive skills about history, the improvement in historical and critical thought through the textbook activities, and the images and text resources all play a significant role

as well. All of these topics show the need for a systematic and comparative analysis that enables us to improve practice in the classroom and the historical education and literacy of the students.

The modern school was born in the nineteenth century as an institution serving modern nations, and as a tool to develop citizens' knowledge and skills that are imperative in order to reproduce the prevailing values (Hobsbawm 1994). The hegemony of liberalism and the emergence of nationalism confined the humanities – and, more specifically, history – to a merely theoretical sphere oriented to form a patriotic spirit among the students (Hernández Cardona 2002). History was transformed into the erudite knowledge that should germinate, to a greater extent, the national consciousness and the fatherland values through studying kings and leaders (Arias 2015; Rodríguez and Simón 2014). From that moment on, history has been incorporated as a compulsory subject in primary and secondary education in all European countries, and it has recently been offered as a university specialty (Prats and Santacana 2011).

The romantic ideas, derived from the emergence of the nation-states, will encourage the government to stimulate the knowledge of national history as a means to ideologically consolidate the legitimacy of power, as well as to initiate and promote the citizens' patriotism (Prats and Santacana 2011). The aforementioned patriotic function of history, as a tool for the service of power, still maintains its relevance in the current syllabi of a number of European, Latin American, and African countries where the study of heroes, kings, relevant figures, legends, and myths has soaked through the identity discourse that has been transmitted through formal and informal education (Reisman and Wineburg 2012). All in all, it implies a syllabus and programs characterized by a culturalist and encyclopedic – and excessively academic – style (de Pro and Miralles 2009), based on a linear succession of civilizations, empires, and political leaderships (Rodríguez and Simón 2014). It has its correspondence in textbooks, which assume as much the role of transmission of knowledge as the function of reproduction of the sense of the hegemonic reality defined by the authorities (Carretero 2007). In this sense, as Barton (2010) puts it, the history handbooks express the national past that emphasizes the role of founding fathers or national documents for reference, which are sometimes accompanied by wars, battles, and other warlike events. The continuous revision of handbooks and school syllabi is thus related to differences in how the nation must think about itself and its change in power.

The history portrayed by textbooks attempts to elicit in future citizens, in the socialization and identity fields: (a) a positive assessment of the past, present and future of their own social group – both at the national and local level; (b) a positive assessment of national political development; and (c) an identification with past characteristics, events, and characters (Carretero et al. 2006).

The history handbooks maintain the process of the production of historical narratives. Carretero et al. (2013) distinguish in the great historical narratives six common characteristics in relation to the concept of nation: (1) the establishment of the historical subject through a logical mechanism of exclusion-inclusion; (2) processes of cognitive identification and affective anchoring; (3) the characters and historical

motives frequently appear as mythical and heroic; (4) a simplification of the historical processes in the almost exclusive terms of the search for freedom and territory; (5) the school narratives assume basic moral orientations; and (6) a romantic and essentialist concept of nation and citizens.

In the last few years, in spite of the continuity in the acknowledgement as power servers of these school histories, we are living a process of deep revision – as much in the educational field as in the civil and political sphere. It is based on the construction of national and local narratives and its repercussion on the creation of social, cultural, and political identities. Such reconsideration of the past implies significant changes in the academic history and equivalent transformations in school history (Carretero et al. 2006). The overall purpose of teaching history should not be instauration, conservation, and deepening of the national identity and the nationalist ideology, but rather, needs to instead be a fundamental tool that makes it possible for the new generations to gain the capability to analyze and comprehend how society and culture functions (Rosa Rivero 2004: 64). The historical pedagogy must focus less on the memorizing and repetition of events and more on the understanding of historical phenomena that make the student into a critical citizen capable of questioning official versions and Manichean discourses (Rodríguez and Simón 2014).

Within this framework, the volume contributes with a comparative analysis that is defined by two main distinguishing characteristics: firstly, national leaders are the essential focus of this collective work –considered at the same time as symbols and symptoms fully loaded with significance about every country's historical reality; secondly, the volume covers this objective in a comparative manner, providing the reader with a comprehensive overview on how national leaders have been portrayed in a number of different countries all around the world. The Spanish history –and the leaders that were its main actors- has been quite influential all through the passing of the centuries, and we hope this chapter will offer a small but significant piece of the puzzle needed for a proper understanding of the world's social and cultural reality.

Findings: National Leaders and Popular Heroes

The diversity that characterizes Spanish history has been translated to the interpretation offered by different textbooks. In the following pages, we focus on some particularly symbolic figures, which somehow have incardinated significant values all through the most relevant moments of Spanish history. The aforementioned diversity applies also to how these leaders have been covered in the different stages of the country's life. That is why we will approach them looking at the History of Spain books that are now being used for teaching purposes, but also we will keep in mind every leader's dimension beyond the strictly contemporary perspective.

Catholic Kings: Territorial Unity and the Pursuit of the Cultural Homogeneity

Among the most emblematic figures in the history of Spain, we find the so-called Catholic Kings – whose relevance goes beyond national frontiers. There are many distinct reasons why they account for such a crucial role in their country's history. The denomination *Catholic Kings* itself was awarded by the Valencian Pope Alexander VI because they ended – militarily, as was usual at that time – the Muslim power in Spain. However, it was not only this fact that defined the religious homogeneity imposed in the country during the reign of Isabel de Castilla (1451–1504) and her husband, Fernando de Aragón (1452–1516). The year 1492, with very well-known connotations due to the discovery of America, was also significant because it was the same year that the Jews were expelled, and went on to inhabit the north of Africa, Flanders, and the Ottoman Empire. Following that expulsion, the forced conversion of Muslims occurred in 1502.

Also, in the first days of the very significant year of 1492 the conquest of Granada took place, marking the final defeat of the Nasrid kingdom – located over a part of the present territory of Andalusia. This episode decisively defines both the aforementioned aspects, in that it implies the incorporation of the Kingdom of Granada into the Crown of Castile, contributing conclusively to the territorial unification of the country that was carried out, moreover, based on a unity founded on the Catholic religion. For many years, history has portrayed this period of the reign of the Catholic Kings while emphasizing the historical relevance of the territorial unification that establishes the unity of Spain. This narrative particularly prevailed during Franco's years of power (1939–1957), but it was also somehow reflected when it came to synthesizing – without any expectation of political indoctrination – the most characteristic aspects of the fruitful reign of Isabel de Castilla and Fernando de Aragón. Surely that is why some textbooks used this chapter to try to specify that "the dynastic union of both Kingdoms was created containing inequality: Castile was much bigger and more heavily populated, and also had an expanding economy and institutions that were more homogeneous and useful for exercising the monarchic power's duties without any obstacles whatsoever. It seemed inevitable that the construction of a solid State was based, above all, on the Castilian Kingdom" (Sánchez Pérez 2009, p. 49). In an explicit manner, even highlighting it visually through the use of bold typeface, in this Oxford Education edition of *History of Spain* (Sánchez Pérez 2009), it is explained that "the unification of Castile and Aragón under the Catholic Kings **did not mean the creation of a unified State, without common borders, yet with common institutions, laws, language, and currency**" (*ibídem*).

Some of the textbooks analyzed, such as the one edited by Anaya, is particularly expressive when it comes to portraying the historical relevance -undoubtedly, unquestionable- of the Catholic Kings. Thus, under the epigraph 1. THE WORK OF THE CATHOLIC KINGS we find the subtitles "1. The monarchy of "all the Spains"; "1.2. Towards territorial unification. The war of Granada" or 1.3. "The foundations

of the Modern State". The book edited by Anaya also refers to the topic of *unity* that symbolizes the Catholic Kings' reign. This, however, does not explicitly question the text, but instead raises a good point for students to reflect on: "If the Kingdoms of Castile and Aragón conserved their own government institutions, legal rules, and economic organization, what defined the dynastic unity created by the Catholic Kings? What practical consequences did they have in the government of the Kingdoms?" (García de Cortázar et al. 2009, p. 75).

This textbook includes, in our view, a very significant use of inverted commas in order to refer to the 'unification' of the peninsular territories in this period, serving as a reminder that it was achieved through a wide range of means: annexation by conquest – as in the aforementioned case of the Kingdom of Granada, the cession, or the peculiar nuptial way, through which matchmaking became a form of political praxis (*ibídem*: 76). So much so that another one of the analyzed textbooks – by the SM Publishing House – explicitly mentions the 'matrimonial policy' as a specific area of the expansionist policy of Catholic Kings – who, let us remember, contracted into matrimony with very notorious political and territorial consequences.

The text by Bahamonde and Otero also incorporates a 'documento 3" that explicitly addresses the 'matrimonial policy of the Catholic Kings', shedding light, very didactically, on an aspect that remains far from being merely anecdotal, and that is adequately highlighted in that manner (2009, p. 51). Also the text published by Santillana mentions this political aspect in what is called "matrimonial alliances of Catholic Kings", by providing in its "documento 2" a map under which the question is posed: "With which countries were matrimonial bonds agreed?" In this way, it provides the teacher with an element over which an explanation is offered, even though it is not explicitly depicted in the text, but emerges from the student's own observations (Fernández Ros et al. 2009, p. 76).

The relevance of the Catholic Kings as historical figures goes beyond even the aforementioned – and traditionally more highlighted – aspects of territorial unification and the discovery of America or the imposition of a religious homogeneity based on the Catholic faith. Another aspect of the highest relevance is the creation of the Modern State. Aróstegui, García Sebastián, Gatell, Palafox, and Risques explicitly mention this fact in the text published by Vicens Vives (2014, p. 34). The statement reads, "1. The creation of the Modern State. The Catholic Kings" visualizing that the construction of a singular political structure, during the reign of these monarchs, is the realization of a very characteristic form of State organization. In fact, as an introduction, we find a graphical box that emphasizes how "the Catholic Kings were the first example of an authoritarian monarchy in the Hispanic Kingdoms: they created organs for government depending on the Crown and, also, tried to subjugate the nobility and clergy – strata opposed to the consolidation of royal power during the Middle Ages" (*ibídem*).

The textbook also highlights – as shown above – a State was formed that was "plural and not united, on the basis of a territory that was called Spain denoting an 'association of all the peoples in the Iberian Peninsula' without 'a political significance.'" In order to emphasize this fact, a question is put forward to the students: 'Which titles did Fernando and Isabel hold? Assess the kind of monarchy resulting

from their marriage' (*ibídem*). Indeed, the titles were Isabel *of Castile* and Fernando *of Aragón*, and not, as could be expected in a strongly united State, a denomination referring to monarchs *of Spain*. In this way, a counterpoint to what had been a prevailing interpretation in pre-democratic textbooks is provided, which had presented an emphasis on the unity of Spain that now seems to be somehow counteracted.

Christopher Columbus: The Main Actor in the Discovery of America

Something similar happened with the figure of Christopher Columbus. For a long time, doubts arose about his nationality, as if this were linked to the honor derived from having been the main actor in the historical milestone of the discovery of a new continent. Christopher Columbus was, for decades, an emblematic figure in the history of Spain, who was awarded with a central role in historical textbooks. In the books that we have consulted with for the elaboration of this chapter, the relevance of Christopher Columbus is not diminished, but the space and the illustrations dedicated to him are, with no doubt, much more discreet than in past times. The contrast with the Franco's years is, again, quite paradigmatic. In all cases, the event – and along with it, the figure that held the leading role in it – is diluted inside a more general unit or section related to the reign of the Catholic Kings.

The question about his nationality continues to be ignored by referring to him as the 'Genoese Christopher Columbus' (Bahamonde and Otero 2009, p. 52; Fernández Ros et al. 2009, p. 90; Sánchez Pérez 2009, p. 58), or resolved as "a sailor still of uncertain origin" (García de Cortázar et al. 2009, p. 84), admitting that 'the origin of this sailor, probably Italian, is covered in mystery" (Aróstegui et al. 2014, p. 34). In this textbook, published by Vicens Vives, we have found a small image accompanying the text that states this uncertainty about the nationality and origin of Columbus. We have also come across an image of this figure in the book published by Oxford Education – a branch of Oxford University Press – (Sánchez Pérez 2009) but not in those by Anaya, Santillana, or SM Publishing House. While it was traditional to find the different educational levels in the textbook photographs depicting the 'Admiral' Christopher Columbus – normally in units or parts where the discovery occupied a central place both in length and typography – what we observe now is that the event and the historical figure that assumed the leading role are much more diffused within the context of what the Catholic Kings or the Spanish fifteenth century represented.

Charles I as a King Beyond the Country's Frontiers

It was in the following century, the 16th, when King Charles I, a grandson of the Catholic Kings, came to Spain. This monarch's dimension is given by his international relevance, drove him to defend his dynasty's interests, namely Austria, and Christianity through military actions developed against the French, the Ottomans, and the Protestants. He was crowned Emperor of the Holy Roman German Empire, which implied that he was named Charles I of Spain and V of Germany. This figure is relevant to the history of Spain and Europe, and is often displayed in textbooks through a picture by Titian (García de Cortázar et al. 2009, p. 80). But, undoubtedly, numerous visitors to the Granada's Alhambra, one of most frequented places by both national and international tourists in Spain, will remember the traces left by Charles V in the Nasrid complex, the elaborated architectonic forms characterizing the captivating Arabic art contrasted with the sobriety and simplicity of the king's palace that was also depicted in one of the books analyzed (Bahamonde and Otero 2009, p. 59).

The highly symbolic nature of this historical figure, Charles V, is represented by the fact that one of the textbooks used – the one edited by Oxford Education – (Sánchez Pérez 2009) shows the image of Charles V on its cover. It is difficult to specify whether this figure is particularly representative of the history of Spain, but quite probably the answer should be negative. The fact that it is a book published by Oxford University Press possibly accounts for this choice, in that it is a British publishing house and the international dimensions of the figure of Charles V are very well known. In any case, it is no more than a mere hypothesis, and it is probably his central role in history that justifies, without further ado, its privileged place as the first image in a book about the history of Spain.

When it comes to heroes, a fertile ground where persons apt to be considered as such emerge – even in an anonymous way – was the so-called 1808 Independence War. The conflict had clear connotations of popular upheaval against the French occupation by Napoleon Bonaparte, who wished to impose his brother José as King of Spain. The textbooks that we have analyzed proliferate in images by the painter Francisco de Goya, who depicted with a particular dramatism the episodes against the French army. Specifically, the picture *The Shootings of May 3, 1808,* painted in 1814, has been included to illustrate the heroism and cruelty of that war (Bahamonde and Otero 2009, p. 90; Fernández Ros et al. 2009, p. 135), but also other prints by Goya situate the student reader in those terrible years (Bahamonde and Otero 2009, p. 92).

A Twentieth Century Dictator: Francisco Franco

The profusion of images portraying Francisco Franco that we find in the textbooks is, on the contrary, very high. It is something that is accounted for by two circumstances: on the one hand, he is a figure of contemporary Spain as many Spanish citizens have lived their lives during the Francoist dictatorship – and some of them even experienced the tragedy of the Civil War that devastated the country between 1936 and 1939. However, on the other hand, the regime that Franco headed– very significantly named *Francoism* – can hardly be understood without its figurehead. We find, therefore, samples of the diverse forms of graphic representation in the shape of pictures depicting General Franco at the front, in a number of moments commemorating the victory, fishing with the then prince of Spain Juan Carlos de Borbón, and – probably the most widely known – meeting Adolf Hitler in the Hendaya station. Yet, we see him also portrayed in the distinctive form of the propaganda posters of the period. The characteristic political organization of the dictatorship, as such, no longer exists in Spain, but undoubtedly, it is not difficult to appreciate certain traits of the political culture generated in those years that persist in the Spaniards' mentality.

The display of General Franco's figure offers a basic form, which is the reflection of the two most important sides of his life: the soldier, who provokes a war in which he is finally victorious, and the Head of State, carrying out the tasks appropriate for leadership and direction of a country through socioeconomically diverse stages. The second, however, directly derives from the first, and we only find an image of the dictator without the military outfit when he is enjoying his leisure by fishing or navigating. Quite probably, the best incarnation of the first form is shown in the aforementioned image of his meeting with Adolf Hitler, in which Francisco Franco is portrayed dressed in military outfit, and is surrounded with figures in military uniforms – Hitler included (Bahamonde and Otero 2009, p. 242, 250; Fernández Ros et al. 2009, p. 386; García de Cortázar et al. 2009, p. 319; Sánchez Pérez 2009, p. 318). Another one of the most well-known images of General Franco depicts him with Eisenhower, also a General, carrying out the tasks of a political ruler, even though he wore civilian clothes when he visited Spain in 1959 – an event that symbolizes the end of the isolation of the Francoist regime among the Western nations (Aróstegui et al. 2014, p. 349; Bahamonde and Otero 2009, p. 254; Fernández Ros et al. 2009, p. 391).

Different textbooks refer to many figures that are well known for reasons not related to political life. Having stood for the losers in the Civil War, they suffered the consequences in the form of exile: this is the case of the painters Pablo Picasso or Joan Miró; the poets Antonio Machado, Juan Ramón Jiménez, or Pedro Salinas; the film-maker Luis Buñuel; the musicians Manuel de Falla, Pau Casals, or Rodolfo Halffter; or the scientists Severo Ochoa and Juan Oró. The image of *Guernica* by Pablo Picasso, one of the universal pictorial works in contemporary Spanish art, serves to illustrate the cover of one of the textbooks analyzed – the one edited by the SM Publishing House. It was painted at the height of the Civil War, between May

11 and June 4, 1937, and depicts the horror generated by the bombing of Guernica, the town that gave the painting its name. It can also be found in the text published by Vicens Vives (Aróstegui et al. 2014, p. 317).

The Transition to Democracy Artificers: Juan Carlos I and Adolfo Suárez

The final chapters in the History of Spain textbooks cover the years of transition to democracy that start after General Franco's death and the restoration of the monarchy incarnated in Juan Carlos I. Diverse figures contributed to the arrival of democracy to Spain and, therefore, they deserve a privileged place in the country's history. But, without doubt, the one presenting the greatest historical dimension is Adolfo Suárez, who has been considered the main creator of the political change in that he was able to smooth the process that eventually led to the dismantling of the political and institutional structure of the dictatorship, giving birth to a new system of freedom as recognized in the 1978 Constitution. Indeed, the main airport in Spain is named after this particularly significant figure, just as in other cities, especially John Fitzgerald Kennedy in New York or Charles de Gaulle in Paris, giving a clear idea of the respect that Suárez's personality deserves in his country. Suárez did not manage to go beyond the moment of the transition to democracy, and did not politically survive the electoral competition once democracy was successfully established. However, his capability for leadership and his complicity with King Juan Carlos I are both described in the textbooks as a determinant for an adequate understanding of current Spain.

Juan Carlos I and Adolfo Suárez shared a common profile: both received their legitimacy, initially, from the dictatorial regime that they so decisively contributed to abolishing. If Juan Carlos I was appointed as Francisco Franco's successor in charge of the State, Adolfo Suárez was a figure strongly linked to the dictatorship, and who was also named President of the Government through a designation that did not derive from the ballot boxes. By one of those paradoxes that sometimes happen in history, quite probably it was this biographical link to the Francoist regime that made it possible for both of them to be acknowledged in the history books as those who gave way to the present period of democratic life. Their Francoist past also facilitated that they could do it in the least traumatic manner possible.

Discussion and Conclusion

If we can patently state that no social science can be thought of as something completely devoid of humanity, then this is particularly true when it comes to history. That is why the analysis of how the protagonists of history are portrayed in Spanish

textbooks turns out to be a valuable tool to understand the enthralling past of a country strongly characterized by its diversity. The chapter pursues -– within the frame of a larger volume that covers a number of countries – an approach to Spanish history that provides the reader with an analytical overview of the most significant actors. By this means, the reader can obtain a deeper understanding of the social and political values currently prevailing in Spain. Somehow these values have changed – following a kind of *law of pendulum motion* – while some others that were promoted and emphasized during the previous regime nowadays are diminished in their relevance.

There is probably a fallacy that emerges in our everyday life when we observe through different media how the focus is placed on the activities and vicissitudes experienced by some prominent figures – namely politicians, but not only. Politicians are the main actors in politics, but frequently the interest in policies that affect real lives are not sufficiently covered by the readings and news that ordinary people receive. A certain degree of superficiality seems to be an essential assumption in the approach of different communication media – including textbooks – to actual social life, which is probably inevitable, given the complexity of the societal circumstances we live in. This implies then, that to properly understand the bits of reality that a chapter like this can offer, the reader should always keep in mind what is beyond the pages and characters depicted. To put it another way, we hope that the reader can find a path of understanding that simultaneously relates the depiction of national leaders in textbooks to historical reality, and vice versa. The bottom line is that the reader is taking a trip of three steps that starts from the social reality and finishes in their own understanding via the learning of lives and events depicted in the textbooks.

An essential premise then is that *history* textbooks are *historical* products themselves – something that has been widely observed in our analysis. Certainly, there is not a single way to relate the history that can be found in different countries and periods of time. This is certainly something that can be assumed with relative ease. What we have found is how a number of subtleties and details in the depiction of Spanish national leaders are reflecting the perceptions that current society has about them. If we are to rely on academic jargon, we would daresay that the passing of the years and figures act as a reality – a *noumeno*, as a phenomenologist would probably say – that is given to public consciousness in different manners by this peculiar type of *phenomenon* that are history textbooks. National leaders as a collective are themselves also *no less, but no more,* than another kind of phenomenon of every country's social life. They behave, therefore, as an Ariadna thread that lets the reader escape from the labyrinth of a highly complex social life to eventually reach the light of understanding -probably not fully complete – of human history.

The textbooks also depict, fortunately, the diversity of agents who were somehow creators in the birth of the longest period of democratic life in Spain. Political and trade unionist leaders, clergymen, and others, find their place – that is to say, their *acknowledgement* – in the books that Spanish students use for pre-university education. Some of these historical characters have already passed away, but many others still occupy a place in the social and political life of Spain. In these textbooks,

graphic and textual references are not missing for those who, even anonymously, were active creators of today's Spain in which we now live. In this country's history, the condition of anonymity does not diminish, in any way, the quality of being a hero.

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Chapter 7
Religious Nation or National Religion: Poland's Heroes and the (Re) Construction of National Identity in History Textbooks

Dobrochna Hildebrandt-Wypych

Religious Nation or National Religion Introduction

Teaching history is focused on building a common national spirit and creating a collective memory based on historical narratives. The educational "vision of the nation" usually reflects the prevailing needs and priorities of the mainstream society. On the other hand however, there are minority discourses that challenge the dominating views and historical foundations of a particular nation-state, and the generally accepted representation of its national heroes. The purpose of this chapter is to examine narratives of two iconic heroes in Polish history textbooks:

> 1. Queen Jadwiga, the first female monarch of the Polish Kingdom and a symbolic (female) representation of Polish Catholicism.
> 2. Józef Piłsudski, the creator of the 20th century Second Polish Republic (*Druga Rzeczpospolita*), supporter of a multicultural Poland, and a symbol of the Polish struggle for national independence.

The textbook narratives of both figures are viewed from the social constructionist perspective, using critical discourse analysis (CDA). Selected key perspectives of the analysis include Romanticism and Catholicism as two important perspectives in the interpretation of national heroism and "national greatness" in Poland; what it means to be Polish through the narratives of national heroes; and the potential space for critical thinking about Polish national heroism, where historical narratives are sources to understand ambiguity and personally identify with national heroes/heroines.

I find the topic particularly important because of the coexistence, and even rivalry, between two educational discourses in Poland. One is rooted in the traditional

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Romantic origin of Polish national identity and claims a special place for Poland among other European countries, due mainly to its moral character and religious inspiration, and the other reflects emerging educational trends, including globalization and Europeanization of historical narratives and attempts to redefine Polishness, and open school historiography up to critical thinking about Polish national heroes and heroines.

Voices from the contemporary public discourse on Poland's past represent a rather polarized view. In both media and political debates in Poland there appear certain problems with the "unification" of the competing "versions" of our national history. In an ambiguous assessment of the last 25 years of "Polish freedom" the voices that praise the liberalization of public life and the Europeanization of laws and policies, including educational policy, are accompanied by the voices of those who are dissatisfied with the results of a systemic change. These discontented voices emphasize various internal and external threats, and are broadly identified with the processes that weaken the Polish national spirit.

On the one hand, there are visible signs that the society is ready to reconsider one-sided versions of history, and there are more examples – especially in the research and public historical discourse – of portraying Polish history, including national heroes' narratives, in a wider picture of global, European and international historiography. On the other hand, however, the traditional, not to say anachronistic, image of Polish national identity and national heroism is surprisingly durable. Polishness is still construed as a rather narrow, mainly defensive identity. It is most frequently found within sources of Catholic legacy, Romantic messianism, noble and gentry's cultures, and the national liberation tradition.

Theoretical Framework

Social constructionism, with its perspective on realities (being constructions or interpretations) and truth (being subjective and multiple) (Berger and Luckmann 1967), functions throughout the text as a key theoretical reference. The social constructionist approach to education (including teaching history) is based on the principle of the social interchange and negotiation between multiple realities, both reproductive and transformative in its character. Human inclination to interpret our reality through collectively constructed lenses applies to common systems of cultural representation, with the primary importance of language and image. National heroes are also socially constructed phenomena, reflecting shared human perceptions of reality, constantly shifting with the change of ideals, norms, values, and material resources of a given nation.

National heroism is a result of a group consensus, based on common goals. The historiography of national heroes constitutes a crucial part of historical knowledge transmitted as a narrative from one generation to another. The consolidation and commemoration of national heroism is done in rituals, ceremonies and – most of all – historiography that constitutes the sphere for social practice of the collective

memory. Collective memory, although it is not based on evidence, converges to some extent with scientific history, especially when official historiography consciously integrates the – even intuitive – image of the past shared in mainstream society. A useful term in this context is an *invented tradition*, understood as "a set of practices […] of a ritual or symbolic nature, which seek to inculcate certain values and norms of behaviour by repetition" (Hobsbawm 1983, p. 1). In the context of national heroism the invention of a tradition may be an ambiguous process, meaning not only its construction, but also a "fabrication of a factitious past that functions as a factual assumption in a new tradition" (Sarot 2001, p. 30).

We can also associate this process of the fabrication of the past with the politics of forgetting. As formulated by Ernest Renan, "the construction of modern nations is based on forgetting," and the collective memory of a nation (including national heroism) cannot exist without this "national amnesia" – "an essential part of the national drama" (Hackmann and Lehti 2012, p. 129).

In the process of "unmasking" or "demythologizing" national heroism discourses in school textbooks we have to consider the difference between the cultural construction of history (including the implicit construction and innovation of traditions) and the falsification or bare manipulation of history. There is a general assumption made, that the aim of school historical narrative is to actualize the past in the present, to take responsibility for the duration of heroes in space and time of a given "imagined community" (Anderson 1991) and to represent heroes and (rarely) heroines as milestones that crystallize national mythology.

The construction of national identity is done within the imaginative space of national heroism, where both Queen Jadwiga and Marshall Piłsudski are pictured as national saviors. The symbolic materialization of Polishness in their narratives means that they embody the values of the Polish (national) community and the timeless ideal of being a member of it. Heroes of the past show how to act in the present. In case of Queen Jadwiga there is also an explicit process of hero sanctification. The feminine ideal of national heroism takes the form of "a sacred heroine" who sacrificed her life for the nation's glorious future. Steven Grosby (2005) described this process of reaching an ultimate stage of heroism as follows:

> When the king or hero of a nation becomes a saint, the nation is joined to the universal order of the universe, thereby contributing to the justification of its territorially bounded, cultural distinctiveness. (p. 88).

In "the drama of the nation" there are two intertwined scenarios possible: a heroic epic and a glorifying tragedy, with the latter usually identified with the creation of "the myth of victimhood". Being a victim has to be made acceptable in a historical narrative, where the elements of a national tragedy are transformed into a source of self-esteem (Hackmann and Lehti 2012, p. 130).

As a result, national heroes sacralize the concept of a nation and a nation-state for internal purposes – its legitimacy and integrity, while sacralization of nationhood via national heroism also serves an external purpose. It defines the country's international dimension and positions a nation in relation to other nations, often within an oversimplified discourse of a "civilized West" versus a "barbarian East".

Both Queen Jadwiga and Marshall Piłsudski personalize Poland's changing position in the European context, especially within the 'Western versus Eastern' discourse.

Data Gathering and Analysis

The choice of St. Hedwig of Anjou (*Jadwiga Andegaweńska* in Polish) and Marshall Józef Piłsudski as exemplars of national heroism may seem random, loose, and imprecise. Constructed in historical narratives as representatives of the Polish society as a whole, both Jadwiga and Piłsudski are not native Poles. He is a Pole, but of non-Polish ethnic descent, "an ethnic Lithuanian from the mixed eastern borderlands," as Mieczysław B. Biskupski (2012, p. 14) puts it. The figure of Queen Jadwiga also reflects the ethnic heterogeneity of historic Poland. Belonging to the Capetian House of Anjou, the daughter of Louis the Great, King of Hungary and Poland, she is closely connected – through her grandmother, Elżbieta Łokietkówna – to the native Piast Dynasty of Poland. However, as Oskar Halecki and Tadeusz Gromada (1991) formulate it, she "belongs definitely to Poland" (p. 77).

The decision to select a female and a male exemplar of national heroism was certainly not based on the proportional representation of women in Polish history textbooks. Iwona Chmura-Rutkowska, Edyta Głowacka-Sobiech and Izabela Skórzyńska (2015) point out, that the aims and content of historical education at the lower secondary level school (g*imnazjum* in Polish) in Poland are to a great extent derived from the principles of the nineteenth century classical historiography, where history is understood as teaching about the past through exemplary figures, mainly drawn from the field of political history (p. 30). Historical education is thus reduced to biographies of "great men" and narratives of collective historical subjects, such as "nobility" or "peasantry". The dominating model of the historical narrative in Poland is, according to the above authors, still based on a Eurocentric, nation-state and linear perspective, where there is little space left for the "history from below". As a result, Polish history textbooks contain "numerous representations of named men and crowds of nameless women, hidden behind family, society, mankind, nobility, workers, Romans, peasantry, bourgeoisie, citizens, slaves, etc." (p. 604).

Queen Jadwiga's narrative is a rare example of "a great woman" in Polish historiography, differing radically from the general image of women in history textbooks, most commonly characterized as "absent", "in the margins" or "shown, but not told" (Chmura-Rutkowska et al. 2015, p. 604). But even Queen Jadwiga becomes a "victim" of the classical historiography and its masculine nature. In contrast to the numerous male national heroes, who are constructed in a subjective and active way, as defenders of the Polish nation and the architects of its independence, few female national heroes are presented as passive "objects of history", in their stereotypical roles as guardians of national patriotism and exemplars of personal sacrifice.

The examination of national heroism discourse in Polish school historiography was based on a repeated critical reading and image analysis of both national heroes

Textbook (Date of publication)	Author(s)	Publisher
Historia najnowsza. 1918-1996 [Recent history. 1918-1996] (1998)	Sierpowski, S.	Warsaw: Graf-Punkt
Historia. Podręcznik do gimnazjum. Razem przez wieki. Zrozumień przeszłość III [History. Lower secondary school textbook. Together through centuries. Understanding the past. III] (2001)	Wojciechowski, G.	Poznan: Wydawnictwo Akra
Historia. Dzieje nowożytne i najnowsze 1815-1939. Podręcznik dla klasy III gimnazjum[History. The recent and modern history 1815-1939. Textbook for the 3d grade of lower secondary school] (2002)	Łazuga, W.	Warsaw: Graf-Punkt
Bliżej historii. Klasa 1 [Closer to history. Grade 1] (2009).	Kowalewski, K., Kąkolewski I., & Plumińska - Mieloch, A.	Warsaw: WSiP
W kalejdoskopie dziejów. Podręcznik do historii. Gimnazjum. Klasa 1 [In the kaleidoscope of history. History textbook. Lower secondary school. Grade 1](2009)	Ciara, S. Kulesza R.	Warsaw: Wydawnictwo Juka
Człowiek i jego cywilizacja. Podręcznik do klasy 2 [A man and his civilization. Textbook for the 2d grade] (2010)	Bentkowska - Sztonyk, Z., & Wach, E.	Wroclaw: Wydawnictwo Edukacyjne Wiking
Przez tysiąclecia i wielki. Klasa 2 [Through millennia and centuries. Grade 2] (2010)	Kucharczyk, G., Milcarek, P., & Robak, M.	Warsaw: WSiP
Śladami przeszłości. Podręcznik do historii dla klasy drugiej gimnazjum [Traces of the past. History textbook for the 2d grade of lower secondary school] (2010)	Roszak, S.	Warsaw: Wydawnictwo Nowa Era
Historia. Podręcznik do gimnazjum. 3 [History. Lower secondary school textbook. 3] (2011)	Ustrzycki, J.	Gdynia: Wydawnictwo Pedagogiczne OPERON
Po prostu historia. Szkoły ponadgimnazjalne. Zakres podstawowy. [Simply history. Secondary schools. The basic program] (2013)	Dolecki, R., J. Smoleński, J. & Gutowski, K.	Warsaw: WSiP

Fig. 7.1 Polish history textbooks analyzed in this study. Full citations are available in References

in the six selected history textbooks (see Fig. 7.1), used in compulsory schooling at a lower secondary level. The analysis was based on a critical discourse approach, with the general aim to disclose the meanings of the specific language used in different social/educational contexts, as well as the question of how the language influences society and, in turn, how society is influenced by this language.

The question of how meanings of national heroism are produced within society brings the idea of ideology into the picture, defined as the way "in which meaning serves to establish and sustain relations of domination" (Thompson 1990, p. 56).

Texts and iconography used to describe Queen Jadwiga and Marshall Piłsudski were critically read and analyzed in order to "unmask those ideologies which seem to be hidden within language-use which poses itself as natural" (Mills 1995, p. 12). Commonly sanctioned views and taken-for-granted ideas on national heroism, embedded in these two heroic figures, were carefully examined in order to illuminate these views and the ideas that were connected to specific ideological assumptions in a given political, social and religious context. This construction of an ideological world of national heroism has to be recognized and critically resisted, with the aim of going beyond the obvious "common ground" and to understand that "what is 'said' in a text is 'said' against a background of what is 'unsaid', but taken as given" (Fairclough 2003, p. 40). Using a multidisciplinary sociological perspective on the language of national heroism in history textbooks, excerpts of selected text, images, and illustrations were coded and categories were built as representations of particular problems connected with a given discursive practice. Categories were created to enable the data to be structured, to analyze it inductively and draw general conclusions on the role and power of public/political discourse (including the discourse of cultural and social change in Poland) in constructing national heroes (and heroines) in history textbooks.

Catholicism, Messianism and National Identity in Poland

The coupling of Catholic religion and national identity was a process that occurred throughout the centuries during the formation of Polish statehood. The central place of religion in the national discourse has a strong association with the recurrent external threats and the accompanying efforts to protect Poland's sovereignty and integrity. As indicated by Jörg Hackmann and Marko Lehti (2012), the religious national discourse has a long tradition, "reaching back to the wars against the Ottoman Empire, the Swedish Empire and finally also against the Russian Empire" (p. 139). The identification of Polish national identity (the Noblemen's Republic) with Catholicism was captured in the mid fifteenth century idea of "antemurale christianitatis": both a religious and secular myth of Poland's mission to act as a shield protecting Christianity (and Europe) from barbarians and pagans. Poland functioned as "the outpost of European civilization," permanently threatened with becoming absorbed by the non-Catholic East (Taras 2003, pp. 131–132). During the Swedish "Deluge" in the seventeenth century the merge of religion and nationality gained a new symbolic facet: the coronation of the Virgin Mary as a Queen of Poland after the successful defense of the monastery in Jasna Góra (Częstochowa). The success of the Częstochowa resistance during "the Deluge" was associated with "the intercession of the Blessed Virgin whose icon, the Black Madonna, was (and is) kept there" (Taras 2003, p. 132). This coupling of the Polish Catholicism with the state's struggle against foreign dominance determined the future development of our national identity discourse, constructed in our historiography as "both the victimhood and the heroism of the nation" (Hackmann and Lehti 2012, p. 139).

Another constitutive aspect of Polish nationalism is the idea of Polish messianism, based on a personalistic view of the nation, entering into relationships with other nations and encompassing both divine and human reality. This new dimension of the religious-national discourse appeared during the nineteenth century partition period. The experience of lost uprisings resulted in the literary (and socio-political) concept of national suffering for all of humanity. The Polish nation was depicted as the one that is predestined by its history to define the importance of Christianity and its consequences for national life. The melting of religious and national consciousness is done through the primary meaning given to Polish history: the struggle for freedom and independence. The ideas of collective suffering and national resurrection were captured in the famous literary expression of the Romantic bard, Adam Mickiewicz, describing Poland as "the Christ of Nations" (in his *Book of Polish Nation*). As a result, the key element of the historiosophical visions of Poland as a glorious, but tragic nation becomes the notion of Poland suffering for the political wrongdoings and religious disobedience of Europe (Burnell 2009).

As pointed out by Taras (2003), the Catholic Church played a decisive role in the spread of so called peripheral nationalism in counter-reformation states, including Poland. The leadership of the Church in the struggle against external domination was to great extent related to the objective weakness of the State for most of Poland's history. The ramifications of these uncommon (for Western Europe) Church-State relations can be traced even to today, when – according to the World Values Survey – Poland occupies a special position among post socialist countries, with the dominance of traditional-religious values. The dominance of an ethno-nationalist concept of a nation is based on the Polish language, the Catholic religion and the ethnocentric idea of *Kulturnation* as a socio-historical tradition of constructing "good citizenship". The civic ideal is associated with the symbiosis between church and civil society. The social construct of civic nationalism is clearly recognizable – as it will be shown in the following subchapters – in the school historiography of national heroism in Poland.

Finding 1: The Image of Jadwiga as a Female Ruler or a Female Under the Rule?

As the youngest daughter of Louis the Great, King of Hungary and Poland, Jadwiga was a member of the Capetian House of Anjou. But she was also from the native Piast Dynasty and that made her a candidate to the Polish throne. Although crowned king and actually being a monarch, and not a queen consort, Jadwiga is never positioned as a ruler in the political realm, able to act fully independently. In March 1387, at the age of 13 she married the 36 year-old Jogaila (Jagiełło in Polish), Grand Duke of Lithuania. One of the representative quotes in this respect reads as follows:

"Under pressure from the lords of lesser Poland Jadwiga married a pagan ruler of the vast duchy of Lithuania" (Kowalewski et al. 2009, p. 242).

In all history textbooks Jadwiga – in spite of being a crowned "king" – functions in a passive and submissive role and her narrative portrayal shows her as an object of dynastic games. Although she is a high-profile woman, her role is reduced to being the spectator of a power struggle. The narrative format here is based on the constant emphasizing that she *was chosen, was married, was crowned*, and most of all – *was sacrificed*. The politically active part is played by the lords (*możnowładcy*) who – when we trace the dominant grammatical forms – *agreed to, chose, pushed, opposed to, realized a plan, rejected the proposal,* etc. As the textbook describes, "The lords and nobility agreed to hand over the Polish throne in the hands of his minor daughter Jadwiga" (Kowalewski et al. 2009, p. 262).

The exemplification of Queen Jadwiga's marginalization and political oppression was the textbook description of overruling her and her family's plan for marrying Wilhelm Habsburg of Austria by Polish nobles. Justified primarily by the threat of the Teutonic Knights of Prussia, the Polish Diet objected Jadwiga's marriage to Wilhelm:

> However, after her coronation the lords of lesser Poland admitted that this marriage constituted a threat of Poland's subordination to the Habsburgs. In order to avoid this, she was chosen Jagoila, a Duke of Lithuania, for her husband (Ciara and Kulesza 2009, p. 235).

In all the history textbooks analyzed, as well as in the general historiography, Jadwiga's narrative can be described as the one about her, but "without her" (Chmura-Rutkowska et al. 2013). Moreover, there are no attempts made to reconsider the powerless and marginal role of Jadwiga from the perspective of a traditional view of medieval women's access to public authority. Jadwiga's narrative is marked by the "politics of forgetting" and playing with the traditional differentiation between domestic (feminine) and public (masculine) spheres of activity. The political and cultural devaluation of women in the Middle Ages is poorly marked in the history textbooks, showing an untapped opportunity to go beyond this traditional division and construct at least some women (especially aristocratic ones) as those who gained prestige and influence in politics. The following quote shows not only gender asymmetry in the public (political) sphere, but also how it is preserved:

> Louis of Hungary had no male heir, but he wanted to keep the Polish throne for his dynasty, so he had to obtain the consent of the Polish nobility for the first female monarch in the history of Poland (Bentkowska-Sztonyk and Wach 2010, p. 8).

The unaddressed (forgotten?) issue of Jadwiga's gender and patriarch relations surrounding her may even cause her royal authority to be viewed as partly (symbolically) illegitimate. After all, she is primarily defined in the political realm through her position as a noble wife of a strong and powerful husband. Such a narrative reinforces the subordinate position of women (and not only medieval) in students' minds. Queen Jadwiga's only strategy to exert influence and independence is located in her private life as an efficient manager of the Kingdom and household. Her more personal, affective, and social orientation is represented in the subsequent fragments:

> Before her death she donated her robes and jewels for the renewal of the Cracow Academy. The last will of the deceased was realized by Władysław Jagiełło. Still today the oldest university in Poland is named after him (Ciara and Kulesza 2009, p. 237).

> It was only in 1400 that the university resumed its activities thanks to the actions of king Władysław Jagiełło (hence the later name: The Jagiellonian University), but most of all thanks to Queen Jadwiga who in her will donated her jewels to the Krakow University (Kowalewski, Kąkolewski, & Plumińska- Mieloch, 2009, p. 256).

The renouncement of personal wealth and donation of her royal insignia to restore the Academy of Krakow (future Jagiellonian University) appears in all the textbooks analyzed. Jadwiga merely accompanies her husband and clearly functions according to the traditional gender division of human activity into private (domestic) and public spheres. Although Jadwiga receives explicit recognition for her private accomplishment, her independence is implicitly undermined. She is – again – ruling within acceptable (feminine) limits and her influence on politics and the larger culture is restricted.

A Religious Figure in the National Context

Jadwiga functions in history textbooks as a "keeper" of national traditions and religious identity. Her marriage to the pagan Jagoila (later baptized and crowned as Władysław) is presented as an act of an intimate sacrifice of the young girl's interests for the sake of the country. As the book says, "Jadwiga's consent for her marriage with Jagiełło was an act of a great personal sacrifice for the country" (Ciara and Kulesza 2009, p. 236). Or, as described in another book:

> Jagiełło pledged to keep the conditions of the union, but the consent of Jadwiga was necessary. The fate of Poland and Lithuania depended now on her decision. It was not that easy and it required personal sacrifice from young Jadwiga (Kucharczyk et al. 2010, p. 23).

The primary importance of Jadwiga's sacrifice and heroic self-devotion when marrying Jagiełło is linked in the textbook narratives with a sacrifice on the altar of the Polish national cause. An agreement (also referred to as "a union") signed by the Lithuanian lords and the members of the Polish Diet in 1385 at Kreva led to the Christianization and the incorporation of Lithuania into the realm of Polish Kingdom. The rise of a mighty kingdom in Eastern Europe not only changed the political situation in the region, but also helped strengthen Christianity.

The symbolic dimension of the cult of Jadwiga is placed both on the national and religious agenda. She is among the national heroes that the Church honors. Her canonization in 1997 (by Pope John Paul II) has been noted in all history textbooks. Her strength as a monarch is derived from her public recognition as a saint, and the quotes below demonstrate it:

> The people loved Jadwiga for her piety and devotion, the nobles respected her for wisdom and defending the interests of her adopted homeland (Kucharczyk et al. 2010, p. 24).

> The modest and pious life of Jadwiga made it possible that during the pontificate of Pope John Paul II she was canonized (Ciara and Kulesza 2009, p. 237).

> Jagiełło's wife, Jadwiga of Anjou, was also characterized by great piety and devotion. After her death she was worshiped by the people as a saint, but only in 1997 was she canonized by Pope John Paul II (Kowalewski, Kąkolewski, & Plumińska- Mieloch, 2009, p. 262).

> Jadwiga took care of the sick in hospitals and contributed to the foundation of many churches. In 1997 she was canonized (Roszak 2010, p. 92).

The quotes show how successfully faith has been incorporated into national culture and national heroism. Jadwiga is constructed as a religious figure in the national context and she amalgamates – with her life – national and religious roots of Polishness. The traits of her character (modesty, piety, devotion) fit well into the national-Christian mythology. In a broader sense Jadwiga's image may be indirectly associated with the reverberation of Polish messianism. It reflects the wider discussion on the mission of Polish Catholicism (and Catholics) to keep their faith uncorrupted and to stand strong against excessive individualism, relativism, and moral decay.

The Personification of Romantic Polishness and National Glory

The images of women play an important role in the historical consciousness narratives, constructing a relationship between religion and the nation. Queen Jadwiga exemplifies a merge between romantic visions and present strategies of defining nationhood in Poland. First of all, Jadwiga's image is rooted in the Catholic view of the natural inequality of women and men, as well as women's subordination to men. Secondly, Jadwiga's historiographic image presented in the textbooks objectifies the relation between Polish romantic nationalism and Polish national Catholicism. Jadwiga's national and religious identity is not discussed at all and her image is fabricated as mono-ethnic and mono-religious. The obscurity of Jadwiga's multiculturalism constitutes a unique contrast to the actual image of the Polish-Lithuanian Commonwealth: both multi-ethnic and multi-religions territory, encompassing areas of today's Poland, Lithuania, Ukraine and Belarus and embracing people of Catholic, Protestant, Orthodox, Jewish, and Islamic faiths. Jadwiga's multicultural (Hungarian, Polish, French, and Lithuanian) identity has been subject to the working of the politics of forgetting. From the theoretical point of view, national heroes and heroines are constructed within the process of "national amnesia", seen as the constitutive part of the "national drama" (Hackmann and Lehti 2012, p. 129).

Queen Jadwiga as an example of a pious woman and a female saint represents not just the 'objectified', early national history discourse. Being primarily the creation of nineteenth-century patriots, intellectuals, and writers, Jadwiga functions as an image of the glorious epoch of the Polish history: the beginning of the Jagiellonian dynasty. As indicated by experts in the field of history textbook analysis, Iwona Chmura-Rutkowska, Edyta Głowacka-Sobiech and Izabela Skórzyńska (2013), the most commonly used textbook image of Queen Jadwiga is a black-and-white reproduction of the painting by the great nineteenth century Polish historical painter Jan Matejko (see Fig. 7.2).

Fig. 7.2 Portrait of Queen Jadwiga of Poland by Jan Matejko. Matejko (image available on the Internet Polish Biographical Dictionary: http://www.ipsb.nina.gov.pl/index.php/a/jadwiga-andegawenska-portret-w-krolowie-i-ksiazeta-rysunki-jana-matejki)

This most popular image of her corresponds to the nineteenth century awakening (and strengthening) of Polish national identity and the creation of national mythology during the partition period. There is also a glaring discrepancy between a mighty, powerful, and adult image of Jadwiga (painted by Matejko) and the textbook description of her as a young and innocent girl. This iconic construction of Jadwiga, entrapped in the nineteenth century, romantic vision, symbolically detaches her from medieval representations. It also shows a unique continuity of the historiographical paradigm referring to romanticism. It not only functions as a support to define the national past, but national-religious zeal is also used to support the importance of Poland's place in today's (civilized and Christian) Europe.

Finding 2: The Image of Piłsudski: An Undisputed Hero of the Partition Period and the 1918/21 Victories

In all history textbooks Marshal Józef Piłsudski's heroism is based primarily on his key role in reclaiming a lost homeland, the fight for national independence, as well as the territorial claims justified on the basis of ethnic and historic affiliations. In the earliest period, Piłsudski is presented as a symbol of the Polish Legions created during the Great War in order to fight for Polish independence. He also personifies the ideal of Polish leadership: the traditional image of a soldier-commander and a man of tough and brave character:

> Galician Conservatives […] obtained permission from Vienna for the establishment of the Polish Legions. At their head stood the Polish generals from the Austrian army and the commander of one of three brigades created was Piłsudski. However, he gained authority in all the legions. Soldiers praised him for example, that while staying at the front together with legionaries he endured the hardships of military life together with them (Ustrzycki 2011, p. 180).

We cannot however forget about the iconic status assigned to the legions, not only during, but also long after the war. They symbolize the revival of Polish statehood still today. In the process of the "sacralization" of Polish politics in the neo-romantic period, Piłsudski's legions were "a founding myth for the creation of modern Poland" (Biskupski 2012, p. 10). Historians note the remarkable cultural similarity of the legionnaires due not only to their prevailing social status (members of the intelligentsia), but also to their "immersion in Polish neo-Romanticism". Their martial ethos was influenced by Sienkiewicz's romantic and especially – patriotic battlefield literature. According to Biskupski (2012): "In their hero-cult and military devotion, the legions were the rebirth of the Romantic tradition" (p. 12).

In the textbooks under analysis there is a number of direct references to the romantic tradition in the narratives about Piłsudski, as exemplified by the explicit reference to Tadeusz Kościuszko, the national hero of the Romantic period:

> From 21 November, Piłsudski formally became the "temporary head of State," who – until the convening of the Parliament – held the "highest authority in the Republic of Poland". The title of the head (naczelnik) referred to Tadeusz Kosciuszko (Łazuga 2002, p. 174).

A reference to Polish Romanticism is also made in relation to the territorial expansion of Poland into ethnically non-Polish territories: "Piłsudski, similarly to many Poles, could not imagine Poland without Vilnius, so strongly linked to Mickiewicz, romanticism and Polish culture" (Łazuga 2002, p. 188). Victorious and triumphant Piłsudski became a charismatic figure for the neo-romantic "Young Poland" movement and "was profiting from the 'messianic myth' in Polish Romantic thought" (Biskupski 2012, p. 10).

In his narrative as a symbol of the national cause, Piłsudski is constructed as a "single-mover", a singular driving force, and the main if not the only originator of events. His selfless heroism, noble spirit, and patriotism are embedded in the legion's symbolism and define the first period of his political activity as well. The exemplifying excerpts from the textbooks highlight his decisive influence on the country's politics and his almost mythical role as "a single person" that can organize a revived state:

> Piłsudski proclaimed to the governments of the major countries of the world the creation of an independent state "encompassing all the lands of the united Polish." Taking the wheel of events in his own hands, Piłsudski became the co-founder of the new government (Sierpowski 1998, p. 23).

> After being released from a German prison Piłsudski came to Warsaw on 10 November 1918. He was perceived then as the only person able to provide Poland with stable government. The day after his return on 11 November 1918 the government surrendered to Piłsudski and the Regency Council appointed him the military authority (Wojciechowski 2001, p. 30).

Another important aspect of Piłsudski's narrative is his construction as a universal hero. In order to achieve his primary goal of the "unification of the independence movement across the borders of partitioned territories" (Wojciechowski 2001, p. 25) he must be a hero of many parts, not only revolutionary, but also a son of a Polish nobility, as well as the Romantic ideal of Poland defined by its history. "Piłsudski was therefore a socialist for socialists, a noble for the aristocracy, and the

National Democratic perhaps the only man able to lead the country for the National Democrats" (Łazuga 2002, p. 174).

The mythologizing of his character and his actions makes him almost a *national saint.* The cult of Józef Piłsudski is traceable by some excerpts highlighting "the hypnotic impact" Piłsudski had on people. One of the examples comes from a report of the governor-general, Hans von Beseler from the Prussian sector (source material available in the history textbooks, the report of 20.12.1916):

> This military dilettante and demagogue, not devoid of ability, undoubtedly personally brave, but undisciplined, and distant from serious knowledge, makes a simply hypnotic impact on the organizations close to him (Wojciechowski 2001, p. 32).

The great historical resonance of Piłsudski was also noticed by his contemporaries, as the socialist politician Ignacy Daszyński admits: "The sympathy of the Polish masses for Piłsudski grew more and more. He became a national hero far above all other Polish politicians of whatever camp, and his renown masked the identities of all other Poles" (Bisupski 2012, p. 9). This aspect of Piłsudski's narrative – his universal heroism – will be continued in the later stages of his school historiography, during the interwar period.

After the 1926 Coup – An Ambivalent Narrative and Visual Articulations

The narrative of Marshal Piłsudski changes in the interwar period. The turning point is the assassination of the first elected president, Gabriel Narutowicz in 1922. Perceived as Piłsudski's candidate, Narutowicz is said to be chosen with the votes of the ethnic minority population that constituted around 30 % of the whole population of interwar Poland. As highlighted by Eva Plach (2006), "The assassination of the first president of the newly independent nation marked an early turning point in the republic's short history and further poisoned an already tense political and social environment" (p. 3). The polarization of the Polish political scene is usually constructed in history textbooks by the contradistinction between left-federalist Józef Piłsudski and right-nationalist Roman Dmowski. Piłsudski and his supporters are presented as being in opposition to the National Democrats and its theoretician and symbolic leader, Roman Dmowski. Dmowski's acceptance of political and social conservatism, ethnic homogeneity, and Catholicism clashes with Piłsudski's approval of some left-socialist ideas and the vision of a multi-ethnic federalism (under Polish leadership) in a strong, secular state. Piłsudski's federalist idea refers to the multi-ethnic heritage of the Polish-Lithuanian Commonwealth (Fig. 7.3).

Astonishingly though, these two competing discourses about the moral, social, and political standards of the Polish nation and the dominant ideology of the state are not openly discussed in the analyzed textbooks. The above-mentioned polarization is reduced to the perspective of a divided and unstable political scene, without any reference to cultural and social life in interwar Poland. There are numerous

Fig. 7.3 Roman Dmowski and Józef Piłsudski, a typical way of presenting those two opposing politicians in history textbooks (here from: Dolecki et al. 2013, p. 32)

fragments in the analyzed textbooks, where the political instability of the interwar period is shown (e.g. fourteen governments between 1918 and 1926, almost one hundred political parties, unstable coalitions, etc.) but the division between the two moral nations, one of Piłsudski and one of Dmowski, is – in extreme cases – reduced to an overly simplified view, lacking any explanatory power: "Dmowski's and Pilsudski's concepts were poles apart. But the ultimate goal of each of them was the independence of Poland" (Wojciechowski 2001, p. 25).

Without the ideological foundations it is even more complicated to understand and assess the fall of Polish democracy and the rise of the soft dictatorship after the coup of May 1926. Those "three days that shook the Republic" (May 12–15) are constructed in the history textbooks in a surprisingly ambiguous way: from a bloody and brutal civil war that initiated a period of moral decay, to a swift quasi-revolution that saved the nation from disintegration and descent into a moral dissolution. Some textbooks present the May events in a way that is explicitly unfavorable to Piłsudski and Piłsudskiites ("Piłsudczycy" in Polish):

> On 12 May 1926, Piłsudski began his march on Warsaw. A particularly important support was provided to him by the Socialists. The railway workers strike, called on their initiative, made it impossible to quickly transport the troops, commanded by officers loyal to the government and the oath, to the capital. Despite this, the bloody, fratricidal struggle lasted for three days; 379 people were killed, and nearly a thousand were wounded (Sierpowski 1998, p. 75).

Fighting in Warsaw cost the lives of 379 people, and more than 900 were injured. Piłsudski declared his willingness to bring about national reconciliation. However,

contrary to his previous announcements, many officers were punished for being faithful to the government (Dolecki et al. 2013, p. 108).

There also appear textbook examples of a different narrative, visibly less critical towards the organizers of the coup. The following description of the same events stands out especially in its judgment of the "fratricidal nature of the fights" during the May events:

> An army led by Piłsudski was not large […] It was believed – among supporters of the Marshal – that this would be enough. That the rest would be done by Piłsudski's spell, his legend as a fighter and a victorious leader, and by the love that he aroused among the soldiers. (…). Piłsudski was helped particularly by the PPS (Polish Socialist Party), that was strong among railway workers. A general strike was announced, and it hindered the transport of troops loyal to the government. The generals were divided, though supporters of the Marshal were in the majority. In the "May events" (as it was then called) 215 soldiers and 164 civilians were killed, and nearly 900 people were injured. […] There was no fratricidal war on a large scale (Łazuga 2002, p. 200).

The 1926 coup gave way to the movement of *sancja* (from the Latin *sanatio* meaning *healing*), associated with the state's rejuvenation and fundamental political reforms and required as a result of weak post-partition political culture (Plach 2006, p. 6). Unfortunately, the discussion about *sanacja* in the history textbooks does not address the key issues concerning the symbolic rebirth of the nation, including the meaning of Polishness, the boundaries of Polish national identity, and the idea of citizenship based on ethnic membership. The narrative of *sanacja* in the history textbooks is almost exclusively focused on political issues, ignoring social and cultural aspects that were behind the coup:

> Piłsudski's supporters (Piłsudskiites), when taking charge, declared that they would do so in the name of the sanacja, the healing of the relationships in the country. Therefore the political camp, ruling in Poland in 1926–1939, is defined as the sanacja. Their followers proclaimed the supremacy of the interests and welfare of the state over other issues (Wojciechowski 2001, p. 74).

> With time, the governance of the Marshal and his team was called the governance of sanacja. In fact, key state affairs were controlled by Józef Piłsudski, who formally didn't hold any important state positions. This method of governance, based on the sole authority of an individual, was called the authoritarian rule (Dolecki et al. 2013, p. 109).

As a result of the excessive focus on the political dimension of the coup and its consequences, the question of cultural and social issues behind the support of some social groups for Piłsudski is not explained. There seems to be not enough explanation given to the civil and cultural dispute that escalated after achieving independence. Moreover, there is not enough information about the groups that supported Piłsudski and the reasons behind their actions. The approval comes from an anonymous "large part of the society", "team of the commander" or "a large part of the population": "A large part of the society held him in high esteem. He had many followers, also in the army, where there remained a faithful group of his subordinates from the legion times" (Sierpowski 1998, p. 75).

> After the May events Poland was ruled by the "team of the commander", subordinates of Piłsudski from the legion times. […] They all regarded Piłsudski as the supreme authority. High positions in the country were obtained on his clear orders (Łazuga 2002, p. 202).

> Dissatisfaction with the situation in the country meant that a large part of the population supported Piłsudski's coup d'état in May 1926 in their expectation of positive changes (Wojciechowski 2001, p. 76).

The "forgotten" part of the narrative is a more detailed explanation of the social support for the *sanacja* concept. Historians describe various examples of active citizenship involvement, but apparently none have found their way into the school historiography. Eva Plach (2006) mentions in this context the formation of the Society for the Moral Rebirth of the Nation (*Towarzystwo Moralnego Odrodzenia Ojczyzny*) – the association of left-liberal intellectuals that "embraced Piłsudski's coup as an important catalyst for moral and national rebirth" (p. 9). In her brilliant analysis she also gives examples of various pro-Piłsudski women activist groups, including the Women's Democratic Election Committee (*Demokratyczny Komitet Wyborczy Kobiet*), that were "sparked off by the coup" and that had an important role to fulfill in the *sanacja* project (Plach 2006, p. 9). Sadly, the moral reforms concerning female citizenship in the secular and modernized Republic are just one of the areas, reflecting again the expectations of the *sanacja* period, that are never mentioned in analyzed history textbooks.

As written by a great Polish writer of the interwar period, Maria Dąbrowska, the *sanacja* regime was "a thing at once terrifying and wondrous, like a chapter from Greek history. A military revolution with a moral ideal… Two moral nations have clashed…" (Plach 2006, p. 7). But the "content" of this clash, as well as its consequences then, and the consequences still for Polish society today, are not discussed in analyzed history textbooks. As theoretical and empirical studies teach us, the content of this clash was more complicated, comprehending various secular reforms and modernist cultural change in key social and cultural areas, "from models of femininity and definitions of the nation to ideas about citizen activism and service to the state" (Plach 2006, p. 8). Instead, the textbooks transmit an over-simplified and politicized explanation, based on the clash between left-liberal and right-nationalist Catholic factions.

As it was during the period from 1918 to 1921, Piłsudski once again functions as a single perpetrator, almost "a demiurge" of the *sanacja* period:

> Many historians do not use the term dictatorship, but [rather] authoritarian rule, because of their reliance on the authority of Piłsudski. Although he was not a president or a prime minister […in] the decision-making process his opinion was taken into account by the highest authorities (Wojciechowski 2001, p. 76).

Some authors go even further in the process of mythologizing Piłsudski, recalling the emotions he provokes along his political way:

> The specific system of dictatorship developed by the Marshal was based on the traits of his personality, the legend (which he also created), great authority, as well as love and fear, which aroused his name (Sierpowski 1998, p. 97).

The mythologizing of Piłsudski's heroism refers also to an imperial (royal) framework and, as in case of Jadwiga, links national heroism with the romantic and messianic rhetoric. In one of the textbooks we can find a symptomatic quote from the speech of President Mościcki, delivered during Piłsudski's funeral in 1935:

> The spirits of the kings are gaining a worthy comrade in their eternal sleep. No crown adorns his temple, and his hand holds no scepter. But he was a king of our hearts and a ruler of our will (Dolecki et al. 2013, p. 113).

The reference to Piłsudski is presented here as how a true nineteenth century noble grounds his national heroism – even if indirectly – in nineteenth century Polish romanticism.

Conclusion

One of the key representations that can be traced in the national discourses on heroism is a prolonged focus on reclaiming or strengthening Polishness rather than on teaching universal understanding of nationhood and citizenship. There are two competing representations of Polishness in the national heroism discourses of both Jadwiga and Piłsudski: one is of a glorious, victorious, and powerful Poland, and the other is of the instability and fragility of Poland's existence.

With the emergence of messianism in Polish metaphysics in the nineteenth century, the Polish nation associated itself with the moral mission as a defender of the civilized future of Europe. Poland's contribution to the salvage of Christian civilization strengthened the identification of Polishness with Christianity (particularly Catholicism). From this perspective, the European dimension of national heroism in Polish history textbooks relates primarily to Poland's unquestionable alignment with European civilization and Poland's contribution to the development of Christianity in Europe.

Recalling Hobsbawm's (1983) observation on the ambiguity of the tradition inventing process, and the construction of heroism in the act of "fabrication" or forgetting, there are certain elements of Jadwiga's and Piłduski's past that have been suffering from a "historical amnesia". These are usually those aspects of their lives that are not fully compatible or that stand in an open opposition to the dominant sources of Polish national heroism: Catholicism, Romantic messianism, noble culture and the explicit (Jadwiga) or implicit (Piłsudski) sanctification of heroism. It may be one of the main reasons for the absence of certain discussions in history textbooks, for example around patriarch relations surrounding Jadwiga's royal authority, Jadwiga's and Piłsudski's multicultural identity, more detailed explanation of the social support for the Piłsudski's *sanacja* concept or the Romantic-messianic model of his heroism.

Both Jadwiga and Piłsudski are symbolically entrapped in the perceptions of nationhood identified with a stateless, nineteenth century Poland. Rooted in the intellectual period of romanticism, the schoolroom historiography of Polish heroes shows a striking continuity of the messianic paradigm of Polishness. Both charismatic leaders, although separated by centuries, represent this metaphysical concept of the nation as endangered, defensive, and repeatedly struggling for freedom and sovereignty. Jadwiga's and Piłsudski's narratives personify this uniquely close con-

nection between Polish Romanticism, widely defined past (spanning the early Jagiellonian Era, the post-partition, and interwar Second Commonwealth of Poland), and the present day.

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Chapter 8
History Textbooks for French High Schools: Events, Long-Term Trends, Europe and Skills, Not National Leaders

Camille Duparc, John Barzman, and Elisabeth Robert Barzman

Introduction: History Textbooks for French High Schools

Current government programs for French high schools ("lycées") no longer advocate a major emphasis on national leaders, a shift that is widely although not universally accepted by public opinion and teachers. Individuals spotlighted by textbooks are rarely "heroes" and frequently not French. France probably stands among those countries that place the least emphasis on their own charismatic national actors, making somewhat moot the question of who these major figures are and how they are presented. By what topics have they been replaced and why? Who are the surviving national figures? Who are the non-French actors? How are they presented in the textbooks? The authors made an attempt to show the evolution of history teaching and formulate alternatives to the focus on national heroes, and to explain how France arrived at this approach, how thoroughly it is applied and how well it meets expectations.

Although introduced gradually, the change is momentous because most French people believe that the identity and unity of France derive from learning the past experience of its inhabitants. History, the teaching of history and history textbooks therefore loom large in public debate (De Cock and Picard 2009). The current

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discussion on history education pits the supporters of a focus on major events, long-term trends and a wider world view, a steadily broadening majority, against an old-fashioned approach centered on national heroes such as Vercingetorix, Clovisse, Charlemagne, Saint Louis, Joan of Arc, Louis XIV, Colbert, Napoleon, and depending on the author, Robespierre, Jules Ferry, Clemenceau and De Gaulle (Amalvi 2001; Corbin 2011).

This chapter examines briefly how history came to play such an important role for national unity and how the official programs to be taught to young people ages 15 to 18 are conceived, then proceeds to look at the textbooks produced for that age bracket and analyze the place granted first to individual and collective actors and second to European and international dimensions. The authors base their findings on an examination of the existing literature on history teaching, official bulletins of the Ministry of Education dealing with history programs and advice to history teachers (see Appendix I) and eighteen textbooks in current use. Where the authors discuss several textbooks that conform with Ministry programs, the reader may turn to the textbooks listed in the sources at the end of the chapter; where they give more specific examples, such as the wording of subtitles or techniques of presentation of individual actors, regular citations are used.

The Place of History in France

The dominant view in France is that the unity of the French nation derives from its history rather than from hereditary biological characteristics, a common language or the sharing of imperial privileges. History justifies the territorial limits and unity of the various provinces of the nation and shows the changing relation between various categories of the population. It demonstrates that the nation is based on an on-going conversation about improving the Republic thereby promoting social cohesion, a key concept in public discourse. Since the consolidation of the Republic in the 1880s, it has been taught at every school level, from year 1 to 13. The central state established and financed schools to disseminate civic values as well as practical and scientific knowledge and gave history significant teaching time and resources to describe and explain how civic values (liberty, equality, fraternity) originated and show how a national and democratic tradition was consolidated in France (Garcia and Leduc 2003).

For a long time, schools organized the learning of history around a national master narrative (sometimes referred to as the "national saga") focused on politics and unfolding in the French national territory. With greater consistency since the 1880s, teachers taught the story of a nation endowed with a collective and persistent will, France personified. A succession of great men (and very few women) embodied this will and advanced the country towards its rightful place in the world. This vision corresponded to historiographical tendencies best represented by Ernest Lavisse, who organized the narrative around a chronological succession of great political leaders who molded their times.

A few decades later, his approach was challenged by new historiographical trends, notably the *Annales* school, which downplayed the role of illustrious leaders to stress, instead, the slow and long-term unfolding of economic and social life as well as the history of mentalities (mindset). The school gained influence in the 1940s, 1950s and 1960s. To this first step away from the hero-based national story, was added more recently an emphasis on the importance of memory and heritage in the subjective national feeling, deriving in part from the success of Pierre Nora's multi-volume series *Realms of Memory* (*Lieux de mémoire*) (Nora 1984–1992).

As of today, school is compulsory until age 16 and history is taught at every level from kindergarten up, and in all tracks – general, vocational, and technological. Weekly hours dedicated to history range from two, shared with other disciplines (geography and civic education) in the technological track of the first (première) class, to four, strictly for history, in the literary and economic and social tracks of the first and terminal (terminale) class (see Appendix II, A. Official guidelines of the Ministry of Education). Topics to be taught are organized in accordance with the three stages of education: primary (ages 5 to 11), junior high (collège) (ages 11 to 14) and high school (lycée) (ages 15 to 18). Each year, teachers use knowledge and skills acquired at the earlier stage to move further. The Common Knowledge and Skills Standards (socle commun) adopted in 2003 recommends that instructors teach high school students history not just through the main political narrative but also through the analysis of two-page case studies with primary sources, including a lot of visual material, documents, and brief explanations. The goal is to teach methodological and critical skills. Students, who are future citizens, thus acquire the tools needed to subject various sources of information to critical review and structure their understanding of the world. High school history contributes powerfully to critical thinking.

The importance of history in education in France was reaffirmed in 2009 as the result of a polemic over a proposal by the Education Minister to eliminate the discipline from the core curriculum in track "S" (for Scientific) at the "terminal" level. The newly proposed program reduced the history course to an elective ("option"). But the move provoked an uproar among associations of parents of students and in the educators' community, as well as a major debate in the media, and history was reintroduced as a compulsory subject in all tracks in the official programs.

The Importance of Programs and Textbooks

Programs

Programs (what is to be taught in public schools in a given year) are the backbone of the teaching of history in France since the Third Republic (1870–1940). Since then, both historical content and pedagogical methods have evolved along with changes in government policy and academic research. The government now claims

that its programs result from a combination of the will of the people (expressed in elections and the governments formed as a consequence), the new findings of historical research and pedagogical considerations. In France, textbooks conform quite closely to these programs, as will be seen further in the chapter, so that it is necessary to study the programs before the textbooks (see Appendix I, sections A, B and C).

The elaboration of the programs is an important issue, and is therefore examined here in some detail. It involves a complex process that fluctuates according to the period, policies and emerging actors such as lobbies promoting the memory of particular groups (concentration camp internees, resistance figures, women, or returned colonial settlers). Since the 1950s, programs were changed at five important junctures, reflecting an alternation between, on the one hand, a traditional view of national history based on well-known landmark actors and a well-defined succession of events and chronological periods, and, on the other, a more thematic outlook centered on emblematic moments in which the neatly defined chronology dissolves.

From the late 1950s to 1989, programs were determined mainly by political decision makers. Prime Minister Georges Pompidou attempted to reemphasize a chronology based on the key turning points of French national history. A decade and a half later, in 1975, Minister of Education René Haby mandated programs that gave first place to a sound pedagogical relation with students and learning broad themes at the expense of the well-defined chronology and major actors, reflecting an advance of the concept of long duration ("longue durée") put forward by Fernand Braudel. Then, in 1984, when Jean-Pierre Chevènement became Minister, the broad thematic history was downplayed in favor of stricter chronology. In the 1990s, a reversal took place under the influence of Inspector-General Dominique Borne: learning the France-based chronology was downgraded and emphasis was placed on the European dimension of the historical past. Another Inspector-General working closely with Borne, Laurent Wirth, went a step further and made the acquisition of skills, rather than the concatenation of historical events, the guiding principle of the learning process.

The fifth major turning point heralded the end of the preeminence of political decision makers and began with the decree of February 23, 1990, which created a National Council on Programs (CNP) and opened the elaboration of programs to a far wider spectrum of public actors. Its impact was felt a few years later. The CNP was composed of twenty-two members appointed by the Minister among designated constituencies. It included representatives of academic researchers, administrative staff, inspectors and members of the educators' community (the Association of Professors of History and Geography-APHG). Its mission consisted in formulating proposals and opinions on new programs. Once the drafts were ready, the opinion of educators was solicited through a national consultation. In 2005, the CNP was replaced by the High Council on Education (HCE), which was consulted less often and relegated to second place by new "groups of experts" set up by the Ministry to prepare new guidelines. Other inputs were solicited from trade union

representatives, the "History and Geography" group, and many inspectors and teachers contacted directly.

The procedure today is that the texts, once approved by the Council, are published as directives or decrees of the Ministry in the Official Bulletin of National Education (BOEN) (see examples of programs for "second" ("seconde"), "first" ("première") and "terminal" ("terminale") classes in Appendix I). They can be amended by decree, which happens quite often a few years after the introduction of the programs, to make adjustments or lighten their content.

The Ministry and its regional antennas, the Rectorates, also issue "companion documents" or "classroom resource kits" which are distributed to teachers to clarify the content of these programs and suggest choices of implementation and further exploration. They are called Eduscol cards ("fiches Eduscol"). Written by historians approved by the Ministry, they provide historiographical interpretations on the issues broached in the program, and suggest relevant Art History resources, complementary bibliographies, and reliable Internet sites. Each thematic section usually ends with a rubric entitled "traps to be avoided" to guide educators faced with difficulties towards solutions considered desirable.

The current high school program aims to take the student on a journey through human history from Antiquity to the present, with a closer focus on the contemporary world. As reaffirmed by Minister of Education Xavier Darcos in 2008, since knowledge of national leaders and other great men is achieved in primary school and to a lesser extent in junior high, it no longer needs to be central in high school, where it should merely help to explain facets of society in a broader perspective. The goal of current programs is to present a history that accounts for a plural French identity, at once national and European, and includes in its scope non-European spaces considered particularly relevant to French society.

This most recent version of the program, written by Wirth, began to be taught in "second" class in September 2010. It involved a reorganization of the periods covered in the three stages of history education: from then on, in primary school, the goal was to identify and characterize the large overarching periods using essentially national history or the national impact of external events as a reference; in junior high, knowledge and skills acquired in primary school were to be deepened while broadening the focus to Europe and the world; finally, in high school, questions were posed in a more conceptual fashion and subject to contradictory interpretation in a critical approach.

Textbooks

In France, school textbooks are the almost exclusive instruments of education, and must conform to Ministerial programs and changing pedagogical practice. They are designed and produced by private commercial publishers and given approval by the Ministry of Education. Free samples are then sent to schools. The teaching team of each establishment chooses collectively which textbook it will use for each level

and track taught. Each teacher is then free to use the textbook as she or he sees fit, emphasizing different chapters and illustrating concepts with different examples. The same applies to the far less numerous private schools, which operate with the approval and under the control of the Ministry in order to be entitled to state subsidies and to grant certificates of equivalency that will be accepted in other schools. The textbooks are then purchased by parents' associations, distributed to the students and returned at the end of the school year for use by the next class.

The model for textbooks which was dominant for a long time in French high schools was codified in 1904 by Albert Malet, a disciple of Ernest Lavisse, and regularly updated after the death of Malet in combat in 1915, by his collaborator, Jules Isaac. It had a classical in octavo format and could run up to 700 pages in length, the bulk of which consisted of narratives written by the textbook author. Little room was allowed for illustrative documents, most often in black and white. Widely known as the "Malet-Isaac", it inspired almost all the textbooks used in France with its Republican patriotism. It proposed a linear chronological account of the French nation or French people, sliced into successive chronological sections dominated by the archetypical hero of the period, and a sound knowledge of the regions of hexagonal (metropolitan) France and its imperial extensions (Malet and Isaac 2012).

Beginning in the late 1960s, and with more assurance in the 1990s, textbooks changed their format towards a larger size and many attractive illustrations, and their content to reduce the place of the main narrative and make room for documents to be studied in class. Before finalizing the detailed outline of the book, publishers sought the advice of a national panel of teachers. The text and design were then entrusted to authors ranging from university professors to inspectors, classroom teachers and other educators. The six largest publishers of history textbooks today are Belin, Bordas, Hachette, Hatier, Magnard and Nathan, and we chose to base the present chapter on their offerings. In order to see how national leaders are treated today, it is necessary to present briefly the general structure of these textbooks.

Unlike the Malet-Isaac model that put forward leaders, battles, and the national epic, today's textbooks allocate space to social groups and collective actors such as women, immigrants, trade unions, associations, and parties. For instance, the textbook for the "terminal" technological track includes a piece on "Women in French society since the 1950s" (Chevallier et al. 2013, p. 122–123). Three textbooks, for the "second" class, have a section on "Irish emigration" (Billard 2010, p. 28–29).

Despite the relative standardization of subjects and visuals to be studied, each publisher can propose several textbooks composed by different authors for the same level and track, to meet the expectations of specific schools and teachers. For example, Nathan proposes for the same grades a collection signed by Le Quintrec, which boasts a wealth of visuals and shorter main text, and a collection by Jacques Marseille, which offers a more scholarly approach, more specific documents and less visuals. Most instructors prefer less main narrative and more case studies, illustrations and art history pages, for two reasons: students like visuals, and shorter

compulsory lectures give the teacher more leeway. Nonetheless some teachers deplore what they perceive as a turn away from academic culture.

For the many teachers attracted by visuals and new technology, most textbooks offer links to complementary resources such as an Internet site, DVDs or subscription to an interactive textbook designed for a video projector or interactive whiteboard in the classroom. Several attempts have been made to replace the big traditional textbook with lighter-weight booklets, or notebooks that students fill in themselves and keep at the end of the year, but all failed, demonstrating the attachment of parents, students and teachers to the traditional object "history textbook". Today's textbooks all follow roughly the same outline: each chapter includes a double page composed of one page of written "main narrative" or "lecture" facing another displaying "documents", several double-page "thematic folders" or "case studies" dealing with a figure, an event or a significant location, a study proposed directly in the ministerial program, and, at the end of the chapter, a part on art history and a part on methodology together with exercises that prepare students for the baccalaureate, the national examination at the end of high school. Teachers can go beyond the standard textbook with complementary studies that are sometimes critical (Halimi 2014).

All this attention to textbooks should not hide the fact that many factors counteract the importance of history in high school. First of all, in the very same school where students are taught history in the history course, they receive other historical-style information from disciplines such as literary studies, geography and civic education. In addition, outside school, they are bombarded with all sorts of ideas about history by the media (Internet, TV, films, DVDs, on-line games, magazines, novels, cartoons), by public debates when laws involving history are discussed in Parliament or during elections, by the elevation of certain locations to the status of monument or heritage memory site, by amusement parks with historical themes, by family or local oral tradition. Above all, outside the classroom they meet the widespread belief that the critical knowledge of how society works, and in particular historical knowledge, is useless and a waste of time, compared to "practical skills".

The Place of Actors and Agency in French Textbooks

The main question for contributors of this volume was the selection of a few national leaders or heroes and an examination of the fashion in which they are portrayed in the high school textbooks. But the evolution of the programs described here shows that, at present, the trend in France is no longer to unify the nation around emblematic figures of French history. Since textbooks follow programs, the trend towards downgrading national leaders is found there too.

After consulting the textbooks proposed by publishers for "second", "first" and "terminal" grades, in the general, technological and vocational tracks, we noted that a large part of the lectures, documents and visuals offered in the textbooks no longer concerned major national actors or heroes. Editors have abided by the programs,

which ask that major actors be pushed into the background even in the field of iconography. Instead, programs for these classes advocate the study of historical processes, the idea that the logic of history cannot be stopped at a given moment. Even though agency, the possibility for actors to influence the course of history, remains central to historical analysis, it is now strongly linked to long-term processes and major events. The actor is no longer presented as a hero, but as a necessary connection in a broad historical process. History is approached through three prisms: actors, events, and context. For example, in the Nathan textbook by Le Quintrec for the "first" grade, Captain Alfred Dreyfus appears not for his own integrity and courage, but through the "Dreyfus Affair", which is an example of the main subject to be studied, the Republic endangered and its subsequent consolidation through a mobilization in defense of human rights (Le Quintrec 2011, p. 306–307).

The actor is still there, but he or she is no longer interesting for his or her own sake or that of his or her glorious contribution to the nation, but for the association with a well-known term, a famous date, a memorable event or an important concept. For instance, Charles De Gaulle receives coverage in the book for the "terminal" grade, not as an extraordinary person or a national savior, but for his role in "Government on a national scale: France since 1946." No full-scale photograph of him, in majesty, or simply alone, is provided; instead he appears in a Roger Viollet photograph from above, as a small figure, "primus inter pares" among a large group. The caption gives his name only after the bold writing: "**The president of the Republic, at the top of a centralized state in 1962**. The head of state, Charles De Gaulle, is surrounded by the mayors of the Doubs department, Besançon, June 17, 1962" (Dalbert 2012, p. 268).

Continuing with French leaders, the other greatest figure, Napoleon, receives several headings in three of the four textbooks consulted for the "second" grade under the chapter "The French Revolution, a new political universe". The fourth textbook dedicates headings to Robespierre and Danton, and not to Napoleon, for the same period, paying substantial attention then to an unavoidable figure, but not quite enthusiastic exaltation.

Moving to non-French leaders, all textbooks for the "first" grade propose a biography of Harry S. Truman. However, it is not for his personality and life achievements, but because the main topic is the Cold War, a historical process, and the widely used term "Truman doctrine" must be explained (Bourel, Chevalier & Hatier, 2011, p. 122). The same applies to Roman Emperors Claudius and Caracalla who appear in the "second" grade: they are mentioned simply in two thumbnail sketches illustrated by sculpted stone busts, not for their own worth, but because the Claudian Tables of Lyons and the extension of Roman citizenship to free men of all cities of the Empire under Caracalla are terms and concepts that are introduced to explain the origins and meaning of extending modern democratic rights to all citizens or residents of a territory (Grondeux and Navarro 2014, pp. 64–65; 66–67).

Another technique to put individuals on stage is to introduce an entire thematic chapter through the study of an individual player. Thus the chapter on "the broadening of world horizons during the Renaissance" is broached through the stories of Fernando de Magellan, "Magellan: a European circles the globe" (Bourel and

Chevallier 2010, pp. 154–155) and Christopher Columbus, "Christopher Columbus's Travel Notebooks" (Bourel and Chevallier 2011, pp. 64–65). Here again, the individual actor highlighted is not chosen because he played a heroic part in French national history, or for his own life, but because he is useful and relevant to the discovery of essential features of historical reality. Applying this device, textbook authors' approach is to show the various facets of an individual on a double-page of documents, as the representative of a particular social group who sheds light on the entire social structure of the period. Thus, in textbooks for the "second" grade, the figure of Bernard of Clairvaux serves to introduce religious institutions of the Middle Ages in "Bernard de Clairvaux and the reform of monasticism" (Billard 2010, pp. 90–91).

The same procedure is sometimes transferred to collective actors. The point then is to diminish the weight of individual heroes and draw attention to the importance of collective actors, such as social classes. In the "second" grade for instance, the spotlight is directed at "workers", "peoples", "generations" or "a gender" as in the double-page of the Nathan textbook entitled "Women and the Revolution of 1848 in France" (Le Quintrec 2010, pp. 188–189).

Large numbers of people can also appear through a real but little-known character or through an archetype combining elements taken from the trajectory of several individuals. Thus, the "immigrant" can be either a composite figure or Alain Mimoun, an Algerian who met success after settling in France (Zachary 2011, p. 57). The influence of micro-history ("microstoria") is obvious as in Pascal Zachary's Hachette textbook, in which all chapters propose two case studies of an actor, each one page in length. In both the Magnard and Belin textbooks for the "terminal" grade, alongside certain inescapable major figures like Franklin Roosevelt, Fidel Castro and Martin Luther King, one finds a large number of minor players: Martial Pacaud for the transformations of society, Jacques Le Petit as the French soldier, the "poilu", of World War I (Zachary 2011, p. 56 and 83). Similarly, in the Nathan textbook for the "second" grade, one discovers a page on "the Prefect, a major agent of Bonaparte's policy" (Le Quintrec 2010, pp. 268–269).

Sometimes, the importance of the moment erases the importance of the actor involved. In the Magnard textbook for the "second" grade, the account of the French king's attempt to flee his country, and of his capture at Varennes, does not include the name of Louis XVI, to emphasize instead the fact that the flight of "the king" signaled a turning point in the French revolution ("The flight to Varennes", Billard 2010, pp. 214–215). In the Hachette textbook, the trend towards the urban expansion of Paris overshadows the personality of the ruling king ("Paris develops under Philip Augustus," Grondeux, 2011, pp. 142–143).

Do these examples mean that the great figures of the national historical narrative only appear in passing in French high school textbooks? In the first place, one should remember that they have been studied in classes before the "second" grade, when school is compulsory and history is present in the curriculum every year. Primary school deals with the major figures of the history of France, which are then studied again in junior high as, for instance, Vercingetorix in the "sixth" grade, and Joan of Arc and Louis XIV in the "fifth". Students are supposed to have assimilated

these landmarks of national history by the time they enter high school at age 15. Renowned historian Alain Corbin paints the portrait of these figures in his *The Heroes of French History explained to my son* (Corbin 2011).

Moreover, in order to avoid forgetting or never learning about these figures, they often reappear in the textbooks for high school in a thumbnail sketch ("vignette"), which presents their life and work at some length, and systematically as an entry in an index of significant personalities placed at the end of the book. The size and number of these biographies depend on the textbook considered. For example, Hachette's textbook for the "second" grade carries thirty-seven such biographies as against eighty-eight in Hatier's. One should note that textbooks conceived for the vocational track, the students of which are prepared for jobs in which they will mainly execute the instructions of others, have preserved the method of entering a subject through the study of famous actors, significantly more often than other tracks: the four double pages of chapter 2, "Journeys and discoveries" are dedicated to Christopher Columbus, Bougainville, James Cook, and La Pérouse (Casta et al. 2013, pp. 36–43). Another example is the use of a biography of Jean Moulin to deal with resistance to the German occupation of France in the textbook for the "first" vocational class (Bourel and Chevallier 2012, pp. 88–89).

European and Worldwide Dimensions

Since the programs changed in the 1990s, the trend towards the lesser visibility of national figures in French history textbooks has been accompanied by another rather clear-cut trend towards teaching European and world history. Throughout the second half of the twentieth century, successive French governments have pursued at once a policy of building a European structure (the Common Market, then its successors down to the European Union which exists today) and of inserting the French economy in the booming development of international exchanges. This has led school programs, and, in their wake, history textbooks, to dedicate ever more space to the realities of Europe and the world. In fact, one of the main arguments for the building of a form of European unity, is that such a structure can defend the place of Europe more effectively in a world undergoing profound change, in which new continental blocs arise and become more powerful with every passing year. Moreover, globalization's apparently inevitable and irresistible nature has been used in public discourse to justify the structural reforms implemented in most countries since the 1980s in the name of maintaining their competitiveness in the world market. These arguments may be accepted or rejected, but to enter the conversation requires an understanding of what exists beyond the borders of the French hexagon.

Other domestic factors have pushed in a similar direction. Schools must now manage a school-age population, a growing section of which shares family or national backgrounds involving territories that were not hexagonal France but

imperial overseas France, Europe or further regions. The study of these non-French territories in French schools aims to renew "social cohesion" on the basis of recognizing the diversity of backgrounds in France. The study of the abolition of slavery in the Atlantic world in the "second" grade, for example, is part of that goal. A consensus has thus emerged to step beyond strict French national history to include certain aspects of Europe and the world. Note that it is European and not "Western" or "Atlantic" history that is inserted in world history.

Programs for the "second" grade, for example, proclaim very clearly their European orientation in the title theme of the year, "Europeans in world history" (see the list of themes for each year in Appendix I). Similarly, the chapter on "the new rise of the scientific and technical spirit (16th to 18th centuries)" discusses the circulation of men and ideas, and the manner in which the latter are received and adapted, on a regional, national and European scale. The actors chosen for this topic are taken not only from France but also from the intellectual landscape of all Europe. Not to be outdone, the program for the "terminal" grade proposes a whole chapter on "The governance of the world economy since 1944" emphasizing globalization and interconnections, for example, chapter 11 of Adoumié & Zachary, *Regards historiques sur le monde actuel (Historical Vistas on the Present World),* Histoire Terminales L/ES, Hachette.

The program enlarged to Europe and the world has been bolstered by many complementary textbook-like publications among which *L'histoire de l'Europe (The History of Europe)* by Serge Berstein and Pierre Milza (2014), the collection *Faire l'Europe (Making Europe)* by Jacques Le Goff (2005) and the publication in 1992 (with later editions) by Hachette of a "eurotextbook" in ten languages (*A History of Europe,* 1997) Such accessories strive to meet the demands of the program with studies conducted on various scales, from short-term to long-term and from local to worldwide, and by integrating state-of-the-art thinking on epistemological matters.

We may also note that projects to write common history textbooks for two or more countries have emerged. Historians of both countries have been called to the task. The undertaking is justified first by the pedagogical argument that students in both countries should have access to a common set of information and interpretation. A political argument is often added: better knowledge of one people by another will enhance mutual understanding and diminish the threat of war. Finally, the point is made that to understand the history of one's own country, it is necessary to know the history of the countries with which it interacted, beginning with those with which the exchanges were most intense.

Hachette's publication of a "eurotextbook" in ten languages was a step in that direction. Other attempts brought together multinational teams of historians to write textbooks. A Franco-German textbook finally came out after many years of preparation in 2006–2007, but schools in France have hardly ever used it. A project to write a more elaborate European textbook of European history is under way. UNESCO has encouraged for a long time the writing of a general history of the world, but has only succeeded in producing an eight-volume *General History of Africa.* Even more daring is the mission given by the French Ministry of Education in 2014 to historian

Benjamin Stora to study the feasibility of a Franco-Algerian History textbook. Little has been heard on the subject since then.

More modestly, the goal of broadening French history programs to Europe and the world aims to highlight certain trends considered essential for the participation of the French people in the building of Europe and some form of globalization. Migratory currents, the process of integration in diverse societies, the emergence of memories of wars, genocides and massacres, the spread of French and European culture in the world, the impetuous rise of commercial exchanges, and World War II stand out among these trends.

But knowledge of these continent-wide trends implies knowledge of at least certain non-French outstanding individual figures. Thus for the post-1945 period, Harry Truman and Winston Churchill appear in the textbooks almost as frequently as French national hero Charles De Gaulle.

Finally, authors seeking to find the impact of great European and worldwide trends in France are led to break with the classical narrative organized in chronological sections of national history, which allowed for the unbroken treatment of important leaders. They deal with each trend separately and when they choose to present one first, they necessarily must present the other in a later chapter, even if it began in reality before the one presented first. This can weaken the relation of cause and effect that may have existed between the two trends. For example, in the "first" grade, the European and worldwide phenomenon of "new conflicts of the 20th century" (meaning among other things, world wars) is presented before the chapter on the general concept and trend towards totalitarianism. In the case of World War I, this is rather logical since totalitarianism follows the world war, but in the case of World War II, it can create problems, as totalitarian regimes are one of the causes of the conflict. The biographies of Hitler, Mussolini and Stalin are broken up by this thematic approach.

The new approach developed in textbooks for high schools has run into some resistance in the name of the difficulty for students to assimilate new areas of information, concepts and skills that bear little relation with the national chronological and spatial framework with which they became familiar in their first ten school years. Some critics add that the new programs impose an effort in history that is too heavy for non-specialists. Other more conservative sectors of public opinion develop political arguments, claiming the new programs lead to a "loss of the necessary landmarks" and the devaluation of "national values". Such was the opinion, in 2012, of the guest writers of the *Figaro* newspaper (*Dossier…,* 2012) who were answered by the Committee for Vigilance against Political Uses of History (see CVUH and the Internet site aggiornamento). The origins of the debate are described in *La Fabrique scolaire de l'histoire (History manufactured in schools)* (De Cock and Picard 2009). At present the conservative trends remain a minority, although sometimes vocal and welcome by the media.

Clearly, learning about trends beyond the borders of France in high school history classes is not the sudden mania of a few ideologues. It corresponds to tendencies visible also in commercial exchanges, in production, in the media, in cultural

events and networks, in sports, in the objects of everyday consumption and in student exchanges and travel around the world. It therefore seems that it is here to stay.

Conclusion

Our survey of history textbooks in France has shown that the traditional approach to national history that focused on national leaders has lost its dominant position in the last three of the thirteen school years in which history is taught. But these three years are the culminating years of the school career and the history that is taught then helps to interpret the previously accumulated data. Of the leaders that used to be presented at length, such as Vercingetorix, Clovis, Joan of Arc, Louis XIV, Napoleon, Jules Ferry and Clemenceau, only Napoleon, identified as Bonaparte (his family name is preferred to his imperial title), the heir of the French Revolution in the "second" and "first" grades, and De Gaulle, in the "terminal" grade, survive as major topics. The others are not unknown or ignored, but confined to earlier school years or small thumbnail sketches, appearances in visual material and entries in the biographical index. They are no longer the organizing principle of the textbooks. As far as individuals are concerned, the trend is to include lesser known figures, non-French leaders, women, prominent writers, artists, and scientists. But more significantly, the focus is now on long-term trends, on the acquisition of skills by exercises on primary sources, and on knowledge of European and world reality, with perhaps one exception, the figure of De Gaulle, who is at once French, a leading actor and a hero.

Appendix I: Examples of French Ministerial Programs for History

A. Program for the "second" Grade in General and Technological Tracks: "Europeans in the History of the World" (Bulletin Officiel n° 4, 29 April 2010)

Theme	Topics	Implementation	"Actors of history" in the textbooks consulted
1. Europeans in the peopling of the Earth	The place of Europe in the peopling of the Earth	Populations of Europe in the major phases of growth of the world population and of the peopling of the Earth from Antiquity to the nineteenth century.	*Jacob Riis*
		European emigration towards other continents in the nineteenth century: choose a study.	*Lewis W. Hine*
2. The invention of citizenship in the ancient world	Citizenship and democracy in Athens (fourth and fifth centuries BC)	Citizen participation in city institutions and life: the foundation of Athenian democracy.	*Aristophanes Pericles*
		Democracy as seen and discussed by Athenians.	
	Citizenship and empire in Rome (first to third century)	Extending citizenship to Roman Gaul: the Tables of Claudius.	*Emperors Claudius and Caracalla*
		Extending citizenship to the entire empire: Caracalla's Edict.	
3. Medieval European societies and cultures from the eleventh to the thirteenth century	Christendom in medieval Europe	An element of religious heritage (church, cathedral, abbey, work of art…) in its context	*Bernard of Clairvaux*
		An example that shows facets of the conversion of Europe to Christianity (evangelization, integration, exclusion, repression…).	*Hildegarde of Bingen*
			Gregory VII
			Berlinghieri
	Rural societies and cultures or Urban societies and cultures	The life of peasant communities (working the land, socializing…)	*William the Conqueror*
		Feudalism (real, imagined and symbolic dimensions).	
		Urban growth.	*Philip Augustus*
		Study of two cities chosen in two different culture zones.	

Theme	Topics	Implementation	"Actors of history" in the textbooks consulted
4. Europeans' new geographic and cultural horizons in the modern era	A wider world (fifteenth and sixteenth centuries)	Europeans contact with other worlds and broader geographic horizons:	*Magellan, Christopher Colombus, Vasco de Gama*
		From Constantinople to Istanbul: site of contacts between different cultures and religions (Christian, Moslem, Jewish)	
		Choose one: a European navigator and his journeys of discovery/a great European port	
		Choose one: a pre-Colombian city faced with European conquest and colonization/Peking: a forbidden city?	
	Renaissance men (fifteenth and sisteenth centuries) or The rise of a new scientific and technical spirit (sixteenth and seventeenth centuries)	A reformer and his role in the rise of Protestantism;	*Luther, Calvin*
		Choose one: a publisher and his role I the spread of Humanism/a Renaissance artist in the society of his times.	*Ch. Plantin, R. Estienne, A. Manuce*
			Michel Angelo, J. Van Eyck, Leonardo da Vinci, H. Holbein, Botticcelli, A. Dürer
			Francis I
		Two studies out of the following three:	*Galileo, Erasmus, Cassini, Vesalius, Rembrandt*
		A sixteenth or seventeenth century scholar and his work/means of disseminating science in the eighteenth century/invention of the steam engine: a technological revolution.	*E. du Châtelet, I. Newton, A. Lavoisier*
			J. Watt

(continued)

Theme	Topics	Implementation	"Actors of history" in the textbooks consulted
5. Revolutions, rights, nations on the eve of the contemporary era	The French Revolution: affirmation of a new political universe	Rise of the ideas of liberty before the French Revolution, its onset and political experiences until the early Empire.	*C.-N. Ledoux, Voltaire, Louis XVI, Napoleon (I) Bonaparte, Marat, O. de Gouges, David*
		Some significant revolutionary days,	
		Role of actors, individual and collective,	
		Essential political, economic, social and religious upheavals.	
	Rights and nations in France and Europe in the first half of the nineteenth century	A national and liberal movement in Europe	*Delacroix, Goya, V. Schoelcher*
		1848 : political revolutions, social revolutions in France and Europe	
		Abolitions of the slave trade and slavery and their implementation	

B. Program for "first" in General Track: "Topics to Understand the 20th Century" (Bulletin Officiel Spécial n° 9, 30 September 2010 – Modifié Journal Offciel, 15 November 2012)

Theme	Topics	Implementation
1. Economic growth, globalization and mutations of societies since mid-nineteenth century	Growth and globalization	Economic growth and its various phases since 1850
		Successive economic world-systems (British, US, multipolar)
	Mutations of societies	The active population, a reflection of economic and social transformations : the example of France since the 1850s
		A study: immigration and French society in the twentieth century

Theme	Topics	Implementation
2. War in the twentieth century	World Wars and hopes forpeace	La Première Guerre mondiale : l'expérience combattante dans une guerre totale - La Seconde Guerre mondiale : guerre d'anéantissement et génocide des Juifs et des Tziganes - Les espoirs d'un ordre mondial au lendemain des conflits : la SDN et l'ONU
	From the Cold War to the rise of new conflicts	The Cold War : an ideological conflict, a conflict of great powers : a place (Berlin 1945–1989), a crisis (Cuba 1962), an armed conflict (the Vietnam war)
		New conflicts since the end of the Cold War : an armed conflict (the Gulf War 1990–1991) ; a place (Sarajevo 1992–1995); a terrorist act (September 11 2001)
3. The century of totalitarianisms	Genesis and affirmation of totalitarian regimes (Soviet, Fascist and Nazi)	Totalitarian regimes between the wars : genesis, common points and specificities
	The end of totalitarian regimes	Denazification of Germany and the Nuremberg trial
		Gorbachev and the end of the USSR
4. Colonisation and decolonisation	The era of colonial dominations	The French Empire at the time of the Colonial Exhibition of 1931, realities, representations and protests
	Decolonisation	The Algerian war
5. The French people and the Republic	The Republic: three republics	The rooting of Republican culture (the 1880s and 1890s)
		Struggles of the Resistance (against the Nazi occupier and the Vichy regime) and the Republican refoundation
		1958–1962, a new Republic
	The Republic and the evolutions of French society	The Republic and the question of the working class: the Popular Front
		The Republic, religions and secularism since the1880s
		The place of women in the political and social life of France in the twentieth century

C. Program for "terminal" in General, ES and L Tracks: "Historical Views of the Present-Day World" (Bulletin Official n° 42, 14 November 2013)

Theme	Topics	Implementation
1. Societies' relationship to their past	Memories: a historical interpretation	Choose one: the historian and memories of World War II in France/ the historian and memories of the Algerian war.
2. Ideologies and opinions in Europe, from late nineteenth century to present	Socialism and the labor movement	Socialism, communism and trade unionism in Germany since 1875.
	The media and public opinion	The media and public opinion in France's major political crises since the Dreyfus Affair.
3. Powers and tensions in the world from the end of World War I to the present	Paths to power	The United States and the world since President Wilson's "14 points" (1918).
		China and the world since 1949.
	A source of conflicts	The Near and Middle East, a source of conflicts since the end of World War I.
4. Scales of government in the world from the end of World War II to the present	The nation-state scale	Governing France since 1946: state, government and administration. Legacies and evolutions.
	The continental scale	The project of a political Europe since the Congress of The Hague (1948).
	The world scale	Governance of the world economy since 1944.

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Chapter 9
Stephen the Great (1457–1504): A National Hero for Romanians

Cătălina Mihalache

Stephen the Great (1457–1504): A National Hero for Romanians: Introduction

This chapter aims to provide an overview of the major trends in representing Stephen the Great as a heroic Romanian leader in recent and current history schoolbooks. This character was chosen, because he is the most prominent figure in the national schoolbook pantheon and the most stable landmark of modern Romanian historical culture. To better understand how he has reached his current status as a representative leader, I took a brief look at the history of his evolution from a regional to the national symbol. I realized that the situation was quite unusual, given the fact that neither his state importance, nor his regional significance, was obvious from the start or completely forgotten. On the contrary, after the recent fall of the communist regime, the local values advocated by Stephen were reactivated while the use of his name and image in politics became more complex, due to the existence of two separate states that equally claim the medieval heritage of Moldavia (Romania and the Republic of Moldova).

In order to identify the overall manner in which the ruler is presented in the current school culture, I studied a sample of nine history schoolbooks, four for Grade 6, four for Grade 8 and one for Grade 7 (the last one only because in the 1990s the topic was moved from Grade 8 to study in Grade 7). Although the most recent (six) books have been officially approved for teaching history in the academic year of 2015–2016, they were originally published during the period between 1996 and 1999, and all their subsequent editions were mere reprints. Moreover, the current books preserve and continue to communicate the ideas, facts, and representations

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that were in use as early as 1970 and 1980 – a fact that can be easily confirmed by making a comparison with the other three schoolbooks from that time. At least when dealing with medieval history, the continuity of schoolbooks is overwhelming, and any change has been processed with great caution, which leaves space for further research and analysis.

The final goal of my analysis is to show how the teaching narrative regarding Stephen the Great evolved towards the end of the communist regime, and what changes (if any) were made during the post-communist times until the present day.

How the Moldavian Prince Became a Romanian Identity Icon

In the nineteenth century, Romanian scholars introduced the public to a successful hero, the medieval prince Stephen the Great (Stephen III), who was famous for his bravery, wisdom, and longevity, and who ruled in the principality of Moldavia between 1457 and 1504. After 1822, the two Romanian principalities of Moldavia and Walachia entered a new stage of their centuries-long history. The Greek Fanariot princes were replaced with princes from the old Romanian or naturalized boyar families, also appointed by the Ottoman Empire, which claimed suzerainty over the two principalities. This event, which was placed in the general context of the movements for national emancipation in the south and east of Europe, triggered an increase in the number of people who identified themselves as Romanian. Scholars have questioned the local tradition for exemplary historical personalities to feed the pride of their people and their claim of an even larger political autonomy from foreign powers.

For centuries, Stephen the Great was the most famous ruler in the principality of Moldavia. Gradually, this regional mediaeval prince was elevated all the way to the national and stately pantheon of Romania. The events that encouraged this process from a political point of view were related to the union of Moldavia and Walachia in 1859, their War of Independence from the Ottoman Empire (1877–1878), and the proclamation of the creation of the Romanian Kingdom (1881). The significance of Stephen the Great from a cultural point of view gained prestige in the national conscience after historians and classical writers of the time portrayed scenes drawn from the ruler's glorious history – especially depictions created in the last decades of the nineteenth century.

Stephen's the Great ascension into the ranks of outstanding national personalities was completed by the 400th anniversary of his death in 1904 and marked by countrywide celebrations, the refurbishment of old churches, and an unprecedented popularization of his image.

The ruler's sketched portrait from this time oversaw a period of calm national waters, accommodating numerous political demands, when Stephen was again revived in history schoolbooks on different occasions. This included such events as the military mobilization for active duty in both World Wars; a fight for the restoration of the Romanian provinces and their reunion with the Romanian kingdom;

heavy nationalistic, anti-Russian, and anti-Bolshevik propaganda which was later recast again to support the so-called friendship between Romania and Russia after the communist power was installed in Romania (1947); the ideology and the personality cult of Nicolae Ceausescu during his leadership in 1965–1989; the rediscovery of the Christian Orthodox virtues after the fall of communism in 1989; the proclamation of independence of the Socialist Soviet Republic of Moldova in 1991; multiple debates on the nature of the unionistic pro-Romanian discourse, or conversely, on the *Moldavian* plea for the necessity of keeping the Republic of Moldova separate from Romania.[1]

In 1992, the Romanian Orthodox Church sanctified the Prince, and his name became officially, *The Faithful Prince Stephen the Great and the Holy*. In the wake of his sanctification, the staid national symbol has had to cope with the electoral competitions, TV consumerism, and fierce disputes over the scope of his place in history textbooks and syllabi. Shortly after the anniversary year of 2004, when the nation celebrated five centuries since his death, Stephen the Great was heralded *the greatest Romanian ever* in the public TV program shown and watched nationwide. Even in early 2016, a search of the term "Erou *național" [National Hero]* on the Romanian version of *Wikipedia* ranks Stephen the Great at the top of the list of examples (*Erou Național*).

The General Framework for Teaching Lessons About Stephen the Great: School Syllabi

According to the provisions of the Ministry of National Education and Scientific Research,[2] school students in Romania should learn about Stephen the Great in their history lessons in Grades 4, 6, 8, 9 and 12.[3] The Romanian school tradition of teaching History of the Romanians and World History separately, which goes back to the

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[1] A state largely covering the territory of the former province of Bessarabia, part of the principality of Moldavia, annexed by Russia in 1812, and recovered by the Romanians in 1918 (in the context of the World War I and the Russian Revolution). The territory was occupied by the Soviet Union in 1940, then returned to Romania in 1941. It was again occupied by the Soviets in 1944, becoming definitively a part of the Soviet Union. The Socialist Soviet Republic of Moldova also included the Transdniester region, which had not been part of Bessarabia. Meanwhile, the northern and southern parts of the former Romanian province were included in Ukraine.

[2] This is the current name of the Ministry, but it keeps changing with high frequency, especially on such occasions as elections and government changes.

[3] In Romania, a complete precollege school cycle takes 13 years (a preschool year– also called *grade zero* – followed by another 12, i.e. four years of primary school, four years of junior secondary school, and the last four years of senior secondary school or high school). This is a benchmark school trajectory, usually followed by higher education. In certain situations, the studies take one more year (in teacher training schools, for instance). However, there is a massive contingent of students who opt for vocational schools, which take 2 to 4 years to receive a degree, and which do not provide their graduates access to higher education straight away. These are options available for the urban population, while children and youth in the rural areas have a very limited access to

nineteenth century, has become thinner and thinner. Practically, it is only in the 8th grade that the study is focused on national history, while in the 4th and 12th grades there are only topic sequences, albeit those are very solid indeed. The option for the current method was accompanied by reducing the number of hours dedicated to the study of history in school (which, as a whole, were already reduced by half after 1990). This shortened the period given to the study of mediaeval heroes as well. One more disturbing factor in the school pantheon was the tendency of cutting down already short biographical sketches and substituting them for the narration of some problematic issues.

The curriculum basis for current school textbooks was generally devised over the past decade. The key documents for Grades 6, 8, and 12 were issued between 2004 and 2009, while the syllabus for Grade 4 is apparently the most recent, and was published in 2014, but it did not bring about any decisive changes in terms of textbooks' structure and contents in contrast to the previous one from 2005, which radically transformed the traditional curriculum for this grade level. I have carefully considered different age groups and decided to choose for my research grades 6 and 8, as students in these grades are part of compulsory schooling and have been initiated in the study of history earlier. More specifically, students at this age are already beyond the literary-legendary stage of knowledge of the past and thus are able to understand the paradigm of a more sophisticated narrative. Chosen textbooks for each grade were initially approved by the Ministry of Education at the end of the 1990s and have undergone very few – if any – revisions. To better understand the textbooks' content and make the analysis more accurate, I have chosen to compare them, whenever possible, with the textbooks of the previous generation, which made the total of nine books under analysis (see Fig. 9.1).

In Grade 6, *The Mediaeval State* chapter includes, after the description of the development of the Ottoman Empire, a lesson dedicated to *The Relationships of the Romanian Principalities with the Ottoman Court in the 15th and 16th Centuries*, in which a note on the battles waged by Stephen the Great against the Turks simply cannot be avoided (Programe şcolare. Istorie, clasele a V-a – a VIII-a 2009).

In Grade 8, when the Romanians' history is studied systematically in an ascending chronological order, the extensive chapter on *The Romanian Principalities and Neighboring States between Diplomacy and Confrontation* contains a lesson which focuses on *The Romanian Princes Fighting the Ottomans*, where Stephen's narrative appears alongside four other iconic rulers of the times: Mircea cel Bătrân [Mircea the Elder], Iancu de Hunedoara [John Hunyadi], Vlad Ţepeş [Vlad the Impaler], and Mihai Viteazul [Michael the Brave] (Programe şcolare. Istorie, clasele a V-a – a VIII-a 2009).

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any form of further schooling after completing a compulsory schooling level (i.e. primary and junior secondary school).

Textbook (Date of publication)	Author(s)	Publisher
Istorie. Manual pentru clasa a VI-a. Istoria de la formarea popoarelor europene până la constituirea națiunilor moderne [*History. 6th Grade Textbook. History since the Formation of European Peoples to the Formation of Modern Nations*]. (1998)	Băluțoiu, V., & Vlad, C.	ALL Educational Press
Istorie. Manual pentru clasa a VI-a. Istoria de la formarea popoarelor europene până la constituirea națiunilor moderne [*6th Grade Textbook. History since the Formation of European Peoples to the Formation of Modern Nations*]. (2003).	Burlec, L., Lazăr, L., & Teodorescu, B.	ALL Educational Press
Istoria antică și medie a Românei. Manual pentru clasa a VIII-a [*Ancient and Mediaeval History of Romania: 8th Grade Textbook*]. (1984)	Daicoviciu, H., Teodor, P., & Câmpeanu, I.	Didactică și Pedagogică Press
Istoria românilor, din cele mai vechi timpuri până la revoluția din 1821. Manual pentru clasa a VII-a [*History of the Romanians, since the Very Early Days to the 1821 Revolution. Textbook for the 7th Grade*]. (1995)	Daicoviciu, H., Teodor, P., & Câmpeanu, I.	Didactică și Pedagogică Press
Istoria evului mediu. Manual pentru clasa a VI-a, [*History of the Middle Ages. 6th Grade Textbook*]. (1990)	Georgian, L., Neagu, V., & Nuțu, C.	Didactică și Pedagogică Press
Istoria românilor. Manual pentru clasa a VIII-a [*History of the Romanians. 8th Grade Textbook*]. (2001)	Lazăr, L., & Lupu, V.	Teora Press
Istorie. Manual pentru clasa a VIII-a [*History. 8th Grade Textbook*]. (2001)	Oane, S., & Ochescu, M.	Humanitas Educational Press
Istorie: manual pentru clasa a VI-a [*History. 6th Grade Textbook*]. (2008)	Pippidi, A., Dvorski, M., & Grosu, I.	Corint Press
Istoria românilor: manual pentru clasa a VIII-a [*History of the Romanians: 8th Grade Textbook*]. (2000)	Vulpe, A. (coord.), Păun, R.G., Băjenaru,R., & Grosu, I.	Sigma Press

Fig. 9.1 Romanian history textbooks analyzed in this study. Full citations are available in References

Findings

Finding 1: The Evolution of Content in Textbooks for Grade 6

The students' encounter with Stephen the Great in Grade 6 is very brief. The narrative does not aim at bringing anything new but at 'fixing' an already familiar image in their minds, the one introduced to them two years prior. However, there are some subtle changes — not so much in the literal historical information as in the tone of the narrative and the perspective offered, which is meant to mark a transition from a singular history of the Romanians to a new and communal European history.

Current books have essentially preserved the textbook structure on medieval history composed in 1970 and being used (with only minimal adjustments) since the fall of the communist regime (in 1989), until almost the end of the century. In the mid 1990s, its content was expanded to cover the modern era as well, which reduced the amount of information on the Middle Ages. Until that time, the content remained practically unaltered. Thus, the textbook for Grade 6 (1970) actually resumed the lesson devoted to Stephen the Great, first introduced to students in Grade 4, albeit in a more condensed and austere manner, and far from the literary effusions for children in elementary school.

In the first post-communist edition, which came out in early 1990s there were practically no changes of the lessons that featured Stephen the Great. The messages to convey the communist ideology and propaganda were still present in almost every single sentence, reaching an apotheosis while describing the most dramatic moment of the battles against the Turks in 1476 stating that the ruler, who "got his army back in place with the help of the people," managed to turn "his defeat into victory," and "maintained the country's independence" (Georgian et al. 1990, p.126) – all of which (and more) are seriously exaggerated, to say the least, and are a distortion of historic information. The end of the lesson about the battles of the Romanian rulers against the Turks reads as if taken directly from Nicolae Ceauşescu's[4] speeches, reinforcing the "unity of all people, their language and culture" in "the Romanian feudal states," and exalting the sense of national pride in this "glorious chapter" of our history (ibid). Placing Stephen the Great in an international context was done not to show any similarities with neighboring countries, but as an opportunity to overpraise national distinctiveness, for example, "the Romanians being the most important factor of anti-Ottoman resistance in these regions." It is even more obviously expressed in the lesson abstract, stating that in those times, "the Romanian principalities would defend the European civilization" (Georgian et al. 1990, pp. 126–127).

In the three current textbooks, Stephen the Great appears each time in the context of the Ottoman Empire's expansion in Europe, alongside other military rulers – Vlad the Impaler in Wallachia and John Hunyadi (a military leader of the Romanian origin) in the Hungarian Kingdom – both who opposed the Turkish attacks. The number of battles and alliances mentioned varies, the minimal version recording only the battle of Vaslui (1475) and the confrontation with Mehmet II in the following year (Băluţoiu and Vlad 1998), while the longer narrative enumerates five confrontations (Burlec et al. 2003). All of the textbooks conclude that an honorable truce was signed as far as Moldavia was concerned, a statement avoided in the former textbook from the 1990s for the sake of keeping the ruler's dignity intact.

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[4] Nicolae Ceauşescu was the communist leader of Romania between 1965 and 1989. He started out as a popular character, but after 1980 his credibility rapidly decreased. His authoritarian policy, accompanied by aggressive propaganda and by a drastic drop in living standards resulted in an explosion of fury among the population. Following violent clashes, the communist government was deposed in December 1989, and Nicolae Ceauşescu together with his wife Elena were executed following a summary trial.

In order to strengthen the image of Stephen as a great victor, the authors of one of the above textbooks added an excerpt from his famous letter to the Christian rulers where he described his victory of 1475 in a very boastful manner: "we trampled them over and put all of them through the sword." Stephen also mentioned the need for support from the West, as the Turks "would want to have their revenge" and conquer Moldavia (Băluțoiu and Vlad 1998, p. 72).

In another textbook there is an excerpt from one of Stephen's messages, which he sent to the rulers of Venice in 1478, where the Prince made his plea very clear: "Because the Turks stumbled over me, many Christians enjoyed peace for four years," and therefore, "I come before you asking for your Christian support in order to preserve this country of mine" (Burlec et al. 2003, p. 60). The Prince's statements are quoted in abundance, and the authors do not suggest even a minimum of critical exercise on the cited historical sources.

In the third textbook, the fact that the "Romanian principalities were never entirely part of the Ottoman Empire" is considered to be a result "obtained through the military and diplomatic activity of half a century, the merit being entirely and solely of Stephen the Great" (Pippidi et al. 2008, p. 52). Thus, eventually, the other princes of the era and their achievements are completely overshadowed by the glory of great Stephen.

The new textbooks found it difficult to give up on the idea that the Moldavian ruler contributed directly to the safeguard of the European civilization. Some authors explicitly added a few resentments inspired by the nationalist ideology, especially during the communist era: the West was to blame for the defeats suffered by Stephen the Great, since they failed to understand that Moldavia was the gateway to the Christian world, and that the Prince eventually signed an agreement with the Turks – despite his admirable military resistance – was allegedly yet another consequence of the lack of support from the western countries. It is also an example of a rare situation when the textbook authors admitted that Stephen eventually found some benefits in the submission to the Ottoman Empire, for example, receiving help "from the Turks when he was attacked by Poland" (Pippidi et al. 2008, p. 52).

Overall, history textbooks for Grade 6 present a concise summary of historical information that was already taught to fourth graders with more weight given to Stephen's foreign policy and military actions, especially to his famous battles with the Turks. The textbook by Pippidi et al. (2008) asserts, "Stephen has lost only one battle at Războieni (1476) and won all the others. History says there were 40" (p. 52).

However, his domestic policy remains almost completely absent. To a great extent, the textbooks published in the 1990s have been reprinted multiple times until very recently, and simply recycled much of the same content from the 1970s and 1980s.

Stephen is portrayed together with other contemporary Romanian princes known for their anti-Ottoman policies (John Huniady and Vlad the Impaler). In my opinion, this is done to engender in the students the feeling that strong cooperation and brotherly ties existed among them all, although Stephen is clearly shown as the most powerful and decisive.

Another visible change occurring in post-communist textbooks compared to the previous ones is the focus on Stephen's victorious battles defending not just Moldavia or the Romanian principalities, but the entire European Christendom. The praises of the prince are accompanied by accusations against other Christian leaders, who did not support him enough in his glorious battles with the Turks. Thus, the pro-European orientation that was to be expected in textbooks published after the fall of the communist regime was deviated back towards the old nationalist xenophobic and isolationist discourse that had dominated Nicolae Ceaușescu's era.

Finding 2: The Evolution of Content in Textbooks for Grade 8

The textbooks for Grade 8 are replete with the documents of those times and details of the complex political and military scaffolding activated by Stephen the Great; sentimentalities are almost entirely absent giving space to the 'pure' historical narrative in an attempt to avoid any subjectivity.

In the last decade of the communist regime, the lesson about Stephen the Great was part of the unit entitled *The Romanian People's Fight for Independence in the Middle and the Second Half of the 15th Century* (Daicoviciu et al. 1984). The narrative was based on the absolute acceptance of the existence of the "anti-Ottoman front" and the Romanians' participation in the war against the Turks, which was, in fact, one of the most enduring constructions of the national-communist historiography, retroactively applying the imperative of the offensive national unity, promoted by Ceaușescu's regime. The criticism of the notion of the Romanian anti-Ottoman front was brought in much later and still in a very cautious way (Cristea 1995), but eventually it helped to remove this conceptual abuse from the textbooks of the late 1990s.

The lesson in the one available textbook from the 1980s was reiterated without any alterations in the 1990s (although the topic itself was moved from the Grade 8 to 7), giving maximal space in the text to the Moldavian ruler (Daicoviciu et al. 1984, 1995). Surprisingly, regardless of the large amount of historic information depicted there, the text failed to achieve a different conclusion in comparison with the textbooks for Grades 4 and 6, allowing, instead, the exaggeration of the ruler's qualities and successes, stating that "his virtues proved to be exceptional"(Daicoviciu et al. 1995, p. 119). The Prince is praised for every decision and every deed in any field to the point that "the crowned heads looked for his partnership, the enemies respected him and the humanist scholars rendered his image for posterity"(ibid). The glorification process was still tuned to the old Marxist theory, as the authors ascribed the Prince's success to "the support provided by the social and political forces trained in the creation of goods" (Daicoviciu et al. 1995, p. 120). The conclusion was even more striking, stating that a century of battles with the Turks enabled the Romanians to bring an "exceptional contribution to the history of the continent" in their role as "the defenders of the European civilization" (Daicoviciu et al. 1995, p. 125).

Of the three current textbooks, one in particular, remains closest in spirit with the 7th grade textbook from the 1990s, although it cannot boast the richness of the lesson dedicated to the ruler described above. Stephen's the Great leadership is viewed here from the perspective of his anti-Ottoman policy, and him being a member of the group dedicated to "the crusade policy of the Romanian rulers" (this formula replaces the old anti-Ottoman front concept of Marxist origin, suggesting – through another historic distortion – realities similar to those in Western Europe).

As for the textbook for Grade 8, it also presents the Prince's battles with other Romanian rulers such as Petru [Peter] Aron, his predecessor in Moldavia, and Radu cel Frumos (Radu the Handsome), a ruler of Walachia – neither in favor of his anti-Ottoman plans (Lazăr and Lupu 2001). The strategic details of the battles of 1475 and 1476 take up a large part of the narrative and omit other, less noticeable, battles.

The cultural merits of the Prince's rule appear within other lessons, but they do not lose their visibility – supported by the commonly used illustrations of the monasteries of Putna and Neamt, or by the Prince's portrait at the monastery of Humor. It is in these fragments that the admiration for the leader reaches its apex – acclaiming his achievements in arts, in building "an impressive number of churches," and being placed in the company of other "brilliant protectors of the religious culture" in the Romanian Middle Ages (Lazăr, and Lupu 2001, pp. 99–101). Yet, there is no mention of the Prince being sanctified by the Romanian Orthodox Church. The admiration is contained in the profane and documented register of the specialists in the architecture and decorative arts of the fifteenth century.

The other two textbooks for Grade 8 expound the same information across several topics due to the requirements of the national curricular standards. The book published by Sigma Press even separates out aspects of foreign policy, dividing them into two clusters: the first, describing relations of the Romanian principalities with Hungary and Poland (on which occasion the victory of Stephen the Great against the King of Hungary, Matthias Corvin at Baia, in 1467, is brought to the students' attention), and the second, with the Ottoman Empire (Vulpe et al. 2000), following the old-fashioned tradition of a standard, national textbook narrating a long story, as was the norm during communist times and in the first post-communist decade.

The third textbook embraces a more research-based approach, sublimating its message into various chapters, lessons, and auxiliary readings. For example, in a collection of historical documents, in the chapter dedicated to *The Rural and Urban Settings in the Middle Ages* there is a large excerpt from the privilege granted by Stephen the Great in 1458 to the merchants of the Transylvanian city of Brasov. Another two documents appear in *The Romanian Principalities* and *Their Neighboring States between Diplomacy and Confrontation.* Likewise, the lesson entitled *The Rulers' Crusade Policy* contains a graphical illustration of the battle of Vaslui, with necessary explanations, and also a brief introduction to the mediaeval military art (Oane and Ochescu 2001).

This is also the only textbook offering information on the fate of the mediaeval manuscript at the Monastery of Humor, where the Prince's best-known portrait was

identified. The explanation, which summarizes how the manuscript was created in 1473 at the ruler's order, is part of the lesson entitled *Print and Book*, in the *Mediaeval Culture on Romanian Soil* (Oane and Ochescu 2001).

Briefly summarizing the above comments, I can reiterate that the textbooks for Grade 8 still use most of the same lessons from books of the 1980s and 1990s with the primary difference being the reduction of some historical information, although the account is backed up with several excerpts from the documents of the era. Another difference is that current textbooks focus more on the cultural achievements of Stephen's the Great leadership instead of the economic and social successes propounded by the earlier Marxist perspective.

In comparison with Grade 6 textbooks, Grade 8 distances itself from the Prince's foreign policy as the dominant textbook discourse. There is no longer talk about the anti-Ottoman front created by the Romanian princes (a historiographical construct of the communist origin), but instead there is more attention paid to the participation in the Crusade policy of the Western Christian princes, who are presented in a more realistic way. The desire to become integrated in the European world has overcome the resentment for the West.

Discussion of the General Aspects of Historical Discourse Regarding Stephen the Great

In this study of history textbooks for Grades 6 and 8, I have mostly concentrated on such elements as the way in which history is being taught, and on the prevailing tone, factual accuracy, and the unilateral or pluralistic approaches of the evolution of events; as well as on introducing the *Others* (neighbors, enemies, minorities), and also on the nature of interconnections between different grade levels. In fact, any discussion of Stephen's the Great presence in the textbooks under analysis should start with the absences observed, and I do not mean the inevitable simplifications and omissions that are typical for school literature. Rather I mean the gaps that I have detected, and that had an effect, on the general tone of the narrative and on the ruler's overall representation, which I will briefly touch upon later in the text.

1. *The superhuman hero.*

The textbooks do not portray the human side of the hero, preferring instead the tragic and heroic biographical details, emphasizing, for example, Stephen's unfulfilled "hope to be helped by the Christians"(Vulpe et al. 2000, p. 54), and the fact that "he was deserted by his allies"(Oane and Ochescu 2001, p. 70). For the same reason, one cannot expect anecdotes, caricatures, or parodies. These are absolutely out of the question when it comes to the school pantheon – and not only in what concerns Stephen the Great. However, it is well known that Stephen still enjoys a genuine popularity among the people – at least in the former principality of Moldavia. Collective memory does not deny, it only completes history lessons, but

the two dimensions meet only occasionally, in the undisputed areas of literature, artistic creation, or in the representations of heritage.

2. *A past that is separate from all present.*

Another structural deficiency refers to the construction of Stephen's own posterity. There is no indication that his descendants have exploited his memory, although the general public and political leaders have continuously done so in a variety of ways since his death. The topic remains a taboo. The most recent aspect of this interdiction concerns the double discourse in regard to his heritage, which has become increasingly substantial after the fall of the communist regime and the Soviet Union. The pro-Romanian unionist vision proposes that there should be reunification with the current Republic of Moldova in order to restore the indivisibility of the old Moldavian principality. The pro-Moldovan autonomist vision argues, to the contrary, that the current Moldovan republic should be preserved – independent from Romania – because it is the true descendant of the principality ruled by Stephen the Great.

3. *The monolith story.*

One other consistent deficiency is the absence of multiple perspectives. The story is monolithic, irrespective of its form or content. There is no clue that others might have had a different approach to the events. For example, the authors could have noted that the "brilliant victories" against the Turks were, in fact, to no avail in the larger context of the evolution of the Ottoman Empire; that the "Romanian brothers in arms" in Walachia were, at the time, exceptionally unpleased with Stephen's the Great military interventions; or that the "Moldavian traitors" or the leaders of those countries that failed to support him in his anti-Ottoman fights had reasons of their own to prefer other political allegiances, etc. There exist multiple points of view on the Prince's rule, not only political and military, but also cultural, economic, and religious perspectives. However, the textbooks make an issue of the same incessant and monotonous odes to Stephen the Great.

Historic memory does not easily accept fissures in such a grand effigy. Nevertheless, not every reinterpretation needs be construed as an attack on the national icon. Authors of courage could have at least mentioned that the relations between Moldavia and the Ottoman Empire were not merely about battles, treaties, and material damages, but there were situations when the Turkish presence in the southeast of Europe became beneficial and brought a unique cultural model, which is still active today (Berktay and Murgescu 2005). Quite often, the Turks were also allies of the Romanian princes, whether they liked it or not. There is just a short indication in one of the textbooks for Grade 6, (cited on page 11 of this paper), that reminds the learner that after accepting the new peace terms Stephen "even got help from the Turks when he was attacked by Poland" (Pippidi et al. 2008, p. 52).

A more objective view of the epoch would have also led to the observation that Romanians often fought other Romanians, because the sense of belonging to the same people, or neighborhood, denomination, country, or political camp could be addressed in various ways, and they were beyond the dogmatic truths of nationalist or communist propaganda, applied retroactively (Simon 2009).

4. *Accuracy and relevance of historical information.*

The obvious need to support certain ideologies also heavily harmed the factual information in the textbooks. Quantitatively, this varies widely, but the data selection works in the same way, its role being that of supporting the legend of a glorious character. Whatever is contrary to the desired version is omitted or at least toned-down, for instance, the territorial losses suffered by Stephen the Great. In the case of battles, even victories, the unpleasant details are usually erased from the story as much as falsifications are being used. Mentioning that Stephen won forty battles and lost just one (Pippidi, Dvorski, and Grosu 2008, p. 52) contradicts the historical truth as he lost at least one more battle (when he failed to conquer the fortress of Chilia, in 1465). As for the forty victorious battles, this remains a beautiful myth inspired by some popular legends and never supported by historical facts.

The cited historical sources are almost devoid of explanations and analysis – readers not informed of their own history – with the one exception being the fate of the Humor manuscript.

5. *The singularity of the hero, the negation of individuals.*

It is not only the unpleasant details that are missing but also most of the information on other actors in the company of the great character. I have already mentioned that the textbooks find no room for the other(s) – for what was different or opposite. As a matter of fact, not even the others are worthy of a fuller account. As far as Stephen's peers are concerned, as pictured in school textbooks, they may be opponents he fought, or his allies. There is no mention of the inhabitants of Moldavia. These are still treated as *social categories*, not as social actors, with certain types of performance characteristics. This could again be a reflection of a Marxist discourse that focuses on the constant hostility towards the 'high aristocracy', without whom Stephen would not be able to rule the country.

6. *Christianity as a useful tool for both nationalism and Europeanism.*

It is obvious that reminiscences of the Marxist ideology took refuge in the appreciation of Stephen's domestic and administrative policies, without being concerned with the ruler's militantly Christian profile. As for his foreign policy, it was set up against the background of a discourse equally Orthodox Romanian and Western pan-European, which took the form of the his participation in the anti-Ottoman crusade. All the nine textbooks failed to mention the fact that Stephen was recently sanctified, although one textbook for Grade 6 named three of his known churches – "Putna (1469), Voroneţ (1488), and Hârlău (1492)" (Burlec, Lazăr, and Teodorescu 2003, p. 59) while another textbook for Grade 8 was especially observing his cultural and religious achievements (Oane and Ochescu 2001). The Christian 'dimension' of his life was never entirely accepted by the official historiography, and the obvious reminiscence of the Marxist atheism only encouraged interpretations marked by the nationalist views and some moderate form of pro-Europeanism.

7. *An absolute state monopoly on the knowledge of the past.*

The regional and localized aspects of his reign continued to be overlooked – although conventional memory appears only occasionally in the school curriculum – lest it should upset the strong belief in the past and present unity of all the Romanians and the territories inhabited by them. This is a feature typical of the statist, centralist, and anti-regionalist Romanian national ideology, which was exacerbated during the communist regime.

Analyzing the matter more closely, one realizes that while the nationalistic and patriotic discourse is dominant, it does not completely succeed in addressing regional identities or a convincing integration of the Romanian Orthodox Church. It is even less successful when it comes to the integrative pan-European movement of recent decades.

8. *A single discourse for all ages.*

The relationship among the textbooks of various grade levels is also very simplistic. At first sight, all textbooks, irrespective of the grade, have the same story to tell, the differences lying in the heart of the text and the organization of the narrative in the main themes: the beginning of the Prince's rule, his domestic policy, stages of foreign policy, legendary battles with the Ottoman Empire, and his final apotheosis. No matter whether the authors approach the issue biographically, or in a monographic way (a monograph of Moldavia), or thematically (aspects of international relations, of cultural or religious life in the Middle Ages), they always end up with a plot focused on the ruler. The story of the great ruler can still offer arguments to support any approach, and this tests, after all, his quality of being a genuine historical icon, affirmed over so many centuries.

9. *A success story, irrespective of a storyteller.*

The key to such success lies unarguably in the fact that the Prince's long rule can always be an evidence of success, in almost any field and at any level: this is precisely what the authors of the textbooks are taking pains to communicate, even at the cost of some inaccuracies or omissions. Stephen's the Great indestructible glory is still fuelled by the need for success of a people with an always uncertain future: thrown into the very midst of the disputes of the mighty and the powerful of those times, always failing in claiming their own rights, and always lagging behind the countries that set the standards for the rest of the world.

10. *How to learn a lesson: by the platitude of the text*

In all the nine textbooks studied for this research, I have found a repetitive motif. It works as a familiar puzzle when some pieces are missing or misplaced but the puzzle will still come together. The same happens in history textbooks' writing – no one is interested in changing a familiar pattern or, at least, in adding some colors to the narrative. The gilded effigy of Stephen the Great is monochromic and dusted.

For History Education

Both the evolution of the content of the analyzed textbooks and the general features of the historical discourse that they communicate provide several directions of reflection and action for history education in Romania. The analysis I have proposed here reveals at least part of the inadequacy, omissions, and inertias of the official texts that have been considered. When reading the lessons mentioned here I see that the distance between the school text and the historical culture of our contemporaries has been growing constantly in recent decades. Political and propaganda intrusions have not disappeared since the fall of the communist regime. A civic spirit has not mitigated nationalism. The authoritarian figure of the medieval Prince Stephen the Great has been almost untouched by the trends towards democratization, tolerance, and multiculturalism that followed the fall of the communist regime and, particularly, the first post-communist decade.

There are signs of improvement, such as the accent placed on the prince's cultural achievements, a less simplistic presentation of the international relations of the era, and the openness for Christian and European values. These improvements however have not reduced the warrior-like and political extremisms associated sometimes with the image of Stephen the Great. Probably the most serious deficiency that was found and confirmed by this research is the almost complete absence of a critical spirit in these textbooks. They miss the most important opportunity to offer students historical and civic education, reducing the lessons instead to mere memorization exercises or conforming to already existing social convictions. This is the area that will require the most serious intervention in the future from those who wish to improve historical education in Romania.

Concluding Remarks

Clearly, this research does not exhaust the possibilities of a qualitative content analysis of the textbooks in use. My study is just a sample of a research-based investigation, which may or may not persuade other researchers to continue such an approach. However, the long-term stake is different: the involvement of historians and teachers in the effort to reevaluate the seemingly immutable past, which would be more likely and therefore, carry a considerably improved educational potential. From this point of view, I hope that my analysis has been persuasive, and the historical character selected has the power to impart a steady improvement to the didactics of history.

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Part II
Research Trends in Globalisation and Historiography of National Leaders: Symbolic Representations in School Textbooks: Asia/the Rest of the World

Chapter 10
The Politicization of U.S. History Textbooks: Reinventing Ronald Reagan

Michael Lovorn

The Politicization of U.S. History Textbooks: Reinventing Ronald Reagan

Americans have once again embarked upon the cyclical process of electing their next president, and as is common during any election year, history lessons everywhere are being contextualized with current events. Generally speaking, this is a good thing because such consciousness serves to heighten students' historical and political awareness and foster real-world connections with the past. We often see candidates making these connections during a cavalcade of debates, town hall meetings, and 24-h news network sound bites. Hillary Clinton and Bernie Sanders, for instance, regularly reference the positions, policies, and accomplishments of predecessors who have become timeless faces of the Democratic Party. This list includes Franklin Roosevelt, John Kennedy, Bill Clinton, and Barack Obama; each of whom provides a measure of legitimacy and a connection to longstanding Democratic ideals.

Of course, Republicans engage in similar practices. Regardless of where they position themselves on the conservative spectrum, Republican candidates have also gone to great lengths to align themselves, both politically and personally, with former president and party hero Ronald Reagan. As the bastion of conservatism and modern face of the Grand Old Party, Ronald Reagan has, for many, become an iconic representation of better times, better leadership, and a "greater America." His overlapping personifications of all-American boy, actor, cowboy, defender of faith and family, and of course, vanquisher of twentieth century communism all seem to make him the quintessential American; a life worthy of our heroification. The

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American Right certainly currently think so. A recent CNBC article pointed out that Reagan's popularity among polled conservatives has climbed dramatically in the last few years (Fahey 2015). This trend has not gone unnoticed by leading GOP candidates including Donald Trump, John Kasich, and Ted Cruz, each of whom has repeatedly referenced his affinity or likeness to the 40th U.S. President in seeming attempts to further legitimize his own nomination-worthiness.

In examining Reagan's evolving legacy, it becomes abundantly clear that his supporters have undertaken a rather expeditious mobilization to lionize him over the past two decades. Organized campaigns to rename streets and public buildings, publication of glorious biographies, and the production of obsequious documentaries and television specials have contributed to the rapid growth of Reagan worship (Fischer 2014). Some conservatives have even proposed that he join the "Big Four" on Mt. Rushmore. Of course, many liberals cringe at these notions. Nonetheless, the ongoing exaltation or "reinvention" of the former President has resulted in a historical reputation on par with those of George Washington or Abraham Lincoln. Interestingly, and as is the case with Washington and Lincoln, it appears that at least part of our collective image of the "Great Communicator" may be based as much in myth as it is in reality.

So, how should we teach high school students about Ronald Reagan's impact on the United States and the world? As he is currently taught, some of the key events or policies of his presidency receive substantial coverage in history textbooks while others are minimized or omitted altogether. What biases exist in current textual sources, and how can our investigation of these sources lead to more comprehensive, less politicized presentations of Reagan as a historical figure? The purpose of this chapter was to analyze historical accounts of Ronald Reagan's presidency as presented in three recent U.S. history textbooks, and to consider implications of these presentations for history teachers. Through historiographical analysis and comparative content analysis, I sought to answer the following research questions:

1. How have three recent U.S. history textbooks presented Ronald Reagan as a historical figure, and what role, if any, does political perspective or bias play in these presentations?
2. What implications do these presentations of Reagan's presidency have for teachers of U.S. history?

A March Toward Historical Thinking

I began teaching history in 1993. My first teaching appointment was at a rural public high school in East Tennessee. Bill Clinton was in the second year of his first term then and America was undergoing a significant political and social transformation. George H.W. Bush's term in office, referred to by some as "Reagan's third term," had just ended, and despite the collapse of Soviet Communism and the end of the Cold War, it was clear that Americans were ready for a change.

At that time, history education was also at a crossroads. History education scholars called for more inclusive, multicultural, perspective-based social studies curricula, while traditionalists discounted this push as "leftist, revisionist history" intended to undermine American cultural identity. History education even became a topic of debate among candidates during the 1992 presidential election. Two years later, concerted efforts to establish the first set of national history standards devolved into a series of personal attacks among supporters and detractors. The contentious movement crashed and burned with the whole country watching.

Over the next few years there would be great debate among my high school history teaching peers as to the nature and purpose of our jobs. We all agreed that we were preparing the next generation of decision-making citizens. We also agreed that it was our responsibility to equip them with the tools to make informed, reasoned decisions. We disagreed on several points too. Some argued that our primary job was to create critical thinking, patriotic citizens; students who were prepared to "revere and defend God and country." Teachers of this mindset often cynically lamented the dire straits of society if left to a generation of young people who were so uninformed of the sacrifices of previous generations. In their eyes, to do so condemn our students and society to uninformed or "soft" stances on critical topics, particularly those related to foreign policy and national security. Most if not all of these teachers favored an Ameri-centric approach to U.S. history, covertly or overtly defending and promoting U.S. imperialism.

By contrast, another group of history teachers believed their primary responsibilities included preparing students to develop and utilize those critical and historical thinking skills for active participation in a global community. This approach was founded on the tenets of critical pedagogy and advocated the development and implementation of socially just classroom techniques designed to foster the environment that would invite students' critical analyses and develop their abilities to question authority in a pursuit of social justice.

In promoting this kind of pedagogy, these history teachers, progressive and sometimes subversive in their techniques, often critiqued traditional textbook design and perceived most textbooks as a nation-building narrative, purposefully mundane and non-confrontational in style. They recognized textbook bias and incompleteness and tried to demote them from unquestionable authority and default curriculum to supplementary resources. These teachers afforded students in-class opportunities to evaluate the resources for themselves. Forward-thinking teachers introduced concepts of bias and agency in the historical accounts of national leaders, and encouraged students to "think historically," or more specifically, to engage in historiographical analysis of all sources from textbooks to the emerging Internet.

No American historical icon was exempt from this critical analysis, and former presidents made for especially popular subjects of debate. George Washington's ownership of slaves, for instance, was discussed with regularity, and there was renewed public interest in Thomas Jefferson's extramarital relationship with Sally Hemings. Andrew Jackson's policies toward Native Americans, Abraham Lincoln's speeches, and Teddy Roosevelt's warmongering would all be common topics of classroom debate as well. Students would evaluate everything from Wilson's stance

on race, to Kennedy's personal life. Students of the 1990s and early 2000s were also prompted to consider the evolving legacy of the recently former president Ronald Reagan.

Trends in Researching and Teaching Ronald Reagan

Since Ronald Reagan's death in 2004, authors of various political persuasions have published comprehensive biographies of his life, rise to power, and time in the Oval Office. Notable and/or bestselling recent biographies include Broussard's *Ronald Reagan: Champion of Conservative America* (2014), Anderson and Graebner Anderson's *Ronald Reagan: Decisions of Greatness* (2015), and, of course, O'Reilly's popular *Killing Reagan: The Violent Assault that Changed a Presidency* (2015). On film, Jarecki's HBO documentary *Reagan* (2011) and an upcoming full-length drama called *Reagan: The Movie* (Joseph & Winter, in production) have garnered a lot of popular attention. The American people cannot seem to get enough of the former president.

Scholars and journalists have also weighed in on the spike in Reagan's popularity. In *The Memory Hole: The U.S. History Curriculum Under Siege* (2014), history education scholar Fritz Fischer observed a "… strong and well-organized national movement to ensure that Reagan is remembered in the 21st century as one of the greatest presidents of the 20th century." He explained that this movement "… is led by politicians and political operatives much more interested in 21st century political debates than in teaching and learning accurate history (p. 112). The campaigns to either canonize or demonize Ronald Reagan have not been undertaken by historians… The impetus is to teach people an ideology rather than trying to get the history right" (p. 113).

In his summary article *Five Myths about Ronald Reagan's Legacy* (2011), journalist Will Bunch agreed that Reagan's legacy and popularity have been greatly inflated in recent years. "It is virtually impossible," Bunch wrote, "for a major Republican politician to succeed without citing Reagan as a role model" (para. 1). However, he also opined "… much of what today's voters think they know about the 40th president is more myth than reality, misconceptions resulting from the passage of time or from calculated attempts to rebuild or remake Reagan's legacy" (para. 1).

CNBC's Mark Fahey also noted in an article entitled *When did Republicans Become Obsessed with Reagan?* (2015) that Reagan's actual presidency was not nearly as well-loved by most Americans at the time. As Fahey noted, Reagan's eight-year approval average of 53 % puts him behind not only Roosevelt, Kennedy, and Clinton, but also below the average for all presidents since Gallup polls began (para. 5). Fahey went on to point out that in 1986, "nearly 1 in 3 Americans thought Reagan should consider resigning before his term was finished," and "even politicians… who would later play up their love for the movie-star-turned-politician distanced themselves back when it seemed that his presidency might be a failure in the history books" (para. 6). Fahey went on to observe that according to surveys of

presidential scholars and historians by Siena College from 1982 to 2010, early polls "consistently characterized Reagan as a middling president," but that today, "nearly 20 percent of Americans now think Reagan was the nation's greatest president – beating out Abraham Lincoln, Clinton, JFK and George Washington. Reagan was mythologized while he was still alive" (para. 8).

The Gallup News Service later confirmed that Reagan's image improved substantially in the years after he left office. In a summative article entitled: *Ronald Reagan from the People's Perspective* (2004), Newport, Jones, and Saad observed that "Reagan's job approval ratings in his first years in office were hurt by the bad economy, and the last years of his administration were marred by the negative fallout from what came to be known as the Iran-Contra affair" (para. 1). They continued, "Americans… now routinely think of Reagan as one of the nation's more outstanding presidents," and observed that "Reagan has appeared in the Top 10 of Gallup's annual Most Admired Man list more than 30 times, more often than any other person except evangelist Billy Graham" (para. 1).

As Will Bunch conceded, "It is true that Reagan is popular more than two decades after leaving office. A CNN/Opinion Research poll [in January 2011] gave him the third-highest approval rating among presidents of the past 50 years, behind John F. Kennedy and Bill Clinton" (2011, para. 2). However, Bunch also noted that "… Reagan's average approval rating during the eight years that he was in office was nothing spectacular [at] 52.8 %… That places the 40th president not just behind Kennedy, Clinton and Dwight Eisenhower, but also Lyndon Johnson and George H.W. Bush, neither of whom are talked up as candidates for Mount Rushmore" (para. 2).

So, why do many Americans seem to remember Reagan much more kindly than history suggests they should? And what should history teachers teach students of the twenty-first century about this twentieth century figure? The answers to these and similar questions may be found in a historiographical analysis of primary and secondary source materials (Lovorn 2014). Fortunately, teachers have seemingly unlimited access to an abundance of biographies, original speeches, policies, laws, editorials, and political cartoons of the day. The problem is, research shows that many resources are produced for the central purpose of encouraging the heroification we have observed (Williams 2014; Moreau 2003). According to Wineburg and Monte-Sano (2008), there is also evidence that the pantheon of American heroes, as well as the concept of hero-building, is similarly ever-evolving, impacting how and what history teachers teach their students.

Of course, differing historical and political opinions have always inundated the history classroom, but students need the skills to separate myth from reality and history from heritage. University professors have often lamented the task of having to "unbox" biased, politically skewed, or "just plain wrong" history students pick up in high school. Interestingly, high school teachers often lament the same task when students arrive in their classrooms fresh out of elementary or middle school (Lovorn 2014). These frustrations arise from the knowledge that historical agency is just as important to teach as is the historical content itself (Éthier et al. 2013). With this in mind, the sharp divide among informed opinions about Reagan's legacy made

Textbook (Date of publication)	Chapter (s)	Author(s)	Publisher
The Americans (2009)	Chapter 33: The Conservative Tide	Gerald Danzer, Jorge Klor de Alva, Larry Krieger, Louis Wilson, & Nancy Woloch	McDougal Littell
The American Republic Since 1877 (2007)	Chapter 28: Resurgence of Conservatism	Joyce Appleby & National Geographic	Glencoe/McGraw Hill
A People's History of the United States: 1492-Present (2005)	Chapter 21: Carter-Reagan-Bush: The Bipartisan Consensus	Howard Zinn	HarperCollins

Fig. 10.1 U.S. history textbooks analyzed in this study. Full citations are available in References

textbook accounts of his contributions a very good target of this brand of historical thinking.

Research Methods

The goals of this chapter were to examine and analyze presentations of Ronald Reagan in three recent U.S. history textbooks, to determine if and how such accounts promote politicized views, and to gauge manners in which they impact public perception of his presidency. In embarking upon this project, I understood that textbook authors often present former presidents, for better or worse, as over-idealized personifications of the times during which they served (Roberts 2009). Of course, the President of the United States, regardless of era in office, embodies all of the perceived successes and failures of a nation during that time. To confront this tendency to oversimplify the times, and to conduct a exhaustive study of a president's memorialized life and legacy, I noted that it would be necessary and prudent to examine those biographies, documentaries, and popular representations of him, mentioned earlier, and then to cross-reference and further examine those sources in educational, political, and popular contexts. However, it was not my intent to conduct such a comprehensive study. Instead, I chose to focus more acutely on how Ronald Reagan, in particular, is presented in three high school history textbooks; how those textbooks tell his story.

I selected three recently published U.S. history textbooks (see Fig. 10.1), and subjected each to a comparative content analysis. I opted for this methodological design for two reasons. First, according to Clandinnin and Connelly (2000) and Neuendorf (2002), content analysis is appropriate for identifying themes across texts, and is especially well designed for narrative text that has been collected for the purpose of comparison. I determined that content analysis was conducive to my identification of recurrent threads, themes and omissions across textbook passages and accounts, and it was my intent to make such comparisons with the selected history textbooks. Secondly, having conducted several successful comparative textual

content analysis studies, I was confident that this particular methodological design of analysis would work well in examining multiple history textbook passages and would likely reveal notable contextualized findings.

Of the many U.S. history textbooks on the market, I chose these three for several reasons. First of all, each textbook is authored by well-known and respected history scholars and has been published in multiple editions. Second, each of the selected works has been adopted or utilized by school systems across the United States and ranks among the best selling history texts used for educational purposes over of the past decade. Third, each of these texts, while occasionally used as supplemental reading in Advanced Placement classrooms, is actually written for general high school history students. Fourth, each of the editions evaluated in this study was published after the events of September 11, 2001 and thus reflected historical narrative in a post-9/11 world. Finally, over the past 15 years, I have personally taught high school history lessons with each of these textbooks (or one of its previous editions), and thus I am very familiar with their scope, content, and tone. Each textbook is briefly described below.

The Americans (2009)

The Americans is a textbook with its own history. The 2009 edition, authored by Gerald Danzer, Jorge Klor de Alva, Larry Krieger, Louis Wilson, and Nancy Woloch, is one in a series of this popular, comprehensive history of the United States, and while newer editions of *The Americans* have been published, this textbook remains one of the most widely-adopted, mainstream U.S. History textbooks in the country. The six-pound, 1360-page behemoth is made up of 34 chronologically oriented chapters and is fairly typical in design. Each chapter includes sections, shaded supplementary readings, dynamic photographs and other visuals, section reviews, and a chapter summary.

The Americans also presents students with a traditional, largely grand narrative, middle-of-the-road style account of U.S. history from Reconstruction to "the present." By "traditional," I mean the style in which many of us are quite familiar. Historical figures, events, and eras are introduced one after another in a fairly predictable, sometimes rather monotonous, manner. Conflict is downplayed and an undertone of the supremacy of American democracy is clear throughout. In this study, I looked specifically at Chapter 33, which is entitled: "The Conservative Tide." This chapter covers the chronological period from about 1980 (Reagan's electoral defeat of Carter) up to about 1992 (Clinton's subsequently defeat of George H. W. Bush).

The American Republic Since 1877 (2007)

I also chose to examine and analyze *The American Republic Since 1877*; the 2007 edition of another U.S. History textbook series of some repute. Authored by accomplished history scholar Dr. Joyce Appleby, this 1020-page textbook is organized into 29 chapters, each of which falls into one of eight units. Like *The Americans*, Appleby's textbook is typical in design, meaning it presents content, eras, and events related to "Reconstruction-to-present" in a chronological, grand narrative style. Each chapter includes sections, shaded supplementary readings such as bio sketches, dynamic photographs and other visuals, section reviews, and a chapter summary. While not as widely adopted as *The Americans*, I selected *The American Republic* because it has garnered support from some interesting organizations. One notable and rather animated endorsement came from the Christian fundamentalist group "Educational Research Analysts." This group, founded by political and religious extremists Mel and Norma Gabler of Texas, is well known for its right wing agenda, which manifests itself especially in the form of history textbook evaluation. The Gablers' organization evaluated the 2003 edition of *The American Republic* as "superior scholarship," and proclaimed the textbook was "no home run, but a definite hit" (2003).

   In this study, I looked specifically at Chapter 28, which is entitled: "Resurgence of Conservatism." As chapter 33 in *The Americans*, chapter 28 of *The American Republic Since 1877* covers the chronological period from about 1980 (Reagan's electoral defeat of Carter) up to about 1992. The chapter opens with the following interesting explanation: "Unlike liberals, conservatives generally have a fundamental distrust of the power of government… They support the original intent of the Constitution and believe that governmental power should be divided… to limit its ability to intrude into people's lives" (p. 861). A few pages later, *The American Republic* informs high school history students that:

> the largest group within the social conservative movement was evangelical Protestant Christians. Evangelicals believe they are saved from their sins through conversion (which they refer to as being "born again") and a personal commitment to follow Jesus Christ, whose death and resurrection reconciles them to God. (p. 864)

In my mind, these and similar passages made this textbook distinct, thus warranting its inclusion in the study.

A People's History of the United States: 1492-Present (2005)

The third and final textbook selection for this study was Howard Zinn's *A People's History of the United States: 1492-Present.* "*People's History*," as it is often shortened, is Zinn's well-known answer to the traditional U.S. history narrative. As its title implies, *People's History* presents readers with an account of U.S. history through the eyes and experiences of common citizens, often workers, rather than

social or political elites. Zinn's book is similar to the two previously described textbooks in a few ways. Like the Danzer and Appleby, Zinn presents an unabridged account of U.S. history in a loosely narrative format. Also, despite the promoted theme of providing voice to the people, *People's History* does, in fact, dabble in the act of historical hero-building. Unlike the other texts examined here, however, *People's History* covers more time (opening with Columbus' arrival in the "New World" and continuing to the present). Differences include the fact that at 752 pages, *People's History* is significantly shorter in length; however, it is worth noting that Zinn's standard book is generally available in smaller print and includes no section reviews, end-of-chapter questions, or even photographs or illustrations.

Perhaps even more so than Danzer's *The Americans*, Zinn's counter-narrative classic also has its own history. The original edition was published in 1980, and subsequently has been revised and republished in print form four additional times. I evaluated the 2005 edition with the knowledge that all editions have been sharply scrutinized by historians, academics, conservatives, and liberals alike. Many of those critics cite blatant omission of critical historical elements and events, overt anti-American tones, and a consistent pattern of victimization of various groups or causes (Plotnikoff 2012).

Data Analysis and Findings

In analyzing the data, my goal was to perform a qualitative and comparative evaluation of various related excerpts from each of the selected textbooks. In particular, I sought to gauge the content of each aforementioned chapter by evaluating the comprehensiveness and tone of its historical account of Reagan's term in office. Immediately, I noticed significant disparity regarding which historical accounts, events, quotes, and news stories were included, and which ones were omitted. I also noted disparity in the ways those accounts, events, quotes, and news stories were presented in text. For purposes of this study, I narrowed my focus down to three common subtopics addressed in textbooks and generally associated with a comprehensive study of Reagan's presidency: 1.) Reagan's rise to power and the elections of 1980 and 1984; 2.) U.S. foreign policy in Latin America during the Reagan years; and 3.) Reagan's positions on various social and domestic issues. By comparative analysis, I noted the language and tone used in various excerpts, and then made qualitative observations about each. My analysis of the data yielded substantive findings on how Ronald Reagan is represented in each textbook in relation to each of these subtopics.

Reagan's Rise to Power

Each of the three textbooks provides an account of Reagan's rise to power. In prefacing the 1980 presidential election and the "Reagan Revolution" that ensued, each book describes varying dynamics related to Reagan's demeanor and the state of the Union. In prefacing the election of 1980, *The Americans* (Danzer et al. 2009) opened with a passage on Reagan's mantra: "Government is not the solution to our problem. Government is the problem" (p. 1036), and then set the tone for a political shift by first describing inflation and the hostage crisis in Iran. Next, authors assert that: "In 1980, Reagan ran on a number of key issues. Supreme Court decisions on abortion, pornography, the teaching of evolution, and prayer in public schools all concerned conservative voters, and they rallied to Reagan" (p. 1038). To this, they added a description of Reagan's shift in philosophy: "Originally a New Deal Democrat, Ronald Reagan had become a conservative Republican during the 1950s. He claimed that he had not left the Democratic Party but rather that the party had left him," and:

> As president of the Screen Actors Guild, he worked actively to remove alleged Communist influences from the movie industry. Reagan had the ability to express his ideas in simple and clear language that the average voter could understand. When he proposed a 10 percent cut in government spending on social programs, he stated, "We can lecture our children about extravagance until we run out of voice and breath. Or we can cure their extravagance by simply reducing their allowance. (p. 1038)

Next, *The Americans* summarized Reagan's appeal with voters by asserting: "In contrast to Carter… Reagan was relaxed, charming, and affable. He loved making quips…" (p. 1038), and "Reagan's long-standing skill at simplifying issues and presenting clear-cut answers led his supporters to call him the Great Communicator. Also, his commitment to military and economic strength appealed to many Americans" (p. 1039). Finally, they claim: "As Reagan assumed the presidency, many people were buoyed by his genial smile and his assertion that it was 'morning again in America'" (p. 1039).

Introducing Reagan in a somewhat different manner, *The American Republic* (Appleby and National Geographic Society 2003) opted to take readers further back in time by describing his virtuous childhood, and even quoting Reagan's own recollection of it:

> In 1926 when he was 15 years old, Ronald Reagan earned $15 a week as a lifeguard at Lowell Park on the Rock River in Illinois. Being a lifeguard, Reagan later wrote, taught him quite a bit about human nature: "Lifeguarding provides one of the best vantage points in the world to learn about people. During my career at the park, I saved seventy-seven people. I guarantee you they needed saving – no lifeguard gets wet without good reason… Not many thanked me, much less gave me a reward, and being a little money-hungry, I'd done a little daydreaming about this. They felt insulted. I got to recognize that people hate to be saved." The belief that people did not really want to be saved by someone else was one of the ideas that Ronald Reagan took with him to the White House. It fit with his philosophy of self-reliance and independence. (p. 865).

"President Reagan, standing for traditional values and smaller government, symbolized this movement. While tax cuts and new technologies fueled an economic boom, Reagan embarked on a massive military buildup and expanded efforts to contain communism" (p. 858). These excerpts make up part of a lengthy biographical sketch of Reagan's childhood years.

Howard Zinn's *A People's History of the United States* (2005) provides a starkly different summary of Reagan's presidential election (which it usually inextricably connects to the subsequent presidential term of George H. W. Bush). In describing the reasons for Reagan's election, People's History offers this rather abrupt explanation: "The [U.S.] hostages [in Iran] were still in captivity when Jimmy Carter faced Ronald Reagan in the election of 1980. That fact, and the economic distress felt by many, were largely responsible for Carter's defeat" (p. 536).

With little more context of the late 1970s, *People's History* then states:

> Reagan's victory, followed eight years later by the election of George Bush, meant that another part of the Establishment, lacking even the faint liberalism of the Carter presidency, would be in charge. The policies would be more crass-cutting benefits to poor people, lowering taxes for the wealthy, increasing the military budget, filling the federal court system with conservative judges, actively working to destroy revolutionary movements in the Caribbean. (p. 536).

Not surprising to anyone familiar with the scope and tone of *People's History*, this account omits any references to Reagan's appeal with voters.

My analysis revealed a high degree of subjectivity among the three different textual accounts of Reagan's rise to power. On the one hand, *The American Republic*, for instance, promoted a clearly ideological introduction to Reagan as an "All-American" boy (a lifeguard who saved many people and who had contemplated the larger implications of his own choices). This sort of virtue-driven opening read like an apocryphal tale of providence and reminded me of Parson Weems' mythical stories of George Washington. Interestingly, *The American Republic* presents very few childhood accounts by other presidents. On the other, in addition to being selective in its wording (as it has often been criticized), *People's History*, provided an extraordinarily one-sided account of this series of events. The excerpt included above neglects to mention any of Reagan's personable characteristics or speaking skills as explanation for his success with voters.

Unlike the two previously-discussed accounts, *The Americans* embedded Reagan's rise to power in a larger context of the growth of conservatism in the United States. While traditionally narrative in style, authoritative in tone, *The Americans* fell in between the imbalance I observed in both the overly-ideological and nostalgic introduction of *The American Republic*, and the meticulously worded, detached account of *People's History*. This is not to say I found *The Americans* free from ideology. On the contrary, like many widely adopted textbooks, it is conservative in tone, somewhat sterile, and generally avoids conflict in text. However, as a result of this analysis, it seemed to promote less historical bias and agency.

Reagan's Foreign Policy in Latin America

As an example of avoiding conflict in text, when compared to *People's History*, *The Americans* and *The American Republic* clearly say very little about U.S. activities and policies toward Latin America during the 1980s. One might even note that they gloss over these significant historical events. In summarizing the Iran-Contra Affair, *The Americans* simply states:

> In 1985, he declared that "America will never make concessions to terrorists." Therefore, Americans were shocked to learn in 1986 that President Reagan had approved the sale of arms to Iran. In exchange for those sales, Iran promised to win the release of seven American hostages held in Lebanon by pro-Iranian terrorists. What's more, members of Reagan's staff sent part of the profits from those illegal arms sales to the Contras in Nicaragua. (p. 1058-59)

The *American Republic* is similarly selective in its account:

> Building up the military was only part of Reagan's military strategy. He also believed the United States should support guerrilla groups who were fighting to overthrow Communist or pro-Soviet governments. This policy became known as the Reagan Doctrine (p. 869) … President Reagan had approved the sale of arms to Iran, but the congressional investigation concluded that he had not been informed about the diversion of the money to the contras. To the end, Reagan insisted he had done nothing wrong, but the scandal tainted his second term in office. (p. 870)

Both books provide few details indicating covert operations and even U.S. involvement in atrocities in Nicaragua, El Salvador, and other Latin American countries. Furthermore, virtually no U.S. officials or agencies is implicated in any sort of poor diplomacy or military decisions. *People's History*, on the other hand, devotes several pages to detailing these and related events and issues. These pages include the following excerpts:

> Reagan came into office just after a revolution had taken place in Nicaragua, in which a popular Sandinista movement… overthrew the corrupt Somoza dynasty (long supported by the United States). The Sandinistas, a coalition of Marxists, left-wing priests, and assorted nationalists, set about to give more land to the peasants and to spread education and health care among the poor. The Reagan administration, seeing in this a "Communist" threat, but even more important, a challenge to the long U.S. control over governments in Central America, began immediately to work to overthrow the Sandinista government. It waged a secret war by having the CIA organize a counterrevolutionary force (the "contras"), many of whose leaders were former leaders of the hated National Guard under Somoza. (p. 548)

To further chronicle and explain U.S. involvement in El Salvador, *People's History* asserts:

> When Reagan became President, military aid to the El Salvador government rose steeply. From 1946 to 1979, total military aid to El Salvador was $16.7 million. In Reagan's first year in office, the figure rose to $82 million. Congress was sufficiently embarrassed by the killings in El Salvador to require that before any more aid was given the President must certify that progress in human rights was taking place. Reagan did not take this seriously. On January 28, 1982, there were reports of a government massacre of peasants in several villages. The following day, Reagan certified that the Salvadoran government was making progress in human rights. Three days after certification, soldiers stormed the homes of poor

people in San Salvador, dragged out twenty people, and killed them. When, at the end of 1983, Congress passed a law to continue the requirement of certification, Reagan vetoed it. (p. 553)

Zinn's account then implicates the former president in a premeditated deception of the American people:

When asked about this at a press conference in November 1986, President Reagan told four lies: that the shipment to Iran consisted of a few token antitank missiles (in fact, 2,000), that the United States didn't condone shipments by third parties, that weapons had not been traded for hostages, and that the purpose of the operation was to promote a dialogue with Iranian moderates. (p. 549)

Unlike *The Americans* or *The American Republic, People's History* also includes details about the fallout once the scandal broke:

Although Congressman Henry Gonzalez of Texas introduced a resolution for the impeachment of Reagan, it was quickly suppressed in Congress… The Iran-contra affair was only one of the many instances in which the government of the United States violated its own laws in pursuit of some desired goal in foreign policy. (p. 550).

My analysis of textbook passages of Reagan's interests and U.S. involvement in Latin America revealed even more startling disparity in thoroughness of coverage. In short, aside from brief summaries of the Iran-Contra Affair and the invasion of Grenada, *The Americans* and *The American Republic* provide little or no information on Reagan's military or paramilitary actions throughout Latin America. What's more, accounts in both texts seem to distance Reagan from what took place, even limiting his knowledge of the actions of his staff and failing to adequately describe how unsettling or even life changing these actions have been to many people from El Salvador, Nicaragua, Grenada, Panama, Colombia, Venezuela, and other countries. This analysis determined that *People's History*, by contrast, while sharply anti-establishment in tone, provides a far more comprehensive account of these events. Zinn also gives readers a better sense of what these events must have looked like from the perspective of the people of El Salvador, for instance, but also their long-term effects.

Reagan's Positions of Social and Domestic Issues

Finally, I analyzed each textbook's attention to various social and domestic issues during Reagan's years in office. Of course, the 1980s were a time of a great many social movements and domestic issues. Government-funded social programs such as welfare and Medicare, abortion, unemployment, drugs, the national debt, and HIV/AIDS were all topics of great public concern, and once again, the accounts of each in the three textbooks evaluated in this study were quite different in a number of ways. Once again, I observed that *The Americans* and *The American Republic* devoted mere paragraphs (in some cases, even portions of paragraphs) to each of these topics in a very systematic, detached manner.

Particularly regarding HIV/AIDS, *The Americans* includes the following brief, rather impersonal account of the disease during the 1980s before moving on to a similarly detached paragraph on abortion:

> One of the most troubling issues that concerned Americans in the 1980s was AIDS (acquired immune deficiency syndrome). Possibly beginning as early as the 1960s, AIDS spread rapidly throughout the world. Caused by a virus that destroys the immune system, AIDS weakens the body so that it is prone to infections and normally rare cancers. AIDS is transmitted through bodily fluids, and most of the early victims of the disease were either homosexual men or intravenous drug users who shared needles. However, many people also contracted AIDS through contaminated blood transfusions, and children acquired it by being born to infected mothers. As the 1980s progressed increasing numbers of heterosexuals began contracting AIDS. As the epidemic grew, so did concern over prevention and cure. (p. 1046)

The *American Republic* includes a similarly inadequate blurb:

> In 1981 researchers identified a disease which caused seemingly healthy young men to become sick and die. They named it "acquired immune deficiency syndrome," or AIDS. AIDS weakens the immune system, lowering resistance to illnesses such as pneumonia and several types of cancer. HIV, the virus that causes AIDS, is spread through bodily fluids. In the United States, AIDS was first noticed among homosexual men. Soon AIDS began to spread among heterosexual men and women as well. A few people got the disease from blood transfusions. Other victims included drug users who shared needles and, through them, infected blood. Many people were infected by sexual partners. By 1988, the Centers for Disease Control had identified more than 100,000 AIDS cases in the United States. (875–76)

Interestingly, *People's History* says almost nothing of the disease or its impact on the world. Disturbingly, while each of the textbooks analyzed in this comparison includes a few sentences on the scourge of HIV/AIDS, none of them include discussion relating to Reagan's stance on finding a cure for the disease or how that stance and public perception delayed medical advancement in treatment or a search for a cure. Furthermore, none of the texts includes a personal story from an AIDS survivor, or even a reference to a person who was associated with the disease then or afterward. Perhaps most disturbing, none of the texts includes a word about the current status of the virus in the U.S. or parts of Africa and Asia. Rather, it is presented as a dilemma Americans dealt with for a few years.

The comparative analysis revealed that while *People's History* seems to have largely overlooked explaining the ongoing global AIDS epidemic, it does elaborate far more on other social issues such as welfare and Medicare, the environment, the national debt, and, of course, unemployment. Regarding the state of the economy and unemployment, Zinn asserts:

> Under Reagan and Bush this concern for "the economy," which was a short-hand term for corporate profit, dominated any concern for workers or consumers. President Reagan proposed to replace tough enforcement of environmental laws by a "voluntary" approach, leaving it to businesses to decide for themselves what they would do. He appointed as head of OSHA a businessman who was hostile to OSHA's aims. One of his first acts was to order the destruction of 100,000 government booklets pointing out the dangers of cotton dust to textile workers. (p. 538)

People's History continues by claiming: "Unemployment grew in the Reagan years. In the year 1982, 30 million people were unemployed all or part of the year" (p. 541); and concludes by asserting: "By the end of the Reagan years, the gap between rich and poor in the United States had grown dramatically. Where in 1980… CEOs of corporations made 40 times as much in salary as the average factory worker, by 1989 they were making 93 times as much" (p. 544).

The Americans and *The American Republic* introduced this discussion topic in a far softer, less accusatory tone, as is exemplified in this excerpt from *The American Republic*:

> To keep the deficit under control, Reagan proposed cuts to social programs. Welfare benefits, including the food stamp program and the school lunch program, were cut back. Medicare payments, student loans, housing subsidies, and unemployment compensation were also reduced. After a struggle, Congress passed most of these cuts. The fight convinced Reagan that he would never get Congress to cut spending enough to balance the budget. He decided that cutting taxes and building up the military were more important than balancing the budget. (p. 867).

Discussion

Upon completion of my comparative analysis of these three textbooks and their coverage of Ronald Reagan's life and presidency, I have concluded that each one has certain advantages. *The Americans* is certainly a comprehensive text, including at least some coverage of key people and events during the 1980s. I found it to be the least biased of the three selections, often aiming for a fairly conservative, if somewhat bland and impersonal, account of most events. The textbook is also filled with rich photos of Reagan and his contemporaries, as well as visuals and graphics of relevant topics. *The American Republic* is similarly comprehensive in terms of coverage, included accessible text on Reagan and dynamic visuals to capture students' attention or generate discussion. Finally, the strengths of *People's History* included, as generations have now observed, giving voice to underrepresented populations in U.S. society, particularly those who did not experience the "shining city upon a hill" image as Reagan had described in his farewell address. Zinn's bestseller also provides a much-needed counter-narrative, filled with statistics and perspectives that challenge conventional wisdom on the 1980s.

My analysis revealed that each textbook also has problems. *The Americans*, while least noticeably biased of the three, is also clearly written as a feel-good, Ameri-superiorist, nationalist narrative. Conflict and counter voices from the 1980s are generally glossed over or left out completely, and just as is the case in *The American Republic*, virtually none of Reagan's policies or decisions are critically analyzed, much less scrutinized. *The American Republic* shares each of these critiques with the additional observation that it seems clear the take-home message for students is that the U.S. is a single entity moving together as one. And despite the comprehensiveness, *The Americans* chapter 33 and *The American Republic* chapter

28 both seem quite shallow in many respects. Each text reads as though the primary goal was to string as many historical tidbits as possible together in an allotment of pages. Furthermore, both textbooks contribute to a sense of American ideology destiny, and promote the superiority of American culture and identity. Neither textbook fosters the brand of critical thinking; that of questioning authority, such as that of President Reagan, or looking objectively at his strengths and shortcomings.

People's History has weaknesses too. While the counter narrative, antiestablishment voice of chapter 21 (and the rest of the book) is one that certainly deserves to be heard and can contribute to more balanced, comprehensive historical study, it cannot be used as a sole text because it also presents a really one-sided, politically charged, and in this case an exclusively cynical, picture of the past. Additionally, let's face it, the book omits a great deal of history as well.

In summary, despite prevailing research, none of these textbooks, in and of itself, facilitates what history education scholar Fritz Fischer calls "complex, sophisticated, and subtle" thinking about the past (2015, p. 142-143). The manner in which Ronald Reagan is being taught to students, the cult of personality that is being fueled, does students no good, and in fact, probably makes them far less likely to evaluate sources of historical information. As Fischer illustrates, the reinvented Ronald Reagan is a striking example of what can happen when we allow demagogues to have power over history. In his study of Reagan and others, Fischer points out that we cannot give up and simply allow politically motivated "anti-historians" to control what should be taught and when (p. 144-45). To his astute assertion, I would add that we cannot settle for bland textbooks devoid of historiographical analysis and critical thinking.

Conclusion

As history teachers, we are reminded that history is not an account of what happened, but rather what we *say* happened. This statement provides insight to the conclusions of this study. Each of the three textbooks I analyzed has a political tone, whether it be of American destiny and cultural supremacy, conservative ideology, or countercultural anti-establishmentarianism. Unfortunately, each one, if utilized alone, would present a series of politicized accounts of the 1980s that would fail to comprehensively educate students about the Reagan Era.

As the world witnesses arguably the most vicious, contested, and ridiculous political race of a generation, would it shock any of us to hear teenagers synopsize the democratic process as little more than a circus? The candidate who lobs the most personal insults wins! History teachers have their hands full. So as this hyperpolitical incongruity and polarization prevails, we should give those teachers the tools (i.e. textbooks) that allow them to help students make sense of it all. This comparative historiographical analysis could be performed with any national hero, and could be expanded to analyze the images and graphics included in select textbooks. The thrust of the analysis would be the same: that instead of inundating

students with textbooks that sell nationalistic narratives and imagery intended to shape their identity as U.S. citizens, we should produce textbooks (and other resources) that facilitate their development of critical thinking and inquiry skills.

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Chapter 11
Representation of National Leaders in History Books and Textbooks in South Africa: A Transitiological Study

C.C. Wolhuter, J.L. Van der Walt, and F.J. Potgieter

Introduction

This chapter compares history books and textbooks used in South Africa and South African schools before 1994 with those introduced after the momentous socio-political change of 1994. The chapter commences with a few brief notes on the choice of interpretivism as epistemological paradigm and social constructivism as the methodology employed. That is followed by an outline of the history of South Africa and an overview of the historiography practiced in South Africa throughout its history. Attention is then given to social constructivist transitiology[1] as the theoretical basis for a comparison of the representation of leaders in (school) history books of the pre-1994 and the post-1994 eras.

Epistemological and Methodological Choices

The research undertaken for this chapter is located within the interpretivist paradigm as it was our aim to interpret data and produce a rich, descriptive, and transitiological account of the representation of national leaders in history books and in

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[1] Transitiology refers to the study of change in societies affected by intense socio-political restructuring during a short time period. A more detailed discussion of the term follows later in the chapter.

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school history textbooks in South Africa. Because interpretivism views reality as being socially constructed, we have decided, for the following reasons, to employ social constructivist transitiology as the chosen methodology and associated theoretical basis for our comparison of the representation of leaders in (school) history books of the pre-1994 and the post-1994 eras in South Africa's history.[1]

In the first place, textbooks themselves are socially constructed, meaning that they can, amongst others, be studied and understood as social constructs and artifacts. Secondly, history textbooks, according to Apple (2000), have the dual nature of either regulating or liberating the school-going students who are supposed to study them. After all, schools are regarded as agents for social control in that (all) learners are socialized (Apple 2000). This is why, inter alia, the kind of knowledge that is disseminated in schools is deliberately and purposely selected, from a larger body of knowledge, by the dominant ("ruling") class.

The result is that history textbooks are a "…representation of political, cultural, economic and political battles and compromises." They are, essentially, symbolic portrayals of the world as well as the society in which we live. Who determines what is taught and what content should be in the textbooks determines how political and cultural domination is achieved in schools and consequently in wider society (Naidoo 2014, p. 17). As a consequence, social constructs and artifacts can never represent the 'truth' – historical, or otherwise. This implies that the depiction of national leaders in school history textbooks can, epistemologically, never be understood to be reliably truthful, as such representations are invariably full of ambiguities and different (and essentially subjective) interpretations. For this reason, the portrayal of national leaders in history textbooks can also never claim to be neutral, as they cannot disguise their ideological and cultural potency (Foster and Crawford 2006). It could be argued that the educational, ideological, and political purpose of most history textbooks is to fulfill a particular agenda of the state in space and time (Naidoo 2014, p. 17). What is regarded as 'truth' in terms of how national leaders are being (or had been) shown in history textbooks is forever evolving, morphing, changing and transforming – in accordance with the terms and conditions of the prevailing, dominant normative orders in a particular society who keep on obtruding and pressing themselves upon every successive generation as the best possible likenesses of and most believable blueprint(s) for *eudaimonia* (the good life) (Potgieter 2015, p. 186).

Finally, any depiction of any national leader that can be found in any history textbook may also be studied and viewed as a social construction. Such social constructions are, furthermore, always present to perform specific social functions (Bottici 2007). Typically, one of the many possible social functions that the portrayal of any national leader could fulfill would be that of a myth. As it can also be argued that history is a mythical construction (Van Niekerk 2013, p. 12), it follows that any representation of any national leader could also arguably be mythical. It would, indeed, be difficult for any author of a history textbook to describe any national leader free of mythical qualities (Van Niekerk 2013, p. 13). In this chapter we have, however, decided against the use of extant theories around myth and political myth in our attempts at developing a theoretical and conceptual framework

within which to come to a better understanding of the phenomenon under investigation (Van Niekerk 2013, p. 12, 13).

Outline of South African History

South African Historiography

Serious history scholarship in South Africa commenced rather late. The first university in South Africa was established only in 1873 by the British colonial authorities. A succession of schools of historiography (some overlapping in lifespan) can be distinguished as follows (*cf.* Smith 1988):

A Colonial Paradigm

The oldest school of historiography was a British colonial paradigm: writing the history of South Africa from a British imperial perspective. This school took off in the second half of the nineteenth century. Paradoxically, two of the major historians of this paradigm, Henry Cloete (1899) and Egidius Watermeyer (1877), were born Afrikaners. Other colonial paradigm historians included Alexander Wilmot, John Chase and John Noble.

A Settler Paradigm

Chronologically, the next school of historiography to emerge was a settler school, writing the history of South Africa from the perspective of English-speaking white colonists in South Africa. This school appeared in the first decades of the twentieth century and the three towering figures here were George McCall Theal (1904), George Cory (1930), and Frank Cana.

An Afrikaner Paradigm

As part of the rise of Afrikaner nationalism and of post-1948 Afrikaner hegemony in South Africa a prolific group of Afrikaner historians emerged, portraying the history of South Africa from an Afrikaner nationalist perspective. Among these historians count F.A. van Jaarsveld (1976), G.D. Scholtz (1967), and C.F.J. Muller (1974). It should be noted that in their publications, Afrikaner nationalism was

emphasized as an ideological force, and depicted as being involved in a Darwinian battle for survival against other ideologies such as British Imperialism, Liberalism and Communism. Black African nationalism was simply denied and ignored, e.g., in one of the major publications of this school, Van Jaarsveld's (1976) history of South Africa, neither the African National Congress (ANC), nor any of its leaders are ever mentioned. Since the ascendancy of the Afrikaner as a people and Afrikaner nationalism stood central in these historical works, another feature of this school of historiography was that Afrikaner nationalism rather than the actions of leaders was regarded as the agency of historical development. For example, in Van Jaarsveld (1976) and Muller (1974) no single exhaustive discussion of an Afrikaner leader will be found. A striking example of this is Muller's (1976, p. 16) depiction of the role of Karel Landman, one of the leaders of the Great Trek, "…he was such a typical Trekker — honest, religious, determined, versatile — that it is difficult to distinguish him from his fellow Trekkers" (translated).

A Liberal Paradigm

As the British Imperial and English Settler paradigms became increasingly anachronistic and faded into obscurity as a result of post Second World War global and national developments, the Afrikaner-centric school of historiography in South Africa was challenged by a school of liberal historiography, i.e., after 1950. This school wrote the history of South Africa by taking the gamut of liberal values (such as individual freedom, academic freedom, freedom of speech, freedom of the press, Human Rights, democracy, and the rule of law) as the highest values in their depiction of what transpired in the past. While the main proponents of this paradigm resided outside South Africa, such as the Oxford historians Leonard Thompson and Monica Wilson who wrote the *Oxford History of South Africa* (Wilson and Thompson 1971), C.W. de Kiewiet, and Eric Walker, the school also had its domestic counterparts such as T.R.H. Davenport.

A Paradigm of Radical History Writing

One unintended consequence of the international academic boycott waged against South Africa (c. 1960 to 1990) was that it also isolated the country from developments in international historiography, including the rise of radical historiography, a research school, which could look at South African history through a class (rather than a racial) lens. Nonetheless, the work of such historians as Martin Legassick (*cf.* Legassick and Hemson 1976), Dan O'Meara and Harold Wolpe could be regarded as belonging to this school.

The Absence of an Afrocentric School of Historiography

Surprisingly, an Afrocentric school of historiography, to counter the Afrikaner-centric school and to serve as an intellectual underpinning of the anti-Apartheid forces never developed. The best that could be found in this regard is the collection of documents put together by two American scholars, Karis and Carter (1972), and published in the United States of America. Even though prominent ANC leaders and Black South African intellectuals pleaded in the early 1950s for a version of South African history written from the African point of view (Matthews 1981, p. 59), Smith (1988, p. 220), in his survey of South African historiography thirty years later, could conclude that such a history of South Africa did not take up much space on library shelves.

The Post-1994 Dwindling of History Scholarship

In the post-1994 era, an Afrocentric school of historiography did not develop either; nothing rose concomitantly with the new political and ideological hegemony, nothing similar to the development of Afrikaner-centric historiography that paralleled the Afrikaner hegemony of the 1948–1994 era. In fact, there was a general decline in the writing of serious, interrogative and critical history (*cf.* Johnson 2004, pp. vii–xv). Explicating and explaining this state of affairs is beyond the brief of this chapter; however, three things need to be stated for perspective. The fading of history scholarship is part of a general muting of critical (particularly, critical of government policies) scholarship in the humanities and social sciences in post-1994 South Africa. This trend has been lamented by scholars in other fields such as Weeks et al. (2006) in Comparative Education, but perhaps best and most explicitly expressed by Gumede and Dikeni (2009).

In general, humanities at South African universities have suffered the same fate as in most parts of the world: the neo-liberal economic revolution carrying its principles (such as the profit-motive, measurable utility and the like) into higher education, and also the switch from Mode I to Mode II knowledge. What hit the practice of history as a discipline at South African universities doubly hard was that in the teacher education reforms in the early 2000s, the task of the academic grounding (including the training in history) of history teachers was taken away from history departments at universities and entrusted to Schools of Education. Student teachers had always been the backbone of the student body of history departments; it was how these departments justified their existence. The result of this development is that once vibrant history departments and courses at universities have disappeared. Johnson described the demise of history as a university discipline in the following way, "Within universities History shrank sharply, [being replaced by] a new bastard subject, Heritage Studies, whose content suggested that it was mainly useful for training tourist guides" (p. xiii).

The above provides the background for the comparison of the roles of political leaders in South Africa in the pre- and post-1994 eras. A brief overview of the main precepts of transitiology will be outlined in the next section. These precepts formed the implicit basis for the comparison following in the ensuing section.

Social Constructivist Transitiology: A Theory of Change and Transformation

Transitiology, *per se*, is the science of change. The purpose of transitiology is to analyze the complexities of transition (De Wet and Wolhuter 2009, p. 361), political and economic "shifts" (Prica 2007, p. 163) such as occurred in South Africa around 1994. From the perspective and understanding of social constructivism, transitiology is the science of describing, understanding, and explaining the transformation or transition of a social system from one state to another, in the case of South Africa from apartheid to post-apartheid democracy (Sqapi 2014, p. 218–219, 226). It is interested in the turning points in history (Cowen 2000, p. 339), the (constructed) social turbulences that educationists have to be aware of in their studies of education systems in a moment-in-time in a particular system (Cowen 2002, p. 413) rather than, for instance, in comparing education across cultures, nations, regions, and academic disciplines.

The focus of social constructivist transitiology, according to Johannsen (2000, p. 3), is how social regime change occurred, who the actors and institutions were in the transition (i.e., the level of explanation), and to what extent democracy was the upshot of the transformation process. An assessment of the roles of institutions is important in transitiology (Przeworski 1988, p. 64).

There is no cutting-off point where the "old" just disappears (Prica 2007, p. 174). Cowen (2000, p. 339) pointed out that transitions tend to be "pleasantly complex mixtures" of political, ideological, economic, and sociological factors playing a role. Generally speaking, they represent an ideological break with the previous system (Prica 2007, p. 163). A transition may also be seen as a move to an altogether "new" future, or retention of some aspects of the old.

Transitions can be sudden and spectacular, or smooth and unspectacular (Prica 2007, p. 1674). This issue has to be approached, first, through a study of the factors that enabled the transition, and then, from the perspective of the distribution of power within the political system (Johannsen 2000, pp. 1–2). Descriptions of a transition could also indicate whether it was violent or smooth.

It is important to note, as Sqapi (2014, p. 220) has done, that transitiology cannot explain all transformation processes adequately. In some cases, it avers, its teleology is so aimed at the end process (democracy, for example) that it loses sight of the complexity of specifications of the process. The result of this is that the transformation is described in terms of rationalistic and deterministic stages along the way, and that the specific contexts of the particular country are overlooked. Transformation is

then seen as a rational process that, for instance, "progressively and continuously moves toward a predetermined and desired teleological result – the consolidation of democracy in a particular country" (Sqapi 2014, p. 220). Transition is, however, not such a linear, rational or natural process. It is more complex and includes a multiplicity of factors (structural, social, historical, etc.) that influence the outcome (Sqapi 2014, p. 220, 226), as will be illustrated below in the case of South Africa around 1994. A certain, linear, teleological thinking in relation to the direction of change is too simplistic given the actual events during transitions, alongside their ideological dimensions. There is not only a single rationality (residing in the goals of the system) but a multitude of rationalities each of which generates the in-order-to motives of the actors and allows them to make their own sense of the actions and the intentions of others. The social world is malleable, although often only to a limited extent. Some structures of meaning cannot be sustained because they conflict with other meaning structures, or with external objects. It is therefore erroneous to see social action as an automatic playing out of role expectation, or as a mechanical reaction to situational restraints. It is equally erroneous to limit sociological concerns to systems of meaning (Otakpor 1985, p. 142–143).

The following section contains an analysis of the representation of two South African leaders intimately involved in the transition that occurred in South Africa during the period from 1992 to 1994. Basic tenets of transitiology implicitly guided the analysis, for instance, its emphasis on the complexities of the transition and the roles played by particularly two prominent actors (leaders) in the transformational processes. The investigation was guided by the following question: How have the respective roles of De Klerk and Mandela as the two leaders in the transitional processes in South Africa in the period 1989 to 1994 been portrayed in the history books and school textbooks[2] currently in use in South Africa?.[2]

Findings

Representation of National Leaders in Pre-1994 School History Textbooks

Pre-1994 history textbooks used in South African schools were exclusively those that fit perfectly in the Afrikaner paradigm as outlined above. In fact, the most prolific author of school textbooks in this era was F.A. van Jaarsveld. Not only Van Jaarsveld's textbooks, such as Van Jaarsveld, Van Wijk, Pluger, Bruwer and Rademeyer (1959) but also others used in South African schools, such as those of Fowler and Smit (1955), Graves (1980) and Van Schoor (1970) presented nothing

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[2]Reference will be made throughout the next section to the books that were analysed either by ourselves or by other historians.

but the Afrikaner-centric version of South African history. Second, in line with the tenet of the Afrikaner paradigm, South African history was depicted as a play of ideological forces, with Afrikaner nationalism constituting the triumphant center-piece. The rough outlines of this history was the founding of White Settlement in the Cape, the Great Trek as the first growth spurt of Afrikaner nationalism, the establishment of Afrikaner Republics in the second part of the nineteenth century as the first major victory of Afrikaner nationalism, the defeat of Afrikaner and Afrikaner ideals in the Anglo-Boer War (a painful event in Afrikaner history), the slow revival and triumphant march of Afrikaner nationalism in the twentieth century, until the establishment of the Republic of South Africa (which cut the last ties with Britain) in 1961, which was depicted as the zenith of Afrikaner nationalism. In this history of Afrikaner nationalism, leaders are not elevated but rather portrayed as those who coordinated and promoted the Afrikaner-nationalist cause, such as in Graves' (1980) reconstruction of the constitutional development of South Africa from British Colony in 1902 to independent Republic outside the Commonwealth in 1961.

If national leaders of the Afrikaner cause were eschewed, the opposing camp, particularly the Black African cause and its leaders, was totally ignored and denied, as their vision (varying from the vision of an integrated South African society to that of an Afrocentric society) did not fit in at all with the vision of the National Party of a segregated society with independent states for each race and ethnic group. In the textbooks cited above, the ANC and its leaders are not mentioned as much as once. According to Carol Bertram, "almost no studies" were done on history textbooks in the 1970s and 1980s, that is, in the days when the dismantling of apartheid began. History textbooks devoted more time and space to European (including white) history than to black history or to black nationalism (John 2014). As apartheid ended, according to Bertram "there was more confidence to critique the dominant Afrikaans history in textbooks." These studies were mostly on Afrikaner nationalism and views on race. Earlier studies reported "the absence of black nationalism in text-books". More recent studies have been about the neglect of Afrikaans nationalism in textbooks.

A number of developments in South Africa from 1976 onwards, after the Soweto uprisings among black youths, as a result of the government's efforts to force school learners to use the Afrikaans language as a medium of teaching and learning, brought about, among others, not only a socio-political change in South Africa but also in how the leaders in all these processes were portrayed. The following section gives an outline of these new developments.

Historical Background: The Roles Played by Two Key Figures in the Transformation Processes During 1989–1994

In January 1989, State President P. W. Botha experienced a health setback and was replaced by Frederik W. de Klerk with a small majority in the National Party (Giliomee 2012). Formerly a hard-liner in the National Party Cabinet, De Klerk was forced by the realities of power into a reassessment of the whole situation in South Africa (Shillington 2005, p. 457). He began giving impetus to the political reforms in South Africa by facilitating among others a conference of churches among all population groups in Rustenburg in 1990. At that occasion, the shortcomings and atrocities of apartheid were openly confessed (Hofmeyer 2012). De Klerk felt himself and his National Party government being increasingly coerced by forces at home and internationally to surrender the political power in South Africa to the ANC and its leader, Nelson R. Mandela.

By the beginning of 1990, De Klerk convinced his Cabinet to lift the ban on the ANC and other freedom parties, to release all political prisoners, among them Mandela who had by then been incarcerated for 27 years, and to enter into multiparty negotiations for a new constitution for South Africa without any preconditions. He took the bold step of repealing the Population Registration and Group Areas Acts and lifting the state of emergency (Shillington 2005). According to Plaut and Holden (2012, p. 30), he told his wife that "South Africa will never be the same" after February 2, 1990, the day when he announced the unbanning of the ANC and the release of all political prisoners. He was right, for his speech transformed the South African political landscape. However, he should not be the only person to receive credit for this change of heart of the government.

During the three years prior to his assumption of the office of State President, the government under the leadership of P. W. Botha had already been involved in clandestine talks with Mandela in prison. The fact that the Soviet Union had collapsed by 1989 made it easier for De Klerk to enter into negotiations with the ANC. The white government's fear "that a Communist Party laden with Soviet weaponry and Moscow gold might dictate terms to a Mandela government had clearly faded" by 1990 (Plaut and Holden 2012). Also the fact that De Klerk understood that the ANC was not going to inaugurate the socialist revolution outlined in its *Freedom Charter* and subsequent propaganda, made it somewhat easier for him to enter into formal negotiations with the ANC after 1992 (Shillington 2005).

The initial encounters between De Klerk and Mandela (both of them qualified lawyers) were marked by the fact that De Klerk (who was, at the time, the State President with all the power and authority associated with that office) was being confronted by an adversary without such power of office but with all the power and authority of a person who had been a long-term political prisoner and who enjoyed the absolute loyalty and support of by far the largest majority of the South African population.

During the ensuing negotiations with the ANC and other stakeholder parties, De Klerk remained somewhat in the background (Giliomee 2012). He urged the main

negotiator on behalf of the National Party, Dr. Gerrit Viljoen, and later Roelf Meyer, to insist on power sharing and on recognition of the various population groups within an inclusive democracy. The National Party also insisted on cooperative government with a rotational President, on individual and group rights as well as a constitution based on fundamental human rights. The core idea behind De Klerk's approach was to ensure that the government and the political scene would not be dominated by the black majority in the population.

Mandela, who had been released on February 11, 1990, also remained in the background, but urged the main negotiator on behalf of the ANC, Cyril Ramaphosa, to insist on majority government. De Klerk played a strong card in the negotiations declaring his inability to convince the white minority to participate in a system that would not suit them. It turned out that most Whites were willing to support the change of regime – more than 69 % of the 87 % of the white electorate who participated in a referendum in March 1992 voted in favor of the change. Using this result as a basis, Mandela remarked that Whites had come to understanding that white privileging was something of the past. In international circles the result of the referendum was interpreted as that white South Africans were prepared to graciously surrender the political power to the majority black population (Giliomee 2012).

De Klerk and the white minority were lauded by critics from abroad for having relinquished their political power in this peaceful manner. They had surrendered power before having been actually defeated by the majority opposition. According to Giliomee (2012), De Klerk had played a "decisive role" in ensuring the "yes"-vote in the referendum after which he declared that very few nations ever had the opportunity to rise above themselves. That was exactly what white voters had done in the referendum. De Klerk referred to poet-philosopher Van Wyk Louw and then declared, "Today in South Africa something has happened that resounds all over the globe and which bears a mighty message of reconciliation, a message that represents a mighty move towards true justice." What was still unknown at this point in time was whether De Klerk's idea of power sharing would be accepted or not by the black majority spearheaded by Mandela and Ramaphosa.

Occasionally during the negotiations for a new dispensation, Ramaphosa tried to discredit De Klerk by suggesting that he (De Klerk) was behind efforts to derail the negotiation process. However, such allegations could never be proved. The negotiations took a turn towards the end that made the members of the South African security forces feel that De Klerk and his co-negotiators had thrown them to the wolves, and that they had little prospect of being protected from prosecution by the new majority government. At the same time, black support for De Klerk's National Party dwindled from around 9 % in 1992 to less than 3 % by the end of that year. After the conclusion of the negotiations, De Klerk and his government were intent on damage control in an effort not to be seen as the losers in the negotiations.

At the same time, however, Mandela began earning widespread respect, also among the reformist inclined white population. He even won the sympathy of many whites; they were prepared to let him take charge of government and let him prove himself as the leader of all South Africans. While Mandela grew in stature, right-wing white leaders began working towards the removal of De Klerk and the

reopening of the negotiations. These plans did not succeed, however, because of the many differences between the various right-wing factions.

According to Giliomee (2012), the elections that subsequently took place in 1994 embodied "a less than convincing effort" to prove that the new constitution was in line with the promises made before the 1992 referendum. As a result, the bond that had existed for so many years between the white electorate and its political leaders, including De Klerk, had been broken.

Mandela and his government, despite their inexperience in governing a country, had to deal with the inequalities and inequities of the past and promote national unity in a deeply divided country. He had to lead the ANC to transform from a group of freedom fighters to a national government faced with a myriad of unfamiliar problems. Much of the new government's success depended on Mandela as its leader. He had to transform his own image from an anti-apartheid struggle icon to that of a capable leader, something that he accomplished with exceptional success. He "displayed remarkable leadership and tolerance," according to Brits (2012, p. 550). Despite their inexperience as a government, Mandela and Mbeki as his second in command achieved a great deal in terms of the provision of electrification, water, and housing. However, for the poor majority the progress was desperately slow. By 2005 the government could not prevent the deepening of the divide between rich and poor, and from land, property and business remaining in the hands of the small white minority (Shillington 2005).

Regardless of these shortcomings, as Giliomee and Mbenga (2007, p. 416) remarked, Mandela's gestures of reconciliation and empathy with white South Africans fostered among white South Africans a broad acceptance of the new government's moral authority. Mandela maintained that human rights should be the core of international relations as well.

Thus, despite coming from diametrically opposing poles of the political spectrum with little, if any common ground between the ANC and the National Party could succeed, after four years of negotiation, to agree on the principles of a new political dispensation, and a peaceful general election was conducted in 1994 after which the ANC took over the reins of government from the National Party.

The Portrayal of De Klerk and Mandela in Post-1994 History (Text)Books

Giliomee (2012) represents Mandela and De Klerk's roles in the most positive way: "Mandela and de Klerk were the two leaders who succeeded in uniting all South Africans [in the processes of transition towards a new democratic dispensation]. [They were] responsible for a spirit of reconciliation during the initial years of the new era in South Africa, with Mandela a remarkable symbol of the new democracy and black-white reconciliation… His leadership was that of a wise statesman, a stately peacemaker, a clever politician and imaginative reconciler of people across

racial divides" (p. 426). Shillington (2005) tends to agree by stating that the main theme of Mandela's single term as President "was reconciliation between the races, and certainly in that respect South Africa has been enormously successful" (p. 457). Shillington (2005) refers to Mandela as a "charismatic statesman of world renown" (p. 439) and Giliomee (2012) as "a legend in his own time" (p. 415).

Brits (2012, p. 550) wrote in the following similarly glowing terms about Mandela: Mandela had proved himself to be "an extraordinarily capable negotiator in his dealings with De Klerk's government in the period after 1990" (p. 550). He possessed the ability to make every person whom he encountered to feel special, De Klerk remarked on occasion, according to Brits. Mandela became the symbol of reconciliation in South Africa and the embodiment of a rainbow (diverse) nation, as Archbishop Desmond Tutu referred to the new South Africa. Mandela succeeded in reaching out to white South Africans, much to their appreciation. He was sensitive about their cultural heritage and even reluctant to change Afrikaans place names. He even became an international sports icon after supporting the victorious Springbok team at the 1995 Rugby World Cup tournament.

Likewise, Giliomee and Mbenga (2007) have great appreciation for Mandela's contribution to the political settlement of 1994. They regard it as "decisive" (p. 400). He never accepted any preconditions set by the apartheid government, and was interested only in negotiating for a unified South Africa that would meet black aspirations for majority rule. The fact that the ANC leader, considered relatively reconciliatory by the government, said such things was of critical importance. In addition, it is difficult to imagine any other ANC official enjoying the authority that Mandela could exert in disciplining the ANC's following.

His moral authority and leadership were especially important after the assassination of Chris Hani in 1993. In this crisis, Mandela's assumption of the role of a national conciliator demonstrated his own and the ANC's political authority. Public support for a political settlement considerably increased among both – black and white people. Mandela tended to delegate decisions about the settlement, although he intervened personally in the bargaining to deny the National Party a minority vote in cabinet decision-making. Of the utmost importance during these negotiations was Mandela's willingness to confront the adversaries and to follow a tactic of brinkmanship in extracting concessions from them (in particular De Klerk's National Party) (Giliomee and Mbenga 2007, p. 403).

While De Klerk regarded himself an equal partner in creating a new South Africa, Mandela would not acknowledge the former president or his government as equals. Being a realist, Mandela was aware of the former government's coercive power and hence the necessity "to do business with it." This was a necessity that many influential ANC personalities were unable to accept. Mandela would not concede, though, that his adversary's actions were in any way morally worthy (Giliomee and Mbenga 2007).

Some historians are prepared to refer to weaknesses in Mandela's approach to the new political dispensation and to government. They allude to his (partial) responsibility for the survival within the ANC of the strong authoritarian disposition that the ANC members brought back with them from exile. Another possible

shortcoming in his approach was his unwillingness to cooperate with De Klerk in the framework of a government of national unity. He tended to marginalize De Klerk since the inception of the new dispensation, possibly as a consequence of his personal hostility towards the former President of South Africa (Giliomee and Mbenga 2007).

The historians consulted for this chapter seem to be initially positive about De Klerk's contribution to the transformation process, but their enthusiasm seems to cool down as they describe the final acts of his role in the process. According to Giliomee and Mbenga (2007), for instance, it counts in De Klerk's favor that he resisted using the might of the state in the negotiations. His simple but fundamental stance was that there could never be peace in South Africa unless there was a political system accepted by the majority. He did not come to this conviction as a result of a conversion in a moment of truth; he was just a practical and adaptable politician weighing alternatives in a shifting democratic and political balance. Pragmatic survival instincts prevailed over morality in his decision to abandon apartheid (for example, he abandoned the homelands policy only because it did not work in his opinion, not because he thought it to be morally unjustifiable). Mandela's anger was obvious for having to share the Nobel Peace Prize in 1993 with De Klerk whose actions he had always regarded as morally unworthy (Giliomee and Mbenga 2007). More than two decades later, during celebrations of De Klerk's 80th birthday in March 2016, ethicist-theologian Amie van Wyk (2016), on looking back to De Klerk's contribution to the political transition of 1994, concluded that he had been inspired by deep Christian moral considerations. Some of his colleagues such as ex-Ministers Pik Botha and Stoffel van der Merwe agreed that De Klerk had based his actions on the "power of his conviction that he was doing the correct thing" (Janse Van Rensburg 2016, p. 12).

It also counts in De Klerk's favor that he briefly appeared on the public stage again when he apologized at the Truth and Reconciliation Commission (that convened for the first time in 1996) for atrocities perpetrated before 1990 in the name of apartheid (Brits 2012).

In the end, De Klerk, referred to as "a model nationalist" by Giliomee and Mbenga (2007, p. 394), suffered a loss in stature, particularly after withdrawing his support from the Government of national unity in 1996. When he finally disappeared from active politics, the membership of the National Party dwindled to the point of dissolution by 1999. After leaving the cabinet in 1996, the newspaper *Die Burger*, under the heading *Oorgawe* (Surrender) asked whether the leader of a party that had fared so poorly in the negotiations with the ANC could continue in a leadership position (in the National Party). In his defense De Klerk pointed out that he had never promised a white minority veto. He weathered the storm, but his political role had come to an end. With the National Party support dropping steadily in the polls, he retired from politics in August 1997, thereby accelerating the party's decline (Giliomee and Mbenga 2007). In a sense, De Klerk suffered the same ignominious fate that Gorbachev suffered after dismantling the USSR in 1989: he just faded from the public stage, to appear only occasionally to make a brief and largely ignored statement relating to the conditions in the country after his departure from politics.

The above analysis of the portrayal of de Klerk and Mandela in history books and publications by political commentators yielded a relatively balanced picture of the two key figures in the political transformation in South Africa in the period from 1989 to 1994. The same cannot be said, however, of the portrayal of these two persons in the approved history textbooks used in schools in South Africa (see Van Eeden 2010, p. 113, for a list of approved history textbooks in 2010). Not only is the role of De Klerk remarkably downplayed, but also, according to researcher Adrian van Niekerk (as reported in John 2014), the "mega-myth" of Mandela as a "messiah" and savior of South Africa is actively being reinforced in school history textbooks through misrepresentations and silences on the icon's role in South Africa. These "misrepresentations allow Mandela to be credited with an exaggerated importance in the historical narrative and to bolster various idyllic representations of him." Not only are the history books relatively silent about the role played by De Klerk but also they are silent about "the flaws that made Mandela human."

Van Niekerk has identified a number of misrepresentations: Mandela is shown as having a policy of reconciliation while in fact, it had long been the policy of the ANC. Mandela was also criticized by the leader of the United Democratic Front Alan Boesak for unilaterally entering into negotiations with De Klerk and his government. He should first have consulted with his colleagues and allies, Boesak claimed. History textbooks also keep silent about his "poor response" to the Aids crisis (John 2014), and most of them do not mention the economic about-turn Mandela and the ANC had to make in 1991. Mandela had to announce at the International economics forum in Davos, Switzerland, that the ANC was not about to inaugurate its socialist policies but would embrace a mixed economy (Plaut and Holden 2012), much to the disappointment of the left-wingers in the ANC.

The post-1994 history textbooks silence the results of the white minority poll in the 1983 and 1993 referendums, which were in favor of a political reform in South Africa. They also ignore the political thoughts of opinion formers such as Max du Preez and Frederick van Zyl Slabbert, who made their voices heard in support of transformation. The current history textbooks for Grade 12 furthermore only mention the obstructive role of white right-wing parties that resisted transformation. This, according to Van Eeden (2010, p. 120–121), leads to a stereotypical and distorted historical presentation of the realities of the time. In addition, she adds, the textbooks are also silent about the black on black brutality and killings in the early 1990s as a key topic to study (students are given only an assignment to find out more about the situation at the time). Most textbooks, Van Eeden asserts, lack an argumentative, critical and explorative approach and style; this would probably have prevented certain distortions and imbalances in the neutrally covered topics. Other textbooks go somewhat too far in their attempts to be creative with their source material (Van Eeden refers to the abuse of a Zapiro cartoon of Dr. Mangosuthu Buthelezi of the Inkatha Freedom Party used in an assignment outlined in an Oxford University Press textbook).

Conclusion

In view of the above, it could be concluded that the ideal of making the history subject curriculum more digestible and all-inclusive (Van Eeden 2010, p. 110) has not been reached. What has been described in our paper does not attest to an all-inclusive approach to the history of South Africa since 1994. Although a portrayal of the Afrikaner part of the population's contributions to the history of the country might not be popular, it should have been included because of the key emphasis on establishing a non-racial approach to the historical content in a textbook. The voices of all stakeholders should be heard in the process, and not only those of role players with social power who "constructed the overall score" (Chisholm 2003, p. 4), such as the ANC and its leaders. The history textbooks should reflect the diversity of voices that contributed to South Africa's history, including those responsible for apartheid and those who were marginalized and subjugated.

Another problem regarding history writing and textbooks in South Africa that should be countered by appropriate measures is the tendency among publishers to satisfy, as they had done prior to 1994, the Ministry of Education by not stepping unnecessarily on political toes. Van Eeden (2010) has noticed a tendency among publishers to ensure that textbook activities reflect the political majority of the day, regardless of whether they effectively present the curriculum that purports to represent multiple voices. There is a need to balance "my" history with "our" history, she insists. The purpose of studying history in a divided community is to promote national cohesion through presenting a variety of sources and voices, to engage the "strange multiplicity" of incommensurable cultures. Social consensus must be reached to ensure approval and adoption of history textbooks which destroy myths that glorify one group and demonize others (Van Eeden 2010).

The discussion in this chapter has proven the two basic precepts of transitiology to be correct: transformations are indeed highly complex phenomena, and certain key actors play decisive roles in the events that transpire during transitions such as that which occurred in South Africa in the period of 1992–1994. While South African history books and publications by political commentators give recognition to key actors (leaders and their constituencies) on both sides, school textbooks tend to be rather one-sided: they heap up praise for one side and neglect the role of the other. Giving room for a variety of interpretation in terms of presenting a multitude of perspectives does not only do justice to complex events in history, as are all transitiologies, but also serve the promotion of education goals such as independent, critical thinking. This is something the current history school textbooks in South Africa sorely lack.

Notes

1. Transitiology refers to the study of change in societies affected by intense socio-political restructuring during a short time period. A more detailed discussion of the term follows later in the chapter.
2. Reference will be made throughout the next section to the books that were analysed either by ourselves or by other historians.

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Chapter 12
National Heroes and National Identity Education: A Comparison of Mainland China and Hong Kong's Textbooks

Wangbei Ye

National Heroes and National Identity Education: Introduction

A nation is defined as a group of people tied to the political objective of self-governance (Weber 1958). Correspondingly, national identity is "the relationship between nation and state that obtains when the people of that nation identify with the state" (Dittmer and Kim 1993). Studies have determined certain fundamental features of national identity: possessing an historic territory or homeland, the existence of common myths and historical memories, a common mass public culture, common legal rights and duties for all members, and a common economy in which members may exercise territorial mobility (Smith 1991). Once national identity is established, five subsequent types of national attitudes can exist: national liking, national pride, national preference, national superiority, and nationalism (Dekker et al. 2003, p. 347).

School is viewed as an important site for national identity education and for the transmission of "a core body [of] material that all children should be expected to assimilate" (Miller 1997, p. 112). In particular, a uniform national language in the education system is viewed as a crucial mechanism for nation state survival (Gellner 1983). However, many countries wrestle with tensions between local autonomy and national cohesion (Koh 2010), with some scholars claiming that promoting a common system may dilute cultural/religious identity (Said 1995), and others that the lack of a common national identity may disunite a nation (Schlesinger 1991). School curricula, as a result, often reflect struggles over representing national identities (Pinar 1993).

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Hong Kong is no exception. A British colony until being handed over to the PRC in 1997, Hong Kong has since struggled to integrate into the PRC under the "one country and two systems" policy. This provides an interesting opportunity to examine two aspects of the tension between local autonomy and national cohesion: which national identity education goals can be pursued when locals enjoy different legal rights than their counterparts in Mainland China, as well as how local education agents (from different traditions and with different understandings of national identity education) can select contents and pedagogy to address these goals.

Although there has been an increased attention to Hong Kong's national identity education since the handover, there are still only a few studies comparing national identity education in Mainland China to that of national identity education in Hong Kong. This chapter analyzes the representation of national heroes in two sets of primary school textbooks (Grades 1–6) in order to identify the Hong Kong textbooks' approach to handling the tension between local autonomy and national cohesion. The first is *Longman General Studies* (2nd edition, Pearson Press, 2008), which is one of six general studies textbooks (Chinese) recommended by Hong Kong's education bureau for Hong Kong students. The second is *Character and Life, Character and Society* (3rd edition, People's Education Press, 2012), the most widely used character education textbook for Mainland Chinese students. Both subjects are compulsory, and both focus on citizenship education and national identity education.

This chapter first reviews the extensive literature on national identity education in China and Hong Kong. Next, it outlines this study's analysis framework and research design. Third, it presents differences in how the textbooks of Hong Kong and Mainland China depict national heroes and pursue national identity education. Lastly, it offers a discussion and a conclusion to the research.

Three Models of National Identity Education in Mainland China and Hong Kong

This section outlines a theoretical framework, by reviewing extant literature on national identity education in ancient China, communist China, and Hong Kong. Three distinct national identity education models were identified: culture-oriented (emphasizing culture and markers of descent); communist (highlighting the communist party's role in ending China's "humiliating" past and constructing a "glorious" modern nation); and local-centered (ranging from de-politicized curricula without national identity education, to curricula focused on cognitive subject knowledge, but including national identity education).

The Culture-Oriented Model: Ancient China's National Identity Education (Before 1949)

As dynastic China did not have the concepts of a "nation" or a "citizen," there are doubts about how, or indeed if, the ancient Chinese perceived their national identity. Some scholars have argued that dynastic China was an empire unified by its culture and civilization (Wang 2012), and was in no way a nation state until the twentieth century. Others have pointed out the differences in Western and Eastern understandings of a "nation" and national identity – the West emphasizes citizenship, territory and equality, while the East stresses culture, religion, and markers of descent (Darr 2011). China's understanding of a nation differs from that of other countries, in that it "has not been forged out of the dynamic of competitive politics, but rather, it has been based on the ideals associated with an imposed moral order." As Pye put it, China is "a civilization pretending to be a nation-state" (1996, p. 109).

Despite an ongoing debate about the nature of pre-modern China's political community, it is widely agreed that culture plays an important role in Chinese understandings of nation and national identity. In ancient China, many of the terms used to reflect such understandings were closely related to culture. For example, *hua xia* was used to refer to people who adopted the *hua xia* culture and who lived in *zhong guo*, which can refer to either to imperial China's culturally-rich geographic core, or to China as a political entity. In other words, the terms reference culture and place (Yao 2010). The Zhou dynasty (1100 BC – 256 BC) further developed the *hua xia* culture and shaped the *tian xia guo jia* system, which drew on Confucianism to define the moral/ethical relationships between an emperor and the people, husband and wife, and parent and child, particularly the role each was expected to play to ensure social harmony. The system viewed the whole of China as one big family (Han 2010); the emperor was deemed to rule by divine authority, and was expected to take good care of his people, lest heaven take his power away (Wang 2011). He was therefore not only the country's ruler, but also its ultimate father figure. This system of paternalism (Fairbrother 2014) created conditions that would directly benefit the people and enable them to maintain their livelihoods (Perry 2008), both of which were seen as elements of good governance in China. Thus, people's understanding of a nation in imperial China was closely related to the Chinese civilization, which was mainly based on Confucian ethical values (Wang 2012).

National identity education in ancient China was based on these understandings and was conducted both in schools and within families. Schools introduced students to great ancestral achievements and China's beautiful scenery. This cultivated their loyalty to the emperor through the teaching of classical Confucian texts, history, essays and poems. Families, on the other hand, cultivated national feelings less directly, by promoting filial piety. These components of paternalism were a fundamental feature of education in all imperial Chinese regimes (Fairbrother 2014).

Communist Model: Mainland China's National Identity Education (Since 1949)

In 1949, the introduction of communism after the May Fourth Movement eventually led to the founding of the People's Republic of China (PRC), and a new age of modern national identity construction in China.

Understanding China's sense of national humiliation at the hands of the West is key to understanding how national identity was conceptualized in communist China. It was widely believed in China that the unequal treaties imposed on it by Western powers and Japan, and the resulting semi-colonial status it endured from the mid-nineteenth to the mid-twentieth century constituted a "century of national humiliation." The Chinese Communist Party (CCP) offered a systematic and comprehensive critique of Western capitalism and, in particular, imperialism (Lee 2003). By exposing the country's feudal past and its exploitation by Western imperialists, the CCP showed that China could follow a different path to national independence. In the past, Chinese people were subjects, and now the CCP proclaimed them to be *zhu ren weng* (owners of the nation), who were emancipated from the social injustices of traditional feudalism and Western capitalism by the CCP's core and irreplaceable leadership in China's modern nation-building. Fairbrother (2014)) commented that, as was the case with previous Chinese regimes, the CCP's claims to legitimacy were based on paternalism and its associated qualities. Glory is another important theme in communist China's national identity. According to Marxist theory, it is a "law of history" that capitalism will be replaced by socialism, which will eventually lead to a communist paradise, and communist China long depicted itself as a progressive force driving this inevitable change (Lee 2003). However, in the post-Mao era, particularly after the 1989 Tiananmen protest, long-held official ideologies and their related understandings of nation became less attractive, and the CCP turned away from them to embrace nationalism (White and Li 1993), so as to maintain social stability. CCP-led nationalism works as a legitimating device by presenting the CCP as an integral part of China's national identity, thus enabling the Party to use non-Communist ideology to assert the legitimacy of its post-Tiananmen leadership; belonging to China naturally means accepting and embracing the leadership of the CCP (Fairbrother 2003).

In the early years of the PRC, national identity education was carried out at the societal and individual levels, by criticizing China's prior feudalism and imperialist exploitation. Peasants were taught that their lands and properties had been given to them by the CCP, which thus shaped their national identity (Guo and Sun 2005). At the same time, national identity education encouraged all Chinese people to behave as the owners of their nation, and exhorted them to devote themselves fully to the construction of a prosperous and independent socialist nation. Patriotism was cultivated as an important virtue. In the following years, Mainland China also made use of important social and political events to carry out national identity education, by telling stories that were both "humiliating" and "glorious." For example, during China's participation in the Korean War, the government organized mass political

event workshops, forums and exhibitions to expose and denounce American imperialism.

In the 1980s, due to the disintegration of the Soviet Union, the subsequent political changes in Eastern Europe, and grassroots political upheavals in China, national identity education became a core task of the CCP and the Chinese government (Zhong and Lee 2008), and policies were introduced to enhance national identity education in formal education curricula. In 1994, the influential *Patriotism Education Implementation Principles* (Chinese Communist Party 1994) mandated cultivating patriotism by embedding patriotic education in such core school subjects as moral-political education, Chinese language, geography and history, thus making it a hidden but integral part of school culture. Chinese society as a whole was urged to support patriotic education by providing students with extracurricular patriotic education places, films, books, and songs. While political, party-related, and Marxism-related themes and slogans have since become less common, national identity education is nonetheless criticized for being moral education rather than citizenship education, and for over-emphasizing knowledge-based teaching and underscoring the affective dimension of education.

Local-Centered Model: Hong Kong's National Identity Education

Before 1949, migration from China to Hong Kong was unregulated, resulting in ethnic Chinese making up the majority of Hong Kong's population. This freedom of movement, together with geographical proximity to China and a common ethnic composition, allowed the people of Hong Kong to maintain their Chinese culture and nationalism, and encouraged them to protest British rule (Tse 2014; Acon-Chan 2008).

After 1949, however, the people of Hong Kong's national identity became more complex. First, the PRC abruptly closed its borders to Hong Kong, causing new generations to grow up with weaker nationalistic feelings toward Mainland China (Chan 2013). Second, although it was not the colonial government's intention to eliminate Hong Kong's residents of Chinese identity, it nonetheless created a culture of political apathy in which national identity was ignored and local identity was promoted (Tse 2014). Third, its rapid and profound economic development, particularly compared to that of Mainland China, positioned Hong Kong as an Asian economic "miracle" and developed a distinct *heong gong yen* (Hongkongese) identity (Chan 2013), characterized by "cultural identities resembling the culture of [the residents'] local communities rather than that of China" (Chu 2003). The observed effects (on Mainland China) of such socio-political movements as the Cultural Revolution heightened this sense of separateness, and combined with the aforementioned factors to challenge the Hong Kong citizens' ability and willingness to share a common national identity with the PRC.

Under British rule, Hong Kong's education system adopted a de-politicized, de-contextualized and abstract academic curriculum (Luk 1991) that created a culture of political apathy and omitted discussion of national identity. As a direct result, students were taught little about contemporary China (Liz 2014). In 1984, China and the UK signed the Sino-British Joint Declaration, and the process of national identity transition began. In 1985, the Hong Kong government published its *Civic Education Guidelines*, which, for the first time, emphasized loyalty to Mainland China (Liz 2014). This was later supported by the gradual addition to school curricula of courses on China's culture, ancient poetry, history, and geography. In 1995, additional civic education guidelines underlined critical thinking, democracy, and an understanding of Chinese government ideologies (Liz 2014); however, these guidelines focused on teaching cognitive subject knowledge alone, rather than on cultivating students' national esteem, pride, sense of belonging and responsibility (Xinhua News 2012).

Since 1997, when Hong Kong officially started its journey toward integration into Mainland China under the "one country, two systems" policy, the Hong Kong Special Administrative Region (HKSAR) government has promoted national identity education to boost nationalism and patriotism (Tse 2014) by adding national identity education subjects/contents to school curricula. In 2001, the general curriculum reform document, *Learning to learn*, asked all schools to enhance Chinese history and culture education, and specified national identity education and Chinese culture as one of six "common sense education" elements for primary schools (CDC 2001). In 2004, "General Studies" was adopted as a core course by all Hong Kong primary schools and one of six study areas focused on national identity and Chinese culture. In addition, greater use was made of national symbols and exchange tours organized to encourage students to "re-imagine" their relationship with the mainland (Education and Manpower Bureau 2004).

The promotion of national identity education made the differences between the pro-Beijing and pro-democracy camps more visible, leading to heated public debates and increased resistance in Hong Kong (Chou 2012). An emphasis on two aspects of the tension between local autonomy and national cohesion increased: what national identity education goals can be pursued in situations where local people enjoy different legal rights than their counterparts in other areas of the nation, and how can local education agents select content and pedagogy to address these goals.

Research Design

The purpose of this study was to examine similarities and differences between ways of depicting national heroes in representative Mainland China and Hong Kong textbooks. The analyses of the two textbooks were guided by a three-step analytical process, based on existing literature on textbook analysis. The analytical process began by identifying the national identity education goals addressed by each

Table 12.1 The seven national heroes in Mainland China's and Hong Kong's textbooks

National hero	Character and life, character and society (Mainland China)	Longman general studies (Hong Kong)
Confucius	Grade 5(I)	Grade 2 (C) Knowing the Motherland
	Unit 3 (1) Extremely Sage Departed Teacher: Confucius	Unit 2 (3.3) The great educator: Confucius
Cai Lun & Bi Sheng	Grade 5(I)	Grade 6 (D) Take a broad view of the globe
	Unit 2 (4.2) The evolution of books	Unit 2 (5.2) Paper-making and printing technologies
Lin Zexu	Grade 6 (I)	Grade 5 (C) Kaleidoscope: China
	Unit 2 (2.1) Lin Zexu and the destruction of opium at Human	Unit 2 (6.1) The Opium War
Sun Yat-sen	Grade 6 (I)	Grade 5 (C) Kaleidoscope: China
	Unit 3(3.2) Sun Yat-sen and the 1911 Revolution	Unit 2 (6.3) The revolution in the late Qing period and the founding of the Republic of China
Mao Zedong	Grade 6 (I)	Grade 5 (C) Kaleidoscope: China
	Unit 3 (3.7) The first five-starred red flag on Tiananmen Square	Unit 2 (6.5) The foundation of the People's Republic of China
Yang Liwei	Grade 6 (I)	Grade 1 (D) Tradition and civilization
	Unit 2 (1.3) China's No. 1	Unit 1(1.6) The amazing Chinese

national hero in the textbooks. Next, related curriculum materials were subjected to content analysis, to determine the nature of their themes, topics, and functions. The author examined each textbook series and created individual observation notes, in accordance with the analytical aspects (e.g. content presentation). Each lesson was read several times. Finally, the pedagogies exploited in these materials were analyzed to identify prominent types of activities and how they reflected national identity education goals.

Seven national heroes were selected from each set of textbooks for comparison: Confucius (551–429 BCE); Cai Lun (circa 61–121); Bi Sheng (circa 970–1051); Lin Zexu (1785–1850); Sun Yat-sen (1866–1925); Mao Zedong (1893–1976); and Yang Liwei (1965–). The selection was based on the following considerations: first, both textbooks provided at least a half-page of information on each hero; second, three were ancient Chinese heroes in the areas of education and science, three were important figures in China's modernization process, and the last is a contemporary Chinese hero, allowing the comparison of Mainland China's and Hong Kong's depictions of national heroes in three different periods. The national heroes presented in the textbooks and the aligned learning goals in the curriculum guidelines (of both Mainland China and Hong Kong) were reviewed (see Table 12.1).

Findings

Learning Goals

The results suggest that when selecting national identity goals to organize the presentation of national heroes, Mainland Chinese textbooks adopted a combined culture-oriented and communist national identity education model, whereas Hong Kong textbooks adopted a local-centered national identity education model.

In terms of learning goal selection, Mainland Chinese textbooks presented national heroes in ancient China by addressing great ancestral achievements. The depictions of Confucius, Cai Lun, and Bi Sheng were intended to help students "to learn that China is a civilized ancient country with thousands of years of history, to master necessary history knowledge, to be familiar with the Chinese nation's cultural contributions to the world, [and] to cherish China's cultural heritage". The other four national heroes were presented by highlighting the CCP's role in ending China's humiliating past and constructing a glorious modern nation. The depictions of Lin Zexu and Sun Yat-sen in Mainland Chinese textbooks were intended to reflect the curriculum goal of helping students "to learn that China experienced aggression by foreign powers, that Chinese people struggled to resist, to respect national heroes, to develop patriotic feelings, and to be determined to work hard for the prosperity of the nation". Mao Zedong and Yang Liwei, in Mainland Chinese textbooks, were depicted in a manner that reflects the learning goal of helping students "to know the foundation of the People's Republic of China, to know the achievements China made after 1949 and the [1978] economic reform, [and] to enhance students' love of the socialist nation and the Chinese Communist Party" (Ministry of Education 2011, p. 15).

In contrast, although Hong Kong's textbooks included the same seven national heroes from different periods of China's history, the base of its national identity education goals were less political and less ideological. This partly reflected Hong Kong's local-centered national identity education model, and partly its education system, which has traditionally been de-politicized to foster political apathy (e.g., Luk 1991). Confucius, Cai Lun, Bi Sheng, Lin Zexu, Sun Yat-sen, and Mao Zedong, in Hong Kong textbooks, were depicted in order to reflect the General Studies curriculum guide goal of helping students "to know some historical people [and] events [that are very influential today]". Yang Liwei's depiction in Hong Kong textbooks reflected the goal of celebrating the "nation's recent development (e.g. economy, science)" (Curriculum Development Council 2011, p. 34). Hong Kong's goals were more neutral than Mainland China's, and neither emphasized great ancestral achievements nor highlighted the CCP's role in ending China's national humiliation and inspiring the Chinese people to achieve great things.

Table 12.2 Total number of words and images: the seven national heroes in Mainland China and Hong Kong's textbooks

Heroes		Character and life, character and society (Mainland China)	Longman general studies (Hong Kong)
Confucius	Words	437	211
	Images	7	5
Cai Lun & Bi Sheng	Words	458	194
	Images	10	5
Lin Zexu	Words	711	181
	Images	8	4
Sun Yat-sen	Words	362	229
	Images	1	5
Mao Zedong	Words	708	114
	Images	17	1
Yang Liwei	Words	129	85
	Images	1	1

Content and Pedagogy

In terms of content and pedagogy, the Mainland Chinese textbooks examined in this study addressed that country's culture-oriented, communist national identity learning goals by presenting national heroes using relatively longer descriptive paragraphs and more pictures (see Table 12.2) than did the Hong Kong textbooks. Table 12.2 counted the total number of words (text) and pictures (images) of lessons listed in Table 12.1. As noted in many previous studies, Chinese textbooks tend to focus on knowledge transmission (Kang 2014; Li 2007; Zheng 2006; Leung 1995). Most of the Mainland Chinese lessons relating to the seven selected national heroes were intended to impart additional knowledge to students. Hong Kong textbooks, in contrast, following the SAR's neutral national identity education learning goals, presented national heroes very briefly and with concise teaching content focused on cognitive subject knowledge teaching, rather than on contemporary China or on cultivating students' national esteem, pride, sense of belonging and responsibility, which echo the findings of other studies (e.g. Cheung, 2005). Moreover, the Hong Kong textbooks raised a series of questions for students to ask when reflecting on national heroes.

Ancient National Heroes: Confucius, Cai Lun and Bi Sheng

Mainland Chinese textbooks dealt with Confucius through a culture-oriented model, not only exposing students to his deep and lasting influence on China's ideology and culture, great contributions to education, and famous writings (particularly the *Analects*), but also to the Chinese people's worship of Confucius. Confucius was

introduced in four steps. A portrait and a paragraph told of his deep influence on China's ideology and culture. Another paragraph and picture (of Confucius giving a lecture) depicted Confucius' great contribution to education. A paragraph and a picture (showing a page of the *Analects*) showcased Confucius' famous writings; two sentences from the *Analects* were presented, followed by a drawing of two primary school students, one of whom commented that "Confucius not only taught his students but also us," to which the other replied, "What we promote today… was promoted by Confucius thousands of years ago." (Character and Society, grade 5 (I), 2012, p. 63). Finally, a picture of *Da cheng* Temple (dedicated to the worship of Confucius) was presented, followed by a paragraph about the temple and Confucius' hometown.

Hong Kong textbooks mainly addressed Confucius' contribution to education through a series of questions and drawings. First, a general question was raised ("Is Confucius a good teacher deserving respect? Why?"), followed by sub-questions and by pictures in which the students could find answers. The first sub-question ("What kind of learning attitude did Confucius have") was followed by a picture showing Confucius saying, "I am not born to know everything. I just like to read and explore." The second sub-question asked, "How did Confucius select his students?" and was followed by a drawing of Confucius teaching an old man, a rich man, and a poor man and saying, "Everyone can be my student." The third sub-question ("How did Confucius teach his students according to their personalities?") was followed by two pictures in which Confucius' students Zi Lu (who was hasty and unthinking) and Rang You (who was always hesitant) each asked Confucius, If you want to do something, is it OK to do it right away? Confucius gave them different answers, suggesting that Zi Lu seek out his father's opinion first, while telling Rang You to act right away.

Both Mainland China and Hong Kong textbooks introduced the two ancient scientists Cai Lun and Bi Sheng together, and highlighted their contributions.

Mainland Chinese textbooks presented Cai Lun through a paragraph and pictures describing the nature of books in ancient China (books made of bones, bronze, bamboo, etc.). A paragraph followed on Cai Lun and his papermaking technology, along with a sculpture of Cai Lun and a drawing showing the papermaking process. Then Bi Sheng was introduced, first, in a series of three pictures showing ancient Chinese printing techniques, followed by a sculpture and a paragraph depicting Bi Sheng and movable-type printing. Considering both characters moral role models, textbooks from Mainland China asked students, at the end of the lesson, what can we learn from Cai Lun and Bi Sheng's stories?

Hong Kong textbooks, on the other hand, mainly focused on cognitive knowledge teaching, and introduced Cai Lun and Bi Sheng by briefly describing their contributions, and by asking how those innovations had impacted Chinese culture. Three sub-questions followed, focusing on the limitations to writing materials before the Dong (Eastern) Han period and specific aspects of movable-type printing, along with pictures depicting ancient bamboo and silk books, the process and product of Cai Lun's papermaking, and a movable-type printing press to help students answer those questions.

National Heroes in the Late Qing Period: Lin Zexu and Sun Yat-sen

Lin Zexu and Sun Yat-sen were two important, but politically sensitive national heroes. The former's opposition to the opium trade was a catalyst of the Opium War, but had led to Hong Kong becoming a British colony, while the latter played an important role in ending the Qing dynasty, but was the first president of the Republic of China.

Mainland Chinese textbooks adopted a communist model when addressing these heroes. Lin Zexu was introduced in three steps that mainly focused on the influence of opium and praised Lin's bravery in fighting the Western powers. First, three paragraphs provided the background to the opium war, including the benefits the United Kingdom gained from the opium trade and its negative effects on China. The following four paragraphs introduced Lin as an officer with integrity who wished to eliminate opium, and noted how Lin would destroy the stocks of opium businessmen who refused to hand over their opium. A sculpture of Lin was then shown, followed by a picture of him talking with a foreign businessman. Another picture showed opium being destroyed, with one character saying, If we don't destroy opium, we Chinese will have no future, to which another person replied, [Lin, help] us Chinese vent our spleen! In the final picture, a primary schoolboy asks students to see films about Lin Zexu and to share their feelings afterward.

Hong Kong textbooks introduced Lin Zexu more briefly, and focused mainly on cognitive knowledge. First, students were asked, "What influence did opium have on Chinese society?" A photo of a Chinese person smoking opium was presented, followed by a picture of a Qing officer destroying opium in 1839; students were asked to identify that officer. A second picture showed a battle being fought in 1840; students were asked to find out what war it was. A third photo depicted some Chinese and foreigners at a table, signing something; students were asked to find out what was being signed.

Mainland Chinese textbooks also introduced SunYat-sen using a communist model highlighting Sun's efforts and willingness to end the feudal power of the Qing dynasty. The first three paragraphs referred, respectively, to Sun as a savior of the nation, as the organizer of many revolutionary groups that ended the Qing dynasty in 1911, and as the Republic of China's first president. Next, Sun's life and his interests in revolution were introduced in another paragraph and photo. However, the contributions of the Kuo Ming Tang political party and its members to ending the Qing dynasty were omitted.

Hong Kong textbooks addressed Sun by asking questions and providing photos to aid students in finding answers. First, Sun was introduced in a single sentence about his devotion to ending the Qing dynasty. Second, students were asked to "look at the historical photos, [and] to think about how difficult the revolution was." Four photos followed, showing Sun founding the Tongmenghui in 1905, scores dying during the 1911 Huanghuagang Revolution in Guangzhou, the Xin Hai revolution in 1911, and, the 1912 founding of the Republic of China. Third, Sun's last words

(The revolution has not yet succeeded, so our comrades must continue to work hard) and a sculpture of Sun were shown, and students asked to think about his influence.

National Heroes in the PRC: Mao Zedong and Yang Liwei

Mainland Chinese textbooks dealt with Mao Zedong using a communist model, noting that he ended China's hundreds years of humiliation, and that people in and out of China were happy as a result.

First, a paragraph discussed the foundation of the PRC, highlighting Mao's declaration that Chinese people have stood up. An oil painting of the PRC founding ceremony, a photo of the first five-starred red flag being raised by Mao Zedong, the words of the song *If there is no CCP, there is no new China*, and a photo of a parade in Tiananmen during the founding ceremony were presented, followed by a picture of a primary schoolboy asking, "When Chinese people heard [at the ceremony] what Mao Zedong said, what did they feel?"

Next, a paragraph recounted how happy people were about the PRC, including Chinese living abroad, because they, too, had experienced endless difficulties due to Western attitudes, just as China had before 1949. The textbook described how some nations congratulated the PRC on its founding, depicting it as a great victory for peace-loving people and proof that the Chinese people had gained their freedom; two historical photos followed, showing people cerebrating the PRC's creation at Tiananmen in Beijing, and in Shanghai. Finally, a primary schoolboy was pictured asking that students "rethink China's hundred years of humiliation, [and] talk about the foundation of new China's great meaning" in the end.

As with other heroes, Hong Kong textbooks' approach focused solely on the teaching of cognitive knowledge. First, a short sentence noted that, in 1949, CCP won China's civil war and founded the PRC, while the Kuo Ming Tan lost and went to Taiwan. Then, a historical photo of the PRC's founding ceremony was presented, and students asked to fill in details, such as the PRC's foundation date and its first chairman and premier.

Mainland Chinese textbooks also dealt with Yang Liwei using the communist model, first locating him as a PRC achievement in a short paragraph on New China's post-1949 achievements, and then presenting a photo of Yang working in space, followed by a paragraph on China's first manned space flight.

Hong Kong textbooks, in several steps, placed Yang Liwei in a wider context: the lesson was located within the "I'm Chinese" unit wherein students were asked to interview family members about China's achievements, and then share their findings with classmates. Yang was depicted in astronaut garb and introduced (in a single sentence) as China's first astronaut, and students were asked if (and why) they loved their Chinese status.

Discussion

While many studies have expressed concerns that promoting a common national identity curriculum may result in the dilution of local identity, this does not seem to be the case in this study. The above comparison suggests that, in terms of learning goal selection, textbooks from Mainland China adopted a combination of culture-oriented and communist national identity education model. Hong Kong national identity education textbooks, however, were local-centered, and authors clearly struggled to achieve a neutral (less political, less ideological) presentation of national heroes, emphasizing neither great ancestral achievements nor the CCP's role in ending China's national humiliation or inspiring great achievement. In terms of the content and pedagogy selection, Hong Kong textbooks presented the national heroes in a very brief manner, and focused on cognitive knowledge. They raised questions that urged further student inquiry, but were less indoctrinating and afforded students more independence and room for thinking, rather than just asking that they commit themselves to the nation, like their mainland counterparts.

This pattern differs from the ancient Chinese national identity education model, which mainly focused on ancestral achievements, China's beautiful scenery, and on promoting loyalty to the emperor. This model's unsuitability to the Hong Kong context led to the local-centered national identity education pattern found in this study. As shown above, the Hong Kong textbooks only briefly presented the national heroes, leading the scholars from Mainland China to characterize them as too concise, and unable to vividly present history, which is therefore possibly unattractive to students (Wang 2000). This differed from Mainland China's national identity education model, which depicted the CCP as having ended China's century of national humiliation, and as having been the leading force behind China's glorious modernization. Hong Kong's local-centered national identity education pattern, however, highlighted neither China's past humiliations nor its more recent achievements, and instead emphasized subject cognitive knowledge. The lesson of Lin Zexu in Hong Kong textbooks, for instance, avoided mentioning China's humiliating (semi-colonial) experience as a result of the Opium War, and instead mainly focused on helping students to master related facts.

Hong Kong's local-centered national identity education pattern offers a better framework for the analysis and explanation of the efforts of the authors of the textbooks in order to balance the tensions between local autonomy and national cohesion, given the contextual reality that Hong Kong people experience different national identity formation and enjoy different legal rights than their counterparts in Mainland China.

First, the Hong Kong textbooks selected less political or less ideological goals when presenting national heroes to construct national identity, so as to balance the tension between local autonomy and national cohesion, while still reflecting Hong Kong's status as an SAR and the important roles such themes play in national identity formation. According to Smith (1991), the fundamental features of national identity include an historical homeland, common historical memories, a common

mass public culture, common legal rights and duties, and a common economy (Smith 1991). Under the "one country, two systems" policy, the people of Hong Kong live in a different social and economic system than that of their counterparts in Mainland China, despite the fact that both share a common Chinese culture, including customs, beliefs, ways of life, historical memories and narratives of homeland (Levenson 1964). This approach can be viewed as a means of advocating Chinese identity, while avoiding ideological conflicts within Hong Kong society. As Yuen and Byram (2007) suggested, promoting national identity education in Hong Kong is controversial, because it leads to value conflicts between those who cherish Western democracy and wish the government to build on those principles, and those who are more overtly pro-Beijing (Byram, 2007).

Second, in terms of content and pedagogy selection, unlike Mainland Chinese textbooks, which used relatively longer and more descriptive paragraphs and more pictures to present official ideology when teaching about national heroes, Hong Kong textbooks addressed national heroes using very brief introductory paragraphs (or sentences), and by encouraging students to make further inquiries on their own, rather than just commit themselves to the nation, like their counterparts from Mainland China.

This can be partly explained by differences in how China and Hong Kong regulate the creation and distribution of textbooks. In ancient China, textbooks were tightly controlled by the central government and used to indoctrinate learners and perpetuate official ideology. Many textbooks, including the *Four Books* and the *Five Classics* utilized in ancient Chinese schools, were chosen by the emperor (Li 2007), and students were required to memorize their contents to perform well on the imperial examination.

Mainland China has largely followed this tradition. It adopted a centralized textbook creation system that ensured textbooks would reflect Communist ideology, and established, in 1951, the People's Education Press to create textbooks, nationwide, under the direct supervision of the Ministry of Education (Li 2014). Although Mainland China has recently enacted reforms to decentralize curriculum power (e.g., allowing other publishers to prepare and issue textbooks), it has maintained very strict textbook censorship, and only government-approved textbooks are allowed to be published (Li 2014). Wong, Wan, and Cheng (2014), in their comparison of science education textbooks in Mainland China and Hong Kong, suggested that even science education textbooks in Mainland China reflected communist ideology (Wong, Wan & Cheng, 2014). Li (2007), reviewing moral-political textbooks published between 1988 and 2002, conveyed that ideological control was more obvious in national identity education textbooks, and reported that Mainland Chinese political education textbooks were adopting content presentation strategies that enhanced ideological control (Li 2007). In this study, Mainland Chinese textbooks were found not only to have more words and pictures, but also to use a great many more adjectives to directly transmit ideologies to students. In the lesson on Confucius, for example, 52 of the 431 words included in Mainland Chinese textbooks were adjectives, roughly double the frequency found in the Hong Kong textbooks, which had only 13 adjectives among their 211 words on Confucius. Although

the inclusion of more pictures in Mainland Chinese textbooks is a strategy reflecting that country's recent curriculum reform (Shi and Ge 2011), such pictures were mainly used to amplify statements made in the preceding paragraphs.

Moreover, the Mainland Chinese textbooks suggested very few interactive activities. In the seven lessons, only the pictures of a primary schoolboy/girl raised questions for students to ask, and even those questions were often directly answered by another picture(s); in short, Mainland Chinese students were not given much room for independent thinking.

In contrast, the Hong Kong government has adopted a textbook creation system that follows free market principles and affords it less influence over ideology in textbooks. The Hong Kong government is not directly involved in the creation of any textbooks. Rather, it leaves that to the publishers, and treats textbook publication as any other economic activity (Fok, Ip, and Wong 2010). Hong Kong's education bureau mainly monitors the quality of textbook content and reviews textbooks submitted by publishers, with textbooks of an acceptable quality being included in the bureau's recommended textbook list (Li et al. 2012). According to Lam (2008), Hong Kong's textbook creation system better suits Hong Kong society's promotion of freedom.

Conclusion

This chapter has analyzed the presentations of national heroes in two sets of primary school textbooks from Mainland China and Hong Kong. The comparisons reveal that, despite concerns that promoting a common national identity curriculum may dilute local identity, Hong Kong textbook authors have struggled to ensure local identities are represented in textbooks. In order to preserve local identity, the Hong Kong authors created textbooks using a local-centered national identity education pattern, which differs from both the traditional Chinese national identity education model and communist China's national identity education model in its over-emphasis of local identity. In terms of learning goal selection, Hong Kong national identity education textbook authors struggled to achieve a neutral (less political, less ideological) presentation of national heroes. In terms of the content and pedagogy selection, Hong Kong textbooks presented the national heroes in a very brief manner, and focused on cognitive knowledge.

This chapter argues that the local-centered national identity education pattern offers a better framework for the analysis and explanation of Hong Kong authors' efforts to balance the tensions between local autonomy and national cohesion. First, it uses less-political or -ideological themes to construct national identity and balance the tension between local autonomy and national cohesion. Second, the Hong Kong government has adopted a textbook creation system that follows free market principles and affords it less influence over ideology in textbooks. However, this study is limited in that it has focused on only two sets of textbooks; as such, this chapter makes no attempt to generalize its conclusions to other contexts.

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Chapter 13
The Master Narrative Indoctrinating Patriotism: National Heroes in Pakistani School Textbooks

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The Master Narrative Indoctrinating Patriotism: National Heroes in Pakistani School Textbooks: Introduction

Pakistani curriculum is based on celebration of history. In Pakistan, history is taught in all subjects, be it, languages (English or Urdu), social studies, Islamic studies, Pakistani studies, or even mathematics, physics, and chemistry (Government of Pakistan 2007, 2009). Islamic history is the major emphasis with texts on Prophet Muhammad and his companions, conquest of Sindh by Muhammad-bin-Qasim (celebrating how Islam came to subcontinent) and the contribution of Muslim researchers in the development of modern sciences. At the same time the focus on patriotism is evident when discussing recent history, propagating negative feelings about India (Nayyar 1997; Jalal 2002; Hoodbhoy 1998; Saigol 2003). The task of rewriting history and changing the curriculum began in 1981 during the dictatorship of General Zia-ul-Haq (Hoodbhoy and Nayyar 1985).

The country currently has four different textbook boards, one per province. This study is based on higher secondary school books approved by the Sindh Textbook Board. The books of history usually discuss past events while those of languages (English and Urdu) are composed of the lives and achievements of Pakistani national heroes. I have investigated the representation of national heroes in the syllabus of English and Urdu languages for secondary and higher secondary level.

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My Trajectory: From Theory to Practice

This is a research on the ideological agenda in the texts on the lives of selected national heroes in books for older teenagers in Pakistan. The research discusses various elements, for example, authors' objectivity, language, use of visuals, themes, and ideas in order to understand the ideological agenda. In this study I address the following questions:

1. How national heroes of Pakistan are textually and visually represented in language textbooks?
2. What are the intended ideological agendas that the texts are presenting and promoting about national heroes of Pakistan?

Textbook evaluation is a process of making a judgment on the quality and suitability of material in the book (Hatoss 2004). Hutchinson and Waters (1987) explain evaluation as "judging the fitness of something for a particular purpose" (p. 96). For this study, I have selected seven different scripts, in both Urdu and English, taught in Years 8 to 12 in state schools of the southern province of Sindh, Pakistan.

I adopt textual analysis as my method, which is commonly used for research on the contents of literature (Bobbie 1996; Neuman 1992). It is an important method in history and other textual studies. It "involves reading source material and drawing evidence from that material to be used in supporting a point of view or thesis," explains Beringer (1978, p. 17). This type of analysis explores "the question of the relationship between how we represent texts, how we see them, and out of theory of textuality" (Rockwell 2003, p. 209). Close reading is a common tool used by researchers in similar studies (Lehman and Roberts 2014; Federico 2016). For the present study, it allowed me to recognize in the process of reading the emerging patterns and to draw comparisons or to unfold the purpose and message behind. It helped me create links between content, form, language, and context and connect them to the actual intention behind and the agenda they promote (Lasswell 1992). For this study, I tried to explore the textbooks by looking into computer graphics and content, tone and style, idea and ideology that is embedded in them. I further find master narrative that the authors are trying to present through close reading in the chosen writings.

Following the above methodology, I am discussing the themes and the style of the author in the next section. I base my critique on accuracy of information, language and tone, pictures and themes, in accordance with Beringer (1978).

The Texts on National Heroes

This chapter analyses the following texts, which I divided into two groups,

Partition Heroes

Allama Iqbal – for Year 9 in English
Shaheed-e-Millat for Year 10 in Urdu
Sir Syed Ahmed Khan for Year 10 in Urdu
Begum Rana Liaquat Ali for Year 11 in English

War Heroes

The Great War Hero (Major Aziz Bhatti) for Year 9 in English
Captain Col. Sher Khan Shaheed for Year 8 in Urdu
Khwaja Younus Hassan Shaheed for Year 8 in Urdu

Varying in their quality and style especially between the languages (English and Urdu), the most important feature of the chosen texts is that they provide factual details like date and place of birth, etc. Most of the descriptions are quite vague, making claims without much factual information backing it. For example, he fought bravely (from Secondary stage English 2013a), or Allama Iqbal is generally known as a great poet (from Secondary stage English 2013b), or he had soldierly talent since childhood (from Urdu ki 2014). Similarly, some of them reproduce the last words of the national hero. However, it is difficult to record the words of a dying person in the battlefield, which is usually the case. Therefore, the quotes for each war hero can be fictitious; for example, "Indians! Until Sher Khan is here, seizing our land is out of the question, however, even your passing nearby will prove deadly for you" [Author's translation from Urdu] (Urdu ki 2014, p. 66). Details like India attacked without reason or we had outdated machinery and equipment to fight their modern… (Asan Urdu 2014a) seem more like devices used to evoke patriotism, courage, and bravery than being factually close to reality.

Most of the times, a picture of the historical figure is accompanied. Wherever present, the pictures are located at the beginning or before the written piece starts. The sizes of the pictures vary from a full page to a passport size photo. All images are in black and white, and only cover pages are in color. All the pictures are individual portraits, and there is not a single representation of any event or any other people around. Caricatures, cartoons or satire are never used either.

National heroes in principle are considered a very important focus, and they are much revered. In the following subsections, broadly divided as partition heroes and war heroes, each of the chosen textbooks is individually discussed which should provide a better insight into the matter.

Partition Heroes

The lives and achievements of partition heroes is a hot topic for schoolbooks. Sometimes, there is more than one text on the same hero. The partition of India is the most important event in the recent history of South Asia. More than a century long against the British rule and its result in the form of partition carries too many

stories within, stories of those who wanted partition and who opposed it. Some stories are highlighted and propagated while others are hidden and never talked about. Below are the texts on those pre-partition heroes who wanted or are thought to have wanted a separate homeland for Muslims of India.

Allama Iqbal (Secondary stage English 2013b, pp. 36–39). This is a text in the English language on the life and services of Allama Muhammad Iqbal, a well-known poet and thinker of Pakistan. There is a contradiction among scholars on the point that Iqbal presented the idea of Pakistan, separating Muslim majority provinces to form a Muslim state out of India, for the first time in his presidential speech in 1930s Muslim League Session (Jalal 1994). This idea is propagated in a number of textbooks, including this one, and is called Pakistan Resolution. However, various critics reject the claim that Iqbal wanted a separate Muslim state by dividing India, but only demanded equal rights for Muslims of India (Moore 1983; Naim 1979; Qureshi 1969). Jalal (2002) argues that the Lahore Resolution of 1940 did not even mention the idea of Pakistan, let alone presenting it as main agenda. The text, however, emphasizes the idea that Iqbal made efforts to convince people that a separate state is the only solution of Muslim problem. In a personal letter to Quaid-e-Azam Muhammad Ali Jinnah, the founder and first premier of the country, Iqbal wrote "Don't you think that the time for such a demand has already arrived?" (p. 38). Another statement, on a similar note is, "Muslims woke up from their sleep due to Iqbal's effort…." (p. 38–39). This is contradictory because Iqbal died in 1930, and Pakistan got independence in 1947. The entire text builds upon the ideology of Islam as an important and defining factor for the existence and safety of Muslims of the subcontinent, reflecting that Pakistan is a state for Muslims (see also, Zafar 2015). Quite a noticeable part presents facts and figures.

Shaheed-e-Millat (Asan Urdu 2014b, pp. 59–61). This text starts with the murder of Liaquat Ali Khan, the first Prime Minister of Pakistan, described in a high patriotic tone. The first paragraph informs the readers that God bestowed Liaquat Ali Khan with the high rank of a martyr, and ends with the idea that martyrs live forever, explaining that by killing Liaquat Ali, the shooter made him Quaid-e-Millat (Leader of the nation) and Shaheed-e-Millat (Martyr of the nation). The paragraph also quotes his famous final words, "May God protect Pakistan" [Author's translation] (p. 59). The next paragraph relates his dedication for Muslim cause of partition, and only in the third paragraph there is a single sentence of factual information on his position as General Secretary of All India Muslim League in 1936. Throughout, there is just one short paragraph on factual information about his birth and death dates. The rest of it only talks about general statements that cannot be fully confirmed like, he was honest, he was Jinnah's right hand, and he left his assets in India at the time of partition for the sake of Pakistan and Muslims. The text ends on a moral and emotional note by summing up the life and death of Liaquat Ali as exemplary and which can never be forgotten by the nation.

Sir Syed Ahmed Khan (Moulvi Abdul Haq 2014). This is taken from a collection by a well-known Urdu essayist, Moulvi Abdul Haq. Usually the texts for the books are written for the purpose of teaching in schools, as are all the others discussed in this chapter. The sentences like, 'he handed everything that belonged to him for the college, yet the problem was he used to keep a keen eye on others' pockets as well'. Although praising the hero for his services to joint India, for his construction of the first college for Indians, Muslims and Hindus alike; it is written in a very different style. The text celebrates Sir Syed Ahmed Khan's cheerful personality even during very difficult times of British rule in India. His quality of finding new ways of collecting money and convincing people around him to give charity for a good cause. Haq intends the readers to understand how charitable Sir Syed was, how he helped people, and how he established educational institutions for the development of Indians in order to prepare them to face the British. This is done quite informally, possibly because the author knew Sir Syed quite well. Lacking any factual information about the life of Sir Syed, his behavior and temperament are discussed at length. As the author did not keep Islamization and indoctrination as the basis of writing, it sounds liberal. It even gives a feeling that it is not about a partition hero but someone or something else.

Begum Rana Liaquat Ali (Intermediate English 2011, pp. 58–61). This is the only text on a female national hero in the books for the five years under consideration. Begum Rana Liaquat Ali was the wife of the first Prime Minister of Pakistan and a great devotee to the cause of partition. The master narrative of patriotism is clearly noticeable throughout. However, for being in English and about a female, the tone is quite solemn, sincere, and serious. It focuses on the services of Begum Rana Liaquat Ali before and after the partition of India. There are too many dates and facts given, for example, that she was awarded the United Nations Human Rights Award in 1978. She was among the first very active Muslim women in her time and played a significant role in encouraging professional training of women, especially a nursing profession. Begum Rana Liaquat Ali was the first female Governor of the province of Sindh. The text highlights and effectively exemplifies her services. It does not use boastful language or try to arouse the emotions and feelings to the extent as the ones in Urdu does. It does not include any image or photograph of Begum Rana Liaquat Ali.

War Heroes

Pakistani schoolbooks have been criticized for romanticizing the India-Pakistan war soldiers as heroes, martyrs, and sons of the soil; thus inciting discrimination against non-Muslims and hatred, especially against India (Nayyar and Salim 2003; Harrison et al. 1999). Continuing in the same strain, Hasanain and Nayyar (1997) state that even recent history, for example, wars between India and Pakistan, is distorted by absolving Pakistan of any blame for the events leading to wars.

Saigol (2003) notes how textbooks depict Pakistan's army as facing and winning over a much larger Indian army, eulogizing it as one of the world's best armies. She explains that this especially happened after the reputation of Pakistani army was damaged due to the East Pakistan episode and its separation as independent Bangladesh in 1971.

The Great War Hero (Secondary stage English 2013a, pp. 74–75). This short English narration honors the achievements and a heroic death of Major Aziz Bhatti who received Nishan-e-Haider, the highest military award in Pakistan. A paragraph explains how he was the best during his training as an Air Force cadet, when he was awarded the Sword of Honor and the Norman medal by the Academy. However, nearly one half of the writing focuses on the day of martyrdom of Major Bhatti in 1965 war with India. The statements like, "the Indians were fully equipped with guns and tanks", "he fought against the enemy for six days and nights without rest, and laid down his life defending his country" (p. 74), "this brave son of Pakistan wanted to save not himself but his country" (p. 75) suggest the idea behind the content. Such statements are full of fervor and fill young minds with a variety of extreme feelings for the country and against the enemy. There are two pictures, one of the hero himself and the other of Nishan-e-Haider, the military award of Pakistan, which Aziz Bhatti was awarded with after his death in the 1965 war against India. The picture of Nishan-e-Haider promotes more patriotic feelings. This is supported by the last sentence (after quoting the final words of the hero), kept as a separate paragraph, "These words will ever inspire the youth of Pakistan with confidence and courage" (p. 75).

Captain Col. Sher Khan Shaheed (Urdu ki 2014, pp. 65–67). Starting with the following words from an officer of Indian army, "this brave officer of yours is a treasure for you …" [Author's translation from Urdu, p. 65], this one celebrates a martyr of the Kargil war 1998. Following are some details on how his name is taken from the name of another brave soldier of 1948 war against India. And his grandfather named him so, that he may also fight and die for the country in the same way as his predecessor. His family is described as being religious and himself being a practicing and staunch Muslim. Religion is beautifully mixed with patriotism, by saying that being religious made him a patriot. Pakistani war strategy and the loss of lives faced by India during the attack are celebrated. The incident when Sher Khan came out of his hideout and addressed Indian soldiers with the words (mentioned earlier) can hype the sentiments of teenagers. 'Due to Sher Khan's returning attack on Indian soldiers, they started fleeing' (p. 66). The whole incident is dramatized through imagery and other setting details. There is not a single detail given on why this battle was fought, as none of the other discusses any contextual and political agendas behind.

Khwaja Younus Hassan Shaheed (Asan Urdu 2014a, pp. 28–30). On a martyr from 1965 war, the entire piece is more like an emotional speech in Urdu to instigate youngsters. The scene and setting on the day of his death is described in much detail

like a Thomas Hardy novel with precise details on surroundings, such as, "the sun was setting, and the sky was blurred in dim light" [author's translation from Urdu, p. 69]. All of it is done in order to create sensation in narration. Like most others, here too exaggeration and emphasis is used, for example, at the time of the attack Indians were three times more powerful in number and equipment, they had comparatively modern technology, guns, and planes. Despite all, Pakistani soldiers fought with bravery and sacrificed their lives for the sake of the country. The martyrdom of these brave heroes resulted in the country's victory in the battlefield. Description of Younus Hassan migration from India at the time of partition, when he was only a boy, arouses more sympathy for him and more hatred towards India. He saw such bloody, terrifying, and heartrending incidents that one cannot imagine. His own family was destroyed during that time, and he finally reached Pakistan with a few family members. In discussing the horrors surrounding migration during partition, people on both sides of the border blame each other. This is visibly evident here: such a narrative is creating anti-India and anti-Hindu feelings amongst school students. Finally, calling 1965, the year of his martyrdom during the war with India, the most successful year of his life, is the final nail in the coffin of humanitarianism.

As Banks argued, textbooks play a vital role in presenting history and historical personalities to students, affecting their thought process. The next section discusses the master narrative.

The Master Narrative of Patriotism

Making the case for the dominant or ruler among the masses requires telling a story, a good story that reproduces the shared fate of both, the dominant and the dominated. It tells what the challenges are and how they must be addressed together to create a positive future for all. This should be and is the story behind the many stories told. Ordinary people are expected to understand and accept the aspirational story about a government dedicated to common good. This big story is presented through a variety of ways and one very important channel, and perhaps extremely convenient to all, is the school textbook. This story is the 'master narrative – the story behind all the stories. It is there to convince everyone of what the government expects them to be convinced of. Master narrative is the story that produces the rest of the stories (Rosen 2001; see also, Cox and Stromquist 1998). These books are not based on different master narratives at different times. They are always typically telling the same story that is serving the purpose of the powers that be.

It is observed that a simplistic and one-dimensional interpretation of Pakistani history is brought forward. Haqqani (2005) notes that officially published textbooks are used in all government and most private schools in Pakistan. He explains that this is a way of creating and propagating the master narrative on Pakistan's history. The texts in question present the lives of national heroes, portraying them as brave,

courageous and ready to die for the cause of country. There is hardly much reference to any individual achievements of these people apart from what they did for the country either by getting it partitioned from India or by dying during the wars with India. They are most often portrayed as people who had nothing else to do but to serve the cause. There is rarely any reference to their families or personal life, let alone hobbies or interests. Usually they are shown as people who were born to or, to be more appropriate, destined to do what they did.

Hasanain and Nayyar (1997) note that while presenting the heroes of partition of India, none of the Muslim leaders, politicians, scholars or *Ulema* (religious scholars) who were among top leadership in Indian National Congress or those against partition of India, are ever mentioned. They continue that the textbook version of history keeps children unaware of the fact that there was a large number of Muslims who had opposed the creation of Pakistan. This has continued by an obvious omission on the contribution of the non-Muslim philanthropists throughout the history of Pakistan for their services to education and social welfare (Ahmad 2004; Khan 2009). On the other hand, Jalal (Jalal 2002) claims Quaid-e-Azam Muhammad Ali Jinnah never wanted partition of India; he, in fact, twice rejected the proposal of the creation of Pakistan. Despite the fact that historians debate this historical claim, textbooks reviewed in this study are generally worded as to imply that all Muslim leaders generally supported partition of India and the movement was headed by Mr. Jinnah.

Besides all other things, a very important observation is the presence of a hyper-nationalist tone in Urdu language. There is also a tendency and effort to sensationalize the scene/narrative, in some of them, by adding a description of surroundings and the setting. It is also evident that the display of such patriotism is made available in Urdu on war heroes. The reason behind this sensationalizing is most importantly the language barrier. It is easier to reach people's heart in their own language. It is more convenient for the authors as well. With the language being clearly understood, these texts serve the purpose of promoting the master narrative better than the ones in English. The major themes arising are Islamization, anti-India feelings and the indoctrination of patriotism. Each of these is evident even when getting a separate country, i.e., Pakistan in case of partition heroes, or dying for the country in case of war heroes (see also, Aziz 1998).

Islamization

There generally seems to be a visible effort for the ruler of the country to Islamize the history of Pakistan. Rahman (2005) writes that during General Zia's time, "Islam was used to support the state's own militaristic policies in a way that it appeared to the readers of these textbooks that Pakistan, the Pakistan movement, Pakistan's wars with India and the Kashmir issue were all connected not only with Pakistani nationalism but with Islam itself" (p. 27). Islam is made a defining factor for Pakistanis, regardless of ethnic minorities. There is also a strong inclination towards showing

Pakistan's cultural association with the Arab world. Conversely, it refuses cultural descend from India or even introducing other cultures to develop cultural harmony and tolerance (see Ahmed 1998).

History textbooks portray "Two Nation Theory" as the ideology of Pakistan. They explain religion as the dividing factor and the reason behind the creation of Pakistan. This is apparent in this chapter. However, Jalal (2002) and Hoodbhoy (1998) argue that the term 'ideology of Pakistan' did not exist at the time of the creation of Pakistan and Quaid-e-Azam Muhammad Ali Jinnah, the founder of the country, never used it and is an after-thought. The term is never used in any of Jinnah's speeches or writings either (Pirzada 1970). The critics doubt the existence of Islamic ideology of Pakistan at the time of its creation and even after for nearly a quarter of a century (Ahmed 2001; Ahmed 2012; Haider 2010).

Islam, God, and Muslim are oft-repeated words, especially in those in the Urdu language. There is a political reason attached to this (Rahman 2002; Shahriar, Baloch, and Bughio 2014). Urdu originated in a present day North India. All Urdu-speaking people in Pakistan are immigrants from India who came at the time of partition, with no roots to the land of modern Pakistan. Therefore, they use Islam as a weapon to promote it as a dividing and deciding factor (Rahman 2010, 2011; Aslam 2004; Mandaville 2014; Esposito 1998). Evidently, the Urdu texts are playing a greater role in implanting the master narrative through diction and style.

The element of the supernatural is evident throughout, though it is more clearly voiced in Urdu. It seems, as whatever happened was predestined; Khwaja Younus Hassan (Asan Urdu, 2014a) specifically mentions the word 'fate'. In the same vein, God is shown as responsible for partition of India, appointment in armed forces, martyrdom, etc. Similarly, Iqbal's famous Allahabad address is quoted, "I have learned one lesson from the history of Muslims. At difficult moments in their history, it is Islam that has saved Muslims and not Muslims that have saved Islam. If today you put your faith in Islam, you will become strong and united once again and save yourselves from complete destruction" (p. 39). However, critics agree on Iqbal being anyone but a fervent Muslim, thus defying the often-quoted famous words as creative rather than true (Paracha 2013).

Anti-India

In language or history textbooks India is presented as an ultimate enemy, busy in devising strategies for the destruction of Pakistan. The curriculum, therefore, seems to be more focused on informing Pakistani children to stay aware of this enemy. Similarly, these books also blame India for most of the mishaps the country has ever faced, including the three wars among the two neighboring states: the separation of East Pakistan (present day Bangladesh), the Kashmir issue, and the Kargil conflict. In Captain Colonel Sher Khan Shaheed (Urdu ki 2014), India is called, "our worst enemy" (p. 67), and there are statements like "Indian army was bombarding Line of

Control without reason" (p. 66), informing students of how cruel and untrustworthy India is.

Apart from wars with India, another sensitive issue is that of migration at the time of partition. This is considered the largest mass migration in the history of humankind (around 10 million) with nearly a million dead due to accompanying riots and fighting among ordinary people (Bates 2011). The Muslims of India demanded a separate homeland for the first time in Pakistan Resolution of Muslim League on March 23, 1940. Although none of the clauses of the resolution, and even any other document till partition, mentioned the migration of people across the borders, yet it happened from both sides of the border. However, the textbooks present the miseries during the migration from India to Pakistan in a one-sided way, explaining how Muslims faced cruelty from Hindus and Sikhs. There is a lack of explanation on how people of the united Indian subcontinent suffered generally, regardless of their religious differences. In Khwaja Younus Hassan (Asan Urdu 2014a), there is specific mention of how he reached Pakistan with a few of his family members while others were killed on the way. Recalling such harsh incidents from the past in school textbooks would not let the nation move ahead, it would, rather, keep it dwelling in the past.

The Anti-India propaganda is directly linked to the theme of Islamization. Connecting the ideology of Pakistan with faith and Islam is present throughout (Nayyar and Salim 2003). There is widespread distrust for Hindus and other ethnic minorities, and no acceptance of the fact that they are essentially a part of Pakistan. This idea is without doubt negating the flag of Pakistan with its one third in white that represents the religious minorities in the country. This acceptance of religious minorities through the national flag of the country is unique and puts Pakistan aside in comparison with any other Muslim country in the world. On the one hand, the texts defy rights of and duties towards non-Muslims living in Pakistan, and on the other, they present India as a Hindu country, although in fact, India has more Muslims than Pakistan.

Indoctrination

Both of the above themes directly refer to this final and most important theme of indoctrination of patriotism. Paracha (2013) explains, "Over the decades, these books, that are regularly taught at all Pakistani schools and colleges, have gradually evolved into becoming one-dimensional manuals of how to become, believe, and behave like a *true Pakistani*. These textbooks do not bother to develop a sense of tolerance, equality, and peace. Paracha goes on to say that the subject Pakistan Studies was made compulsory by Zulfiqar Ali Bhutto's government as an indoctrination tool at a time when Pakistan lost the 1971 war and also half of the country, East Pakistan, became a separate country, Bangladesh. However, with the eleven-year military dictatorship of General Zia-ul-Haq, every effort was taken by the

government to implant all sorts of extremism in ordinary people, which is the root cause of the challenges facing Pakistani nation (see also, Ali 1998).

Agreeing with Loewen (1995, p. 14–15), "textbooks are often muddled by the conflicting desires to promote inquiry and to indoctrinate blind patriotism," this chapter asserts his views. Secondary stage English (2013a) effectively discusses the day of death of Major Bhatti. However, it ends with "these words will forever inspire the youth of Pakistan with confidence and courage." This is while mentioning Major Aziz Bhatti's refusal to return and take rest during the attack. Similarly, the repeated use of words 'Shaheed' and 'Shahadat' for martyr and martyrdom, in themselves are enough to arise patriotic feelings among the readers; let alone the of the military award that the brave soldier received. These words are not just used for all the war heroes but also Liaquat Ali Khan (Asan Urdu 2014b), who was killed while addressing the nation in a public session.

Evaluation

This research is based on an evaluation of the texts on the lives of national heroes in Pakistan. The study includes books of English and Urdu languages taught at the higher secondary school level. The stories of national heroes either during the struggle for partition from India in late 19th and early 20th centuries or during the wars against India after the creation of Pakistan in 1947 are discussed. These heroes and the events around their lives are generally portrayed as isolated from the bigger picture, excluding other people and events attached to the historical context they belong to in most cases. This chapter aimed at exploring the ideological agenda behind through the style, tone, language, content, and graphics.

The master narrative is a bigger story behind any selection of writings in order to serve a purpose. It is all about telling your story in such a convincing way that the readers are blinded to think of or see any other version of the story. It is this art of storytelling that this chapter intended to explore. Seeing the interconnection between the attitudes and style of portrayal, it seemed that the master narrative of heroism is intended.

Together all the texts cited in the chapter make sense of history, instead of seeing them as isolated events in history, and together they unearth the big-story, each attempting to inculcate and augment patriotism in its young readers. They help develop the master narrative that is created and implanted into the minds of young generation through textbooks. This is always meant to leave lasting impression on the minds of people.

The master narrative here is the big story that the students are told over and over again about the hardships and struggles with which Pakistan is created and the sacrifices that so many people made for freedom before, during, and after its creation. It celebrates soldiers at the frontiers. By doing so the writers are claiming to build a bond between individuals and their country. However, in fact, they are not creating patriots, they are creating blind followers who do not question either the validity of

information, or the past, and whose future continues to grow on a debris of misinformation from the past.

Conclusion

The above research findings help in exploring the master narrative presented to teenagers through syllabus. The research advances the understanding on the influences implied through format and implication. This study is limited in many ways, and it calls for more research in the future. On the one hand, using the syllabus for languages for the purpose of this study helped understand the amount of history taught and the extension of the master narrative from the books of history to other subjects. On the other hand, however, the study does not focus on how actual history books present this particular narrative. Therefore, another study would be needed to explore this aspect. Moreover, this study included only books published by Sindh Textbook Board. There can be other studies conducted in a similar manner on books from other provinces. However, a more interesting and wider comparative study can be conducted on the books published by different textbook boards around the country. Such a study can further explore the master narrative and analyze the extent of its propagation and effort on the implementation in the books from all different boards. Such a study will also confirm the validity of this narrative spreading through the books portraying history in Pakistan.

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Chapter 14
Gender Mainstreaming in Textbooks Discourse via the Metaphorical Account of Malalai of Maiwand, Afghanistan

Shabana Khattak and Hussain Akhtar

Gender Mainstreaming in Textbooks Discourse via the Metaphorical Account of Malalai of Maiwand in Afghanistan: Introduction

Afghanistan, a war-torn country in the South Asian region, has been struggling for decades to achieve peace and stability. The country witnessed a severely oppressive form of the government from 1996 to 2001: the Taliban. Its anti-women government restricted women from gender mobility, health services, education, and work. However, the dark rule was followed by a "bright sunshine" of 2001, when the newly implemented constitution of the country encouraged gender mainstreaming in all walks of life. Thus, more Afghan girls and young women are now engaged in education. Historians call the people of Afghanistan Pukhtun/Pushtun or Pathan; similarly their language is known as Afghani, or *Pukhtu/Pashtu.* In this study, however, we will use the word 'Afghan' to refer to all groups living within the borders of Afghanistan, while the word 'gender' will be a synonym for 'women' rather than the feminist standpoint.

The government of Afghanistan, with the collaboration of international donors, developed a gender-sensitive and anti-discriminatory curriculum and corresponding textbooks for schools and colleges that were innovations in the history of Afghanistan (Fahim 2010). Textbook discourse is the heart of education policy through which the country transfers knowledge and values to the new generations. The social and cultural norms in Afghan society are effectively integrated into these textbooks.

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Afghan women were not always oppressed by fundamentalism, such as they were under the Mujahideen and the Taliban; they lived a liberated life in the past (Ahmed-Ghosh 2003, p. 2). Women in Afghan society are generally illiterate. They are mainly allocated to household chores because men are supposed to be the financial supporters of the family. Nevertheless, they contributed to Pukhtu literature and folklore. Haleema Khattaka, the daughter of the great Pukhtu poet Khushal Khan Khattak was one such example. Nazo Ana, mother of Mir Wais Hotak, and Zainab his daughter, were others. In addition, Neik Bakhta, daughter of Allah Dad, Zargohna Kakara, daughter of Din Muhammad Kakar and Rabia Qandahri, were amongst many learned writers who contributed their *Diwans*, or poetic collections, to the rich body of Afghan literature (Shah 1998, p. 70). However, these women belonged to the ruling or upper classes of the Pukhtun society. The secondary and higher secondary level textbooks included these topics permanently in the syllabus to encourage women to contribute to society through literary or social means. Furthermore, they allow the students to taste the feminine classical prose and poetry of Pukhtu literature. Patriarchy did not prevent them from expressing their feelings and thoughts; we found the following female authors included in the textbooks:

Nazo (Grade 9, Pukhtu Textbook, 2009, p. 68)
Pukhtaney Khazey (Grade 9, Pukhtu Textbook, 2009, p. 72)
Zarghuna (Grade 10, Pukhtu Textbook, 2009, p. 29)
Zarghuna (Grade 11, Pukhtu Textbook, 2012, p. 86)
Merman Hameeda (Grade 10, Pukhtu Textbook, 2012, p. 85).
Rabia Balkhi (Grade 10, Pukhtu Textbook 2012, p. 101).
Neik Bakhta (Grade 11, Pukhtu Textbook, 2009, p. 24).
Haleema Khattaka (Grade 10, Pukhtu Textbook, 2012, p. 81)
Haleema Khattaka (Grade 12, Pukhtu Textbook, 2012, p. 10) (see Billaud 2009 for further details).

The bravery of Pukhtun women was not limited to writing literature; women also participated in the battlefield, such as Malalai of Maiwand. She is the pride and national heroine of the entire Pukhtun belt of Afghanistan and Pakistan: the Pakistani women's rights activist Malala Yousafzai and Afghani activist and politician Malalai Joya[1] are both named after Malalai of Maiwand. Similarly, many schools, hospitals, and magazines have been given her name too. Malalai is an Afghan version of Joan of Arc (Qazi 2011, p. 1). To honor Malalai, the Afghan government named an official medal of bravery after her. Qazi (2011) further quoted an audacious mother, Reza Gul (of Farah Province), who was awarded the medal after reportedly killing dozens of Taliban militants because they killed her son.

Bravery, chivalry, and fighting skills have been considered essential characteristics of the Pukhtuns (Shah 1998) and therefore Pukhtun women love to see these qualities in their fathers, brothers, husbands, and sons. Women sing *tappi/landai* to celebrate the pride of their bravery. This feminine folk genre was transferred verbally from generation to generation; it is a reflection of purely female feelings and

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[1] See Malalai Joya website http://www.malalaijoya.com/dcmj/ for her struggle for Afghan women empowerment.

emotions and a gender-specific genre. A Pukhtun woman does not like her husband's cowardice, but rather wants to be proud of his brave death on the battlefield:

> Pa spin maidan ki darsara yam
> Za Pukhtana da toro natakhtam ma'ina [Pukhtu]
> You will definitely find me with you in the battlefield
> Being a Pukhtun I am not afraid of swords [Translation] (Shah 1998, p. 70).

Similarly, in the battle of Maiwand, when Malalai saw the lower self-confidence of Afghan warriors, she cried her famous *tappi* that the Pukhtun women sing to show reverence for her valor even today (we will discuss this further in our data analysis). Malalai's impressive action and martyrdom in the Anglo-Afghan war led to the greatest defeat in British imperial history. This chapter examines her metaphorical portrayal in the textbook discourse of Afghanistan. As there is very little researched data available that theorize Malalai's daring role for gender mainstreaming in Afghanistan, there is also a dearth in research investigating her historical significance as portrayed in textbook discourse.

Research Questions and Theoretical Framework

This study has two broad aims: first, to analyze the role of Malalai as a symbol of women empowerment in history textbooks of Afghanistan, and second, to examine the language and images of Malalai in the textbooks that are supposed to shape students' thinking. More specifically, our research question is:

> How do repeated metaphorical accounts of the heroic image of Malalai in current high school history textbooks encourage gender mainstreaming in Afghanistan?

Our methodology consists of a comprehensive and qualitative content analysis. We analyze how the frequently taught character of Malalai and the historical events of the Second Anglo-Afghan War that made her the national folk heroine of Afghanistan are described in History textbooks for Grades 9–12. These textbooks were published by the Ministry of Education in 2011 and are currently used in public schools.

For the purpose of our study we have used essays from the following textbooks. From a Grade 9 textbook, we selected 'Anglo-Afghan War History' (Textbook 2011, p. 44); from a Grade 10 textbook – '*Da Maiwand Malalai'* (Malalai of Maiwand) (Textbook 2011, p. 73–75); from a Grade 11 textbook – '*Peghla Malalai'* (unmarried Malalai) (Textbook 2011, p. 27–31), and from a Grade 12 textbook – 'Anglo-Afghan War History' (Textbook 2011, p. 51). The Grade 10 and 11 essays are overviews of Malalai of Maiwand's life, while the Grade 9 and 12 essays exclusively discuss her role in the context of the Anglo-Afghan war.

Review of the Related Literature

As is well known, textbooks are not only a source of knowledge and information but they also play a vital role in shaping children's ideology and ideas. Social norms and traditional values are taught directly through educational curricula or indirectly through hidden curriculum. In our analysis of the traditional Afghan textbook discourse we found two main themes: first, that heroism in historiography is a masculine paradigm; second, that textbooks are tools for transmitting men's knowledge to children. Radical feminist paradigms hold that that whatever we learn in schools is simply an account of male experience in our daily life (Thomas 1990), because the majority of the experts of history are men and history courses are dominated by men's ideology—that history can best be studied through the acts of great men (Osterman 2013, p. 5).

Osterman (2013) intensified his argument stating that gender, race and class are main problems of textbooks so if we remove them, there is only one perspective left from which we can teach history: through the perspective of the political elite. This hero worship is "crippling to students" (Loewen 1995, p. 28). Its effect is crippling because in doing so, historical accuracy is ignored for the benefit of putting forth a 'Disney version of history', a history whose only job is to provide students with role models to inspire them to achieve (p. 6).

However, textbooks are a key indicator of the state of a society; the character traits that are emphasized and glorified in a textbook's depiction of national heroes reflect the culture values at the time of the text's publication (Hutchins 2011, cited in Osterman 2013).Hutchins (2011, cited in Osterman 2013) states:

> The choice of heroes and the way in which textbooks present them offer unique insight into the interplay between scholarly historiography and competing versions of ethno-history. (p. 12).

Similarly, historiography and national heroism is a political tool in Afghanistan, like in most Asian countries. Politicalization of history and social studies textbooks is a common phenomenon in the country. The ruling political party would decide what themes, heroes and villains to include. For example, the Soviet intercession brought communism and Marxist theory, and made Karl Marx a hero in the Afghan history textbooks. The US, during the Cold War, loaded the textbooks with religious messages of *Jihad* (holy war) and extremism (Hussain 2012), which was little more than a 'covert effort to incite resistance to the Soviet occupation' (Sieff 2012). Sieff further added that the Taliban regime (1990–2001) filled the history textbooks with traditionalist conservative Islamic topics and heroes; for example, the Tehran-backed militant groups Hizbollah and Hamas.

The director of publication and information for the Education Ministry of Afghanistan holds that the foreign powers only deepened divisions, distributing books to further their own political agendas and to bring the 'New Great Game' in Central Asia into Afghan classrooms (Sieff 2012; rferl.org 2012). Therefore, the Ministry of Education excluded four decades of history after 1973 from the textbooks in order 'to teach the country's contentious history that is acceptable to all

Afghans regardless of their politics, ethnicity, or religion' and to promote national brotherhood and a single Afghan identity (rferl.org 2012).

However, removing four decades of history from the curriculum is not a solution to the problem because it will deprive new generations of their history. This decision has been strongly criticized and condemned by many historians, educators, scholars and academicians, but the Afghan Ministry of Education is still firm with their decision, and the new textbooks without forty years of history are taught in all public secondary schools. Although some analysts (A. Fahim, personal communication, April 5, 2016) appreciate the removal of the portion of history from textbooks premised on the idea that it was triggering conflict among local communities. For example, the Northern Alliance was depicted as heroic, and this was not acceptable to other Afghan communities. Fahim further states that Afghan historians are also the product of these four decades and have their own political affiliations and preferences, so until we have an independent, objective review of our forty years of history, it is good not to include it in the history curriculum (ibid). We argue that closing our eyes to history will not help to change reality, especially as history textbooks published during those four decades are still available in Afghanistan. Therefore, history textbooks based on objective data should be written by independent researchers and not by a religio-political lobby. As Kaila (1980) argued, we need to stop lying to our children by hiding the truth in history lessons; we need to let them decide for themselves who their heroes are.

The present Afghan history textbooks are overflowed with ancient historical events and the uncontroversial national heroes and heroines. This might be the reason that Malalai of Maiwand and the historical events of Second Anglo-Afghan war are frequently discussed in the textbooks discourse. She is indeed admired and respected by all ethnic groups in the country.

Gender mainstreaming is a new observable feature of the modern Afghan history curriculum, especially in the domain of education because during the reign of the Taliban, not a single girl was enrolled in school. Therefore, the Afghanistan National Development Strategy (ANDS) and National Education Strategic Plan (NESP) both strongly advocate gender mainstreaming in all walks of life (Fahim 2010). This is evident from their education policy, which gives profound value to promoting gender equality. Moreover, national heroines and gender-related topics are included in the curricula, although the content of history textbooks is stereotyped. As Fahim (2010) asserts, textbooks are full of gender marginalization and discrimination: active and strong masculine roles are given to men and weak or inferior roles to women.

Women are depicted as dependent on men, and as always, in need of men's support to cope in society. Similar findings are described by Kalia (2014), Jabeen and Ilyas (2012), Hall (2014), and Pesikan and Marinkovic (2006) in their studies of stereotyped-gender representation in textbooks in India, Pakistan, Iran, and Serbia. The authors highlight the lack of national heroines in the textbook discourse of their respective countries because it is exactly 'great men' who serve as the curriculum designers, writers, compilers, and publishers of these textbooks (Osterman 2013).

Nevertheless, all the above mentioned literature did conclude their criticism with a positive comment that there is a lot of room for improvement and that some gender mainstreaming topics are evident, and while they may be small in number, they are huge in effect. Therefore, we are taking those few threads of gender-representation further in this study regarding gender mainstreaming in the history textbooks of Afghanistan.

Efforts to promote gender equality have had little effect to date in Afghanistan because the country adopted the policy from foreign countries. A proper translation for the word "gender" in *Pashtu* and *Dari* (national languages of Afghanistan textbooks) has not yet been found (Larson 2008). Thus, the implementation of the policy is less effective and social and cultural differences between men and women in Afghanistan are not clearly demarcated under the strongly patriarchal version of Islam. Women are either invisible in the textbooks or, when they appear at all, they are seen performing low-status tasks (Fahim 2010).

However, Malalai retains a high profile role in the textbooks of Afghanistan. She is portrayed as an attractive and courageous woman, held in deep respect. Many scholars (Ewing 2005; Qazi 2011; Dalrymple 2013) appreciate the role of Malalai and her active participation in the Anglo-Afghan war; however, none of the authors investigated her role in the textbook context for gender mainstreaming and emancipation. Therefore, this study explores Malalai's gender representation in the Afghan history textbooks.

Data Analysis and Discussion

Our main focus in analyzing the data is to disclose how secondary school history textbooks depict and historicize Malalai as an Afghan role model for women. We also investigate Malalai's gender-visualization, gender-centered language (such as feminine generic), and gender-poetry genre of Pukhtu (*tappi*) in four history textbooks.

Gender Role Modeling

All the sample textbooks depicted Malalai as a legendary Afghan figure and role model. Her bravery is shown as an inspirational quality for women to emulate. As we know, women in textbooks in many countries around the world are depicted as dependent, submissive, and domesticated. In contrast, men are mostly portrayed as sensitive, intelligent, brave, proud, ambitious, inquisitive, aggressive, dominant, and forceful (Baranovic 1999, Husseini 1999, and Michel 1986, cited in Pesikan and Marinkovic 2006).

The textbooks under analysis attribute 'masculine' characteristics to Malalai, such as bravery, ambition, leadership, and intelligence. None of the Afghan men in

the battle have the courage, bravery or ambition to motivate their people except Malalai of Maiwand. The 18-year-old heroine 'Unmarried Malalai' *'shines like the moon' during the battle'* (Translation from Pukhtu, Grade 11, textbook, 2011, p. 29).

Her character is modeled for the student readers, while other characters of the war are not mentioned at all. Even the Afghan army commander, Ayub Khan is mentioned only once in the Grade 11 textbook, and only a couple of times in the Grade 10 textbook. The information about Malalai is brief, unified, and accurate, but it is presented in an exaggerated form because Afghan women were seldom revealed in official reports or narratives of the war due to the patriarchal culture of Pukhtun society.

The Pukhtun culture did not allow anyone to mention women's names in public, as women are considered the honor of the family. However, Malalai's name was explicitly uttered in the battle of Maiwand because of her bravery and encouragement; her war slogans gave new spirit to the wounded soldiers. A centuries-old custom is overturned in the textbook discourse to redefine women gender roles for Pukhtun society. Malalai was serving as a water and ammunition bearer. Similarly, she encouraged other native women to help her. Ewing (2005) highlights that the British sources did not mention Malalai in their historical record:

Her actions may not have been noticed by any of the British, or they may not have seemed as consequential as they were to the Afghans. Afghan women are very rarely mentioned at all in the reports and narratives of the war (p. 1).

So, all the analyzed textbooks depicted her as a national role model. As mentioned earlier, the writers and publishers of the textbooks and the curriculum designers went against the tradition of depicting only 'great men' in history and brought in a 'great woman' in the history of Afghanistan.

Gender Visualization

Illustrations in the textbooks primarily aim to emphasize the story of a particular subject or character. We found gender marginalization in many images in the above textbooks. For example, Grade 9 textbooks are filled with 30 male and no female portraits; Grade 10 textbooks have three males and one of Malalai of Maiwand (shown below); Grade 11 textbooks have seven portraits of men and only two women (Malalai and Razia Sultana[2]); Grade 12 textbooks have 37 major male portraits and a single image of Angela Merkel, a German politician. However, for the purposes of this analysis, we chose to examine the following two images of Malalai (see Pictures 14.1 and 14.2).

The chosen textbooks have a good quality of printing as compared to the previous 2009 editions. The Malalai illustrations are prominently visible in the Grade 10

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[2] She was a daughter of Mughal King Shamsuddin Altutmash and became his successor ruler of Delhi in 1236, the first and last female *Sultan*, of India.

Picture 14.1 Malalali at the Battlefield of Anglo-Afghan War (Grade 10 textbook, p.73)

Picture 14.2 Malalali at the Battlefield of Anglo-Afghan War (Grade 11 textbook, p. 27)

and 11 textbooks. Grade 9 and 12 textbooks share similar representation of the history of Afghanistan; the texts narrate the story of Malalai within the historical context of the Second Anglo-Afghan war.

As far as the Grade 10 textbook illustration is concerned, the tri-colored Afghan national flag looks more prominent than the black-and-white image of Malalai. The black color of the flag represents the darkness of the past history, the red stands for

bloodshed and war while the green symbolizes hope, prosperity, and a bright future (Afghanistan Culture 2014).

The picture also depicts Malalai's famous *tappa* and her traditional Afghan frock with its baggy *shalwar* (trousers) and a black scarf on her head in first image, with horse riders in the background. The picture clearly gives prominence to Malalai.

The Grade 11textbook image is fully colored; Malalai appears in an orange wedding dress with blurred black and brown horse warriors in the background, drawing more attention to her character. Both images are based on historians' imagination because, as mentioned earlier, the British record did not highlight Malalai and nobody knew how she looked like. Therefore, an imaginative sketch of Malalai has been drawn by historians to highlight her visibility and presence in the war scene. According to Bodmer (1992; cited in Fang 1996, p. 132), primary colors (red, yellow, blue) are used in textbook illustrations to emphasize, expand, explain, interpret or decorate a written text. This illustration takes the reader to the historical time and location of the event. Furthermore, these color techniques convey a message that the real heroine of the Anglo-Afghan war was Malalai rather than Ayub Khan. The Grade 9 and 12 textbooks have a small black-and-white image of Ayub Khan in contrast than that of Malalai and the pages are full with details about Malalai's participation in the war.

Furthermore, one of the titles of the textbooks is 'Unmarried Malalai' because as some historians have said, it was her wedding day, but when the war was declared, her father and husband volunteered to fight for their country's liberation. She joined them, so in her image she wore all her jewelry, which, symbolizes her devotion, selflessness, and love for her people and country. Her wedding was not as important as the freedom of her country. It is worthwhile to mention here that all the analyzed textbooks' writers, experts, compliers, and historiographers historicized Malalai as they normally would a 'great man' in the often male-dominated history textbooks.

Machin and Mayr (2012, p. 7) quote Hodge and Kress (1988), Kress and Van Leeuwen (1996) in their conclusion that visual analysis is lacking a toolkit that assists us for systematic, careful and accurate description analysis. The most prominent object in the picture is the flag, which symbolizes the Afghan nation, while the carrier denotes pride and strength, although to others it might equally symbolize closed-mindedness and stifling exclusion (Machin and Mayr 2012, p. 19). We agree with the former analysis, because during the Anglo-Afghan battle, when the flag bearer died, Malalai jumped in the battlefield and hoisted the flag, as a fallen flag was a traditional sign of defeat. A flag has to be high to signify national pride and victory.

In both images, the iconography of gender visualization is impressive. From the traits and body language of Malalai, it is clear that she is not concerned about the mounted warriors or their ammunition. Her body posture is open and bold. Malalai looks confident, yet at the same time feminine. Again, this is important because in discourses of female identity, women often take on the mother/house wife role (Machin and Mayr 2012). We observed some color coordination in the image of Malalai and the setting; however, the background full of images is not as crucial as Malalai, the texture of her loose fitting clothes, and her head shawl. The latter are

supposed to symbolize her strong traditional Muslim values, but at the same time when she realized that her motherland was occupied by foreigners, she ignored the tradition of keeping her body fully covered so she could participate in the battle. Some historians mention that she hoisted her veil instead of the flag to raise the morale of Afghan warriors. Both pictures are large in size and covered with the full figure of Malalai, as opposed to other illustrations in the sample textbooks that show only small headed-portraits. This is certainly a representation of a strong and empowered woman by the conservative Afghan writers.

Machin and Mayr (2012) state that any illustration in a story depends on the author's choice of how to represent the character–either as confident and victorious, or defeated and sensitive. They further argue that the photograph that accompanies a story may, therefore, not have been captured in a moment related to that story. However, even if this is the case in the situation with Malalai's pictures, it is still a matter of choice of a particular photograph (p. 70).

Malalai is clearly represented as victorious as her colors are very bright compared to other images in the analyzed textbooks. Her action sends a powerful message: that for the national cause, there shouldn't be any obstacles for women—they should stand and fight side by side with their male counterparts.

Gender-Centered Language

The sample textbooks are couched in the male-centered tone of the Pukhtu language. Machin and Mayr (2012) argue that language and grammar change people ideologies; they reference Fowler's et al (1979) publication 'Language and Control' and stipulate that the text predicts the people, events, places and their actions, as well as what is in the foreground, what is in background, and what is altogether excluded (p. 2).

The sample textbooks introduce texts about Malalai with eye-catching titles: '*Peghla Malalai*' (Unmarried Malalai) or *Maiwandai Malalai*, to attract the readers, as Malalai was hardly over 17–18 years old when she participated in the Anglo-Afghan war. Most girls at the secondary level educational institutions in Afghanistan are unmarried. Those who are married usually dropout of school to take on household responsibilities. The textbooks' writers convey a powerful message of devotion and bravery through the metaphorical characteristics of unmarried Malalai, showing that even a young woman can contribute to a humanistic cause. In other words, the text encourages young women to follow the legacy of Malalai.

Furthermore, the choice of the word *'Peghla'* is striking by itself as maturity; determination and bravery are usually considered masculine characteristics in textbook discourse. For example:

> daa Afghani merman zamung da viyaar ow efftikhar nakha da. Zamung la para da naag ow Pukhtu missal dy [Pukhtu original text] (Grade 11, Textbook, 2011, p. 27).
> This Afghan woman is a symbol of pride, gratification and honor for us [Translation].

The nationalist tone of the Pukhtu text is overwhelming in the above sentence. Sometimes the word '*Pukhtu*' is a synonym of honor, integrity, righteousness, and morality, or what the Pukhtun call '*ghairat* or *naag'*. Pukhtuns consider women to be the greatest Pukhtu honor; therefore, they are overprotective about their modesty and chastity. As mentioned earlier, the Pukhtuns deliberately avoid naming women and mentioning their gender overtly. In the following text, Malalai and other women have been mentioned as mothers and sisters during the war:

> Da yadawaney warra da, da Afghanistan tarikh pa ogdoki zamung Afghani miyande khuy-ande narenao sara sama wanda aghistti da [Pukhtu original text] (Grade 12, Textbook, 2011, p. 51).
>
> It is worthwhile to remember and acknowledge the active participation of our Afghan mothers and sisters in our Afghan history [Translation].

The essays are written in a strong patriotic tone, and provide space to show women as patriots. For example:

> Da Maiwand da fathi da naag ow jang ki Pukhtano merman brakha aghisti wa. Ow ghazy-ano tai khwara, obba ow wasla rasola. Owzaney da khple pakki khware dapara khplo wrano sara oga pa oga da dukhman muqabila kola [Pukhtu original text] (Grade 10, Textbook, 2011, p. 73).
>
> The victorious honorable war of Maiwand was a war of Pukhtu; our patriotic women actively participated in it by providing food, water and ammunition to the ghazis. Some of them fought side by side with their brothers to clear their sacred land from the enemies [Translation].

As mentioned above, history textbooks are promoting a particular ideology of women empowerment through Malalai's character; and for that reason, the war scenes are painted in a women's friendly way. Furthermore, a specific vocabulary has been used in the description of Malalai, that of a daughter, mother, and grand-mother of the Pukhtuns such as 'Malalai Ana' (our grandmother). In addition, Pukhtu words that are commonly used for masculine subjects, such as '*sarkhadana'* (raised-headed)*, 'nagiyaltoob'* (honorable)*, 'weyarr'* (proud)*, and 'baryalai'* (victorious)*, are employed in contrast to the traditional Afghan male-dominated and misogynistic historiographical approach.

The textbooks for Grades 9 and 12 describe Malalai in a black-and-white text, however, the texts in textbooks for Grades 10 and 11are outlined in lively pink, light green, yellow and purple colors. The authors deliberately use these bright colors to emphasize her gender presence.

Gender-Genre of Pukhtu Poetry

All the four textbooks under analysis unanimously mention Malalai's famous *tappi* in the battle of Maiwand. When the Afghan troops lost their pluck, Malalai called out:

> Ka pa Maiwand kay shaheed nashway
> Khudaigo laaliya benangaye la day sateen [Pukhtu]

> Young love if you do not fall in the battle of Maiwand;
> By God someone is saving you as a token of shame [Translation] (Shah 1998, p.70).

Malalai told her young countrymen that to die as a martyr is much better than to live like a slave of British imperialists, which would be a shame to Pukhtun honor. She exhorted them to fight back for the liberation of their land. These words instilled new spirit in the young Afghan soldiers. They reunited and attacked with their full strength and defeated the enemy. In this *tappa,* the word 'someone' is used for the British army although she sang the verses in Pukhtu and only indirectly mentioned the intention of the British to occupy her motherland. Furthermore, when the flag bearer died, she jumped into the fray, took the flag and sang:Khal bad a weyarr la veeno kigdam

> Chi shinki bagh ki gulgulab o sharmaveena[Pukhtu].
> With a drop of my sweetheart's blood,
> Shed in defense of the Motherland,
> Will I put a beauty spot on my forehead?
> Such as I would put to shame the rose in the garden [Translation][3]

A beauty spot (*khal*) is a South Asian custom: it is usually a red spot that a woman puts between her eyebrows. As Malalai's fiancé/husband was fighting in the battle of Maiwand, she shows that she is happier to have his blood as a '*khal'* rather than fake red coloring. She compares this with the red rose of a garden and finds her '*khal'* more beautiful and bright. The textbooks under analysis beautify the details of historical events with the romanticism of Malalai's *tappi*. Most of the Pukhtun women sing *tappi* in their daily life. They do not need special training or education because it is purely based on feminine feelings and emotions. These *tappi* are deliberately portrayed in very bold and bright colors to attract the attention of the readers. Of course, poetry is a literary genre, however, the authors and publishers of the history textbooks were aware that the historical representation of Malalai would be incomplete without these *tappi,* as the latter underline the fact that despite being uneducated, Malalai had such love and dedication for her home country, which motivated her to stand up and resist.

Shah, a famous historian, appreciated the efforts of the Afghan curriculum to give a prominent place to Malalai in the textbooks so that her message can reach the new generation (Shah 1998). The analyzed textbooks state that Malalai's contributions to her people's struggle against the British colonialists in the 19[th]century are amongst the most famous and courageous episodes of the Pukhtun history. However, Malalai's martyrdom is depicted in the text by her burial with all the related official honors in her village *Khig* near Kandahar; her grave stone can still be found there. Pukhtun poet Ajmal Khattak chanted Malalai in the following verse:

> My Malalai is living, and they praise others' beauty
> Though they have eyes, they are blind[4]

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[3] Translation quoted from http://www.pkhope.com/malalai-of-maiwand-and-malala-of-malakand-two-heroines

[4] Translation quoted from Wikipedia Retrieved from: https://en.wikipedia.org/wiki/Malalai_of_Maiwand

All the textbooks under analysis represented Malalai in soft nationalist poetic tones, in contrast to male heroes described in hyper-nationalist tones. More details and consideration are usually given to the male heroes of Afghan history. However, Malalai is portrayed as a heroic role model for secondary and higher secondary students.

Conclusions and Recommendations

The aim of this study was to explore how a metaphorical account of Malalai had been used as a tool for gender mainstreaming in textbook discourse in Afghanistan. Our analysis allows making the following conclusions.

The chosen textbooks depict Malalai as a role model due to her character, patriotism, courageous actions, and leadership skills. All the textbooks construct more or less similar historical accounts about Malalai. However, based on collected data analysis, the images of Malalai have been given a high profile. The women-centered voices are echoed by the textbooks. Some textbooks over exaggerate the metaphorical accounts of Malalai in their discourse, probably because Afghanistan lacks women as role models that can be used for gender mainstreaming. We consider that Malalai's role is overemphasized in the textbook discourse of Afghanistan. However, Malalai is just one example of a step forward towards the emancipation and empowerment of women in the Afghan society. For the current generation of Afghan learners the undertaken measures towards gender mainstreaming are a huge success bearing in mind heavy gender marginalization in Afghan society that occurred during the reign of the Taliban. The initiatives taken by the Afghan Ministry of Education need more women role models in their cultural and historical content and in the teaching methodologies.

The narratives from Grade 10 Textbook (2011, p. 73–75) and Grade 11 Textbook (2011, p. 27–31) strengthen students' beliefs that Malalai is the real national heroine of Afghanistan. We have also found that the visual presentation of Malalai is more prominent than most or all other masculine characters in the analyzed textbooks. We argue that the accounts of Malalai in current history textbooks of Afghanistan display a big step forward towards gender mainstreaming. It is noteworthy that there have been more references to Malalai in recent textbooks than there were in the past fifty years. This by itself serves as an evidence of a real shift towards gender mainstreaming. In addition, these textbooks are gradually adding references to some other female historical figures. But as a historiography of Afghanistan is almost completely dominated by males, Malalai seems to be a rare exception.

There are a number of such uncontroversial, accepted by all ethnic groups, role models that could also be included in textbooks. Kalia (2014) recommends that the Indian religious characters 'Durga ma' and 'Setta maiyah' be included in Indian textbooks; likewise, in Afghanistan such Islamic women role models as Khadijah,

Aiysha, and Fatima,[5] the wives and a daughter of Prophet Muhammad[6] should also be included in the textbooks.

We recommend further investigation about the role of Malalai in the Anglo-Afghan war and the historical accuracy of her legendary bravery, so that this field of study can be linked to the present condition of Afghan women and modern Afghan teaching methodologies. With the increased inclusion of upstanding Afghan and Muslim women of strong moral character in Afghanistan's textbooks, the country may look forward to a day when gender equality becomes evident in all aspects of Afghan society.

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Chapter 15
Resurfaced and Disappearing Past: National Heroes in History Textbooks of Post-Soviet Kyrgyzstan

Nina Bagdasarova and Larissa Marchenko

Resurfaced and Disappearing Past: National Heroes in History Textbooks of Post-Soviet Kyrgyzstan: Introduction

In this chapter we conduct a critical review of how history textbooks in Kyrgyzstan have represented the heroic figures of Kurmanjan Datka and Mikhail Frunze. For generations they have occupied a prominent place in the cultural memory of Kyrgyz citizens. At the same time the ways they have been depicted in officially sanctioned school textbooks underscore the shifting political and ideological purposes behind those representations. A comparison of the history textbooks in the Soviet and post-Soviet eras highlight how the representations of Kurmanjan Datka and Frunze embody these purposes.

While these different representations shed light on the ways Kurmanjan Datka and Frunze served as proxies for both the communist and nationalist agendas of the ruling elites, they also raise important issues about the possibilities and limitations of history textbooks to foster critical thinking among student learners. This is of particular significance for the democratic nation-building project, being undertaken in Kyrgyzstan today. We argue that unless iconic figures such as Kurmanjan Datka and Frunze are presented as complex human beings operating within particular historical contexts then students will not be encouraged to think critically about the past and the world they live in today. This is not just a challenge for building a democratic future in Kyrgyzstan, but one all nations face in an increasingly intercultural and transnational world.

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Map 15.1 Map of Kyrgyzstan (Retrieved from mapsofworld.com/Kyrgyzstan)

Geographic and Demographic Profile of Kyrgyzstan

A basic knowledge of the geography and the ethno-cultural diversity of the country is helpful in understanding the contextual features that have shaped the history of Kyrgyzstan and in turn the textbook representations of Kurmanjan Datka and Mikhail Frunze. Kyrgyzstan is a landlocked country located in Central Asia (See Map 15.1). It is defined by the Tien Shan Mountain Range and steep valleys, which encompass the entire country. Today a slight majority of the population's 6 million people live in urban areas. During the life times of Kurmanjan Datka and Frunze though most people lived a semi nomadic and agrarian life. Then, as now, the country was made up of many ethno-cultural groupings, including Kyrgyz, Uzbek, Russian, and Dungan peoples. In recent years the central government has made it a priority to foster a stronger sense of national and civic identity among Kyrgyzstan's diverse cultural groups. History textbooks have been one of the means post-Soviet governments tried to use to promote a Kyrgyz collective identity for all of its citizens.

Historical Scholarship Pertaining to Kurmanjan Datka and Mikhail Frunze

Much of the archival research conducted on Kurmanjan Datka and Frunze has been built upon fragmentary accounts derived from folk traditions, oral histories, and documents from the Russian Empire and the Bolshevik/Communist Party records. While what is actually known about the real lives of these two figures remains

embedded in some degree of myth and state propaganda, there nonetheless are consensus agreements by a range of Kyrgyz and Russian scholars about certain key moments in their respective lives. The following brief biographical sketches serve as a point of comparison and contrast for what will be reviewed in the textbook accounts of the these two historic figures.

Scholarship Relating to Kurmanjan Datka

Kurmanjan Datka (1811–1907) lived during a time of the Russian Empire's expansion into her native homeland of the Kyrgyz people in the Alai Mountain Range (an extension of the Tien Shan Mountain Range) in Central Asia. This was home to numerous tribal groups and regional nations, such as Kokand and Bukhara. Within a mix of inter-tribal conflicts and alliances Kurmanjan Datka (datka, meaning *righteous ruler*) would emerge as the most famous Kyrgyz political leader of the late nineteenth century and early twentieth centuries (Kakeev and Ploskikh 2002). The fact that she was a woman in this position was highly unusual for Central Asia then and even today.

She was born into a family of a local tribal leader, and, as was the custom of the day, she was placed in an arranged marriage. After a short time she fled this marriage and returned home to her family, which represented a major violation of the patriarchal tradition. In the years to come and to this day her refusal to accept an arranged marriage symbolized a heroic act of freedom for Kyrgyz women (Mokrynin and Ploskikh 1995). The historical record indicates she remarried to a man from another prominent Kyrgyz tribe. Whether it was love and/or other contributing factors that led to this marriage is still unclear. We do know that her husband was a Kyrgyz nobleman Alimbek Datka who supported greater regional autonomy from Kokand khanate. (Omurbekova and Choro-Teghin 2014). Because of his political activities he was assassinated in Kokand in 1862. Kurmanjan assumed her husband's position as datka over a large amalgamation of Kyrgyz tribal groups in the Alai Mountain Region.

Scholars agree that Kurmanjan Datka's ascension to power came at a particularly turbulent time in the region's political history (Omurzakova 1996; Omurbekov 2004). The Kyrgyz were divided into two large groups of northern and southern Kyrgyz peoples. Not only the history but also the geography affected political preferences of these clans. The northern part of the Tien Shan Mountains was closer to Russia and allowed access through several passes and valleys. Northern tribes started seeking support from the Russian Empire and obtained Russia's protection in the 1850s and 1860s. The southern clans had a more autonomous status due in large part to nearly impassable mountains that separated the region from Russian control. The paths heading to their territories were open from the side of the Fergana valley which made it much easier to maintain control over that land from Kokand. At the end of the 1860s, Kyrgyz tribal groups led a series of uprisings against the

Kokand Khanate, officially an ally of Russia. During this time of upheaval Kurmanjan Datka became the de facto leader of all the tribal groups in the Alai Mountainous Region. She was given the title of *Datka* and became ruler of the entire Alai region. Kurmanjan Datka and her sons remained the political and military leaders in the Alai for decades.

Datka was placed into in a precarious position as a leader. If she continued resistance to Russian imperial rule, the chances of success were slim and would likely unleash brutal repressive measures upon her people. If she co-operated, she could be perceived as a collaborator and a proxy of Tsarist Russian interests. Most scholars believe she tried to chart a middle course (Pannier 2014). Kurmanjan Datka persuaded the southern Kyrgyz to stop fighting and accept Russian protection and citizenship, recognizing the futility of their resistance. For many years, she was highly respected by Russian officials and the southern Kyrgyz clans. She encouraged toleration and respect among the different Kyrgyz tribes living in the region, while also maintaining a degree of cultural autonomy from the Russian Empire.

In 1896, two of Kurmanjan's sons and two of her grandsons were charged with contraband trade and the murder of customs officials. These allegations were not confirmed in a civil court and were, in all likelihood, not true. One of her sons was sentenced to death, while another one, together with the grandsons, was exiled to Siberia. Datka did not support the violent protests against these sentences, fearing greater reprisals against her people from Russian authorities. The details of her negotiations with Russian Imperial authorities are not known and leave open to question the costs and benefits that resulted from her accomodationist strategies. Nonetheless, by the time of her death in 1907 at the age of 96, she appears to have been an honored and respected figure in her homeland.

Scholarship Pertaining to Mikhail Frunze

Scholarly documentation on the life of Mikhail Frunze (1885–1925) has focused on the leadership role he played in Russian revolutionary politics. While he was born in the Kyrgyz town of Pishpek (renamed Frunze and then Bishkek, which is the country's capital today), he was not an ethnic Kyrgyz and spent most of his adult life engaged in Soviet political and military activities that had little to do with Kyrgyz nationalist causes (Frunze 1991).

Frunze was involved in underground revolutionary activity beginning at the age of nineteen. He was subsequently sentenced to death twice by the Tsarist government, exiled to Siberia for 10 years from which he escaped, and eventually became a Bolshevik commander during the Russian Civil War (1917–1922). He was recognized as a brilliant military strategist who innovated battlefield tactics during the war. Due to his battlefield success and original Stalin's support he succeeded Leon Trotsky as commissar for military affairs after the Civil War. Today he is viewed by military historians as one of the fathers of Soviet military theory (Gareev 1988; Lafleur 2012).

After the Civil War his revolutionary stature rose to a level where he was considered one of the potential successors to Lenin. Scholars have speculated that his popularity could have threatened the ambitions of Stalin and been a factor in his death. He died during the minor surgery on the operating table in 1925. Some scholars believe Stalin had ordered the overdose of chloroform as an anesthetic, though there is no hard evidence to support this claim (Runov 2011).

A year after his death the Kyrgyz capital of Bishkek was renamed to Frunze by Soviet authorities. After Kyrgyzstan gained its independence in 1991 the city's name reverted back to Bishkek. Throughout the Soviet era Frunze's name appeared on numerous statues and institutional affiliations, such as the prestigious Frunze Military Academy in Moscow, Military College in Omsk, and several Soviet naval ships. Metro stations in Moscow, St. Petersburg, and Minsk still bear the name *Frunzenskaya* in his honor. As will be discussed later in this chapter, the heroic adulation of Frunze during the Soviet era has presented a dilemma for Kyrgyzstan history textbook writers today. Should Frunze be represented as a legitimate national patriot of an independent Kyrgyzstan or more as a secondary figure associated with the Soviet era? How that dilemma has been negotiated will be examined in the findings from this review of national history textbooks.

History Textbooks Selected from the Soviet and Post-Soviet Eras

The representations of Datka and Frunze within Soviet and post-Soviet era textbooks reflect the priorities of officially sanctioned publications in Kyrgyzstan during those time periods. A basic understanding of those priorities has informed our review of history textbooks from those eras.

History Textbooks Produced in the Soviet Era

During the Soviet era, all school textbooks had to be approved by the Ministry of Education. Schools used the same books throughout the USSR, and uniform textbook preparation has remained almost unchanged to this day in Kyrgyzstan. Beginning in the 1930s, the history of Kyrgyzstan fit into the general course of history of the USSR. Kyrgyzstan's history was only relevant in so far as it illustrated the general ideological schema of the Soviet Union (Stalin 1936). Usually, these curricula were about the "exposure of the joint struggle of the Kyrgyz and Russian peoples against social and national oppression" and the "friendship between Kyrgyz, Russian and other peoples of the USSR" (Jamgerchinov 1981, p. 69). Indigenous Kyrgyz historical actors generally did not appear in the textbook accounts unless they were identified as part of a larger class struggle against capitalist or imperialist forces.

Soviet era history textbooks emphasized the material conditions of society as the causal agents of change and downplayed individual agency of historical actors (Stalin being a notable exception and those allied to his policies). Though Soviet era textbooks referred to the struggles of oppressed peoples, they rarely appeared as actual human beings living real lives (Kanimetov and Sherstiuk 1974; Jamgerchinov 1981).

History Textbooks Produced in the Post-Soviet Era

Since 1991 history textbooks have abandoned Marxist methodology for the study of history. According to the current history curriculum, the new pedagogy is based on "formational, civilizational and regional approaches". Nonetheless, a lot of quasi-Marxist rhetoric is still in place in the learning materials. The political and economic factors are presented as primary factors that influence historical events, while cultural and intellectual factors are covered in the very last paragraphs of each section. These last paragraphs consist mostly of lists of names and a few poor illustrations of material artifacts. Data regarding everyday life in different epochs are generally absent. As in Soviet era textbooks, there are no sections devoted to issues of gender or to inter-cultural issues within the region.

Some attitudes towards certain events and processes have changed; most noticeably in attempts to both recognize the importance of ethno-cultural diversity to the history of the country and also in attempts to promote a sense of national identity for all the peoples of Kyrgyzstan. How to do that has resulted in ongoing debates among historians and textbook writers, especially around the issue of how much attention should be given to the periodic conflicts both between and within different ethnic groups.

The description of Kyrgyz-Russian relations is the most controversial part of the current historical narrative as Kyrgyz-Russian relations are too complex for an unambiguous and unified explanation covering imperial colonization, the Soviet time, and the present day. Analyzing new history textbooks, Damira Umetbaeva asserts that Russia and the Soviet Union are simultaneously considered "a colonial and oppressive ruler" and "a nation- and state-building power and a modernizing state" (Umetbaeva 2015b, p. 77). This tension can be seen in the often conflicting and contradictory representations of Kurmanjan Datka and Frunze in post-Soviet textbooks.

Selected Textbooks for Examination from Both Eras

We examined all the textbooks on the history of Kyrgyzstan that were available during the Soviet era (see Fig. 15.1) and all the post-Soviet textbooks pertaining to the activity of Kurmanjan Datka and Mikhail Frunze (see Fig. 15.2).

Figure 1 Soviet Era History Textbooks		
Textbook (Date of publication)	Author(s)	Publisher
Istoria Kirgizskoi SSR. [The History of Kyrgyz SSR] **(1981)**	Jamgerchinov, B.D.	Mektep
Istoria Kirgizskoi SSR. [The History of Kyrgyz SSR] **(1974)**	Kanimetov, A. K. & Sherstiuk, I. N.	Mektep
Izuchenie istorii Kyrgyzstana v sredney shkole. [Studying of History of Kyrgyzstan in the secondary school] (1964)	Sherstiuk, I. N.	Mektep
Rasskazy po istorii Kirgizii. [The Stories about History of Kirgizia] **(1968)**	Sherstiuk, I. N.	Mektep

Fig. 15.1   Soviet Era history textbooks

Findings

Two central findings emerged from our examination of the selected textbooks. They are:

1. Soviet era textbooks have largely silenced Kurmanjan Datka's historical significance while representing Frunze as a revolutionary hero of the USSR.
2. Post- Soviet era textbooks have domesticated Kurmanjan Datka's historical significance within a traditional gendered framework, while Frunze becomes one of many political and military leaders in the twentieth century Kyrgyzstan.

We will now explain how these findings have been achieved through the dominant narratives constructed during the Soviet and post-Soviet era textbooks.

Finding 1: Silencing Kurmanjan Datka and Representing Frunze as a Revolutionary Hero in Soviet era Textbooks

Kurmanjan Datka

Kurmanjan Datka does not appear in any of the Soviet era textbooks. She vanishes from the historical record. This is likely because during the 1960s, the previous discourse around the "conquest of Central Asia (Middle Asia) by Russia" was substituted for a narrative of "Kyrgyzstan's voluntarily accession to Russia," which remained the only acceptable version of the complex historical events and lasted for

	Figure 2 Post-Soviet Era Textbooks	
Textbook (Date of publication)	Author(s)	Publisher
Kratkie rasskazy po istorii Kyrgyzstana (5 klass) [Short Stories about the History of Kyrgyzstan (Grade 5)]. (2009)	Dootaliev, A.	Kitep Kompani
Istoria Kyrgyzstana (9 klass). [The History of Kyrgyzstan. (Grade 9)] (1996)	Imankulov, M.	Bilim
Istoria Kyrgyzstana v XX-XXI vekakh (9 klass). [The History of Kyrgyzstan in XX-XXI Centuries (Grade 9)] (2006)	Imankulov, M.	Kitep Kompani
Istoria Kyrgyzstana v XIX veke (8 klass)[The History of Kyrgyzstan in XIX Century (Grade 8)] (2014)	Omurbekova, T. & Choro-Teghin, T.	Bilim
Istoria Kyrgyzstana [The History of Kyrgyzstan] (1995)	Mokrynin, V. P. & Ploskikh, V.M.	Kyrgyzstan
Istoria Kyrgyzstana : osnovnye vekhi s drevneishikh vremen do serediny XIX veka.(11 klass) [The History of Kyrgyzstan: Main Milestones since the Middle of XIX Century till nowadays (Grade 11)] (2003)	Osmonov, O.	Tekhnologiia.

Fig. 15.2 Post-Solve Era textbooks

decades. To include references to Kurmanjan Datka would have complicated a new Soviet era narrative that downplayed ethnic and regional demands for autonomy during the time periods of the Russian imperial rule.

Despite the elimination of Kurmanjan Datka from official textbook accounts during the Soviet era her name and respected status were kept alive in Kyrgyzstan popular culture through folktales and songs. Also, preserved manuscripts in Turkic, Farsi, and different Arabic scripts from that era testify to her importance as a leader to the indigenous inhabitants of the Kyrgyzstan region (Pannier 2014).

Mikhail Frunze

Mikhail Frunze is marginalized in Soviet era textbooks in relation to the history of Kyrgyzstan, but he takes on a more prominent role as a revolutionary hero when represented in the overall history of the USSR. Individuals in the official accounts of the Kyrgyzstan region were usually represented as either nameless builders of

Soviet republics or reactionary elements seeking to wreck the workers' republics. Just mentioning the name of a certain person in these history textbooks was enough to show the individual's importance in history, particularly the history of the USSR. Frunze was one such person.

While Frunze's name was only sparingly referenced in Soviet era textbooks in reference to Kyrgyzstan, this was not the case when he was referred to in the building of a Soviet state. For example, a large portrait of Frunze as a revolutionary hero appears in a 1974 textbook (Kanimetov and Sherstiuk, p. 50). In this textbook Frunze is represented as a military hero who successfully led the effort to suppress the Basmachi Movement (A revolt by Muslim cultural groups in Central Asia against the Soviet rule). The textbook states, "The fight against Basmachi was conducted not only by military measures. The orders by Mikhail Frunze, Commander of the Turkestan Front, contained the instructions to organize political propaganda among the general population along with the violent suppression of counter-revolution. As a result of this kind of propaganda, the mobilization to the Red Army among the local population was successful in May, 1920" (p. 54). Representing Frunze as a Soviet and not a Kyrgyz leader was typical of Soviet era textbooks. Furthermore, when he was shown in this fashion it was in the context of building a Bolshevik revolutionary movement or defending the Soviet Union, not promoting Kyrgyz nationalism.

Though textbook representations of Frunze within the context of Kyrgyzstan history were minimal most high school students in Soviet republics would have recognized him as a revolutionary hero. This paradox can be explained by the fact that he occupied a prominent place in museums dedicated to him (including his memorial museum), movies featuring him as a Soviet hero, or student participation in mandatory extracurricular activities where his name would be included in events pertaining to Soviet history. Also, Kyrgyz teachers were provided with material related to a Frunze museum located in Maili-Suu, a small town in the south of Kyrgyzstan.

Beginning in 1926 every school student was supposed to visit the Frunze museum erected in the country's capital, which had been renamed Frunze in his honor. One of the local regional schools even had its own Frunze museum. This speaks to the fact that before starting to study the history of Kyrgyzstan as a high school subject local children and teenagers already knew a lot about Frunze, especially in regard to his evolution as a revolutionary hero of the Bolshevik cause and as a protector of the Soviet state.

Finding 2: Domesticating Kurmanjan Datka and Downplaying Frunze's Political Importance in Post-Soviet era Textbooks

Kurmanjan Datka

The depictions of Kurmanjan Datka in post-Soviet era textbooks have relegated her historical presence to incidental and gendered stereotypes. Students gain little knowledge of the sophisticated and difficult choices she made as an important political leader in the history of Kyrgyzstan. In one textbook (Mokrynin and Ploskikh

1995) attention is focused on her marriages and little else. Even when she is described in the role of conducting delicate negotiations with the Russian General, Mikhail Skobelev, over the status of Kyrgyzstan within the Russian Empire, the textbook focuses on her supposedly feminine qualities and not her diplomatic skills. This is illustrated in the passage describing the Russian general's response of Kurmanjan Datka's gift of her horse to him, "…Me riding this old gelding? It is just for old ladies… Besides, look. He is practically orange!… He explained to Kurmanjan that Russian men could not take any gifts from women because it was their job to present them with gifts. And he gave her a luxurious brocade gown from Bukhara" (Mokrynin and Ploskikh 1995, p. 268).

A more recent textbook (Omurbekova and Choro-Teghin 2014) had a much more explicit nationalist narrative which explained historical events in a teleological fashion; all historical decisions and events built toward the creation of an independent Kyrgyz nation state (Umetbaeva 2015a). Within this narrative structure familiar gendered stereotypes prevailed, especially in relation to the depiction of Kurmanjan Datka. This is evidenced once again in the meeting with General Skobelev. There is a detailed description of Skobelev's military campaign, which focuses mostly on the role Kurmanjan's son, Abdylda-Bek, played in leading Kyrgyz resistance to the Russian army. Kurmanjan reappears on the scene when Skobelev chose Kurmanjan as the only person who was capable of stopping the bloodshed. The textbook depicted Kurmanjan as the "nominal ruler" (p. 125) of her people and is portrayed as someone susceptible to flattery and gifts, an obvious stereotypical male representation of women's behavior.

In general these post-Soviet textbooks represented her as a supportive and faithful wife and a devoted mother but not as a politician, leader, or as a powerful woman. Representing her as a strong woman engaged in complex leadership decisions would have undermined traditional Kyrgyz values and gender roles that continue to be promoted nation-wide in history textbooks and in the popular media. This is underscored in the immensely popular movie, *Kurmanjan Datka, the Queen of the Mountains*. The movie was released on August 31, 2014, Kyrgyzstan's Independence Day. The representation of Kurmanjan in the movie is closely related to the dominant post-Soviet textbook narratives. She is shown as a romantic and feminine individual. The image of Kurmanjan as the "mother of a nation" is the apotheosis of the movie. The life of Kurmanjan was perfectly framed within the same gendered and nationalist discourse running through Omurbekova & Choro-Teghin's textbook.

Mikhail Frunze

Mikhail Frunze vanishes as a Soviet revolutionary hero in post-Soviet era textbooks. As a Kyrgyzstan national historical figure, he is mentioned very briefly in post-Soviet history textbooks. When he is, it is mostly in relation to the Basmachi Movement, which presents a difficult challenge for textbooks promoting a more Kyrgyz nationalist agenda. How can this person born in Kyrgyzstan be represented in a positive light when he was instrumental in suppressing one of the first

indigenous rebellions against both Russian Imperial and Soviet rule? This is especially problematic because current day textbooks portray the Basmachi fighters much differently than the Soviet depictions of them as reactionary enemies of the state. Instead, the writers of the post-Soviet textbooks describe them as members of an early national liberation movement attempting to rid Central Asia of Soviet rule.

There has been no clear-cut solution to this dilemma for today's textbook writers. The course most frequently taken is simply to minimize the mentioning of Frunze's name. This tendency is illustrated in the single line of the following textbook, "On August 14, 1919 the Turkestan Front was established commanded by our compatriot M. Frunze" (Dootaliev 2009, p. 113). There is no explanation of who Frunze was, nor any description or assessment of his activity as the commander of the Turkestan Front, which ruthlessly suppressed the very group that is now represented as early national liberation army attempting to rid Central Asia of Russian occupation.

This short, neutral sounding depiction of Frunze is indicative of post-Soviet textbooks, as are the paradoxical representations of Basmachi as a national liberation movement. For example, the textbook for Grade 9 (Imankulov 2006) states the Basmachi are "people's fighters" but they also are "rebels" who only "initially" relied on the support of the "overwhelming majority of the local population of Turkestan" (Imankulov 2006, pp. 34, 37). The author conveys regret that the Basmachi Movement was unsuccessful because "one of the main aims of the Basmachis in their fight against Bolshevism was to create a nation-state" (p. 32). Then the author adds, "The local population, exhausted by robberies and extortion, was reluctant to resist the Bolsheviks, and part of [the local population] openly opposed the rebels" (p. 39). As for Frunze himself, this textbook simply states that Frunze was "the suppressor of the Basmachi liberation movement" (p. 40) but also a person "well acquainted with local conditions [who was] a Pishpek-born, prominent Bolshevik" (p. 35).

These contradictory statements about the Basmachi and truncated descriptions of Frunze leave the discerning reader confused. Frunze becomes both a suppressor of a national liberation movement, but also a prominent Bolshevik leader. On the one hand, the Basmachi are laying the foundation for independence from Soviet rule with their armed resistance. Yet, they also appear to terrorize the local population with their "robberies and extortion," possibly associating them in the reader's mind with current day radical Islamic groups. What is clear is that the representational status of both Frunze and the Basmachi remain unresolved in the post-Soviet textbook narratives.

However, the Soviet era Frunze museum in Bishkek is still operational, and schools regularly take students there on field trips. Although these tours are not mandatory, as they were in the Soviet period, many teachers still consider them valuable. The Soviet era artifacts representing the revolutionary heroic status of Frunze in Kyrgyz popular culture is further testament to the unresolved place he occupies in the hearts and minds of both government officials and ordinary citizens.

Summative Comments on the Findings

The differences in the textbook representations of these two historic figures in the Soviet and post-Soviet eras have been noted in our findings. Yet, there is an important convergence in the representations between the different eras of textbook representations.

One first sees this convergence in the static textbook portrayals of Kurmanjan Datka and Frunze from both eras. They are not represented as complex human beings operating within shifting historical contexts. Instead, whether it is the heroic revolutionary figure of Frunze in the Soviet era or Kurmanjan Datka as the "maternal mother" of the post-Soviet era, neither historical actor is presented to student readers as a dynamic human being that encompasses a multitude of traits and tendencies.

There is also the issue of popular culture and officially sanctioned textbook materials pertaining to each of these figures. Even when Kurmanjan Datka is silenced in the Soviet era textbooks or Frunze is briefly (and ambivalently) mentioned in the post-Soviet era textbooks, the wider popular culture keeps their names and memories alive. While not fully explored within the scope of this present study, it seems the popular culture representations (folktales, monuments, statues, etc.) present a much more unambiguous and heroic construction of each of these human beings.

Finally, both Kurmanjan Datka and Frunze present challenges for how they fit into the nationalist and democratic project that Kyrgyzstan has been undergoing since independence. Avoiding any detailed examination of their actual lives based on existing scholarship or romanticizing them as story book characters have been the general patterns we have noticed from textbooks in each era, though obviously done for different purposes. In both cases the student reader does not have access nor is encouraged to actively interrogate source material that would enhance a more mature historical understanding of the legacies these two human beings have for their lives today. The implications of these representations for research and educational practice will now be discussed.

Discussion

The findings from our review of Soviet and post-Soviet era textbooks used in Kyrgyzstan schools raise important issues about the purpose of history education in the country today. The depictions of Kurmanjan Datka and Mikhail Frunze in both eras bring into sharp relief how the following issues need to be examined and discussed in even greater detail by both educational researchers and practitioners.

The Importance of Evidence Based Representations of Historical Figures

Our findings revealed the static representations of Datka and Frunze from both eras. This type of representation does not foster a critical investigation of historical actors based on authentic source material and peer reviewed scholarship. When figures like Kurmanjan Datka and Frunze are portrayed in an anecdotal manner or on the level of romantic or ideological stereotypes ('revolutionary hero' or 'husband supporter'), student learners are not encouraged to go beyond these labels. The textbooks do not present what is known from scholarship, however fragmentary, about the lives of these individuals.

It is not an issue of student readers dealing with contradictory data about historical figure per se. All human lives from the past and present contain contradictions, but if the textbook narratives present figures with contradictory traits without offering ways to investigate those traits than student learning is hampered. As a result, schoolchildren constantly face "conflicts of interpretation" without the necessary "critical tools" because of the very traditional pedagogy of national history. There could be opportunities within the text that allow students to consider and weigh source material (letters, government reports, local legends, etc.) that encourage deeper reflection. Furthermore, textbooks could provide examples of how students gain practice in the skills of decoding narratives or methods for analyzing historical sources.

Certainly, these approaches could offer a more nuanced and interesting account for students when reading about the lives of Kurmanjan Datka and Frunze. This type of textbook account does not mean these figures are dismissed as insignificant; it does mean they can be understood, debated, and appreciated for who they were in their own time and what they mean for Kyrgyz students today.

Nation Building and Heroes in History

Kyrgyzstan is positioned at a very important historical moment in the world. As its leaders and citizens strive to forge a national identity out of its many ethno-cultural groupings, it becomes imperative that all of its citizens believe they have a stake in the country's future. The alternating elevation or marginalization of era-based heroic figures from the nation's past demands a more expansive approach to be included in the making of the nation's history. This is the challenge for Kyrgyz policymakers, historians, and school educators. Historical records and scholarship need to be scoured to retrieve and lift up for examination the lives of ordinary people who contributed to the economic, political, and social fabric of what has become the modern nation state today. This is not a return to the Soviet era approach of nameless 'workers' building a glorious future but rather an opening up for examination of how common people figured into events and movements normally only associated with major figures.

Such an approach de-centers the learning of history from deified or iconic folk heroes and begins to situate known leaders within more complex networks of real people who had lives and contributed in some way to what Kyrgyzstan is today. Leaders and heroes provide us a real opportunity to understand the role of individuals in history, but it is necessary to create room for critical and creative discourse in order to make this understanding possible. This becomes a different kind of exercise in nation building. History textbooks around the world usually serve some kind of civic or national identity function. At the same time this function need not mean simply an exercise in heritage nostalgia nor a fixation on the larger than life figures who reinforce existing ethnic or gendered stereotypes. Instead, it deepens and extends the study of actual women and men who have been part of the social, economic, and political life of the region. Any step in this direction by textbook writers would generate a greater student interest in and identification with the nation's history.

Conclusion: Kyrgyzstan History Education Beyond the Textbooks

The study shows that post-Soviet history textbooks have inherited the Soviet mode of the so called objective historical narrative, while the former general concept of the liberation of the oppressed Kyrgyz people has been substituted for the dominating narrative of the Kyrgyz statehood and independence. Post-Soviet era textbooks have domesticated Kurmanjan Datka's historical significance within a traditional gendered framework and represented her as a supportive and faithful wife and a devoted mother, and downplayed her role as a leader of several Kyrgyz tribes. Frunze's portrayal is also downsized despite of his role in building the first state institutions in Kyrgyzstan in the early 1920s. This type of representation does not foster a critical investigation of historical actors based on authentic source material and peer reviewed scholarship.

Our examination of textbook representations of two historical figures underscores the very limitations of textbooks as instruments that can foster a critical and reflective awareness among students about their nation's past. Given the cultural diversity of the country and the importance of popular cultural traditions in shaping people's understanding of themselves and how they understand such personalities as Kurmanjan Datka and Frunze, there needs to be a greater integration between textbook accounts and other sites of cultural memory. The fear would be that this might legitimatize sectarian or narrow 'tribal' affiliations that have been a challenge to Kyrgyzstan nation building and its democratic project. Yet, this need not be the case. If, indeed, a critical and evidenced based stance were to be incorporated into textbook and supplemental educational materials, then another kind of education results. Students can explore the dynamic interplay between how popular cultural accounts interact with textbook accounts when learning their national history. They

could explore and ask questions about the relative strengths and weaknesses of these accounts to provide authentic representations of events and historical actors, such as Kurmanjan Datka and Mikhail Frunze.

All of these suggestions require the freedom and agency of thoughtful teachers themselves to create the learning environments where students can engage in this kind of historical investigation. Many Kyrgyz teachers are doing some of this already. We would argue that there needs to be more of a national commitment to support the exchange of ideas between history teachers from different regions of the country and with scholars themselves. Devoting the resources for this type of intellectual renewal and pedagogical support rewards innovative teachers and in turn enhances students' intellectual growth.

These suggestions are not confined to the educational needs of a relatively young nation such as Kyrgyzstan. They are universal considerations for all national history educational programs, especially in a world where traditional borders have become more porous through rapid increases in human migration and communication. It is no longer good enough to have cardboard representations of national, mythic figures whether it be in Kyrgyzstan or any other country. At least in twenty-first century Kyrgyzstan we might begin the process of critically reviving our approaches toward history education. Rethinking the textbook depictions of Kurmanjan Datka and Mikhail Frunze might be a good place to begin.

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Chapter 16
The Portrayal of John Curtin as Australia's War Time Labor Prime Minister

Deborah Henderson, John Whitehouse, and Joseph Zajda

Historical Significance and Pedagogy

Historical inquiry depends on making judgments about the relative importance of aspects of the past. The historian pursues one line of investigation at the expense of another: one source is taken up as evidence whilst others remain unaddressed. Not all roads are taken. As a custodian of public memory, the historian must make decisions about the inclusion or exclusion of material to construct an account of the past (Zajda 2016). The criteria underpinning these choices may not be shared by fellow historians. For students to engage in meaningful historical inquiry, they must also grapple with issues of historical significance and they need to consider the ways in which historians interpret significance through the particular sources they privilege in texts. Seixas (1996, 1997, 2005) argues that the capacity to establish historical significance is a key part of historical thinking – a position that is supported by Lévesque (2008) and Whitehouse (2015a). The pedagogical challenge is for teachers to make the establishment of historical significance an explicit part of learning and teaching, rather than simply an implicit feature of content selection (Zajda

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2015a). Research offers two sets of criteria for use by students in evaluating historical significance. Partington (1980) presents the first set of five criteria: *importance* (to people at the time), *profundity*, *quantity*, *durability* and *relevance*. This approach is supported by Phillips (2002) and Lévesque (2008). Counsell (2004) offers a second set of criteria: *remarkable*, *remembered*, *resonant*, *resulting in change* and *revealing*.

Provision of such criteria to students assists them to 'make judgments about the past by expanding the frame of reference in which such views are formed' (Whitehouse 2015b, p. 63). In the absence of such an approach, students tend to ascribe significance on the basis of personal interest, lessons that might be drawn from the past, or matters of symbolism (Lévesque 2008). What are the implications of this research for the way in which textbooks treat a key article by Australian Prime Minister John Curtin following the outbreak of war with Japan in 1941? What does this mean for learning and teaching? This chapter explores these questions in two parts. First, it establishes the historical context for the significance of Curtin's decision making as it is represented in a key source and offers possible readings of it with reference to secondary school history texts used in Victorian schools. This is followed with reference to the ways in which Curtin's leadership is represented in a history textbook widely used in Queensland secondary schools.

Australia Looks to America

1942 was an important year for Australia. The country was facing an imminent invasion by the Japanese, who had already bombed Darwin on 19 February 1942. John Curtin, who was Australia's war time Labor Prime Minister, had his three divisions (6th, 7th and 9th) fighting in North Africa, now wanted them back to defend Australia. The Curtin Government voted for the 6th and 7th divisions to be transferred from North Africa to Australia, especially when Singapore surrounded to the Japanese on 15 February 1942. The Australian 8th division was captured by the Japanese, with some 15,000 men. Curtin informed Winston Churchill that he wanted his divisions returned to him at once. In doing so, he was one of the few leaders who could challenge Churchill and stand up to his military policies, affecting Australia. Churchill was very reluctant to oblige, as the outcome of the battle of El Alamein 'hung in the balance' (Manchester 2008, p. 251). A compromise was reached and the USA assumed the responsibility to defend the whole of the Pacific Ocean, which automatically put Australia in the American sphere. On Saturday, February 21, Curtin called a special meeting of his cabinet to modify their demand that their three divisions be returned to Australia, provided that the USA appointed a senior American general to defend the area near Australia. As a result, on 18 April 1942, MacArthur was appointed supreme commander of Allied Forces in the Southwest Pacific area. Curtin also agreed that the main body of the 6th division (the 16th and 17th brigades) could remain from mid-March to early July 1942 to defend Ceylon.

The two brigades finally arrived in Australia in August. The 19th brigade had already departed to Australia and arrived at Fremantle on 10th March.

During February both Churchill and Roosevelt were placing a great deal of pressure on Curtin to agree to diverting of the 6th, 7th and the 9th Australian divisions, en route to Australia from the Middle East to Burma, and the Pacific theatre. Curtin sent an urgent telegraph, dated 22 February, 1942 for the return of the divisions to Australia:

> …our advisors are concerned with Wavell's request … that the destination of the 6th and 9th Australian Divisions should be left open, as more troops might be badly needed in Burma … The movement of our forces to this theatre … and its adverse results would have the gravest consequences on the morale of the Australian people. The Government therefore must adhere to its decision (cited in Churchill 1985, p. 142).

General Sir Archibald Wavell, who requested the Australian divisions to be sent to Burma, was at that time, the Supreme Commander of the American-British-Dutch-Australian (ABDA) theatre. He was in command of all Allied forces in South East Asia, in early 1942, during the Pacific War in World War II. Curtin, in his next communication, on 23 February 1942, to Churchill, insisted that the divisions were needed in Australia:

> We feel a primary obligation to save Australia not only for itself, but to preserve it as a base for the development of the war against Japan (cited in Churchill 1985, p. 144).

Already, in late 1941, Australia was in perilous circumstances. In response to the Japanese attack on Pearl Harbour, the Australian government led by John Curtin declared war on Japan. This was the first such declaration by Australia; previous governments had simply followed the lead of Britain. In December, HMS *Prince of Wales* and *Repulse* were sunk by Japanese bombers. The loss of these capital ships meant that the British bastion at Singapore was Australia's key remaining military defence against Imperial Japan. Three Australian divisions had been deployed to the Mediterranean area; only the Eighth Division was assigned to protect territory to the near north of Australia (particularly Malaya and Singapore). Australian military resources were very limited. A current Australian textbook provides the following account of these events:

> Australia's deepest fear became reality when Japan entered the war in December 1941. Australia's most experienced troops, three AIF divisions, were far away, fighting alongside British forces. Australians had hoped that, if Japan entered the war, the British would defend Australia. But Britain was fighting for its own survival and lacked the resources to protect Australia and the Asia-Pacific region. On 27 December 1941 Japanese troops were advancing quickly down the Malay peninsula towards Singapore. On that day John Curtin, Australia's recently elected Labor prime minister, declared that Australia would look beyond Britain to shape its own foreign policy (Darlington et al. 2012, p. 50).

The first sentence of the extract captures the anxiety that resulted from the Japanese assault on Pearl Harbour and the advance southward. The text proceeds to sketch the dire situation in which Australia found herself: three divisions are half a world away, and Britain is unable to provide help. The second section of the extract implies that December 27th, 1941 constitutes a turning point in Australian history, for it was

on that day that Prime Minister Curtin resolved to adopt a distinctively Australian foreign policy. The specific date is chosen because it was on this day that the Melbourne *Herald* published a key article by the Prime Minister. The textbook reproduces part of this article:

> The Australian government … regards the Pacific struggle as one in which the United States and Australia must have the fullest say in the direction of the Democracies' fighting plan … Australia looks to America, free of any pangs as to our traditional kinship with the United Kingdom.
>
> We know the problems that the United Kingdom faces. We know the constant threat of invasion … But we know too that Australia can go and Britain can still hold on.
>
> We are therefore determined that Australia should not go, and we shall exert all our energies towards shaping a plan, with the United States as its keystone, which will give to our country some confidence of being able to hold out until the tide of battle swings against the enemy.

A convincing case for the historical significance of this source might be constructed, but not as the origin of independent Australian foreign policy. Churchill and Roosevelt were committed to a combined effort against the Axis powers. The Australian declaration of war on Japan provides a clearer reflection of the nationalism of the Curtin government. Serle (1993) regards Curtin's article as a mundane piece that lacked tact and enraged Prime Minister Winston Churchill. For Serle, the dispute between Curtin and Churchill over the diversion of the Seventh Division to Burma was a genuine milestone. In terms of the legal context of the development of Australian foreign policy, the Statue of Westminster (1931) granted dominions such as Australia the authority to conduct their own foreign relations. The conservative administrations of Lyons and Menzies did not move to adopt it. Indeed, this only occurred later in 1942. Rather than diminishing ties with Britain, Curtin later hoped to strengthen the Empire through establishment of a structure to co-ordinate policy.

It might be argued that the account offered by Darlington et al. (2012) is not without foundation in historiography. Some commentators perceive the appeal to the United States as a milestone in Australian history. For example, historian Russell Ward describes British reversals against the Japanese and then turns to the matter of Curtin's article:

> For 150 years most people had, like R. G. Menzies, taken British protection for granted. Even fervent Australian nationalists like Curtin or Evatt had hardly envisaged the suddenness and the extent of British disasters. Three hundred thousand Australians had travelled to the other side of the earth to defend Britain only twenty-five years earlier. Now, when Australia's peril seemed to be even greater, Britain was not able, or willing, to spare three thousand men to defend her. It was against this background that Curtin made his historic appeal for American help, in the last days of 1941 while the Eighth Division was still fighting in Malaya (Ward 1988, p. 248).

In some ways, this narrative is not unlike the account presented in the textbook: Ward underscores Australian expectations of protection by Britain, highlights the dangerous circumstances facing the nation, and provides a sense of the fear caused by the British losses. Ward underscores the irony of situation: in the First World War vast numbers of Australians enlisted to defend Britain, but now that Australia was

threatened Britain was of no use. Immediately after the abovementioned extract, Ward turns to the Curtin article and quotes from it. Nevertheless, Ward does not explain the precise significance of Curtin's appeal. The fact remains that Australia lacked the authority to pursue its own foreign policy.

Another Reading of the Source

A different interpretation of the article reveals that it is the product of a complex set of relationships and imperatives. Rather than offering students a pre-determined judgment of historical significance, it is helpful for the teacher to ask students to construct a case for the importance of the source. This should begin with basic details of the source: it is a newspaper article attributed to Curtin, but a member of his staff may have written much of it (Serle 1993). The extract opens with a call for unity by the Allies against the Axis powers. This provides the context for the statement that other theatres of war are no less important that the Pacific. Allied efforts against Japan are to be driven by the US and Australia; these nations should be responsible for planning this part of the war. Despite long-standing links with Britain and Empire, Australia must turn to the United States if the struggle against Imperial Japan is to be won. The article exemplifies continuity and change: the Australian need for the support of a great power is constant, but military circumstances in 1941 demand that this protector is the United States, rather than Britain. Curtin even observes that Britain might endure, but Australia might not. In terms of the intended audience, readers must shift their mindset from reliance on Britain to focus on America as a new source of hope. The end of the extract looks ahead to victory.

Historical inquiry is a challenging business. It is difficult to capture the complexities of the past in a textbook. Historical events are perceived from different perspectives. This gives rise to debate. There is also the ever-present challenge of catering to the learning needs of students. Although textbooks should point to the complexities of historical inquiry, some students may become lost in the complexities. The inclusion of the article as a source for analysis in Darlington et al. (2012) assists the teacher as it can more readily become the subject of discussion than would otherwise be the case. This is a key point where the teacher has agency. Teachers must build context by making links between the article, key concepts and landmarks in time (Van Boxtel and Van Drie 2012). The source can be used to point to a shift, rather than a break. Another Australian textbook speaks in such terms:

> War had come to Australia at a time when its main ally, Britain, was at war in Europe. Prime Minister Curtin had recognised the need to bring Australia closer to the powerful United States and to not rely solely on Britain for protection. Source 2.62 is Curtin's announcement of his planned change in relationships (Ashton and Anderson 2012, p. 82).

Significance and Historical Interpretations

The key textbook for the subject at post-compulsory level in Victoria takes an approach to the topic that foregrounds the importance of historiography:

> With Australia's military resources meagre and Britain's virtually wiped out in the Asia-Pacific region, Curtin looked to America for her security. Historians David Lowe and Joan Beaumont argue that this was not the 'turning point' in Australia's foreign policy, as has been claimed by some historians and commentators since, but rather a handover of Australia's defence from one major ally to another as a result of the realities of war. Lowe also points out that since Federation Australia had pursued America as a major ally in the Pacific region (Mirams et al. 2006, p. 138).

This is careful historical explanation. The extract begins with an assessment of the military positions of Britain and Australia at the close of 1941. These circumstances provide the context for the article by Curtin. The extract engages with historical interpretations by Lowe and Beaumont. These historians reject the notion that Curtin was engaged in pivotal change. Instead, Lowe and Beaumont underscore the continuity and pragmatism evident in the situation. The textbook even notes that Lowe argues that Australia had long sought to engage the United States as an ally. The overall result is to highlight the multilayered nature of historical inquiry. To understand history is to grasp the fact that different historians hold different views. Perspective counts. In the hands of an expert teacher such a text might be used as a stepping off point for the exploration of further historical interpretations. The following section explores notions of historical inquiry and making judgments about the relative importance of Curtin's decision making at a critical time in Australia's recent past with reference to a history text book from Queensland.

The Portrayal of John Curtin as Australia's War Time Labor Prime Minister

Prior to examining the portrayal of John Curtin as Australia's war time Labor Prime Minister in the textbook *Inquiry 1 - A Source-Based Approach to Modern History,* (Hennessey in Hoepper et al. 1996), this part of the chapter provides a brief overview of the text's structure and context in relation to the official Queensland syllabus for Modern History. This syllabus emphasises the study of history as a specific form of inquiry in which the interrogation of sources of evidence is fundamental. Following this, the chapter provides an account of the ways in which John Curtin's leadership, as it was shaped by war from October 1941, is discursively positioned in one chapter of the *Inquiry 1* textbook.

Inquiry 1 has been widely used in Queensland senior history classrooms since 1996. Written specifically to align with Queensland Senior Modern History Syllabus (BOSSSS 1996; QSA 2004) requirements, *Inquiry 1* adopts a critical inquiry approach to school history. In doing so, the text reflects the syllabus's emphasis that

the study of history centers on investigating the processes of change and continuity that have shaped today's world, their causes, and the roles people have played in those processes. In addressing human agency, the syllabus positions the development of historical understanding as resulting from processes of critical inquiry, debate and reflection, and through empathetic engagement with the standpoint of others. The syllabus's emphasis on second-order concepts of evidence, cause, change, time and empathy that 'provide our understanding of history as a discipline or a form of knowledge' (Lee and Ashby 2000, p. 199), indicates that it was informed by the seminal work of United Kingdom-based researchers during the 1970s and 1980s including Roy Hallam, Peter Lee, Rosalyn Ashby, Alaric Dickinson, David Sylvester and Denis Shemilt, amongst others. Accordingly, students are expected to engage with the critical analysis of primary and secondary source documents in the classroom. To accommodate this syllabus approach, the chapters in *Inquiry 1* consist of sections of introductory and linking narrative accounts that provide context for extracts from primary and secondary sources together with questions and activities which prompt student inquiry and reflection.

Hennessey's chapter 'Was 1941 a Turning Point in Australian Foreign Policy?' in *Inquiry I* (Hennessey in Hoepper et al. 1996) develops this distinct focus on historical inquiry by exploring Curtin's agency at a critical moment for Australia during World War II, for Curtin took office as the fourteenth Prime Minister of Australia on 7 October 1941, just eight weeks before the Japanese attack on Pearl Harbor. In emphasising Curtin's leadership and decision making in the national interest, the chapter provides opportunities for students to reconstruct Curtin's intentions and motivations in the section titled 'Why did Australia 'look to America' in 1941?'. Throughout this section, the author utilizes constructs of the nation-state together with foreign policy formulation as an expression of nation-building to discursively locate Australia as a unified imagined political community (Anderson 1983). In this context, Curtin's actions in pursuing the Australian nation's independent stance, in ways that were often at odds with the political preferences of Great Britain, are presented as a new form of political discourse (Henderson and Zajda 2015; Zajda 2015b).

From the outset, Curtin is introduced in stark contrast to his predecessor, Prime Minister Robert Menzies, who was forced to resign following criticism of his efforts to neutralize the threat of Japanese militarism. Curtin is foregrounded as man of action and discursively positioned asserting the nation's interest: 'By contrast, Curtin approached the war with a grave sense of emergency. Central to all Curtin's measures was the defence of Australia at all costs' (Hennessey in Hoepper et al. 1996, p. 363). This portrayal of Curtin as a strong decisive leader who was willing to make strategic foreign policy decisions in the nation's interest was significant as the British war strategy had committed a large proportion of Australia's forces to the Middle East. Furthermore, Australia's defence was in a vulnerable state; it lacked the armaments essential for modern warfare as the nation did not possess modern fighter aircraft, heavy bombers and aircraft carriers. Public sentiment at the time was that Australia would not be able to hold out against a major invasion. This narrative context sets the scene for Curtin's advocacy for Australia which is positioned

as a unified imagined political community (Anderson 1983).The narrative in the text invites students to critique an extract from a primary source, a secret cable from John Curtin to the British Prime Minister, Winston Churchill, sent on 29 November, 1941. The introduction makes clear that this source reveals Curtin's approach to war and his formulation of foreign policy at this time. Significantly, in this source Curtin's independent thinking, agency and leadership are clearly demonstrated by the author's (Hennessey in Hoepper et al. 1996, p. 363) selection of the following extract:

> We assume that your Government welcomes our independence of thought and advice rather than that we should wait on you for guidance and support. The latter would be most unhelpful to you and would be equally unhealthy from an Australian national viewpoint. Consequently, sometimes it is inevitable that the Commonwealth Government will formulate a policy at variance with yours … (Curtin cited in Neale 1982, p. 153).

Students are then asked to respond to a series of questions aimed at interrogating this source, one of which seeks an interpretive response to the following: In what ways does this secret telegram herald a new direction in Australian foreign policy?

In the next section, the narrative makes clear that in both World War 1 and at the outbreak of conflict in 1939, Australia had gone to war as a direct consequence of Britain's declaration of war. Curtin's decision, endorsed by his government, that King George VI be asked to make a separate declaration of war against Japan, is foregrounded in terms of Curtin's leadership in Australia's national interest. The narrative makes explicit that Curtin is determined to assert Australia's independence in foreign policy *prior* to gaining royal permission. The text relates that as preparations were underway for the King's formal declaration, Curtin delivers an address to the Australian public and during this radio broadcast on 8 December 1941; he asserts "We are at war with Japan" (Curtin cited in Hennessey in Hoepper et al. 1996, p. 365). In emphasizing that "the formal declaration was not given the King's approval until several days later" (Hennessey in Hoepper et al. 1996, p. 365), the narrative reiterates Curtin's independence and advocacy.

Students are then asked to read and respond to Curtin's statement on the significance of war with Japan in an extract from the *Herald* newspaper, published in Melbourne on 27 December, 1941. Curtin's announcement was made at a time when the Japanese army was moving south towards Singapore, and the fear of invasion intensified in Australia. Accordingly, the selection of this primary source provides students with opportunities to evaluate Curtin's decision to alert Australians of this danger. Following this, students are also provided with a series of statements and asked to decide which of these Curtin would have agreed with and to support their decision with reference to evidence from the extract of Curtin's statement published in the *Herald,* 27 December, 1941. These statements include:

(a) The war against Japan in the Pacific is an extension of the war in Europe.
(b) The war in the Pacific is just as important as the war in Europe.
(c) The United States must have the dominant say in the fighting plan in the Pacific.
(d) Australia must continue to look to Britain for protection.
(e) Britain, while facing problems, can survive the war without Australia's help.

 (f) The United States is Australia's new Pacific ally.
 (g) Australia is going to be defeated by Japan because the United States is having problems.
 (h) Australia has guilt feelings about abandoning Britain during the war.
 (i) With the help of the United States, Australia will defeat Japan.
 (j) Australia is going to continue to support Britain in the war against Germany.

In inviting students to exercise some practical inferences about how Curtin may have perceived the context, this activity is designed to involve students in the processes of exercising their *informed* historical imagination and to develop an empathetic response. According to UK researcher, Peter Lee, the development of the capacity to understand actions in history 'presupposes empathy as achievement … because it involves seeing an action as appropriate in terms of the agent's goals and intentions, and his view of the situation' (Lee 1984, p. 90). Similarly, the Queensland Modern History Syllabus contends that students' historical understanding can be enhanced by developing empathy and define it in terms of 'the ability to understand something from another's point of view' (QSA 2004, p. 3).

Following this empathetic task, the author invites students to compare this source, identified as 'Curtin publically turns to America, 27 December 1941' with the previous source, 'Secret cable from John Curtin to Winston Churchill, 29 November 1941' and to consider the degree to which the Curtin government has been consistent in formulating its foreign policy. The author's narration then makes clear Curtin's assertion that Australia now 'looks to America, free of any pangs as to our traditional links or kinship with the United Kingdom' (Curtin cited in Hennessey in Hoepper et al. 1996, p. 365) infuriated Churchill because it undermined the then secret Anglo–American strategy of defeating Germany before turning against Japan. However, there is no implied criticism of Curtin in the author's narrative. Rather, the narrative casts Curtin as independent of colonial ties and acting in Australia's national interest. Similarly, whilst the author refers to the Australian Liberal party's opposition to Curtin's speech and its accusations that under his leadership the Labor Party had deserted the motherland, Curtin's actions are not critiqued by the author. The narration provides explanatory text that as the United States was not in a position to support Australia immediately, Curtin continued to pressure Great Britain to reinforce its positions in Malaya and Singapore and that Churchill continued to provide reassurances of support.

Students are then provided with an extract from Curtin's correspondence to Winston Churchill about the strategic significance of Singapore sent on 23 January, 1942. The extract (Hennessey in Hoepper et al. 1996, p. 366) makes clear why Singapore's fate was viewed by Curtin as critical for Australia's defence.

> After all the assurances we have been given, the evacuation of Singapore would be regarded here and elsewhere as an inexcusable betrayal. Singapore is a central fortress in the system of Empire and local defence … we understood it was to be made impregnable and in any event it was to be capable of holding out for a prolonged period until the arrival of the main fleet … the Australian people, having volunteered for service overseas in large numbers, find it difficult to understand why they must wait so long for an improvement in the situation when irreparable damage may have been done to their power to resist, the prestige of

the Empire and the solidarity of the Allied cause … (Curtin cited in Hudson and Stokes 1982).

A series of questions follow this extract. These questions are designed to prompt student interpretation and decision making about the source's significance and include the following, amongst others: According to this source, what situation does Curtin fear the most? Why might Curtin have included the statement about 'Australian people, having volunteered for service overseas in large numbers' in his message to Churchill? Why do you think that 'improvement' in the military defences of Singapore was delayed? To guide student responses to the latter question, the author includes a question in parenthesis - What was happening to Britain in the war against Germany at that time? The narration that follows relates how Singapore was vulnerable to a land invasion as the British had always assumed that an attack on Singapore would come from the sea. The account of the fall of the assumed 'impregnable fortress' of Singapore makes clear the flawed nature of the British strategy as Singapore 'fell within a week of fighting at a cost of 1789 Australian lives (more than three times the number killed in Vietnam). The Japanese took 15,384 Australian prisoners of war. The fall of Singapore was catastrophic for morale in Australia' (Hennessey in Hoepper et al. 1996, p. 366).

The author's sympathetic portrayal of Curtin's decision making and foreign policy advocacy in Australia's national interest continues in the narration about the significant differences between Curtin and Churchill over the direction of the war, the threat of Japan to Australia and the placement of Australian troops overseas. Emphasis is assigned to Curtin's request that the majority of Australia's trained and experienced troops, then positioned in the Middle East, be returned to defend Australia and the reluctance of the British government to accept this request. In order to foreground the increasing tension in the bilateral relationship, the author includes a series of political cartoons for students to interrogate. The first cartoon by Mahony published in the Australian newspaper, the *Daily Telegraph* in 1942, titled 'Long distance thinking' depicts Curtin and Churchill conducting a heated discussion by telephone. The cartoonist contrasts the offices of both leaders. On his office wall Churchill has an itemized list of the resources at his disposal including 'plenty of planes, plenty of tanks, 2,000,000 soldiers and 2,000,000 members of the Home Guard'. By contrast, Curtin's office is empty. However, standing in the open doorway is the looming figure of a Japanese soldier with his machine gun ready to fire. Following a series of interpretative and analytical questions about this cartoon, the narration details the nature of the Japanese advance including the bombing of Darwin in the Northern Territory and the discovery of Japanese submarines in Sydney harbor and makes explicit that "these attacks on Australia brought the war directly home to the Australian people" (Hennessey in Hoepper et al. 1996, p. 367). Here the author is discursively positioning Curtin's advocacy of the war effort as unchallengeable.

The fear of Japanese invasion and the potentially disastrous course of the war for Australia are depicted in four cartoons published in the Australian newspapers the *Daily Telegraph* (1942) and the *Argus* (1943). The narrative asks students to

interpret, analyse and compare these cartoons and to then identify their depiction of themes related to Australian foreign policy during 1942 and 1943. Following this, Curtin's call for assistance from the United States is detailed and an account is provided of the subsequent arrival of US troops and equipment under the command of General Douglas MacArthur in Australia by mid-March 1942. The author signals the significance of the US presence and the gravity of the situation in the Pacific for Australian and US troops by including MacArthur's comment 'There can be no compromise. We shall win, or we shall die' (MacArthur cited in Hennessey in Hoepper et al. 1996, p. 372) in her narrative. She then provides several primary sources for students to investigate including Curtin's welcome to MacArthur and American troops on 19 March 1942, published in the *Sydney Morning Herald* and a cartoonist's depiction of Australia as a small child leaving the care of a British soldier and embracing a much taller and better equipped US soldier. After responding to a series of interpretative questions about this cartoon, students are invited to provide a caption encapsulating its message.

At the end of this part of the chapter, a range of questions are provided to prompt student reflection. For example, students are invited to consider which of the sources in this section most aptly marked a 'turning point' in Australia's foreign policy and to explain their decision. Students are asked to classify the sources they encountered in terms of whether Australia adopted a 'dependent' stance in its foreign policy or an 'independent' stance. The author also included the following activity: 'Some historians have claimed that John Curtin was Australia's greatest prime minister. Research his career and decide whether you agree with this claim' (Hennessey in Hoepper et al. 1996, p. 372).

Hennessey's portrayal of John Curtin is sympathetic of his advocacy for Australia's national interest. In her narrative, the author did not reveal that Curtin had to resist some of his own colleagues when he bowed to pressure from the United States and his conservative opponents and introduced conscription for overseas service within Australia's immediate region. Many were critical of Curtin for this decision, given his opposition to conscription during the First World War. Curtin's critics in the Labor party argued that his changed position on conscription, pushed through a special labor conference in January 1943, seemed to contradict Labor's core principles. Curtin was reported to have wept when the radical Labor parliamentarian Eddie Ward charged Curtin with 'putting young men into the slaughterhouse, although thirty years ago you wouldn't go into it yourself'.

Conclusion

Historical significance is frequently discussed in terms of events, people and ideas. It is also helpful for students to establish the historical significance of sources. This demands careful contextualisation (Wineburg 2001; Van Boxtel and Van Drie 2012). In the case of Curtin's article, application of many of the criteria presented by Counsell (2004) is instructive. This published statement was widely remarked upon.

It is remembered though the writing of historians and textbook writers. It attempts to bring about change by offering the US to the Australian public as a new source of hope, fostering public resolve, and claiming a leadership role for Australia in Pacific war. It announces that Australia plans to draw closer to the US due to the demands of war, but this is not the end of ties with Britain. It reveals continuity and change during a testing period for Australia.

Of course, it is not possible to include every facet or controversy about a leader's decision making in a time of war and as textbooks in Australia are commercially produced, authors have strict word limits to meet in constructing their narratives. In the chapter from the Queensland text, Hennessy's portrayal of John Curtin's leadership as Australia's war time Labor Prime Minister provides students with opportunities to connect Curtin's decision making and advocacy to the particular set of circumstances at the time. By responding to and engaging with sources, students can arrive at a particular inference. It can be surmised that the author adopts a rational approach to fostering empathy in her student readers. Furthermore, the author's emphasis on Curtin's efforts to pursue Australia's national interest addresses the hermeneutical challenge of providing sufficient context and guiding questions for students to interpret historical sources in the context of their time and for them to avoid judging Curtin and his decision making from an ahistorical present.

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Chapter 17
Research Trends in Globalisation and Historiography of National Leaders: Symbolic Representations in School Textbooks

Joseph Zajda, Tatyana Tsyrlina-Spady, and Michael Lovorn

Research Trends in Globalisation and Historiography

History teaching is a multilayered and multifaceted process. Of course, as we noted earlier, the same observation has often been made of history textbook development. These related observations are of great significance to researchers and practitioners alike because both groups are aware of how a history textbook can so often become the default curriculum in the classroom – meaning the teacher patterns her course syllabus to mirror the scope and design of the textbook (Freebody 2007). With this understanding, the authors of our chapters undertook the task of investigating the nature and influence of heroification – particularly of national, political, and military figures – on history education (Zajda 2014, 2015; Lovorn and Tsyrlina-Spady 2015; Tsyrlina-Spady and Lovorn 2015).

The studies and discourses included here constitute our concerted effort to provide deeper, broader, and more globalised insights into heroification of national leaders, famous and heroic personalities. It was our intent to provide multiple lenses through which these insights could be actualised. Diverse expertise in critical discourse analysis, social semiotics, content analysis, among other theoretical frames and methodologies facilitated this collection of investigations and our opening and closing chapters were intended to contextualize and summarize these findings.

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The following assumptions are based on our contributors' conclusions and are grounded in the concept and cultural trope of a national hero with 'a thousand faces' (Campbell 2008) – male and female, religious and secular, conservative and democratic, ancient and modern – in accordance with an old saying by legendary Thomas Carlyle (1888): 'Hero-worship endures forever while man endures' (p. 15).

Almost every author in this book agrees that history teaching and history textbooks serve as convenient and often efficient tools to create and enforce national identity of the younger generation, construct a sense of national belonging and pride while learning and reflecting on attractive and powerful images of their national heroes. Reformulating what Walter Benjamin once said, as quoted by Dobrenko (2008): 'History does not break down into stories but into images' (p. VI), we can also apply it to the role of heroes in history textbooks. The only exception here are the French, who seem to be moving away from placing emphasis on certain personalities (Duparc, Barzman & Barzman). Every other nation represented in this book, however, is leaning (or running) toward the opposite practice. We recognize that there are at least eight research-backed findings or 'tendencies' that emerged from this collection of studies. Each tendency is synopsised below.

Tendency 1: (Re) Creating Ancient Heroes

The contributors to this volume find that there exists an emerging tendency to create heroic figures (potentially serving as role models of bravery and national pride for younger generations) out of personalities who lived long time ago and whose lived experiences, accomplishments, and in some cases even very existence are difficult to verify. It is sufficient to mention such examples as a mediaeval prince Stephen the Great for Romania and Moldova (Mihalache), or Malalai of Maiwand for the Afghan population (Khattak and Akhtar), or Saint Jadwiga for modern Poles (Hildebrandt-Wypych).

None of the above are represented as human beings with their strengths and weaknesses – quite on the contrary, these personalities emerge as monumental figures worthy of celebrated veneration. Many of the nations examined in this volume also seem to be fixated on shaping new idols out of formerly forgotten heroes. This phenomenon was exemplified in the image of Kurmanjan Datka in Kyrgyzstan (Bagdasarova & Marchenko).

Tendency 2: Downplaying Atrocities

A second disturbing finding is centred on the tendency of several nations to downplay (and even omit) the atrocities and crimes committed by their former and/or current national leaders. Some of those nations, as we observed, have even come to represent some of their miscreant political or military figures as powerful founders,

noble or shrewd leaders, and/or enlightened visionaries. Often, the resulting textual excerpts and narratives devolve into mythical – even "divinely inspired" – tales that not only deify the hero's life, but sanitizes related historical circumstances, factors, or unfortunate events. Quite typically, the hero takes on some semblance of a "Christ narrative," meaning he or she (but almost always he) is plunged into some untenable or deplorable situation by hostile alien forces only to triumph by rising to a position of premeditated moral or intellectual superiority. By doing so, the figure remains strong, proves his or her devotion to the nation, and provides a weakened people with timely guidance and unity. In doing so, he or she earns the timeless admiration of the people, and the title of a "hero."

This narrative is reflected in the portrayals of leadership authorities of different caliber and quite often of opposite ideological standings like, for example, Mussolini in fascist Italy (Wingenter) and Stalin in the Soviet Union (Caroli). As observed by Wingenter:

> …Although contemporary textbooks do not necessarily reflect or perpetuate a benign view of Mussolini, some of them do provide narratives that work to distance him from the most violent and criminal aspects of the regime, in particular the persecution of Italian Jews and the involvement of Italy in the Second World War.

As Tsyrlina-Spady & Stoskopf remind the reader: "many key events that are widely known and still actively discussed at national and international levels are left unstated…" and explain why as otherwise these 'accounts would have undermined the legitimacy and heroic stature of both Stalin and Putin.' The same 'disease', widely known as characteristic 'historical amnesia' also affected the content of several U.S. textbooks. As Lovorn demonstrated, multiple popular textbooks present a favourable and largely uncritical portrayal of President Ronald Reagan. While all three textbooks evaluated in his study credited Reagan for cross-party popularity and winning the Cold War, for instance, none of them implicated him directly in the Iran-Contra Scandal or U.S. interference in civil unrest in El Salvador.

Tendency 3: Legitimizing the State

Directly connected with the above is another tendency well recognized and documented by Tsyrlina-Spady and Stoskopf who argue that 'all too often textbooks around the world serve to legitimize national institutions and centres of power by constructing a past that leads to an uncritical acceptance of the nation state in the present.'

In case of Soviet and modern Russia one can clearly see it in the juxtaposition of such images as Lenin and Stalin (as shown by Caroli), and Stalin and Putin (Tsyrlina-Spady & Stoskopf). A different but also juxtaposed way is characteristic for the representation of two recent South African leaders – former State President F. W. de Klerk and his successor President Nelson Mandela.

Tendency 4: Promoting a Nation of Faith

Typical of former socialist nations from Eastern Europe, is the tendency of nation building as a combination of an expanded national idea and a nation's religious foundation. The best example in this regard is Poland and its attempts to find new 'Polishness' through the revival of the figure of Saint Jadwiga, a famous mediaeval queen, 'an image of a glorious and powerful Poland' who embodied 'the symbiosis between church, education, and civil society.' Together with a reinforced image of Marshall Piłsudski, both of these figures have found a new life in modern Polish history textbooks that while placed 'in a broader context of Polish cultural and social change shows an incredible durability of the connection between national discourse and religious framework' (Hildebrandt-Wypych).

Tendency 5: Creating a Larger Alliance or Affiliation

There is also a clearly emerging tendency exhibited through multiple attempts in different European nations to go beyond their national identities towards "Europeanization." This tendency is well documented by Duparc, Barzman, and Barzman in their analysis of French history textbooks. The authors argue: "the trend towards the lesser visibility of national figures in French history textbooks has been accompanied by another rather clear-cut trend towards teaching European and world history" and in this way emphasizing a stronger impact of the European unity on the destiny of France and its people. Hildebrandt-Wypych also states a "noticeable, though limited and perfunctory "Europeanization" of the national heroism discourse in Poland."

Tendency 6: Gender Streaming

Gender streaming is another tendency undoubtedly evolving in textbooks all over the world, represented, for example, by the metaphorical account of Malalai of Maiwand, a legendary Afghan heroine, who has been, in the opinion of Khattak and Akhtar, overemphasized in the texts. The authors consider that the main reason for this heroic representation of Malalai is a significant lack of "role models that can be used for gender mainstreaming." The researchers further remind the reader that this is "just one example of a step forward towards the emancipation and empowerment of women in Afghan society" and explain how important it is "for the current generation of Afghan learners … bearing in mind heavy gender marginalization in Afghan society that occurred during the reign of the Taliban" (Khattak and Akhtar).

At the same time another female Kyrgyz national heroine Kurmanjan Datka is represented in post-Soviet textbooks

as a supportive and faithful wife and a devoted mother but not as a politician, leader, or as a powerful woman. Representing her as a strong woman engaged in complex leadership decisions would have undermined traditional Kyrgyz values and gender roles that continue to be promoted nation-wide in history textbooks and in the popular media. (Bagdasarova & Marchenko)

Tendency 7: Creating "Memory"

Another analytical approach and perspective in the analysis of history textbooks brings to light one more recent tendency. Pruchova opines that history textbooks continue to be "one of the most complex sites of the media of memory, providing a platform for dynamic interaction among the official producers of memory, diverse mnemonic groups, individual memories, mnemonic technologies, and particular mnemonic practices." As a result, the role of textbook imagery is becoming stronger, being employed as an ideological tool by itself while pictures and illustrations placed in modern textbooks are often transformed into powerful enhancers of certain national symbols and at times speak louder than their textual explanations. As shown by Pruchova: "The image is not a silent witness of historical events or their passive illustration. It is a powerful and complex medium which has to be critically interpreted based on strict methodological procedures."

Tendency 8: Fuelling Ideological Bias

The final textbooks' representation of national heroes and political leaders in many parts of the world remains ideologically biased and impacted by the political authorities ruling the country – be it Communist nationalist ideology in mainland China or more liberal principles in Hong Kong (Ye), or developing democracy in South Africa (Wolhuter, Potgieter, & Van der Walt), or an authoritarian regime in modern Russia (Tsyrlina-Spady & Stoskopf). Ideological filters continue to work hard and strong, leaving little if any, space for the whole process of hero-making (Loewen 2007, p. 11) starting with the choice of heroes, construction of their presentable images, selecting (or inventing) highly complimentary facts from their lives, silencing any provocative or negative information in this regard, and finally moulding monumental figures for teenagers and young adults to admire and emulate, leaving most of them "handicapped by history" (Loewen 2007, p. 11).

Conclusion

The above research is another reminder to the world educational community to be alert of the magic power of the strong propagandist disguise of textual and visual representations of many national heroes in modern history textbooks, to remain able and willing to dig deeper into historical facts and data, to challenge themselves and young minds with provocative questions, and to especially examine the content that has been silenced and withdrawn from the books. We would also like to attract attention to the strong impact of images and the necessity to carefully scrutinize them, never underestimating the need to develop critical thinking skills in the younger generation.

Perephrasing the words by Marietta Chudakova (2014) quoted in the opening chapter, we have now all the more reasons to say that the fate of many modern nations remains in the hands of history teachers, as Anne Wingenter, one of our bok contributors explains:

> A textbook is not the same as a history class. We need to know much more about how teachers use and, more importantly, how students comprehend the materials they encounter in their studies. Do they privilege image over text? How much of the historical debate that most texts present in appendices are they assigned to read? (And how much do they actually read?) How do they apply what they learn in school to the many other sources of information available to them, (and vice versa)?

Finally, as the above findings demonstrate, ideological frameworks and concepts that promote a sense of national pride and identity, particularly those involving hero constructs, continue to be implemented in various educational contexts as a means of advancing nationalist agendas. Such initiatives often compromise or even undermine the very historical thinking and historiographical analysis skills they claim to champion.

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