

Yesterday & Today
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Two peer-reviewed issues are annually published.

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Scientific research articles in the following field of research are published (covers 75% of the Journal):

History teaching: Refers to research reports dealing with the methodology (didactics) and practice of History teaching.

Educational history: The history of any education-related theme is reported.

History research: Relates to any historical content or theme, especially represented in the History curricula of Southern Africa. It is recommended that all the contributions should reference to either the GET or the FET or HET curriculum content. A theme of choice should also be linked to ways of HOW to educationally utilise the latter in teaching History in general, and or the classroom in particular.

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EDITORIAL

SPECIAL EDITION ON HISTORY TEXTBOOKS IN AFRICA

History textbooks are powerful media used to transmit to the learners what they are supposed to know about the past. However, textbooks by dint of their nature are not only educational material but, as Apple and Christian-Smith (1991:1) reminded us “the results of political, economic and cultural activities, battles and compromises”. As a result textbooks tend to be complex in nature as they are influenced by many conflicting pressures in the process of their production. This in turn has an impact on what is included and/ or excluded from the available subject matter. Whose knowledge gets selected for inclusion in the textbook, why and how, are thus major political and educational questions. Apple and Christian-Smith (1991) refer to the “official” or “legitimate” knowledge which is included in the textbook as the product of complex power relations and struggles among different competing social groups based on class, race, gender, religion and so forth. Resulting from these encounters the knowledge of the most powerful or dominant group is generally included in the textbook and thus textbook content changes as do powerful groups. This is even more visible in countries which experienced a fundamental political transition like South Africa.

Textbooks also serve a critical role in achieving the educational goals of many countries as they are vehicles through which the legitimate knowledge in the curriculum infiltrates schools. Accordingly, textbooks can dominate what learners learn and teachers teach. Moreover, learners possibly spend a large proportion of their time interacting with textbooks regardless if they are in the classroom or at home. In fact, for most learners textbooks provide their first exposure to books and are their most readily accessible and trusted source of knowledge (Kalmus, 2004).

History textbooks, as with all other textbooks, play a vital role in education and their use to support teaching and learning is an almost universally accepted practice. They are widely used in classrooms to fulfil a range of purposes ranging from transmitting knowledge to legitimising dominant historical narratives, from encouraging critical engagement with multiple perspectives to creating patriotic citizens. This elevates History textbooks as a powerful medium of mass communication which can be employed by dominant groups in society

to establish, amongst other uses, cultural and political hegemony. Very few members of society experience school without being exposed to the power of History textbooks. As such History textbooks are the one form of the printed media which probably has the widest societal reach. Yet, empirically, there is little evidence on how textbooks are used by teachers in the classroom and how they are received by learners. In which way historical thinking of youngsters is influenced by textbook knowledge is, for example, not yet comprehensively investigated. More empirical studies on the “enacted curriculum” in the classroom, analysing the complex relationship between teacher, textbook and learners are therefore needed. The aforementioned forms the rationale for this special edition on History textbooks in Africa.

This edition of *Yesterday & Today*¹ consists of three sections, a Festschrift, the academic articles and the History teachers’ voice segment.

The first section, which serves to encapsulate the edition as a whole, is a Festschrift dedicated to Professor Rob Siebörger. Robert Frederick Siebörger was born in Port Elizabeth, South Africa and studied at Rhodes University and the University of Exeter. He first taught at Hoërskool PJ Olivier, Grahamstown and then at the Port Elizabeth Teachers’ College. From October 1986, until his retirement in December 2014, Rob has been attached to the School of Education at the University of Cape Town. As a History educator, Rob experienced History Education under apartheid, the high hopes, with apologies to Aldous Huxley, of a “brave new post-apartheid History Education world” of the early to mid-1990s. This included workshops initiated by the Georg Eckert Institute for International Textbook Research in which Rob played a key role. This initiative was followed by subsequent frustrations of outcomes and the learning area “Human and Social Science”, the slow but steady return of the subject to a recognisable discipline, to the current flirtations of making History compulsory in one form or another up to Grade 12. Throughout all of this, Rob kept his eye in an unwavering manner on History Education be it as a textbook author, conference organiser, editor, curriculum developer, lecturer, supervisor, consultant, mentor, teacher, advisor, member of the South African Society for History Teaching and other international organisations and in other ways too numerous to mention. A man for all History education seasons indeed but definitely not a fair weather to History Education. This Festschrift edition with its focus on History textbooks, a key area in the work

¹ *Yesterday & Today* is an accredited open-access South African academic journal focusing on History Education. The journal appears twice a year, both electronically and in print. Back issues can be accessed at: <http://www.scielo.org.za/>

of Rob, is hopefully a fitting tribute to a doyen of History Education in South Africa. Although the edition in its entirety is a tribute to Rob we will in the special Festschrift section encounter the homage from colleagues from across the globe as they reminisce about Rob the mentor, critical thinker, rugby supporter, unflappable colleague and most of all mensch.

This edition of *Yesterday & Today* contains nine academic articles, including a contribution by Rob, on History textbooks. The nine articles contained in this edition are those that stood the test of academic rigour in our call for submission on History textbooks in Africa. These are laid out in a sequence that begins with articles on the provision and selection of textbooks in South Africa, then engages with methodology. This is followed with the practice of historical thinking, then an overview of textbook studies in South Africa, before finally ending with two articles that focus on other countries in Africa.

In the first article Ryota Nishino places the provision of textbooks in apartheid South Africa (1948-1994), under the microscope. He takes a historical perspective and makes particular reference to History textbook production. In the process, the apartheid bureaucratic strictures and commercial imperatives which gave rise to a conformist ethos that stifled innovation, encouraged conformity which resulted in commercial and political kowtowing are laid bare. Nishino's article is followed by a contribution from Rob Siebörger in which he analyses his own experiences of serving on the 2007 selection panel for Grade 12 History textbooks. His description of the persistence of a blended commercial and political practice from the Apartheid era is very similar to that described by Nishino. Siebörger draws on Pingel (2010:54) to remind us that "... the text itself is the result of a negotiated societal process." A global truism when it comes to textbook production.

The articles then take a methodological turn. In his contribution Marshall Maposa reflects on his choice to apply Critical Discourse Analysis (CDA) in a study in which he analysed South African History textbooks for their construction of African consciousness. An argument he concludes by pointing out that, though fraught with challenges, the application of CDA offers a worthwhile alternative methodology to more accepted ones, such as textual and content analysis, in the enquiry into History textbooks. In a similar methodological vein, Bharath and Bertram describe how progression in historical thinking manifests itself across seven South African textbooks, one each from Grade 3 to Grade 9. They argue that one way in which progression in historical thinking is signalled in textbooks is by the genre type of the texts

with which learners are required to engage. They conclude that using genre as a methodological tool can illuminate some aspects of progression of both first order and second order concepts in History.

The theme of historical thinking is pursued further by Daniel Ramaroka and Alta Engelbrecht. They use one element of a historical thinking framework, the analysis of primary sources, to evaluate History textbooks. This was achieved by using the three heuristics distilled by Wineburg (2001), sourcing, corroborating and contextualising, to evaluate the utilisation of primary sources. Their conclusion was that source work was influenced by authors' conventional epistemological beliefs about school History as a compendium of facts.

Also focusing on the practice of 'doing school history', Mackenzie and Steinberg explore the nature of History as a school-based discipline and how it is recontextualised in the South African History Curriculum and Assessment Policy Statement (CAPS) and three Grade 10 History textbooks. Their particular focus is on what the assessment activities and questions required of learners. Their findings indicate that within the 'doing school history' construct, there is both an academic and a political dimension which may appear to be at odds with one another. However, in their view the study of History is strengthened when both dimensions are given their due respect.

Bertram and Wassermann provide a broad picture of the state of History textbook analysis studies in South Africa over the past 75 years. This was done by building up a database of completed academic studies on History textbooks so as to provide an overview of the nature of History textbook research in the country. The article firstly provides a broad overview of all the peer-reviewed studies, noting the trends since 1944. Secondly, it engages in a detailed analysis of the studies that did content analysis of textbooks. In so doing a broad picture of the state of History textbook analysis emerged which shows a huge increase in the number of textbook studies in the last 15 years, which are mostly small scale qualitative studies. They argue that the body of research into History textbooks would be strengthened if authors used methodological and analysis tools that have been used by others in order to make these tools more robust and trustworthy, as well as to make philosophical paradigms more explicit.

The final two articles provide perspectives on History textbook research from other parts of Africa. One hundred years after the outbreak of the First World War (WW1) Denise Bantoro revisited the event. In a comparative

analysis of over 30 History and social studies textbooks from 15 different African countries she investigates the core questions around which lessons on WW1 are designed across the continent, and the specific knowledge conveyed and emphasised in the answers provided to these questions. In her article she demonstrates the efforts, found across African textbooks, to re-claim and re-centre local historical agency, experiences, and views related to WW1, while also pointing to the possibility to better valorise this part of national, African and world heritage to learn meaningful lessons for the present and the future.

In the final article Chiponda and Wassermann analyse the visual images of women contained in junior secondary school History textbooks used in Malawi. The purpose being to explore how women are portrayed visually and why they are portrayed the way they are. In the article it is argued that women are generally oppressed, under-represented and subordinated in their portrayal in the visual images in the textbooks analysed. They furthermore argue that their research findings in an African context speak to similar findings in other parts of the world and can for the most part be attributed to similar reasons – the powerful influences of patriarchy in society which is carried into both History and History textbooks.

The third section of this edition gives voice to those in History Education very close to the heart of Rob Siebörger – History teachers. This section, a unique developmental feature to *Yesterday & Today* gives a hands-on voice to History educators alongside the contributions by their academic peers as outlined earlier. In this edition, in line with the theme on History textbooks in Africa, we can read the perspectives of nine History educators from six different African countries on the topic of using textbooks in their classrooms. In their articles, they explain how they use History textbooks in their planning, preparation, teaching and assessment – be they as self-standing sources or in conjunction with other material. The selection and other production processes of History textbooks are also unpacked.

In the process Nancy Rushohora lays the workings of the “Desa” bare, George Muriira explains how History textbooks are used in a deep rural context in Kenya, Christine Kayeli Akidiva describes how they are used in a peri-urban context, Jean Pierre Tuyisenge provide understanding on how he uses History textbooks in a Rwandan university context, Annick Umugwaneza shares her ideas on how active learning can be achieved by using textbooks, Fortune Khumbulani unpacks the use of History textbooks in Swaziland, Pretty Kajal Domur and Debby Lee Joubert provided insights into how they educate

History learners in two all-girls' schools in different parts of Africa while Nyinchiah Godwin Gham unravels the intricate world of History textbooks in Cameroon. Intertwined with the uniqueness of these contributions from the various parts of Africa are to be found universal themes related to pedagogical, political and commercial challenges. These are stories of how outstanding History teachers, using textbooks and other resources in hand, rise to the challenge of teaching History in often difficult circumstances.

In conclusion, although the opinions expressed in the various sections of this edition of *Yesterday & Today* on History textbooks in Africa are those of the authors alone, we would like to thank them for entrusting their intellectual property to us. Finally, a word of thanks towards the editorial board of *Yesterday & Today* for allowing us to act as guest editors for the December 2015 issue.

Guest editors

Johan Wassermann, Carol Bertram & Inga Niehaus

A FESTSCHRIFT DEDICATED TO ROB SIEBÖRGER

A Teacher of History Teachers

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I had gone to the mountain to meet a man. I had hoped that our discussion would result in collaboration, one where he would allow me to learn from him. “Rob Siebörger is doing good work”. These were the words of Professor Chris Breen as we shared a cup of coffee up at the coffee shop at Rhodes Memorial in May 2009. I had gone to him to ask for advice with regard to doing a Master’s degree at the University of Cape Town. Until then I had no idea who Robert Frederick Siebörger was. Nor did I have any idea of the extent to which his work of the previous two decades had contributed to the shaping of the landscape of History Education in South Africa. This was to change over the following six years as the demands of our relationship allowed me glimpses of the man, of the academic but most of all of the History teacher.

However, the purpose of this Festschrift contribution is not to draw attention to the academic articles published by Rob. Instead I want to focus on his commitment as a teacher of teachers of History, especially primary school teachers. His legacy for me lay not in the number of publications attributed to him. For me it lay in the impact he had on those whom he taught and supervised.

His style of supervising appealed to me. Then, as an opinionated post-modernist I was eager to show my irreverence to accepted practice. My mission was to discredit grand narratives and the History class was an ideal vehicle to further my nihilistic project. He would allow me to exhaust my limited repertoire, much like George Herbert in *The Collar*. In one of our sessions I famously declared that I could teach History from a *Sunday Times*. Rob’s reply was more than equal to the task: not only did it expose mine for its short-sightedness, his also reflected the gaze required of someone who wanted to engage in a long-term relationship with History teaching. “But you cannot develop a curriculum around a *Sunday Times*”, was his retort. That was when I became aware of the connection between the intended, enacted and assessed

curricula. A chance remark, or so it seemed, succeeded in providing me with the lenses required to see the unintended consequences of my practice as a teacher of History.

Rob's knowledge of matters related to curriculum is confidence inspiring, especially to one who is attempting to engage with it at a theoretical level. As my supervisor I had hoped, wished that he would guide and chart my stuttering progress whilst writing my dissertation. When encountering a problem, which was often, I would in painstaking detail describe the cliff-face before me. Instead of showing me the way, and today I know he knew, he allowed me to find my feet. "So what are you going to do?" In that way he ensured that I make the effort. And his guidance from the wings has allowed me to become conscious of my growth, something I now do with my own learners. Where I previously might I have consciously, or not, tried to impress my high school learners with my second register, I now allow them to discover the complexity of our historical gaze. For I know the reward they will feel when they succeed.

Until I met Rob I was prone to becoming a disciple of one or other theorist, from Paulo Freire to William Doll. My practice as a teacher of History was characterised by an attempt to legitimise one or other "ism". Watching Rob move between "isms" and advancing the cause of the History Education made me rethink my relationship with theorists. I find using the writing and thoughts of Basil Bernstein extremely useful when trying to understand why my learners are struggling to make their school experience a meaningful one. Today I would say that I am a teacher of History and not a Bernsteinian: I find Bernstein useful, or as Rob would say "a toolbox".

My relationship with Rob continued after I completed my dissertation. He invited me to be interviewed by his PGCE students on two occasions. I am also aware that he has invited many other History teachers to serve a similar purpose. These teachers, too, have echoed similar feelings of affirmation of practice in being asked to share with future practitioners. This could only happen if the space was created, opened up, by the gatekeeper: in this case, Rob.

Rob Siebörger occupies a unique space in the community of History Education practitioners. We, who teach from textbooks shaped by a curriculum which bears his fingerprints, are not always aware of his efforts. Whilst other academics have dedicated their professional lives to publishing of academic articles Robert Frederick Siebörger has invested in teachers. Much of what he

has written has practical application. Of special significance is the *Turning Points in History*. It is a series of lessons which I have been able to use as a means to deepen high school learners' historical knowledge. At no point do the learners sense or even recognise Siebörger's hand. The consequence of their hour's efforts, however, bears Siebörger's hand.

Now, Professor Emeritus, he still shapes the landscape. He is active in shaping the response of the South African Society for History Teaching (SASHT) to pertinent issues of the day.

I had gone to the mountain that day in May 2009. I owe Professor Chris Breen a tremendous debt of gratitude for pointing me in the direction of the unassuming man who to this day is shaping History Education in South Africa. We who follow in his wake will find the waters calmer for he has cleared the sandbars.

A MAN OF HISTORY

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I first met Rob Siebörger a year or so after he took up his post at the University of Cape Town, School of Education and have now known him and valued his friendship for close to thirty years. The invitation to contribute to this Festschrift has given me a welcome opportunity to reflect on some key moments of those years.

Rob's contribution to History Education in South Africa has been wide-ranging and invaluable. This has included:

- teacher education at UCT;
- scholarship in the field of History Education, in particular curriculum – making a significant contribution to the academic debate around the curriculum changes between 1990 and the present;
- materials development in the field of History Education – a key text being *'What is Evidence? South Africa During the Years of Apartheid: a Skills-based Approach to Secondary History'* published in 1996;

- assessment expertise – including *Transforming Assessment. A Guide for South African Teachers*, Juta, published with Henry Macintosh and in the assessment group for the Revised National Curriculum Statements;
- active involvement in national curriculum initiatives;
- extensive professional development work with teachers and curriculum advisers.

While all aspects of Rob's long and distinguished career have made a significant difference, I am focussing on just three "moments" at which our work intersected: the period of transition between 1990 and 1994; his co-direction of a Nuffield-funded Primary History Programme (PHP); and in his involvement in the national curriculum development processes.

During the years of transition between 1990 and 1994, the School History "community" was in a state of excited anticipation. During apartheid, Afrikaner Nationalist historians had controlled School History. Alternative History textbooks had been produced, but had never received official approval. Now that an ideological space was opening to challenge the Afrikaner Nationalist interpretation, the "progressive" History community, who had felt that they had been in the 'wilderness' for too long, were pushing to open up the debates. Rob played a central role in organising the platform for that to happen. Three teacher conferences were held in 1992 in Johannesburg, Cape Town and Durban to debate a new History curriculum for South Africa (Siebörger, 2000). This was groundbreaking in opening the way for teacher involvement in thinking about and debating History Education. It was also the first time teachers from all of the apartheid education departments had come together as equals. The general emphasis in all of the conferences was on History as a discipline, on how it should be taught in order to reflect the skills and processes of historians, and on a more inclusive History (Siebörger, 2000).

In 1993 two textbook colloquia on "School History Textbooks for a Democratic South Africa" sponsored by the Georg Eckert Institute (GEI) Braunschweig, Germany, took place. Again Rob played a significant role in the organisation. The colloquia brought together historians and History educators with diametrically opposed views on the nature and purpose of History and History Education. Given these opposing views, outside facilitation was thought necessary to facilitate the dialogue between the Afrikaner nationalist historians and textbook writers and historians and writers representing the progressive History community. The GEI had had

experience in textbook revision in post-conflict societies. A statement released after the second colloquium took positions on the construction of curriculum as well as on school textbooks. This included that the role of School History should be “inclusive and democratic”; that a new History curriculum should not “exclude, diminish or distort the History of particular groups, classes or communities”; and that it should reflect “cultural diversity while reconciling national unity” (Siebörger, 1994). Although these processes did not influence the first post-apartheid curriculum changes, they laid a firm foundation for the thinking that became integral to History within the Revised National Curriculum Statement (RNCS).

A primary school programme co-directed by Rob and Jacqui Dean¹ (Leeds Metropolitan University, United Kingdom), was to impact not only on the teachers and advisors in the Western Cape, but was also to have a direct influence on the Outcomes and Assessment Standards of History within Social Sciences in the RNCS.

In 1994 the Nuffield Foundation funded a pilot teacher education and curriculum development project in South Africa. In 1997 the Foundation extended its support by awarding a major grant for a four-year Primary History Programme (PHP) in South Africa. This project directed by Jacqui Dean in the UK and Rob in Cape Town, operated in partnership with the Western Cape Education Department. It focused on working with teachers from mainly from disadvantaged schools and with curriculum advisers working in the General Education and Training (GET) phase.

The PHP was set up at a crucial time of curriculum change in South Africa, when Curriculum 2005 (C2005) was being introduced. It continued for four years. C2005 had a strong values framework but emasculated School History. The challenge for the programme was how to develop History as democracy within C2005, infusing the values of the new curriculum while developing the skills and processes of History in the primary school classroom. Teachers and advisers were inducted into “Doing History” – an approach alien to traditional History teaching in the majority of South African schools. “Doing History” (Hexter, 1971) is a process of enquiry, evidence-based interpretation and construction of the past, a debate and the study of the human condition. Participants were provided with procedural knowledge and skills, within the context of appropriate propositional knowledge, as the medium for the fostering of changes in attitudes and detailed pedagogy so that they would be

¹ Thank you to Jacqui Dean for contributing to this section of the Festschrift.

able to implement Curriculum 2005 (Dean, 2000).

The PHP involved an annual two-week visit to the UK during which the teams were introduced to new approaches to History teaching, and alternative sets of models of education to use, where relevant, within their own teaching contexts (PHP final report, December 2003). Rob organised and facilitated the on-going in-service and developmental support in South Africa. The whole Programme operated within an action research and reflective practice framework, with team members keeping a reflective journal on issues and problems identified in their own practice and the strategies developed to address those problems. The journal was written up as a formal assignment which was submitted to Leeds Metropolitan University in the UK for a professional development diploma course, customised for the Programme (PHP, 2003).

The Programme's action research/reflective practice focus provided a framework for building bridges between team members' situated, familiar models of History teaching, the models of good practice they saw in the UK and a new model of good practice that could be realised in the South African context (Dean 2003).

Two of the programme teachers won national awards for their teaching portfolios; several team teachers were promoted within their schools. In 2015 one of the team members who had been appointed as head of his primary school, won the top Western Cape leadership award for primary school principals. The programme also developed a teaching video and materials in conjunction with the Western Cape Education Department (WCED) using actual lessons taught by team members in their classrooms.

The PHP had influence beyond that of the teachers and advisers who took part in the programme. The "Doing History" approach became the foundation for History within the Revised National Curriculum Statement (RNCS). Three members of the PHP, including myself, were involved in the RNCS GET and Further Education and Training (FET) curriculum processes. Through this, History as a process of enquiry, based on disciplinary knowledge was built into the Learning Outcomes and Assessment Standards for GET and FET History. Through the participating teachers, the PHP had demonstrated the possibilities of excellent History teaching in ordinary, crowded South African classrooms, which encouraged the writing of good practice into the curriculum.

Rob has played a significant role in the curriculum processes from C2005 to the current Curriculum Assessment Policy Statement (CAPS) History curriculum. As a member of the Human and Social Sciences (HSS) Learning Area writing group he made a strong bid to retain History as a recognisable strand of the learning area. Unfortunately time pressures of the process undermined his efforts and the political imperatives meant that History was in fact removed from the HSS learning area (Siebörger, 2001). Rob was a member and then leader of the Assessment Group for the RNCS. When I was asked to reorganise the NCS FET History for the current CAPS curriculum, I turned to Rob for help. His input was invaluable in shaping the content and the conceptual frameworks. Not everyone has been satisfied with the NCS or the CAPS curriculum frameworks, but as Rob himself noted, there is “one inescapable truth: that it will never be possible to create the ideal History content, nor to satisfy all the members of a committee, let alone the academic or teaching professions or general public” (Siebörger, 2012).

What is not in question, is that because of his dedication and his contribution to the cause of History Education in South African schools, Rob has ensured that School History is in a better place now than it was when he entered UCT.

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AN IRISH TRIBUTE TO ROB SIEBÖRGER

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I first met Rob at a Standing Conference of History Teacher Educators' conference at the University of Oxford in 1996. It was the morning after a very rough night on the streets of Belfast and I was the focal point of enquiries into what exactly was going on. Very quickly I developed an affinity with Rob. We talked the same language as reluctant members of once dominant communities coming to terms with the loss of privilege and position. Rob was the first South African educator that I had met face to face (with the exception of his colleague Jackie Dean who by then was working in England). South Africa has a particular hold on me in that as a result of reading Alan Paton's *Cry the Beloved Country* and Mary Benson's *Struggle for a Birthright* in my mid-teens I had become politicised around the anti-apartheid movement and, consequently, this provided a critical lens of "distance" through which to objectify the mayhem that was developing on the streets around me as I moved to adulthood and a professional career in teaching. Also, living in the midst of conflict I realised the complexity of such situations and the vital importance of avoiding naïve judgments by probing the realities with those who experienced events from within.

At that point Northern Ireland and South Africa were ahead of others in addressing conflict through History teaching. Soon, our conversations explored each other's social and professional contexts. As liberals within our communities we knew the scorn of diehards as well as the distain of those from other backgrounds who impatiently advocated the tearing down of the existing order. As teacher educators we were wrestling with the challenges of bringing History teachers to a place where they are committed to social justice and equipped to confront the difficult past with sensitivity, compassion and inclusivity. As proponents of History Education we were also very conscious of the tension between preserving the rigour of the discipline and using teaching to promote social change. In the years that have followed Rob and I have carried on these conversations at intermittent intervals, sometimes by email, but particularly at HTEN (the successor to SCHTE) and History Educators International Research Network (HEIRNET) conferences.

Indeed, on three occasions, at an HTEN conference in 2001, then a Nuffield sponsored seminar on Teaching History in Divided Societies in 2002 and lastly at a HEIRNET conference in 2011, Rob visited Northern Ireland, thus giving our discussions even more vitality. It was during the last encounter that I discovered that we had even more in common than I had thought. Given Rob's gentle and understated manner, it had never occurred to me that despite his heritage, he might share my passion for rugby. At the end of the last day of the conference I found him impatient to travel to Ravenhill in Belfast to watch three of his beloved Springboks, Ruan Pienaar, B.J. Botha and Johann Muller play for Ulster that evening. Possibly, it is good that this was a belated discovery in our relationship as, had it happened earlier, it might have truncated our more cerebral discussions! It is a personal regret that I was unable to travel to Cape Town for the HEIRNET conference hosted by Rob in 2009. It is likely that my first visit to South Africa will have to become an essential pilgrimage as part of my own retirement.

In this brief tribute it is only possible to pick out aspects of Rob's contribution to History Education scholarship and practice. My perspective is an international one but I am very aware that he has had a considerable impact within South Africa. Three aspects stand out for me. The first relates to the period of political transition. At a time when new political arrangements were emerging in Northern Ireland, and educators were appreciating the possibilities of working in an environment free from daily violence, I found his clear and undemonstrative accounts detailing the responses and vacillations of History Education policy in South Africa informative and revealing (Dean & Siebörger 1995; Siebörger 2000; Siebörger & Dean, 2002). The 1995 article articulates sharply the dilemmas facing History educators who wish to contribute to democratic nation-building while preserving the critical dimensions (and discomfort of discovering inconvenient evidence) of an enquiry based discipline: there is a tension between the political aim of nation-building and the educational aim of teaching students to think historically. In support of his critique Bundy quotes John Slater, who warns that History does not seek either to sustain or devalue tradition, heritage or culture. It does not assume that there are shared values waiting to be defined and demanding to be supported. It does not require us to believe that a society's values are always valuable. If History seeks to guarantee any of these things, it ceases to be History and becomes indoctrination. However, given the divided nature of South Africa's past, the desire to build a cohesive nation is both strong and widespread. It can be argued that only countries with a long History of

nationhood and an established democratic tradition can afford to be purists; do South African political and social imperatives make the harnessing of History in their service acceptable? Can the ends justify the means? Many, perhaps most, people in South Africa today would answer in the affirmative (Dean & Siebörger, 1995:36).

Twenty years into Northern Ireland's faltering political transformation I continue to wrestle with this dilemma. Indeed, recently I have become uneasy at the blurring of History and Citizenship Education and advocate that teachers should be clearly aware of the different, but complementary, contribution each can make.

In relation to this, though we may differ on how far History, alone, might go in pursuit of supporting democratic practice, Rob's second contribution has been to insist on the key importance of enquiry based, disciplinary teaching in societies emerging from conflict. This has involved students understanding that historical interpretation is constructed not only through the examination of evidence but from the vantage point of the interpreter, and that debate is crucial to the clarification of ideas: A key issue is whether students can learn that there is more than one view of the past, but that the views which exist take account of each other, and inform and react against each other (Siebörger, 1995:33).

This thinking he applied to his critique of existing textbooks and to the production of new textbooks for the post-apartheid era. The 1995 *Teaching History* article provides a perceptive analysis of differing textbook approaches of the time which continues to provide insight for History educators working in post conflict reconstruction.

The third contribution I wish to highlight is perhaps the most valuable one from an international perspective. That is, the recognition that teachers themselves have to engage with personal transition before they are in a proper place to work effectively with their students; that teachers, too, are products of conflict affected societies and carry with them emotional baggage associated with its traumas. Rob's encounter work with Jackie Dean on the Nuffield sponsored *South African Primary History Programme* was of great significance in exploring how teachers might, through intensive shared experiences, find common points of reference thus "playing a crucial role in forging links between people historically divided" (Siebörger & Dean, 2002:87). My own work convinces me that this type of work is of critical importance if teachers are to overcome the emotional barriers that face them in classrooms in divided

societies. However, the follow-up work of Gail Weldon and others suggests that South African educators have often been bolder than us in pursuing the liberation of teachers from their pasts.

In 1995 Rob and Jackie wrote that defining of the purpose of History teaching was not an academic debate but ‘a fight for the soul of the new South Africa’ (Dean & Siebörger, 1995:37). My understanding is that History teaching in South Africa is again at a crossroads with the distinct threat of a move back to a single narrative, nation-building approach. It would be wise council to refer back to Rob Siebörger’s calm but decisive writing with its emphasis on criticality, inclusivity and discourse as pillars of effective History teaching in contributing to a socially cohesive society.

I wish Rob a long and healthy retirement.

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THE ETHOS OF COLLEGIALLY

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It gives me great please to honour Rob Siebörger as one of the most consistent and dedicated trainers of teachers that I have met during my career and someone who has been a major influence in the field of History Education in South Africa since the 1980s. He stands out for his selfless and

unassuming dedication to his students and to the teaching profession in a world where such values are increasingly rare. In an academic world where all the stress is currently placed on research output and policy networking, Rob always identified the needs of students and schools as his primary concern in the School of Education and in the broader professional context, without neglecting his research commitment. Only when he retired did the School realize that he had been assuming responsibility for a wide range of tasks that had thenceforth to be redistributed among a number of colleagues.

While we all realised the limitations of Colleges of Education in the apartheid era, we had to admit to an ethos of commitment to education in these institutions that is seldom to be found in Universities. Many of us had hoped that the new post-1994 era would provide the space for an enhanced commitment to that ethos with the addition of greater academic rigour. The closure of the Colleges without any consultation with the profession was something that none of us anticipated. Whatever their limitations, the Colleges represented professional commitment to the teaching profession and an ethical dedication to the tasks of education. The closure of the Colleges sapped the profession of that essential ethos at a crucial time and many of the problems in South African education at the present time can be traced to those disastrous policy decisions. Only in the person of individual teacher educators does that ethos live on – and Rob Siebörger is a beacon of inspiration in that regard. Rob has been responsible for admissions and for the Secondary PGCE Programme in the School of Education at the University of Cape Town (UCT) for as long as most of us can remember and was for many years in charge of the Advanced Certificate of Education (ACE). Most significantly he was responsible for the training of History teachers from the early 'eighties until 2014. Aside from the task of mentoring students, he participated in a range of research activities relating to the complex area of the teaching of History, curriculum reform and assessment. Key elements of those initiatives at the time when I worked with him were his work on the History Education Group (HEG), the Human Sciences Research Council (HSRC) investigation of *The Teaching of History in the RSA* (1992),¹ the National Education Policy Investigation (NEPI) *Curriculum Report*; the Magaliesberg conference sponsored by the Georg Eckert Institute to support the transformation of History Education in South Africa, and a variety of interventions related to the shaping of a new History curriculum for South Africa after 1994. His

1 See in particular: "The Assessment of History in the Senior Secondary Phase" (with P. Kallaway, J Bottaro and D Hiscock), in a report for the HSRC Education Research Programme, No 27, (Pretoria, HSRC, 1992).

contribution to a key international publication on History Education mapped out the important initiatives that marked the transition from apartheid to the new processes that characterized the curriculum development in a democratic South Africa.² In more recent years he was involved with History curriculum reform and was one of the authors of the Curriculum Assessment Policy Statement (CAPS) curriculum statement of 2011. He was also involved in the writing and editing of a range of school textbooks and teacher aids which sought to meet the exacting demands of the new curriculum revisions. Notable amongst these was his contribution to *Turning Points History* (with Jeff Guy and Peter Lekgoathi) and his work with Gail Weldon on *What is Evidence?*

Rob has produced a number of academic publications since 1990 mainly associated with the field of School History, curriculum, pedagogy and evaluation in relation to secondary and primary schools, and has focused on issues such as citizenship and education and values and education.

He participated enthusiastically in the building of a new community of History educators, nationally and locally, and helped to establish the networks that today make up the South African Society for History Teachers (SASHT). He was also regularly attended the meeting of the History Educators International Network Conference (HEIRNET). He was also an enthusiastic participant in the Kenton Education Conferences and the Southern African Comparative and History of Education Society (SACHES). I will be forever grateful to him for his tireless work on the World Congress of Comparative Education Societies (WCCES) held in Cape Town in 1998.

The hard truth is that Rob leaves the profession at a time when the teaching of History in schools has to confront difficult times. Many changes in the curriculum crafted without any consultation with the teachers and teacher educators who have to implement it, have often left teachers bewildered and vulnerable. The distance of School History from the practices of the discipline of History have led to a good deal of confusion about what teachers are trying to achieve in the classroom – and to a mass defection of students from the field!

The current initiatives to make History a compulsory subject in high school under some misguided notion that this will promote a patriotic nationalism among the youth might be a death-knell for much good History teaching.

² R Siebörger, “The History Working Group and Beyond”, T Taylor & R Guyver (eds.), *History Wars and the Classroom: Global Perspectives* (Charlotte, IAP, 2011).

In this context of apprehension it is with sadness that we have to bid you farewell from your formal role at UCT where you will be direly missed. But we look forward to your future work in a field that you have contributed to so generously and unstintingly!

ROB SIEBÖRGER: REIMAGINING THE FUTURE AS HISTORIAN AND EDUCATOR

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Rob Siebörger views historical study as an opportunity to challenge the status quo and reimagine the future. With this belief, he has helped to create a new History for schools in South Africa. In post-apartheid South Africa, the place of History was questioned. Yet Rob argued that the study of History would be critical to the ability of pupils – and society – “to cope with the complexities that South Africa presents today” (Siebörger, 2008b). Essential to this endeavor has been the way that Rob combines the mind of an historian with the heart of an educator. In even the most challenging of situations, he perceives possibilities for discussion and the transformation of perspectives and ideas.

I first met Rob in 1998. Sight unseen, Rob agreed to take me on as a research Masters student. He took a risk on me – here I was, arriving in South Africa fresh from finishing my undergraduate degree in the United States and determined to understand how History was being taught in post-apartheid South Africa. Did I have a lot to learn! I was fortunate to have an excellent teacher.

With Rob as my guide, I became immersed: in literature, in on-going debates, and, most importantly, in daily experiences of students and teachers in schools. It was a time when it was easy to get caught up in the excitement of change – in rhetoric, in policy, in beliefs about how the future would be different. But Rob challenged me, gently but constantly, to focus on how these dialogues translated into classroom experiences. Rob worked from the

position that transformation is woven into the daily experiences of children and teachers.

I know that Rob's constant and gentle reminders were not only for his students. Rob did the work of connecting *talk* of change to *acts* of change tirelessly over the past five decades. His leadership in the South African Primary History Programme (PHP) was one example. The late 1990s introduction of Curriculum 2005 and its outcomes-based education approach left teachers feeling stranded. This massive shift in educational practice occurred in the midst of social and political change in post-apartheid South Africa "without anything like the human and financial resources necessary" to realize its goals (Siebörger & Dean, 2002).

Rob's questions in this context focused on the spaces in which the new educational approach was enacted on a daily basis: by teachers in classrooms who, as he wrote, "would be primarily responsible for the implementation of the new curriculum and its values" (Siebörger & Dean, 2002). The PHP "aimed to provide participants with a support and educational structure which would introduce them to new models of teaching and learning, while providing education and support for their own development as reflective practitioners and action researchers" (Siebörger & Dean, 2002). It did so by creating shared experiences of "doing history"; teachers mutually supported each other in creating History lessons, researching their own practice, and collectively reflecting on the processes and outcomes.

Quite by happenstance, I had the opportunity to work with one of the teachers who participated in PHP and taught at a primary school in one of Cape Town's largest townships. His excitement about History teaching was palpable. He arrived at school daily with armfuls of primary source materials he had gathered; he drew a map of South Africa on outdoor play area with chalk and brought all of his Standard 7 pupils outside to physically experience the movement of the Mfecane across the geography of the modern nation-state; he called me in the evening to discuss how to design lessons that would allow his pupils, mostly recently arrived in Cape Town from the former Transkei Bantustan, to see themselves in the "new South Africa".

Rob described how the PHP worked at the micro-level toward the transformation of the practice of History teaching and the experience of History learning, with the larger goal of building a democratic society. He quotes from one participant: "In this country, we can't expect racism to disappear just because we have an excellent constitution and a new government.

We can't throw open schools and expect everything to be fine and not put support structures in place. Just as there is a gap between education policy and practice, there is a gap between a constitution and the lived experiences of the people" (Siebörger & Dean, 2002). The PHP was one way of bridging this gap between the Constitution and lived experiences in schools.

Rob also connected talk of change to acts of change through the Turning Points in History project of the Institute for Justice and Reconciliation and what was then the South African History Project, located in the Department of Education. Rob's work again underscored the role of teachers as agents of change. He wrote the teachers' guides to the series of books and co-created a set of classroom modules to demonstrate how the books could be used. In addition, Rob led workshops on the books and their classroom use for the Education departments of all of South Africa's provinces. *Turning Points in History* was winner of the 2008 UNESCO Prize for Peace Education.

As with the Primary History Programme, Rob perceived the training of teachers in Turning Points to be a space for the sharing of personal narratives. Rob argued that "fundamental to being able to understand the purpose and workings of democracy are a strongly formed sense of personal identity and a tolerance of the standpoints of others" (Siebörger, 2008b). In the workshops, as in the curriculum, participants are asked to identify turning points in their own lives and to discuss and deliberate them together. For Rob, these were important moments both professionally and personally to "invite conversations about race in history education" and to reflect on his own identity as "an older, white, professor who had been around in the apartheid years" while the "participants were, with very few exceptions, black South Africans" (Siebörger, 2008a). As had motivated previous work, Rob found that the Turning Points trainings provided a springboard for the sharing of experiences and processes of coming to understanding across lines of race and previous and current social and political positions.

A true historian and educator, Rob brings to his scholarship, his teaching, and his mentorship questions shaped by historical methods *and* by pedagogy. He begins with the substance – What historical events will get children excited to learn? What dilemmas of the past will turn their assumptions upside down? What narratives of people – famous and not – will allow children to put themselves in others' shoes? He also listens to the kinds of puzzles young children grapple with. When his seven year-old son David asked "Has it happened yet?" about a house that was built in 1655 or his four year-old

daughter Kathy asked “Daddy, was it here yesterday?” about a prehistoric landmark (Siebörger, 1991: iii), Rob did not take it as a sign that History was beyond grasp but rather that History probed kids to ask great questions. Rob believes that children can do sophisticated and complex thinking and analysis, and he has helped to lay the foundation for future generations of South African children to do just that.

Rob invites others to think with him. He excitedly explores ideas that are not yet fully formed, working together with others to build understandings that, together, are greater than the sum of their individual parts.

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ARTICLES

POLITICAL ECONOMY OF HISTORY TEXTBOOK PUBLISHING DURING APARTHEID (1948-1994): TOWARDS FURTHER HISTORICAL ENQUIRY INTO COMMERCIAL IMPERATIVES

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Abstract

The provision of textbooks in apartheid South Africa (1948-1994), a source of controversy and media interest in recent years, is placed in historical perspective, with particular reference to History textbook production. Michael W Apple (1993) proposes an analytical framework of political economy to enable better understanding of the tensions behind textbook production and distribution. During apartheid bureaucratic structures and commercial imperatives gave rise to a conformist ethos that stifled innovation. The textbook approval and adoption processes led publishers into adopting strategies to ensure approval for and approval of their textbooks. To avoid friction with education departments, editors urged self-restraint on their writers and instructed them in how to write officially approvable manuscripts. While some authors were disappointed, most wrote to satisfy their publishers, often resorting to copying the content and style of previously-approved textbooks. Focusing on History textbooks as a field of publishing history, this study synthesises existing primary and secondary sources, further supplemented by interviews with former History textbook writers and editors.

Keywords: Textbook publishing; Textbook adoption; South Africa; History education; Apartheid.

Introduction¹

Amongst numerous education and curriculum issues, the textbook, History textbooks in particular, can evoke passionate discussion. Parents and policy-makers have legitimate concerns about the best use of public funds for the teaching of History at primary and secondary school levels. This article focuses on South Africa during apartheid (1948-1994), which enacted a most blatant form of institutionalised racism and segregation. During apartheid South African History textbooks attracted both international and domestic criticism for their potential to shape the minds of the youth who would invoke a common historical narrative that legitimised the apartheid regime, be it overtly or subtly. For the majority of the pupils in apartheid South Africa, whether they are in an ethnic minority or majority group, History accumulated notoriety over decades. It was regarded as an exercise in rote-learning and as a conduit for state-sponsored indoctrination whose functions and purposes under apartheid included the strengthening and preservation of Afrikaner nationalism, white exclusivism, Christian National Education and Separate Development (Boyce, 1962; Auerbach, 1965; Cornevin, 1980; Dean, Hartmann & Katzen, 1983; Van den Berg & Buckland, 1983; Kallaway, 1984, 1993, 1995, 2002).

The end of apartheid presented educationists and curriculum designers with the eagerly awaited opportunity to overhaul the apartheid-era History curriculum, and for History textbooks to respond more wholesomely to the challenge of nation-building. Nearly ten years into a democratic South Africa, the National Department of Education accepted the realisation that a complete break from the apartheid-era History curriculum and teaching practices would not be immediately feasible or possible, advocating instead lessons to be learned by stakeholders from hindsight. In this context, in its progress report on the South African History Project, issued in 2003, the Department urged “history researchers and scholarly writers to engage in a combined effort to review, revise and rewrite outmoded apartheid-era school history texts” (Department of Education, 2003:6). In 2012, in a review of the most recent version of the “new” History curriculum, the Curriculum Assessment Policy Statement, an historian of South African education, Peter Kallaway, argued that historical research into apartheid-era History education

1 I am indebted to several readers who provided me with useful constructive criticism. My special thanks go to one reader and two anonymous reviewers of this journal. However, these readers remain beyond reproach. This article derives from my doctoral work at the University of Western Australia, Perth, Australia (Nishino, 2007). My field trip to South Africa between October 2003 and March 2004 was funded by the University of Western Australia Convocation Post Graduate Travel Award.

is rapidly fading into the mists of time, while History educators have found themselves having to defend the viability of History in the post-apartheid era (Kallaway, 2012:26). In recent years, the provision of textbooks has been characterised by “crises” and “sagas” in the delay or non-delivery of textbooks in the Eastern Cape and Limpopo provinces. These issues would appear to undermine the recent reversal of the status of the textbook from a text to be transmitted unmediated to pupils, an approach which dominated ideas about historical knowledge during apartheid, to the constructivist approach advocated in Curriculum 2005 (Chisholm, 2012).

Research into textbook publication seems to be a burgeoning field. It has attracted wide interest from scholars of various disciplines such as textual analysis, studies on nationalism, and international relations (Hein & Selden, 2000; Barnard, 2003; Klerides, 2010; Repoussi & Tutiaux-Guillion, 2010). The social and cultural approach to education and education research that gained ground after the 1970s resulted in historians of education beginning to investigate the ways in which state-sanctioned national identity was transmitted through the History curriculum, the textbook and pedagogy (Phillips, 1998; Grosvenor, 1999). While these studies have been valuable in situating the production of textbooks in a socioeconomic and political context, more can be achieved to expand and enrich the study of the textbook by situating it in an historical context. If media coverage serves as a measure, a report on the apartheid-era textbook approval and provision practices suggests it is scarcely an issue that should be consigned to the dustbin of History (Whitaker, 2010). Historians of education would help advance the discipline if they examined more closely how textbooks were produced and circulated during apartheid. This article approaches the political economy of textbook publishing as a historical enquiry, and uses apartheid-era History textbooks as a case study. Future research may provide a more rounded picture of the complex educational bureaucracy and substantiate numerous anecdotes associated with the textbook publishing industry during apartheid. Contribution by researchers with sufficient command in multiple languages is particularly welcome.²

This article analyses the commercial imperatives that shaped the political and cultural ethos of textbook publishing during apartheid. In the 1980s Philip Altbach and Gail Kelly saw the textbook as a complex educational medium whose production demands co-ordination of the educational system, the national finances, the publishing industry and the public consciousness

² My first language is Japanese, and second is English. I do not know other languages.

(Altbach & Kelly, 1988:6 in Chisholm, 2012:9). As a result of such arguments, questioning about who co-ordinates the delicate balance of interests involved in the process of textbook production has added additional fuel to the textbook debate. The educationist Michael W Apple conceived of textbook production as contestation between hegemonic and counter-hegemonic parties over pedagogy, content, the role of teachers and the administration of schools. Though the American and South African markets are different, Apple's political economy approach has merit for it regards the textbook as:

... not simply 'delivery systems' of 'facts'. They are at once the results of political, economic, and cultural activities, battles and compromises. [Textbooks] are conceived, designed, and authored by real people with real interests. They are published within the political and economic constraints of markets, resources and power. And what texts mean and how they are used are fought over by communities with distinctly different commitments and by teachers and students as well (Apple, 1993:46).

Apple's conceptualisation rests on his concern with the political economy of the textbook, and demands an understanding of the bureaucratic mechanisms that influence the ways in which the bureaucracy, the publishers and the writers operate. These demand an understanding of those processes and the power dynamics of various stakeholders that regulate the dissemination of historical knowledge and pedagogy. Apple's stress on "real people with real interests" is noteworthy for its reminder of the multiple influences that operate on and make up the political economy of the textbook. A case in point in South Africa is the syllabus revision of the early-1980s that gave way to a number of alternative textbooks to the long-selling series by established publishers. The Joint Matriculation Board, which administered private schools, adopted analytical and interpretive approaches to its History syllabus from the 1970s. In the mid-1980s, the Natal and the House of Delegates education departments revised their History syllabus, incorporating a similar pedagogical approach to that of the Joint Matriculation Board (Kallaway, 1995:13).

Two decades since democracy in South Africa the time is ripe for an analysis of disparate primary and secondary sources on the processes of History textbook publication. If hindsight can prove useful for the present and future, this article looks into an under-researched issue of the roles played by the bureaucratic regulations, and the responses by publishers and authors. Correspondence with the textbook writer and the doyen of Afrikaner historiography, Floors van Jaarsveld, serves as revealing examples of the publishers' commercial

imperative.³ The publishers had to contend with commercial interests, which affected both their relationships with authors and the textbooks as final outcomes. Alternative textbooks published for “open” schools fall outside the purview of this article, although this is another field that could enrich the historical enquiry into South African History textbooks.⁴ It is hoped that the gaps in this article will point to a direction for future research.

South African History textbook publishing: Textbook industry profile

During the apartheid-era the South African publishing industry was dominated by educational publishing, which included school textbooks. For instance, the available data from 1990 show the domestic book trade to have grossed an estimated R431.5 million. Out of this total, the sales of educational publications brought in R344.4 million, or 77% of the total (Joubert, 1990:Appendix 1).

A distinct feature of the apartheid-era textbook industry was the domination of the market by white-owned publishers; “black” publishers of commercial significance were few. In her study of the South African publishing industry, Susan Joubert compiled a list of textbook titles adopted by the Department of Education and Training (DET) for its primary and secondary schools in 1990. Of the top ten publishers, the top three were Afrikaner publishers (Educum, a Perskor subsidiary, 20%; De Jager-Haum, 16.7%; and Via Afrika, a Nasionale per subsidiary, 14.3%) – their combined share was 51% of the total. The fourth and fifth largest were the non-Afrikaner companies such as Juta, and Shuter and Shooter at 10.5% and 9.1% respectively. These top five publishers accounted for over 70% of the total. The remainder was taken up by Maskew Miller (5.8%), Nasou (4.9%), Boekateljee (4.2%), Dynamic Books (2.0%), and Oxford University Press (1.7%) (Joubert, 1990:Appendix 4).⁵ Textbooks for black schools were typically published by subsidiaries of white companies. For instance, Via Afrika and Nasou, subsidiaries of the Afrikaner publishing house, Nasionale Pers, sold textbooks in the homelands and “independent” homelands of Bophuthatswana, Transkei, Ciskei and

3 Interviews with former textbook writers and editors were conducted between November 2003 and March 2004. To protect the identity of the interviewees the names will remain anonymous. All interviews were in English. I thank them for their largesse and time in agreeing to share their recollections, some of which were sensitive.

4 A challenge to state-approved textbooks emerged from the late 1970s when alternative textbooks promoted “struggle history” and targeted private and “open” schools. The projects tended to be small-scale projects because they were not dependent on government funding and catered only to a select clientele. The livelihoods of these alternative publishers often depended on the success or failure of a single book (Holland, 1993:110).

5 Joubert cites figures from DET Primary schools catalogue 1990 and DET secondary schools catalogue 1990.

the Northern Transvaal. Thus, profits from textbooks sold to schools in the Homelands were channelled back into the parent publishing houses (Mpe & Seeber, 2001:21, note 19).

Despite these large sales figures, the textbook publishing industry was derided as “the Cinderella of publishing”, being perceived as lacking the glamour of other realms of publishing (Diamond, 1991:60). The most attractive reward for the textbook publisher was the certainty of sales. Once a textbook title was adopted by an Education Department, the department would purchase a set number of the textbooks for its schools. Only then did the publisher know the size of orders and subsequent print-runs. In other areas of commercial publishing, the publishers typically speculate on how many copies could be sold and determine the volume in a print-run. In textbook publishing the *de facto* guaranteed sales eliminated the time-consuming and costly practice of collecting and disposing of remainders (McCallum, 1996:58-59). Furthermore, textbook sales were boosted by mandatory bilingual legislation that applied to all textbooks. During apartheid textbooks were not considered by education departments for commission and purchase unless they were available in both English and Afrikaans. Despite the costs and the time required for the translation, it potentially broadened the market to include both Afrikaans- and English-medium schools (Thompson, 1985:54).⁶

Another incentive for textbook publication was the schools’ high demand for replacements. As a general pattern, schools would loan the textbooks to students free of charge on an annual basis. Education departments budgeted for a five-year textbook working life before needing replacement. Ensuring adequate maintenance and the return of the textbooks fell to the schools, which were permitted to order a limited number of replacement copies each year (Siebörger, 2006:242, note 11). This demand grew with the spread of the school boycotts across many townships during the 1980s. The increase in the theft and damage to textbooks coincided with the escalation of school boycotts. Textbooks were often not returned at the end of a school year. Even if they were returned, in whatever condition, many schools had poor storage facilities, which reduced the lifespan of textbooks or made them vulnerable to theft (Monyokolo, 1993:13-14,18). In the Johannesburg area alone, 280,000 copies, worth R7 million, were lost annually (Diamond, 1991:61). Thus, contrary to the accepted wisdom of free market principles, while the textbook market seemed lucrative, it was a market shaped and controlled by the powers

⁶ African languages were not used as medium of instruction in secondary schools.

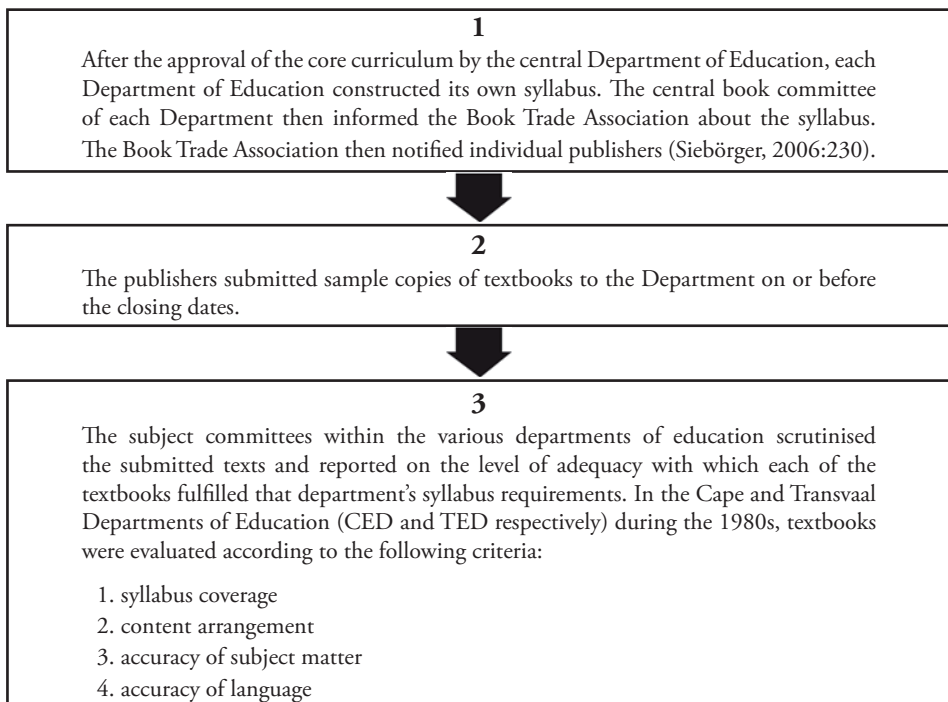
and policies governing textbook approval and adoption.

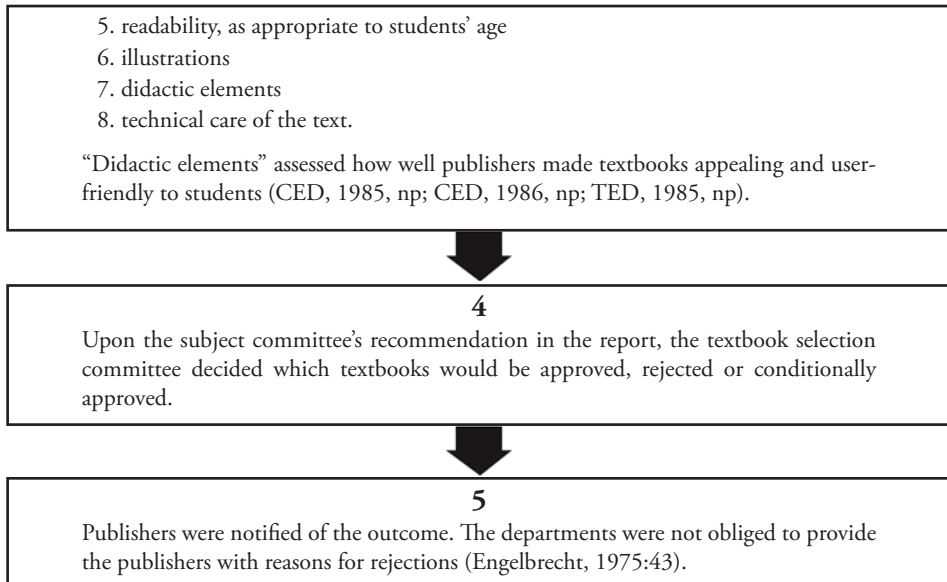
Textbook approval process: “Don’t rock the boat”

Apple’s conceptualisation of the textbook as a reflection of market, resources and power raises questions about how textbooks were certified and adopted for use in schools during apartheid. Creating coherent historical narratives of the History of History textbooks awaits thorough treatment by researchers with competency in African languages and Afrikaans, as well as knowledge and experience of educational bureaucracy. These researchers may investigate the inner-workings of the Afrikaner-dominated and homeland education departments and supplement the gap in the available literature in the English language.

The general pattern and model of the textbook approval and adoption process in South Africa was not a centralised one: during apartheid the individual education departments conducted their own textbook approval. However, a few accounts suggest the textbook approval processes in these departments followed broadly the same five steps:

Table 1: Steps in the certification and adoption of textbooks during apartheid





While the overall process can be generalised, variations across the different education departments presented practical issues to publishers. It was acknowledged that the Homelands tended to follow the procedures of the Department of Education and Training (DET), the department responsible for "black" students in "white provinces". The Transvaal and the Cape departments (TED and CED), together with the DET, were known to be the most controlling of the education departments (Kantey, 1992:11). Publishers were notified that the Cape and the Transvaal departments considered only bound page-proof copies (Engelbrecht, 1975:35; Joubert, 1990:15; Kantey, 1992:11). This requirement presented a serious dilemma for textbook publishers. A letter written in February 1991 from a textbook publisher to one of the interviewees in this study who was involved in textbook production states, "Our very big problem is that [education] departments now require submission in page proof form. This, of course, entails a tremendous amount of work, including final art work". The failure to submit the manuscript on time resulted in the publishers' missing the selection round, reducing to waste the effort and expense already channelled into the production of their textbooks (Monteith, 1985:14; Moss, 1993:24; Mpe & Seeber, 2000:21; Siebörger, 2006:9-10).

Having the textbooks inspected and gaining the approval of the various education departments was only one step towards the eventual sales. Another

crucial step was to have them put on to lists of approved textbooks. Just as there were differences in the levels of control in the approval process, the fragmented education bureaucracy – a manifestation of the ethnically-divided apartheid state machinery – gave rise to overlapping selection and adoption policies by education departments. Most education departments issued ‘approved textbook’ lists from which schools could choose. The DET limited the number of the texts on the list per course per Standard to six, the Transvaal department set its limit to three (Engelbrecht, 1975:31; Kantey, 1992:11-12). However, in the TED, there was no guarantee that this limit would always be observed (Engelbrecht, 1975:31). In one instance of readers for literature studies, out of 45 anthologies (also known as “readers”) submitted to one education department, six titles went on to the list of adopted books (Joubert, 1990:15). It appears that not all education departments excluded teachers from the selection of textbooks. While the Cape and Natal provinces accorded more autonomy to teachers in evaluating textbooks, the Orange Free State allowed teachers to make recommendations but principals retained the right to choose the textbook (Engelbrecht, 1975:42-43). Since most Homeland authorities replicated the DET textbook lists, having their textbooks on the DET list was, for publishers, critical (Chernis, 1990:302; Monteith & Proctor, 1993:37; Moss, 1993:24).

Notwithstanding the differences, for much of the apartheid era the education departments conducted selection and approval of textbooks. *Prima facie*, this seems plausible considering that the textbooks are purchased from the tax revenue. The education departments informed the publishers of their decisions. Most manuscripts were approved on condition that specific changes were made. There was little opportunity for publishers and authors to challenge the departments’ instructions for amendments. Publishers often found it confusing when a department announced a rejection but offered no reasons. The task of informing the writers of the outcomes of the approval fell to the publisher; the authors amended the text for resubmission (Kantey, 1992:12).

A few interviewees in this study, who had written textbooks during apartheid, admitted that they were initially naïve and unaware of the power dynamics of textbook publishing. They had initially perceived the textbook publishing industry as following a top-down model in which, to have the textbook approved, the publishers needed to comply with the Department’s instructions. They saw this ethos as giving rise to a risk-averse and conservative

outlook amongst the publishers and an ethos that stifled innovative approaches to presenting historical information. Soon they realised that the publishers were primarily interested in satisfying their financial motives rather than questioning the level of control the education departments were imposing on publishers. These authors found it frustrating and disheartening to see their editors discouraging and disapproving of their initiatives to include new historical content and innovative pedagogical approaches (Interviews 18 February 2004 & 20 February 2004).

Commercial constraint: Tender price

As Apple points out, the political economy of the textbook requires us to think about the available resources invested by the state in the provision of textbooks. From the 1960s, education departments purchased textbooks and stationery from the same channel of funds, thus placing further constraints on the costs of textbooks (Evans, 2002:193). An education department's textbook budget determined how many copies could be distributed to students, and effectively set the "tender price" or *de facto* price cap on each copy.

Textbook publishers at this time were acutely aware of the cost of textbooks and the implications for sales. In a letter dated 28 August 1959 to historian and History textbook author, Van Jaarsveld, his publisher advised him against publishing his textbook in two separate volumes because it would increase the cost and deter potential buyers:

The price difference between [rival publishers'] two and our one book is exactly 5/6 [five shillings and sixpence] [...] Our travellers [sales representatives] report daily that the schools don't have money and a price difference of more than 5/- [five shillings] will tip the scales. Then intrinsic value and quality no longer count for a headmaster. (Letter to Floors van Jaarsveld, 28 August 1959)

This letter underlines publishers' sensitivity to the financial concerns of schools and provides a glimpse of the conflict of desires and interests between the writer and the publisher.

We do not know whether the above is an isolated example of a conflict of interests, or one of many such interchanges over a number of years. Suffice to say that publishers' concerns with the cost of textbook production seemed to persist well into the late 1980s. Joubert's study provides an example from the late 1980s. Out of the textbook budgets in the DET, R5 was estimated as the "tender price" for a copy. This was deemed sufficient to support a textbook of

80 to 90 pages. The publishers needed to sell at least 20,000 copies to recover the production cost. Joubert contends that the price ceiling could have stymied the development of good-quality textbooks. The publishers opted for lower-quality paper and sacrificed visual aids to cut the production costs. In addition, they were unable to attract suitably-qualified and experienced authors to develop the textbooks. The textbook publishing industry became a game of bottom-line production rather than production aiming for higher quality (Joubert, 1990:15-16; Interviews 14 February 2004 and 18 February 2004).

Publishers' response 1: Collusion between publishers and education department officials

A review of these textbook approval and adoption processes clearly indicates that the education departments during apartheid assumed and ensured a monopoly in textbook approval and adoption policies and processes. Difficult to ignore in the various accounts – published, unpublished and anecdotal – are the allegations of secrecy on the part of the education departments regarding those policies and processes (Moss, 1993:25-28; Proctor & Monteith, 1993:32; Mpe & Seeber, 2002:18-23). These allegations take the form of criticism of the lack of accountability for decisions, and claim collusion between education department officials and the publishers. Although more investigation of this is required for full substantiation of these allegations, that of collusion stems from well-known connections between Afrikaner publishers, especially of newspapers, and National Party politicians. For instance, DF Malan, Prime Minister of South Africa from 1948 to 1954, had been the editor of a Nasionale Pers newspaper, *Die Burger*, from 1915 to 1924. Two prominent leaders of the National Party, and also Prime Ministers, HF Verwoerd and BJ Vorster, served on the Perskor Board of Directors (Mpe & Seeber, 2002:19–20; Giliomee, 2003:417, 550).

A former textbook writer relates long-standing rumours in the industry about department officials accepting offers to write textbooks, and their names appearing as authors despite their often negligible contributions. This kind of “patronage” on the part of publishers and education departments was said to put these textbooks in an advantageous position for manuscript approval and adoption by the Department (Interview 14 February 2004). Furthermore, syllabus committee members were often involved in writing

textbooks before the final syllabus was completed, and were even receiving royalties of between 10% and 15%. These involvements flew in the face of the prohibition of department officials' participation in textbook writing (Kantey, 1992:11; Moss, 1993:28; Siebörger, 2006:239).

Dismissing such allegations as mere anecdotes may not be warranted. Persistent rumours of rampant corruption prompted President FW de Klerk to appoint a commission to investigate the DET in 1990. The four-part report, *Kommissie van Onderzoek na Aangeleenthede Rakende die Department van Onderwys en Opleiding (Commission of Enquiry on Matters Concerning the Department of Education and Training)*, was released in 1992. Mareka Monyokolo confirms that de Klerk's report discusses the issues of corruption and malpractices in financial accounting and corrupt practices in textbook production and distribution in the DET (Monyokolo, 1993:35, note 13). However, only the Afrikaans edition of the report was available at the time of my own enquiry. This is an area that can be best pursued by researchers with a solid command of Afrikaans who, with an additional understanding of DET education policies, can reveal and interrogate the details of the report.

My research into the archives illuminates the practice of honorary authors dating back to as early as 1959, as shown in a letter from an editor at Voortrekkerpers to Van Jaarsveld:⁷

Natal is a province which is fast becoming densely populated and there is definitely a market for such a series of books [...] The Voortrekkerpers will be very happy if you would undertake the great task. Keeping in mind the huge amount of work you have already done, one hesitates to ask you. But we believe however that this too will be very rewarding for you.

Mr X [name altered] is our link with Natal. He is an inspector of education with great influence that means a tremendous amount to us. We therefore would like to mention at this stage that we would like his name on the book for obvious reasons [...] He also recommends that we should add the name of a pure-bred Englishman from Natal. He is at present busy trying to find such a person. If the Englishman and Mr X make a contribution we can give them a small royalty – if not, Voortrekkerpers will recompensate [sic] them for the use of their names (Letter to Floors van Jaarsveld, 1 September 1959).

The editor tries to persuade him to add the names of not one, but two, Departmental personnel for “obvious reasons” – selling his textbook in Natal. The editor requests him to agree to have their names on the book to boost the prospect of adoption and of sales. This is but one piece of correspondence

⁷ National Archives, Pretoria (NAP), Floors van Jaarsveld Collection, A, 2055. The letter was written in Afrikaans. I am indebted to the assistance of an anonymous translator for the English translation.

with his publisher that Van Jaarsveld kept – most of which was in Afrikaans. I was unsuccessful in locating his reply to the editor but those proficient in Afrikaans may be able to do so because he kept carbon copies of his own letters.⁸

Publishers' response 2: Desperate measures for desperate times

Tight timeframes set by education departments presented authors and publishers with practical constraints on the developing of good-quality textbooks. The length of time considered sufficient to develop a textbook may vary from one author or publisher to another. By way of a guideline, in a study of textbook publication in the mid-1990s, Kate McCallum estimated that producing a high quality textbook would require at least three years from the beginning to the completion of the process. The steps she outlined involved preliminary market research, recruitment of authors, research into the contents and pedagogy of the subject area, design, drafting of manuscripts, editing, trialling in schools, final revision, submission for approval, printing, marketing and distribution (McCallum, 1996:58). The reality of textbook production during apartheid was very different. A letter sent by a publisher to another textbook author in 1984 communicated the deadline set by the Transvaal Education Department. The TED announced the submission dates for Standards 9 and 10 textbooks to the publisher: 28 February 1985 and 3 August 1985 respectively, the manuscripts to be available in both Afrikaans and English by that date. The letter was dated 31 October 1984. The letter ends by saying, “[a]s we have so little time it is absolutely imperative that we receive the manuscript as soon as possible”. This is not an isolated example. As the table indicates, at this time the publishers typically began the writing process when they received syllabi from education departments. A former editor recalls that education departments at the time distributed syllabus documents to publishers only in the second half of 1984. The departments expected the new textbooks to be ready for submission in early 1985, allowing the publishers an unrealistic six months to complete manuscripts (Monteith, 1985:13). The tight timeframe was not peculiar to the 1980s. One interviewee recalled his first textbook project in the early 1970s. The writer remembered the whole writing process was “very rushed”. He wrote a chapter on a period of History about which he as writer had no expert knowledge, and had in

⁸ Afrikaner publishers had undergone mergers since the end of apartheid; personnel changes were common. I made repeated attempts to request interviews with (former) Afrikaner publishers and textbook editors, to no avail.

fact replaced another author who had opted out of the project (Interview 27 February 2004). It seems that the publishers simply forced their authors to meet the departmental deadlines, rather than requesting the education departments to extend them.

Time pressure, together with the commercial imperative, gave rise to plagiarism of textbooks. A former textbook writer and editor recalled textbook authors replicating existing textbooks. The rationale for this practice was that the authors were in effect denied time to write a new manuscript using original research. Simply following, and to a large extent replicating, textbooks that had already been approved and adopted by education departments was easier (Interview, 4 Dec. 2003). Studies by Merle Babrow and Leonard Thompson found that a textbook by C Fowler and GJJ Smit, *New History for Senior History Certificate and Matriculation*, closely followed works by the prominent historian in Settler historiography, George McCall Theal. Originally published in 1931, the textbook went through multiple revisions and editions until its discontinuation in 1974 (Babrow, 1962:63; Thompson, 1985:57-58).⁹ Unlike scholarly works, textbooks do not typically list sources, nor are they required to do so. This loophole in the textbook writing conventions seemed to have aided and abetted the persistence of plagiarism over decades.

This trend persisted throughout the apartheid era and even into the early post-apartheid era. Using textual analysis, I interrogated the History textbook written by Settler historian George McCall Theal in 1891: *Short History of South Africa 1486-1826: For the use of schools*. I then compared Theal's textbook with 30 Standard 6 History textbooks published between 1945 and 1996.¹⁰ The comparative study focused on one of the most frequently discussed "border wars" – the Fifth Anglo-Xhosa War of 1818-1819. The analysis makes obvious the extent and significance of the influence of Theal's textbook and his narrative on the writing of apartheid-era History textbooks. Most of the textbooks analysed were consistent with Theal's version of the conflict in characterising the war as a clash between the two "races" – the British and the Xhosa – in which the Xhosa were in the wrong. From this it can be deduced that apartheid era textbooks reflected the government's official rhetoric of separate development in subtle ways. A handful of History textbooks published after the mid- to late-1970s condemned the British for meddling with the Xhosa people and attributed the war to

9 I thank an anonymous reader for advising me the end-point of the publication.

10 The textbook was translated into Dutch in the same year and reprinted in 1891 as *Korte Geschiedenis van Zuid-Afrika*.

cultural misunderstandings, the implications of this interpretation being that peace would have been maintained had the two groups remained separate. The textbooks that appeared in the late 1980s and the early 1990s laid the blame for the ongoing conflict on the white settlers and exposed the white settlers as relying on the Dutch and the Khoi reinforcements against the Xhosa. While these shifts may indicate the weakening hold of the apartheid regime on apartheid ideology, these textbooks continued to narrate the war according to Theal's framework of "racial conflict". This example underlines the government's continued role in the screening and adoption of textbooks even in its final years (Nishino, 2008:06.7-06.11). Only after the demise of apartheid did two History textbooks denounce the "racial conflict" model and offer a materialist interpretation of the war (Nishino, 2008:06.12).

Publishers' response 3: Self-censorship

The publishers responded to the commercial imperatives by reducing the possibility of their being rejected by the education departments. These responses took several forms of self-restraint, the most explicit being that of urging the textbook writers to exercise caution in their choice of words, warning that the textbook would not be published unless it gained departmental approval. It seems that the Afrikaner authors were also under pressure, even during the National Party's rule. Many South Africans who grew up during apartheid would remember Van Jaarsveld, not as a high priest of Afrikaner historiography as historians would, but as the author of numerous History textbooks. A publisher's editor wrote to the young Van Jaarsveld in April 1957 advising him to make several changes to his manuscript. The editor wrote: "The following sentence worries me [the editor]", singling out a sentence in his original manuscript: "In the stars the face of people could be read [...] Today we still fear the number 13. No hotel has a room 13".

The editor expresses his concern with this sentence: "We Christians do not believe in fate because it is a heathen [pagan] concept. Show the learners that Christians should not be so superstitious as to fear the number 13". The editor also focuses on his [the author's] description of the relationship between the Dutch East India Company and the Dutch Reformed Church. He writes: "Along with van Riebeeck the Dutch Reformed Church came to S.A. ... Under the [Dutch East India] Company only one church denomination was allowed, viz. the D.R. Church".

The editor comments on these two sentences:

Here we now again have to do with the name of the church. I think we should be careful. Ought we not steer around the whole matter? ... The Reformed] Church contends that the Ref. Church was re-founded in 1859. My position becomes a bit thorny (Letter to Floors van Jaarsveld, 16 April 1957, National Archives Pretoria, Floors van Jaarsveld Collection, A.2055, underlining in the original).

The editor advises Van Jaarsveld to “be careful” and even to “steer around the whole matter” when dealing with van Riebeeck and the Dutch Reformed Church, the denomination perceived to be the bastion of Afrikaner nationalism and the National Party, in the same breath. Indeed, the editor may well be pointing out that the Reformed Church (Hervormde) would concede to the Dutch Reformed Church (Nederduits Gereformeerde) as the first church in South Africa.¹¹ Yet, what seems to concern the editor is that, at face value, Van Jaarsveld’s original text would draw criticism from education departments for it can create an impression that van Riebeeck placed the Dutch Reformed Church in a subordinate role.

These examples illustrate a publisher’s in-house measure to avoid friction with the education departments and to avoid the risk of a costly rejection. However, the likelihood exists that the authors of textbooks would see such caution not only as an affront to their writing but as in-house censorship. This censorious and conservative trend seems to have persisted even in the last years of apartheid. The Department of Education and Culture (DEC), a national body for white provincial departments, sent a revealing explanatory letter in December 1988. Addressing a textbook author, the DEC expressed the view that “some aspects [of a manuscript] have been treated in a manner that is causing dissatisfaction to readers in a Christian Society, the principles of which are being upheld by the Department”. It seems that religion was a sensitive concern for education departments in the context of maintaining the principles of the National Education Policy Act of 1967, which enshrined Christian National Education. As a result publishers came to rely on authors who were known to be sympathetic to Afrikaner nationalist historiography (Kros & Vadi, 1993:92-93; Proctor & Monteith, 1993:37).

Commercial imperatives tend to manifest in more subtle measures of self-restraint and censorship exercised by both the writers and the publishers. Editors during apartheid also developed a “feel” for selecting those writers who would cause least friction with the editors and other writers. A judicious publisher or editor would appoint a team of writers comprising an appropriate

¹¹ I benefit from the insight of an anonymous reviewer for this point.

mix of subject specialists and teachers who had strong collegiality and commitment, and shared a common vision in History teaching and learning (Interviews 15 December 2003, 30 January 2004, 18 February 2004, 27 February 2004). In other cases, editors found it difficult to work with writers with little experience of writing school textbooks according to this model. The editors found it frustrating to work with authors who did not appreciate or possess the skills needed to write age-specific prose, and who were impervious to the editor's advice to modify the register of a text. Having to work with "slow writers" also made an editor's life difficult. If the deadlines were not met, the publishers would face the many ill consequences of missing the approval rounds (Interview 17 February 2004). While some authors found this kind of clash with the editors frustrating and disheartening, seasoned authors simply developed a co-operative approach to ensure that the textbooks would be published. As interviewees related, the seasoned editors had learned that the standards of checks varied. Some department personnel were more concerned with spelling and factual accuracy than with ideological references and implications. Thus both editors and writers developed a "gut feeling" for what department selection committees were looking for in a textbook. They learned what to write and what not to write to satisfy the departments, and used this knowledge to ensure that their textbooks would pass the approval test. What concerned the department selection committees most was whether the textbooks featured the contents prescribed in the syllabus, often in the same order as those in the syllabus documents. If a textbook featured contents not prescribed in the syllabus, the writer would feature these but in a "boxed text" to indicate extra content

Publishers' response 4: Self-withdrawal

If in-house editorial intervention is a manifestation of commercial imperatives affecting textbooks, withdrawal from an approval process is an escalation of the commercial imperative. The fragmented approval and adoption processes during apartheid made it possible for one textbook to be approved by one education department but rejected by another.

In this context the case of the *History Alive* series published by Shuter and Shooter is worth documenting. The series took advantage of the national syllabus revision of 1983, which yielded to a new orientation of History as an academic subject. In particular, the revised documents of 1985 in the Cape and Natal provinces recast History as "an academic discipline and [a set of]

intellectual skills and perspectives” (Cape Education Department, 1985:191; Natal Education Department, 1985:2). The authors and editors of the *History Alive* series who were interviewed welcomed the syllabus revision and saw the revision as a fillip for new kinds of History textbooks. They expected the revision to encourage the all-important Matriculation examinations to shift the emphasis in History as a subject from rote-learning to the acquisition of analytical skills. It was further hoped that teachers would adapt their pedagogy and seek textbooks that catered to the needs of the revised syllabus (Interview 18 February 2004; Interview 27 February 2004).

The series had varied receptions from education departments. The Transvaal Education Department rejected *History Alive* for Standards 7, 8 and 9 without explanation, and approved the texts for the lower standards after changes were made. As of September 1987, this series was approved for use in white schools in Natal (Natal Education Department), and in Coloured (schools under the House of Representatives) and Indian schools (House of Delegates) (*Business Day*, 1987). The series was popular in private schools administered by the Joint Matriculation Board whose examination and pedagogical styles were compatible with *History Alive*. The series gained a reputation for its innovative pedagogical approaches, new contents that refuted age-old historical myths, and its inclusion of some “left-wing” historical interpretations (Interview 27 February 2004).

The 1987 approval round in the Transvaal stirred controversy amongst the education and publishing communities. For Standard 10 History, the Transvaal Education Department adopted *History Standard Ten* by CJ Joubert and JJ Britz and replaced AN Boyce’s *History for Standard Ten*, which had been adopted by the TED for 25 years. The National Minister of Education at that time, Piet Claase, claimed that the Joubert and Britz textbook was the only title submitted for approval. However, it soon emerged that five textbooks had been submitted, including Boyce’s. These developments incensed a sizeable portion of the Transvaal education community: the English-speaking teachers’ union, the Transvaal High School History Teachers’ Association (all English-speaking teachers) and the parents’ lobby group (Nishino, 2011:57-58).¹²

What did Shuter and Shooter do amidst the controversy? It was reported that they decided against submitting the manuscript of *History Alive Standard 10* to the TED because they felt it was not worth risking its rejection (*Business*

¹² The English-language newspapers reported the Transvaal textbook controversy extensively. See the reference section below for the list of articles I consulted.

Day, 1987). In one sense, this decision indicates the publishers had exercised the ultimate form of control – self-withdrawal. In thus making a business decision to “cut the losses”, the publisher knowingly avoided unnecessary strife and costs in dealing with the education departments that would almost certainly reject the manuscripts. Simultaneously, however, the teachers and parents groups, as well as the learners, in the Transvaal missed the opportunity to have the series as a teaching and learning resource. However, the series defied the rejection by the TED and continued to sell elsewhere, such as the House of Delegates Department that administered the “Indian” population. The publisher anticipated the imminent end of apartheid and commissioned a series for DET schools, *Discovering History*. This series retained the pedagogical orientation of its predecessor, but made its prose and tasks more accessible to students in DET schools (Interview 15 December 2003).

Conclusion

Following Apple’s model of textbook production, this article hopes open scholarly enquiry on the commercial imperatives that faced the textbook publishers, editors and writers during apartheid will continue. The article has attempted to show how they responded to these market forces. This article does not intend to be the definitive or comprehensive account. From the evidence examined, textbook industry during apartheid offered a few significant profit incentives to publishers and the various education departments remained dominant in the textbook approval and adoption processes during the period. The lack of transparency that characterised the selection and approval processes bred persistent allegations of collusion, which continued to dog both publishers and the bureaucracy. The use of honorary authors, in-house screening before submission, and the selection of co-operative or “colluding” authors were among the strategies publishers and editors developed. Consistently rigid and tight timeframes not only stifled the development of textbooks of quality, but compelled writers to engage in *de facto* plagiarism of textbooks that had successful records in the selection and approval processes; the publishers acquiesced in and encouraged such practices. Combined with these constraints, the *de facto* price-caps on the textbooks gave rise to an additional commercial concern for textbook publishers and one that compromised the educational concerns of the pupils and teachers. The nature and extent of these constraints engendered an ethos

that encouraged and rewarded conformity rather than innovation amongst publishers and authors. This said, innovation in officially-approved textbooks occurred after syllabus revision gave way to, and included, a revision of pedagogy. Nonetheless, further research on textbook production will deepen our understanding of textbook production.

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Interviews

- 4 December 2003: A former teacher of History, textbook writer and editor.
- 15 December 2003: A former school History teacher, later became a university lecturer.
- 30 January 2004: A former contributor to a History textbook.
- 14 February 2004: A former History teacher, and a university lecturer. A textbook writer at the time of interview.
- 17 February 2004: An editor in a publishing house.
- 18 February 2004: A former editor in a publishing house.
- 20 February 2004: A former History teacher and a textbook editor.
- 27 February 2004: Two former History teachers. Both taught at universities and wrote textbooks.

THE DILEMMAS OF TEXTBOOK SELECTION – THE DEPARTMENT OF EDUCATION’S 2007 SCREENING OF GRADE 12 HISTORY TEXTBOOKS – A CASE STUDY

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Abstract

Textbook selection presents a conundrum for history as a school subject. On one hand it is desirable that the best textbooks are available to be used in classrooms, on the other selection appears to imply control over what can be studied, or even bias and state interference. This is a case study of the textbook screening of Grade 12 history textbooks conducted by the Department of Education in January 2007, in which the author was a participant. It is based upon the criteria and evaluation report forms for the 10 books that were submitted for approval. The article is in three parts: a description of the selection criteria employed by the department and a discussion of the issues that they raise in terms of selected literature on textbook assessment in history; an analysis of the way in which the selection criteria were used in the textbook screening process followed by a discussion of what it concerns; and, in conclusion, a consideration of the place and importance of textbook selection to history education.

Keywords: Textbooks; NCS FET History; Department of Education; Selection; History Education; Criteria.

Context

There has been textbook selection for South African schools for a considerable length of time. Books have had to be approved by education departments before being permitted to be used in public school classrooms or purchased by them. This is an account of the selection process that operated for Grade 12 textbooks in 2007, discussed as a case study of the development and use of history textbook selection criteria. It is in three parts: a description of the selection criteria employed by the Department of Education and a discussion

of the issues that they raise in terms of selected literature on textbook assessment in history, an analysis of the way in which the selection criteria were used in the textbook screening process followed by a discussion of what it concerns and, in conclusion, a consideration of the place and importance of textbook selection in history education.

A new South African curriculum for the final three years of schooling, the National Curriculum Statement (NCS) for Further Education and Training (FET), was published in 2003 (Department of Education, 2003).¹ In creating the curriculum the Department of Education had backtracked significantly on previous policy for Further Education and Training, which had envisaged a “Further Education and Training Certificate” with separate outcomes-based qualifications for each National Qualification Framework level (Grade 10 = NQF Level 2, Grade 11 = NQF Level 3 and Grade 12 = NQF Level 4). Instead, the new NCS strongly resembled the Revised National Curriculum Statement (RNCS) (Department of Education, 2002), the curriculum published the year before for the first nine years of schooling and it was decided that the long-standing Senior Certificate examination would live on in a new format as the National Senior Certificate (NSC), with fewer subjects and similar examination requirements, set nationally, not provincially. The new curriculum was introduced into Grade 10 in 2006, and in the following grades in the succeeding years.

One of the problems facing the Department of Education was that the existing textbooks for the Senior Certificate were (with a few latterly adapted exceptions) written for the former apartheid education departments and used for provincial Senior Certificate examinations. It was apparent that there would need to be “national” textbooks for the new national examination and that these books would need to be approved for use in the country as a whole, not per province. Thus it was that with very little advance preparation and consultation, the Department of Education had to put an approval mechanism into place for Grade 10 books (in the first place), so that they could be available for ordering for schools in 2005. Having then piloted what was referred to as the “textbook screening” of the proposed Grade 10 books, screening for Grade 11 and 12 textbooks followed in consecutive years, with

¹ The first school curriculum developed in South Africa post-1994 was the *Interim curriculum*, from 1996, which altered but did not entirely replace the existing curriculum for Grades 1 to 9. *Nated 550*, the curriculum for Grades 10-12 continued. In 1998 an entirely new, outcomes-based, curriculum was introduced for Grades 1- 9, known as *Curriculum 2005*. This was replaced by the *Revised National Curriculum Statement* (RNCS) curriculum from 2004. The *National Curriculum Statement* (NCS) for Grades 10-12 was introduced from 2006. These curricula were replaced in their turn by the *Curriculum and Assessment Policy Statement* (CAPS), Grades R-12, in 2012.

little change to the procedure that was initiated in 2005.

The process operated broadly as follows. Textbooks' publishers were invited to submit pre-publication copies of their books (a learner book accompanied by a teacher book), which were expected to be in as close to as final a state as possible. Teams of screeners were appointed for each subject, according to the number of books submitted for it. They were departmental officials and subject advisors from the provincial education departments – a strict condition being that they had not written any textbooks for the curriculum, nor were they employed by publishing companies. A week was set aside for the screening. It was left to each team to assign three of its members to screen a book and to allow about a day to process it.

An innovation for 2006 was that a representative from a university was invited to join certain of the teams to strengthen them. I was appointed to the team of History screeners. The following is a description and analysis of the selection criteria that were used in the screening process.

Selection criteria: The criteria used in 2007

The 2007 screening teams were provided with a set of *Guiding Criteria for Selecting Textbooks* (Department of Education, 2007).² It comprised four generic sections that were used for all subjects and a specific section (Section 5) for each particular subject.

These were the generic criteria used:

Section 1: CONTENT/CONTEXT

- 1.1 The textbook covers all the Learning Outcomes (LOs) and the Assessment Standards (ASs) of the subject.
- 1.2 The textbook covers the suggested content and this is appropriately sequenced.
- 1.3 The content is suitably paced and the weighting of LOs is appropriate.
- 1.4 The content is current and up-to-date.
- 1.5 The content places learning in context i.e. integrates Assessment Standards within the subject to give learners an authentic learning experience.
- 1.6 The content is appropriately scaffolded.
- 1.7 There is clear integration of theory and applied competence.
- 1.8 The content is sensitive to diversity e.g. culture, religion, gender, etc.
- 1.9 The textbook provides a variety of meaningful activities for individuals, pairs

² These are the criteria that were used in 2005 and 2006. I am not aware that they were published publicly, or made available before the 2005 screening, but they were not confidential nor were screeners asked to treat them or the process itself confidentially.

- and groups.
- 1.10 The level of the content is appropriate for the specific grade.
 - 1.11 The language used and vocabulary are appropriate for the grade and language level.
 - 1.12 Key concepts and terms are clearly defined.
 - 1.13 The language and vocabulary are correct and appropriate for the subject.

Section 2: LEARNING ACTIVITIES & ASSESSMENT

- 1.1 Learning activities and assessment tasks are derived from Learning Outcomes (LOs) and Assessment Standards (ASs).
- 1.2 The textbook presents the learner with learning and assessment activities appropriate to the subject.
- 1.3 Assessment tasks are aligned to the Programme of Assessment as described in the Subject Assessment Guidelines (SAG).
- 1.4 A variety of learning activities and assessment tasks are used.
- 1.5 Learning and assessment targets learner achievement at different levels of complexity.
- 1.6 Learning and assessment tasks are clearly formulated and unambiguous.
- 1.7 Assessment tasks and learning activities provide for daily assessment.
- 1.8 Learning and assessment tasks allow for expanded opportunities for learners.
- 1.9 Learning activities and assessment tasks are appropriately scaffolded.
- 1.10 Assessment activities reflect the integration of Assessment Standards (ASs).

Section 3: LAYOUT, DESIGN AND OVERALL QUALITY

- 1.1 The text is structured, using headings and sub-headings.
- 1.2 The font and typeface are clear and easy to read.
- 1.3 The illustrations and diagrams are clear and relevant, without bias.
- 1.4 The paper is of a good quality and bound securely. [If a draft copy/manuscript is submitted a clear indication of this must be given.]
- 1.5 The textbook has table of contents with clear reference to chapters and page numbers.

Section 4: TEACHER GUIDE

- 1.1 Provides clear and systematic guidance on the use of the textbook.
- 1.2 Provides examples of a work schedule which speaks to the content, sequence and pace of the Learner's Book.
- 1.3 Includes an exemplar assessment plan for the grade which speaks to the formal assessment tasks in the Learner's Book.
- 1.4 Provides memoranda, check lists, rubrics, etc. that match the assessment tasks

in the textbook.

- 1.5 Provides suggested answers solutions / memoranda / assessment tools for learning activities / exercises.

Some observations assist in gaining a broader understanding of these 26 criteria. For each of the five sections the three evaluators were expected to agree among themselves on a score from a four point scale and to award a “final score” out of four for the book (1 = poor or no criteria covered. i.e. the material would require extensive changes to be made to be considered suitable; 2 = Insufficiently covers the criteria; 3 = Good coverage of criteria, with minor shortcomings; 4 = Excellent, fully covers the criteria / suitable for its purpose). While these scores were never quantitatively analysed or used other than as a rough indication that a book should not be approved if it had a final score of less than 3, the scoring system had the effect of treating all the sections equally, whereas they were not equal at all and there was no mechanism for prioritising any of them. The same comment must be made about the individual criteria. “1.4 The content is current and up-to-date” is surely a very much more important criterion than, e.g., “1.7 There is clear integration of theory and applied competence.” But the criteria were not scored or aggregated in any way and their chief purpose was to enable the scanners to compile a list of “Strong points” and a list of “Weak points” per book. These two lists and the scoring for each section comprised the entire evaluation and on the basis of them the screeners had to designate the book “Approved”, “Conditionally approved” or “Not approved”. (The final decision was made by the entire team.)

It is also apparent that there was a particular focus on the technical specifics of the NCS and the broader National Qualification Framework (NQF) (SAQA, 2001). 13 of the 23 generic criteria for Sections 1 and 2 on the content and activities of the textbooks refer directly to the apparatus of the curriculum and, while they are not unimportant aspects (nor objectionable), the cumulative effect of them on the screeners was to reduce their activity in this regard to mechanical checks against the curriculum documents.

The criteria for *history* were:

- 5.1 The textbook provides learners with guidance of how to
- Identify, select and access relevant sources of information
 - Extract information from sources
 - Analyse, interpret and evaluate information and data
 - Engage with and analyse historical sources.

- 5.2 All sources of illustrations, diagrams, cartoons must be fully acknowledged as the acknowledgement also provides information needed.
- 5.3 Topics are framed using key questions.
- 5.4 Organising themes of content are recognisable.
- 5.5 The volume of content suggested is appropriate for the 4 hours per week allocated to the subject.

These criteria, by any consideration, are very limited. The best one can probably conclude from them is that the books that satisfied all five criteria were compiled with care and some insight. 5.1 and 5.2 appear to have direct relevance to requirements for the Senior Certificate examination (see Department of Education 2005:21). 5.3 refers to the way in which historical content knowledge is presented in the NCS, where a key question frames each of the seven Grade 12 topics (Department of Education 2003:26-27). It is not apparent what 5.4 refers to, nor what it expects (no gloss or explanation of the criteria was provided). The final criterion, on the relation of volume to teaching hours, is extremely subjective in the judgement that it requires and it ignores two dominant examination realities, viz. that the content topics all need to be more or less the same length and that no teacher would try to cover all seven topics in the year (a selection of them would be made according to examination guidelines). But, it is useful that the criteria highlighted source work and aspects of the historical method, based on the four Assessment Statements for Historical Enquiry, which is Learning Outcome 1 of the NCS (Department of Education, 2003:17).

The criteria are next discussed, in terms of literature on history textbook selection.

Selection criteria: Discussion of the criteria for history textbooks

It is extraordinarily difficult to create comprehensive selection criteria for textbooks that can be administered consistently and used with confidence to determine which books are prescribed. In a review of methods of school textbook research, Jason Nicholls (2003) considered the evaluation of history textbooks. He reviewed the (limited) literature available from a research rather than a selection point of view. Fetsko (1992) is an example of a generic list of selection criteria to which he drew attention, while Stradling (2001), together with Pingel (1999/2010), is his favoured author on history textbook selection (Nicholls, 2003:16-17).

William Fetsko's categories are useful for comparison with the generic 2007 *Guiding Criteria* (Department of Education, 2007). His list of categories is: 1. Subject matter (content and skills, together with meeting curriculum requirements); 2. Community standards (which include values, the treatment – fair or biased – of groups in society and human rights); 3. Readability (including level, prior knowledge, writing comprehension and style); 4. Format (presentation, illustrations, ideas and concepts, activities, the abstract and the familiar) and 5. Quality of the text (size, production quality, etc.). Conspicuously missing from these measures in the *Guiding Criteria*, are that content is not first in the Department of Education's list; skills are only mentioned very obliquely in assessment standards and tasks; "community standards" do not feature at all and readability has no place beyond language and vocabulary. The format and quality of text, however, are criteria that are adequately dealt with by the Department of Education.

I argued in an unpublished 1996 conference paper (Siebörger, 1996), based largely on the experience of writing textbooks at the time of the introduction of the Interim curriculum (1995-1997), that there ought to be seven general criteria (posed as questions) for textbook selection. They were: 1. Who is the book written for? (Teachers or learners, first or second language readers?) 2. What method(s) of teaching is the book based on? (Teacher-centred or learner-centred / whole class teaching / group work / individual work /skills-based?) 3. What is the approach to content of history? (The way the content is presented, and whether up to date?) 4. What is the approach to outcomes based education and assessment? 5. How easy is it to read the book? (Reading level, historical terms used); 6. What kinds of activities are there? (Tasks for learners, how do they learn and how varied are they?) and 7. How attractive is the book? (Layout; illustrations; quality). The 2007 *Guiding Criteria* include numbers 4, 6 and 7 of these, but there are large gaps regarding the other four criteria, especially on the audiences for the books and their needs, and the emphasis on teaching and learning (1, 2 and 6), which are missing in Department of Education criteria.

A very early attempt to match selection criteria for history textbooks to an assessment schedule was published in 1970 by Jeanette Coltham, on behalf of a working group which had been tasked to consider the assessment of history books. The group produced a set of 12 criteria and a schedule for assessing them, which, it was believed, "would help any teacher to make a fairly speedy and comparatively objective assessment of a history book; between 15 and 25

minutes [appear] necessary ...” (Coltham, 1970:214). The criteria were, A. Use of language; B. Special terminology; C. Facts (concrete or generalised); D. Treatment of facts (what was done with them); E. Concern for human beings; F. Views of society; G. Notion of change; H. Cause and effect; I. Time (chronology); J. Illustrations; K. Activities and exercises suggested and L. Format. A model of this kind if used in the 2007 textbook screening would have produced very clear and objective data, such as, a text-illustration ratio, and, for example, the rubric for assessing “G. Notion of change”: “Assessment for both ratings is made by skimming through the book to note whether some or all of the following are present: (1) direction in the text to make comparisons; (2) contrasting illustrations are juxtaposed; (3) diagrams are used; (4) a section is devoted to the idea of change. Presence of at least two of these is required for endorsement” (Coltham, 1970:217). In terms of relevance, C, D, E, F, G, H, I are all aspects that were not included in the *Guiding Criteria*.

Another early attempt to understand the process of the selection of history textbooks, Wilkes (2007), is unique in that it was compiled from the point of view of the author and publisher of a textbook. It draws valuable attention to the constraints involved in producing history textbooks and how they influence the final product. These were characteristics that were not considered at all in the 2007 screening. Had they been, the results would have been far more nuanced and more considerate of the importance of the production process. (Textbook publishers are likely to have approved of the recognition of the practical issues they faced, but would, equally, have been sensitive to the criticisms of their books that would have emerged in the event.) John Wilkes’ conditions for “Making the best use of textbooks” were: The constraints within which the textbook author must work; Compression and organisation of material; Oversimplification; The use of textbooks – the publisher’ view; The use of textbooks - in schools; Technical and commercial constraints; Omission; and Availability of source material (Wilkes, 2007).

The substantial treatments of textbook selection in history that assist in analysing the *Guiding Criteria* regarding history books in particular, are those produced by the Sparkling Waters colloquia³ in South Africa in 1993

3 Two colloquia on “School History textbooks for a democratic South Africa” were held under the auspices of the Georg-Eckert Institute for International Textbook Research at the Sparkling Waters Conference Centre in Rustenburg in 1993. They were followed by a workshop on School History Textbook Writing in Cape Town in 1995. Collectively these events are often referred to as “Sparkling Waters”. The product of the colloquia was a joint statement in three parts: Textbooks and the History Curriculum; What new history textbooks should be like; and The production of textbooks.

(Siebörger, 1994a, 2006) and that of Robert Stradling (2001), mentioned above. It is a tragedy for history teaching in South Africa that the Sparkling Waters criteria were not considered by the Department of Education for the 2005-2007 textbook screening (or that which took place in 2011) and it is equally regrettable that a thorough set of benchmarks such as Stradling's, which was a project of the Council of Europe, was also not employed.

The Sparkling Waters criteria were the product of extensive discussion by textbook writers and academics, facilitated by the Georg Eckert Institute for International Textbook Research during 1993-1995. They cover virtually all characteristics of history textbook writing and were published under six main headings: 1 Historical consciousness; 2 Language of textbooks; 3 Practical criteria (format and layout, structure and illustration, learning abilities, interactive instruction and independent inquiry; 4 Criteria which stimulate perception and experience in textbooks (emotional and visual perception, multi-dimensional approaches, multi-perspectival approaches); 5 Criteria which stimulate understanding and interpretation (standards of historical discourse, narrative, skills of historical thinking, a dynamic process); and 6. Criteria reflecting the role of history in present-day life (see fuller discussion in Siebörger, 2006).

Stradling created a checklist of 40 questions organised into three main categories: questions designed to evaluate the content and pedagogy of history textbooks; questions which focus on the intrinsic qualities of textbooks (regardless of the country in which they are published and used, the content covered, or the age and ability of students) and questions which focus on the extrinsic factors (external to the processes of writing and publishing) (2001:257-8). (He paid little attention to how they should be applied, however, stating, "History teachers and committees authorising textbooks will no doubt look at possible textbooks in some depth before deciding which ones are most suitable" (2001:258).) Many of the questions touch on factors that have already been discussed. The following are examples of questions drawn from each of the categories that have not already been mentioned above: "How much emphasis is given to political, diplomatic, economic, social and cultural history within the contents of the textbook?" "Can any patterns be discerned in those topics, events, groups, dimensions and perspectives, which are omitted from the text, illustrations, source material or assessment tasks? Are there any implicit messages in these omissions?" "What prerequisite knowledge, if any, is required for the student to effectively access and use

this textbook?” “Does the textbook provide opportunities for the student to develop a comparative perspective by, for example, contrasting events or developments in two or more countries or regions?” “Is it likely that this textbook will arouse their interest in the subject and their curiosity about the past?” “Has the book (or parts of it) been field tested or trialled with teachers and students?” Such questions would promote a much deeper analysis than the *Guiding Criteria* permitted.

There is one conspicuous omission in the whole of the above discussion of textbook selection. It is the matter of who the writers and publishers of the books were? These are key questions in the transformation of education in South Africa, as very plainly identified (together with concomitant dangers of corruption) by Andre Proctor and Mary Monteith, who draw attention to the need to level the playing fields for small publishers (1993:32, 34, 43). Some will be surprised and offended by the absence of any reference to these very significant concerns in the process of the textbook scanning. Others might be relieved that the Department of Education did so little to rock the existing boat, by not drawing attention to this in any way.

While the criteria were crucial to the process, no less crucial was the way in which they were applied by the screening teams.

Applying selection criteria: The 2007 process

Ten Grade 12 textbooks were submitted for screening by educational publishers in January 2007, one book per publisher in almost all cases. The Evaluation Report Forms that were completed by the screening teams for these books were analysed. In brief, six of the books were awarded a final score of 4 (“Excellent, fully covers the criteria / suitable for its purpose”, i.e. awarded a score of 4 for the majority of the five sections), five of which were approved and one conditionally approved (subject to changes being made); three books were awarded a 3 (“Good coverage of criteria, with minor shortcomings”) all conditionally approved and one was awarded a 2 (“Insufficiently covers the criteria”) and not approved.

In terms of the data contained in the “Strong Points” and “Weak Points” columns, there were 93 strong points and 102 weak points listed in all – very similar numbers, an average of 20 per book. All except one of the books that had been awarded a 4 had more positive comments than negative ones. The other four books had more negative than positive comments, which is what

one would probably expect, but as the comments carried no weighting there is no necessary reason for this to be so. There is no perceptible difference in the numbers of comments recorded by the various groups of screeners. An improvement would have been to have weighted the sections, e.g. with the History section the most important, followed by the other three in their respective order (e.g. History possibly 40%, Content/context 25%, Learning activities and assessment 15%, Layout and design 10% and Teacher guide 10%).

An analysis was made of the comments recorded in the two columns of each report. It excluded the learning activities and the teacher guides, as both were very mechanistic evaluations and did not contribute many comments. There were also few points made about the layout, design and overall quality, nine in all – two on the structure of the text, two on the font and type, and five (all negative) on the quality and choice of the illustrations.

It is not possible to categorise all the comments made. Some fell outside the ambit of *Guiding Criteria*, such as “Chapter summaries and integration with other subjects are commendable;” “Warning statement needed to the effect that the requirements for the examination are subject to further change;” “Interesting ‘Did you know?’ and ‘Extension Activity’ sections”, “The rich bibliography attests to the good quality of the book” and “Practice exam papers are provided as exercises for learners.” Of the comments made relating to Section 1 Content/Context, by far the most were made regarding the “suggested content” (1.2). Fewer than half as many were made about language, vocabulary and concepts, while a number concerned the Learning Outcomes and Assessment Standards. There were not many other comments on Section 1.

The range of comments on content issues included praise, criticism and suggestion, as the following excerpts illustrate:

- Different interpretations are provided and this allows for objectivity in the handling of issues, e.g. Cold War;
- Concise coverage of the NCS content in the intended sequence (with Heritage the exception);” “No explanation is given for the change of curriculum sequence in Chapters 4 and 5. The Teacher’s Book (p.x) anticipates the opposite. Chapter 4 begins (p.xxx), ‘The collapse of apartheid in South Africa came as a surprise to many people.’ This is the reason why the curriculum puts the collapse of the USSR first and it is suggested that the authors should either explain why they ignored this sequence or restore the curriculum order in the book;

- Content needs to be expanded in the following areas: role of China in the Cold War; civil society protests in Eastern Europe, SA involvement in the Angolan war; National symbols in Heritage;
- Content on pp. xx-xx irrelevant to content framework and can be collapsed as a brief background to chapter x;
- Chapter x: The USA is not covered;
- Zimbabwe is incorrectly regarded as central Africa. Pages xxx – xxx;
- China's role in the Cold War needs expansion; Vietnam and Mid East conflicts not covered;
- Heritage concerns 'constructed heritage icons', not heritage sites, as on pp. x-xx (note misspelling of Mapungubwe, p.x).

In the History section, the bulk of comments focused on 5.1, source work. There were nine comments that concerned acknowledging the sources of illustrations, positive and negative, and six related to how topics were framed by key questions. Typical comments were:

- Sources are very well integrated into the text and the activities flow logically from them;
- Very good balance between sources and content and thorough engagement with sources is encouraged;
- Excellent range of sources. Various levels of questioning are employed;
- Use of multiple sources in activities most commendable – well referenced;
- Little attempt to find original and interesting photographs in many cases – many heads of important people rather than sources to interact with;
- Not always clear what the purpose of the sources is throughout the book, as the activities do not consistently refer to them (e.g. 34 sources in Chapter x but only 13 referred to in activities);
- Some sources are not acknowledged and contextualised, e.g. pp.xxx – xxx;
- Source 13, p.xx, no caption or translation provided; p.xxx, no bubble text.

Sprinkled amongst the comments on content and sources were more general ones, such as:

- Text layout very plain and attempts to enrich it by boxes not consistently used in all chapters;
- The use of marginal icons, windows, boxes, etc. assists in highlighting important

points;

- Only three cartoons in the book (all unacknowledged);
- Not many opportunities provided for enrichment/expansion.

Applying selection criteria: Problems revealed by the 2007 process

The 2007 textbook screening highlights many of the issues involved in textbook selection procedures. In retrospect, it was a saving grace that the process was labelled textbook “screening”, rather than “selection”, “assessment”, or “evaluation”, as it was certainly no more than that. It is also true that “screening” conveys that the formative function of the process was much more prominent than the summative, as few books were ultimately rejected on the second submission but all must have been improved in some way, albeit minimally in cases, as a result of what was a version of peer review.

Most significant amongst the concerns it raises is the (lack of) specification of a method for applying the criteria. Coltham (1970) was the only example found of a scheme that took the requirements for establishing compliance with the criteria as seriously as it took the criteria itself (though the Sparkling Waters colloquia did pay some attention to this aspect and published illustrations of good practice for some of the criteria (Siebörger, 1994b), and Stradling (2001) is at least cognisant of the need). The Department of Education’s model provided no guidance at all for the interpretation of the criteria or for compiling the “strong” and “weak” points. It was, thus, impossible to ensure consistency of application and judgement at a level of detail. There is no evidence, however, to suggest that the final recommendations made to approve/conditionally approve/not approve were not deserved, based as they were on the scores awarded to each of the five sections. Ultimately much more disturbing is that there was no means to check or control that the assessments had been thoroughly done: Were the early chapters checked more carefully than the latter ones? How much of the content was carefully read? Was there more concern for checking references and spelling, than, e.g. the way sources were used in activities (which was only an implicit criterion)? Did the screeners devote more attention to pet criteria than to others? And so on.

The method of compiling the evaluation report is also open to question. There was no definition provided for what constituted “strong” or “weak” points other than that they were positive or negative, nor for any weighting of them. The request to provide a bulleted list rather than supporting paragraphs

was obviously to save time, but it encouraged both a “list mentality” and the jotting down of fairly arbitrary, disconnected, points without proper justification for them. The result was that they made sense to the screeners but much less sense to the publishers and authors, to whom they were ultimately sent. Both the flavour of the report and the final score might likely have changed, had the instruction instead been to compile observations per section in paragraph style, rather than strong and weak points for the book as a whole.

If the criteria and their means of application are open to criticism, ought a place for history textbook selection to remain? This question is approached in the concluding section.

The relationship of textbook selection to history education

“Textbooks in Africa were found to fulfil three important purposes simultaneously: they provide the major vehicle for the curriculum; they are the main, if not only, source of information for the teacher; and examinations and student assessments are derived heavily from them” (Proctor & Monteith, 1993:33 quoting a 1991 British Council report on textbook provision and library development). Despite the digital resources now available, this remains true of the situation in most schools in South Africa. Consequently, textbooks are centrally important to the practice of history education and their quality influences the quality of the history taught. Anything such as textbook screening and selection that may be used to strengthen and improve textbooks, is vitally important to history. History education should devote far more attention than hitherto to establishing and applying effective textbook selection criteria. In South Africa, the Sparkling Waters colloquia provided a unique opportunity to take this forward, but they were a decade too early and there is a severe risk that everything then hard fought for and achieved will be lost unless it is soon re-visited.

Tangentially, the 2007 textbook screening highlights the great benefit of having a selection of books for learners, teachers and examiners to use, as it clearly shows that there was no single book which was so much better than the others that it could in fact replace them. The books had a range of different strengths and weaknesses amongst them, not the least being that they reflected very well the diverse qualities of narrative, explanation, evidence and investigation that typify history as a discipline. To understand history at all there has to be more than one version available and more than one set of ideas

with which to work. To that extent, one might find oneself looking back on 2007 as a golden moment for history education in South Africa, when there were 10 nationally approved and accessible textbooks available.

It is, therefore, an irony that it should be this very characteristic of history that may be its Achilles' heel regarding textbook selection. The multiple perspectives and approaches that are so valued can very easily translate into a *laissez faire* attitude of accepting any text or activities and a view that it is wrong to be prescriptive or judgemental about history textbooks as a whole. This case study shows, above all, that it is possible to develop better ways of assessing and selecting textbooks – and that it is possible to produce better textbooks. This must always remain the aim. Specification by means of criteria is desirable not for specification's sake but because it can create the opportunity to raise the standards of books.

In the ten years since the authors of the 2007 books first started writing their texts, much has changed in print and digital publishing. The growth of the internet and the enormous expansion of the resources available for history has meant, contrary to what one might have expected or hoped, that the quality of textbooks universally is dropping, resulting in shorter books that are compiled more quickly, using easily available material and largely ignoring pedagogy. History education needs urgently to benchmark what it is that is required to teach and study history, beyond TV series, YouTube and collections of visuals. The skill with which this can be done will be drawn from the body of academic work that has been devoted to textbook research, evaluation and selection, internationally and in South Africa, since 1945, as has been summarised well by Falk Pingel (2010). He reminds that “The textbook is just ‘one medium in a chain of media’... Textbook revision cannot be restricted to the ‘text’, as the text itself is the result of a negotiated societal process” (2010:54).

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REFLECTIONS ON APPLYING CRITICAL DISCOURSE ANALYSIS METHODOLOGIES IN ANALYSING SOUTH AFRICAN HISTORY TEXTBOOKS

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Abstract

This article is a reflection on the choice to apply Critical Discourse Analysis (CDA) in a large scale study in which South African history textbooks were analysed for their construction of African consciousness. The article begins with an evaluation of history textbooks analysis as a field of study. It then explains my rationale for adopting CDA in a field where most studies are qualitative content analyses. This is followed by the explanation of my practical adaptation and application of Norman Fairclough's version of CDA mixed with functional linguistics and visual semiotics. Only a few examples of the findings in the larger scale study are given to elaborate on this application. The article ends with a reflective evaluation of my application of CDA. I conclude that, though fraught with challenges, the application of CDA offers a worthwhile alternative methodology in the analysis of history textbooks.

Keywords: Critical Discourse Analysis (CDA); History textbooks; Methodologies; Africa; Africanness; South Africa.

Introduction, contextualisation and research problem

History textbook research can be considered, at the very least, to be a century old. One landmark development in history textbook research was the Casares Resolution of 1925 through which the League of Nations commended early forms of textbook analysis and recommended even more research in the field. Since then, huge strides have been made in the field of textbook research, with notable developments such as the establishment and growth of the Georg Eckert Institute for international textbook research located in Braunschweig, Germany. In spite of the evident expansion, textbook research in general has not taken a significant position in mainstream education research (Johnsen, 2001).

In relation to the shortcomings of textbook analysis, Weinbrenner (1992) lamented the absence of any specific theory guiding textbook analysis methodologies. A generation later, this claim is still arguably valid; resulting in a continued undervaluing of textbook analysis studies. Indeed, textbook analysis still remains not clearly defined – sometimes referred to as document study/analysis or secondary analysis (Cohen, Manion & Morrision, 2009; Strydom & Delpont, 2010). This undervaluing of textbook analysis is rather regrettable, particularly if one considers the critical role that textbooks still play in education systems throughout the world. Despite technological advancements, the textbooks sector remains a multi-billion industry and textbooks remain the most utilised form of educational media (Foster & Crawford, 2006; Lavere, 2008; Selander, 2008; Swanson, 2014).

Many methods have been applied in the analysis of history textbooks, including content analysis, hermeneutic analysis and discourse analysis. According to Nicholls (2003), qualitative forms of content analysis have been the most dominant methods to be used by history textbook analysts. This means that there are still opportunities for the employment of other methods. It has been quite evident that methodological choices, amongst other choices, can have a huge bearing on the findings of textbook analyses. In addition, the nature of the study focus may require researchers to use methods other than content analysis. For example, discourse analysis methods transcend content analyses in that they may be useful in studies which aim to reveal underlying and contextualised meanings of text (Firer, 1998; Lebrun *et al.*, 2002; Nicholls, 2003; Mouton, 2011).

There are many forms of discourse analyses, but in this study I will focus on Critical Discourse Analysis (CDA). One outstanding application of CDA in history textbook analysis is by Barnard (2003) who published in his *book Language, ideology, and Japanese history textbooks* in which the linguistic tenets of CDA were used to reveal the influence of the context in how textbook producers use language, ultimately also playing their part in the socialisation process. Nevertheless, there is very little evidence of CDA methodologies being applied in the analysis of history textbooks (Nicholls, 2003; Oteiza & Pinto, 2008; Morgan, 2010; Pingel, 2010; Morgan & Henning, 2013).

It is on the basis of the foregoing background that I present in this paper some reflections on the application of CDA as a methodology with which to analyse history textbooks. The critical question that this paper aims to answer is: How can CDA methodologies be applied in the analysis of history

textbooks? The reflections in this paper stem from a larger-scale study in which I analysed the construction of African consciousness in South African History textbooks (Maposa, 2014). In the larger study, I analysed four contemporary Grade 12 South African history textbooks. Within the selected textbooks, I only analysed the chapters/units that deal with postcolonial Africa. I applied a CDA methodology to describe, interpret and explain how the text represents Africa and Africanness, thus constructing a particular African consciousness to which the textbook users would be exposed. The study was theoretically framed within discursive postcolonialism and premised under a social constructionist paradigm.

I will firstly explain the issues around my choice of CDA after which I will explain how I used it giving a few examples from the findings of the larger scale study. This paper will not dwell on presenting the detailed findings of the construction of African consciousness in South African history textbooks as they can be found in other papers.

Rationale for CDA methodologies

The nature of the field of history education dictates that qualitative methodologies are dominant. To explain the appropriateness of qualitative methodologies, Firer (1998:196) argues that the history textbook analyst engages with “the art of persuasion and his business is to analyse the apparent, the implied, the hidden, and the missing in curricula and textbooks”. It is also for this reason that she recommends that textbook analysts should sometimes transcend content analyses and apply discourse analysis methods such as CDA. Henning, van Rensburg and Smit (2005:117) warn that “the analysis of data for discourse purposes is both similar to and different from content analysis.” In addition to being influenced by my theoretical and paradigmatic orientations, my decision to use CDA was bolstered by considerations of how CDA methodologies regard text (language) and context.

The growth of discourse theory (from which CDA stems), was centred on the linguistic turn, which emphasised the nature of language and how the understanding of language enhances the understanding of social phenomena. Johnsen (2001:34) states a case for CDA in textbook analysis thus: “Language mastery has become essential in view of our daily contact with print and electronic texts”. Language is closely related to text in that language can be represented through text, and text can in turn generate language (through

meaning). In this case text includes both verbal and visual signs (LaSpina, 1998; Väisänen, 2008). Therefore it is language that enables text to maintain coherence and gain and (conversely) construct meaning (Peräkylä, 2005). Focusing on language in the history textbooks that I analysed did not necessarily imply abandoning engagement with the historical content. Rather, it enabled me to engage with the manner in which the content was represented through language, in the process constructing a particular African consciousness for the textbook audience. The basis of such an approach is that language choices in the writing of text are conscious decisions that are taken for a particular end.

CDA also emphasises considering the context of the text whenever analysis takes place. In relation to textbook research methodologies, Crawford (2000) identifies three contexts: influence, text production, and practice. The context of influence is explained by Crawford (2000:1) to be the setting “where the ideological and political basis of policy is debated and decided by government and powerful interest groups”. In this context, understanding hegemony is important because it is within this setting that the powerful groups of society exercise their respective influence to determine what the learners ought to learn in schools. All policy is based on particular ideological fundamentals, but textbook production is not only about political power, as other forms of power (such as economic power) are significant. It is within such contexts that the educational discourse of a country is established (Naseem, 2008). It is not a coincidence, for example that a fundamentally combating government in Palestine would produce a military educational discourse as Naseem (2008) argues. Therefore in choosing CDA, I had to be sure that I have a competent grasp of the discourses on Africa and Africanness that emerge from the macro-level of the context- in this case South Africa.

I did not delimit the context of influence to the geopolitical space of countries. I took cognisance of the fact that the country under focus may belong to international bodies to which heads of states submit their policies and practices. To explain, South Africa may be a sovereign state, but its policies and discourses may be influenced by bodies such as the Southern African Development Community (SADC) and the African Union (AU) to which it belongs. It is of particular importance to note that the political leaders might have different discourses and discourse practices in their respective countries, but when they are at regional and continental forums, they invariably speak similar discourses informed by the postcolonial African condition, even if it

is mere political posturing. I therefore considered the discourses from such contexts of influence when analysing the selected textbooks.

The application of CDA in history textbook analysis assumes that the hegemonic groups in the context of influence and text production are also the same stakeholders who endorse textbooks for use in schools. In some contexts the state holds virtually sole hegemony, but in other contexts even apolitical groups such as civil organisations are also involved to ensure that the textbooks are representative of diverse society and also correspond with the expectations of curriculum policy. This is the context of text production “where texts deemed to represent policy are constructed” (Crawford, 2000:19). While my study was not specifically focused on hegemonic practices, I still took into consideration how power struggles and how the interests of the dominant group are exposed through CDA. In South Africa, the Department of Basic Education reserves the right to approve textbooks that fit their criteria. Still, this does not mean that the production of the text is the sole responsibility of the state. As Lebrun *et al.*, (2002) note, the parties involved in the context of text production include authors, editors, technical and scientific advisors, publishers, the printers, the illustrators and layout artists, evaluators and the market. Critical engagement with the socio-educational context within which textbooks are produced constitutes one of the major differences between content analysis and CDA (Lebrun *et al.*, 2002).

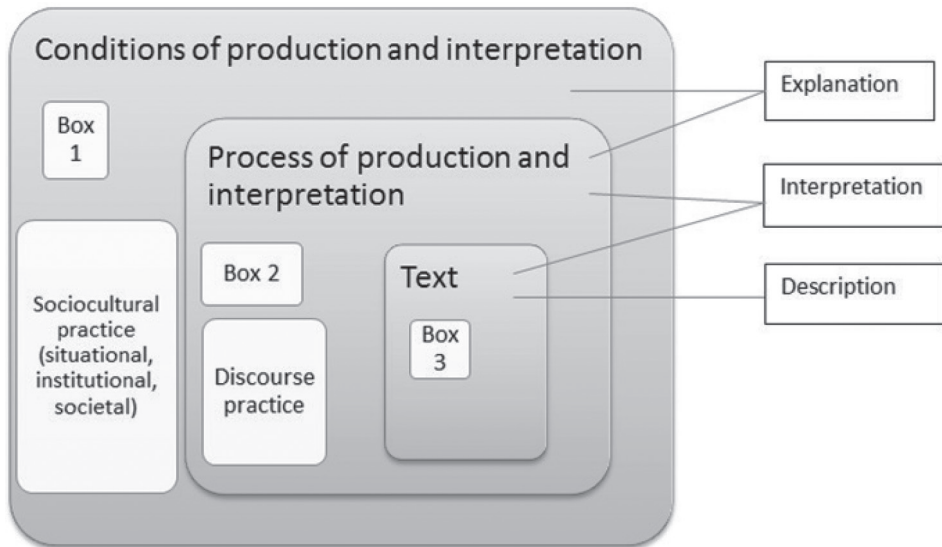
I was mindful of the fact that CDA methodology is not originally fashioned for history textbook research. Nonetheless, I was aware that it has been applied in many fields, education included (Rogers, 2003). Applying CDA to the analysis of textbooks meant that I was practicing an interdisciplinary methodology. This is not strange in textbook analysis if one works under the premise that interdisciplinarity strengthens studies. Indeed, according to Johnsen (2001:24) “linguistics, pedagogics, philosophy, history, sociology and psychology are just a few of the traditional disciplines that are applied singly or in combination in textbook analyses”.

I therefore made the decision to conduct a CDA study with the intention of applying the insights explained above. The textual analysis that I conducted was not meant to reveal just apparent meaning, but hidden connotations. This is because “it is never possible to read meaning directly off the verbal and visual textual signs” (Janks, 1997:332). Based on this, the application of CDA was meant to reveal the textbook producers’ construction of African consciousness even in cases where they tried to hide it through using seemingly neutral language.

Application of CDA

Just as there are different forms of discourse analysis, there are also several variations of CDA, explanations of which would surfeit the limited bounds of this paper. I focused on Norman Fairclough's CDA whose main characteristic is the merger of some key concerns of linguistic and critical social research (Peräkylä, 2005). The critical aspect is represented by an analysis of how power influences the reproduction and legitimation of knowledge. In the case of my study, I worked under the premise that power influences the way the textbooks represent Africa and Africanness, such that they legitimate the African consciousness that is constructed for the textbook user. What was most relevant for my application of Fairclough's CDA model is its guidance on the three dimensions of analysis as shown in Image 1 (Fairclough, 1995:98; Janks, 1997:330). These three dimensions of analysis were applied to both the verbal and visual data. Although the model in Image 1 was conceptualised by Fairclough (1995), I relied mainly on Janks (1997) on the basis of how he applied the model in analysing discourses in South African media.

Image 1: Methodological framework - Fairclough's CDA dimensions of analysis



Source: Fairclough, 1995:98; Janks, 1997:330.

Description: Verbal text

As an entry point, I worked “from text to discourse” meaning that I started within the box of description (Janks, 1997:331). I analysed the verbal text as recommended by Janks (1997) such that other forms of text (visual text) would fill in the gaps and complement the verbal text when I reached the interpretation stage. At the level of descriptive verbal analysis I read the verbal text (narrative text and paratext) and coded all the references to the two key concepts of Africa and the African being.

In addition to analysing simple mentions of Africa and the African being, I applied the link that Janks (1997) makes between CDA and Halliday’s (1985) systemic functional linguistics. I therefore focused on five aspects of functional grammar: lexicalisation; referential cohesion devices; the use of nominalisation; the use of active and passive voice; and patterns of transitivity.

When analysing for lexicalisation I not only looked at how often the concepts of Africa and the African being were used, but especially at the alternative words or synonyms that were used in their place (Janks, 1997; Luke, 1997; Nieuwenhuis, 2006). I therefore looked at nouns that were used in each textbook to refer to Africa and the African being (including names of specific countries of Africa and African people). For example, the analysed textbooks lexicalised Africa as “sub-Saharan Africa,” or “Tropical Africa” (*Textbook 1:53*). This revealed how the concept of Africa was constructed in the textbooks as not representative of the whole geopolitical space that is known as Africa.

Analysing nominalisation in the text entailed my analysing the way verbs related to Africa and the African being were converted into nouns (Janks, 1997; Luke, nd, Nieuwenhuis, 2006). To exemplify, the textbooks had conflicting representations of African heads of state. In some cases they were nominalised as “African leaders” (*Textbook 1:75; Textbook 2:60; Textbook 3:106; Textbook 4:79*) while in other cases they were “rulers” (*Textbook 3: 98*) or “dictators” (*Textbook 1:77, Textbook 2:60, 63, Textbook 4:85*). This was very useful in that it revealed not only the stereotype of Africa and Africans, but other characteristics such as the agency with which these concepts were associated.

The analysis of the use of the active and passive voice also aimed at arriving at an understanding of the agency that the textbooks were vesting within the hands of Africa and the African beings. Similar sentences whose only difference is the active and passive voice connote different meanings (Janks,

1997; Luke, 1997). For example, *Textbook 4* (77) explains “the internal and external factors affecting Africa at this crucial time.” In such a statement, Africa is not in the active voice, and that represents it as lacking in agency. Instead, Africa is here represented as a passive subject upon whom deeds are acted.

I also analysed for referential cohesive devices which presented another form of reference to Africa and the African being(s) such as referential cohesive devices (pronouns). For example, in the statement, “We can see that the reasons for Africa’s relative backwardness,” (*Textbook 1*:79), the use of the pronoun “we” separates South Africa from the rest of Africa. Similarly, the absence of gender-specific pronouns to refer to Africa shows attempts in the textbooks to present Africa as gender-neutral.

Finally, analysing transitivity was a more extensive task than the other four. However, this method was most relevant in that it analysed more deeply the historical processes associated with Africa and the African being(s). These processes can be identified through an analysis of the activities that are linked to the constructs. Transitivity analysis entailed identifying all the verbs associated with the constructs under focus and explaining the processes they represent (Janks, 1997; Barnard, 2003). An example is the statement in *Textbook 2* (49) that “some African states opted to pursue new forms of colonialism or neo-colonialism after independence.” The verb “opted” implies that the decisions of the post-colonial African governments were a mental process which was thus informed by their political values. Linguists identify at least six forms of transitivity and these are material processes; verbal processes; mental processes; relational processes; behavioural processes and existential processes (Janks, 1997; Barnard, 2003). Although some researchers do not analyse for all processes, the nature of my study informs my decision to use them all. This is because of all the items I analysed, transitivity reveals more of the textbook producers’ constructions, sometimes done subconsciously (Janks, 1997).

Description: Visual text

CDA provided an apt methodology to analyse visuals as text since I viewed visual text to be corroborating rather than competing with verbal text in the construction of African consciousness. Although there is no specific CDA-based method of visual analysis, according to Janks (1997) the way to go about

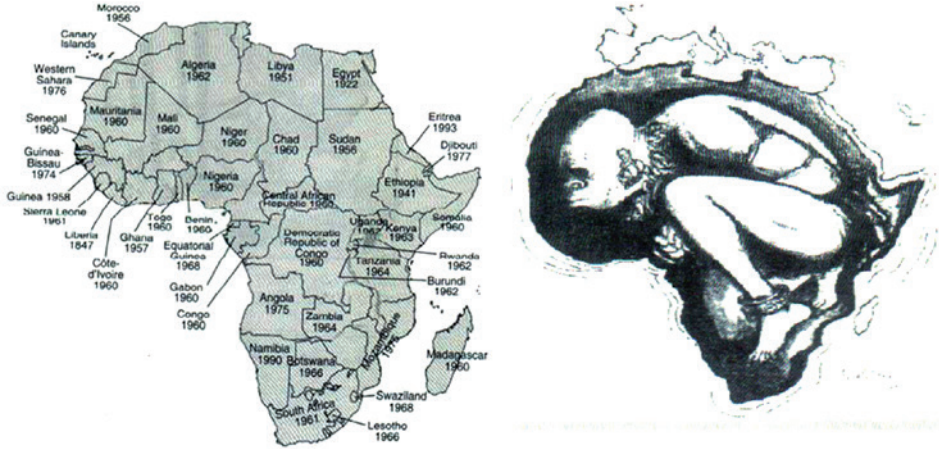
this is to apply visual semiotics. This method entails an acknowledgement that visuals are signs which comprise signifiers that represent a particular meaning (the signified). It should be clarified that visual semiotics at a functional level does not aptly correspond with CDA since it is founded in structuralism and CDA is basically a poststructuralist methodology. However, Janks (1997) maintains that aspects of visual semiotics do tally with CDA. For my study, from the three types of visual semiotics, I found symbolic visual semiotics to be most useful.¹ Firstly, a symbol assumes arbitrary nature, whereby meaning is constructed through agreement or habit. Secondly, words (verbal text) are also symbolic since their meaning is just as arbitrary.

In applying visual semiotics to my CDA framework I also started from Fairclough's dimension of description. At this point I provided descriptions of the visuals that were associated with Africa and the African being(s). For each visual, I analysed the components and what meaning they could represent in relation to my focus. The map of Africa in Image 1 which excludes the islands such as Mauritius or Seychelles speaks to the textbook's spatial notion of Africa. This can also be called denotation or analysis at the first level of articulation (Noble & Bestley, 2005; Chandler, 2007). Besides analysing what was in the visuals, I also looked at their prominence or lack of it. I achieved this by considering issues such as the size of the image and its position in the chapter or on the page (Janks, 1997). For example, the drawing featuring Africa as a mother's womb is placed at the beginning of the selected chapter in *Textbook 1* and covers the whole page thus making a bigger impression on the textbook user than the others. Some images had captions and these captions are meant to make the reader gain a stronger impression of the meanings being conveyed. For example, the captions helped me identify the time frame, the space and the people involved in the visual. I also needed to find the link (if any) between the lexicalisation in the captions and the visuals. I therefore analysed the lexicalisation of the visuals using the method applied for verbal analysis.

1 One of the pioneers of visual semiotics, Charles Peirce identified three types: iconic, symbolic and indexical.

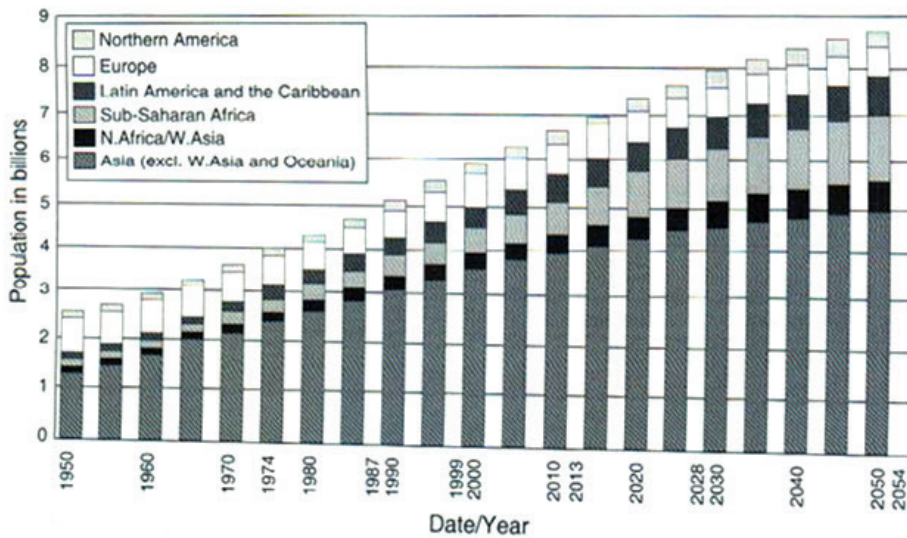
Examples of visuals from the analysed textbooks

Image 2: Map of Africa in 1991, showing date of independence



Source: Friedman *et al.*, 2007:58; Bartels *et al.*, 2006:53.

Image 3: This bar graph shows real and projected population growth for various regions of the world



Source: Bartels *et al.*, 2006:91.

Image 4: This British cartoon shows Africa welcoming the rivalry between the super powers over Africa



Source: Bottaro *et al.*, 2006:109.

Interpretation: Verbal and visual text

The descriptive data from both verbal and visual analysis was useful only as far as obtaining a picture of the representation of Africa and the African being(s) was concerned. To further enrich my findings, I moved into the dimension represented by Fairclough's box of the analysis of the discourse practice as indicated in Image 1. This entailed interpreting the descriptions according to "the context of production and reception" (Janks, 1997:333). To analyse the descriptive data through the lens of the context, I considered two types of context: situational context and intertextual context.

In doing the situational context analysis I scrutinised the data through space and time (Janks, 1997). In other words, I made use of my understanding of the discourses on Africa and Africanness in the South African context within the time that the textbooks were published. This is because textbooks published within a particular time-period are bound to be influenced by the discourses and practices of the time. For example, the use of lexicalisations such as Tropical Africa in the description of Africa reveals an exceptionalism of South Africa, North Africa and the islands of Africa. The situational context supports such discourses of South African exceptionalism, perceiving South Africa to be exceptional to the general view of Africa.

To strengthen my interpretation, I also analysed the intertextual context within this dimension of CDA. I approached this analysis in two ways: firstly by collating the findings from the visual and verbal text, and secondly by collating the findings from the different textbooks. For example, the graph in Image 3 supports the notion of Sub-Saharan Africa that is also pronounced in the verbal text. In CDA, intertextual analysis is meant to strengthen findings from a single text and it is for this reason that it is always recommended to analyse more than one text (Janks, 1997). Not only did I analyse the component parts of the visuals, but also their interrelatedness to each other and to the whole (LaSpina, 1998). For example, Image 2 shows a map, a drawing, a cartoon and a graph, but they individually and collectively represent the meaning of Africa according to the textbooks. This means that by the end of the interpretive analysis of visual text, I had found “the key to its coherence” (LaSpina, 1998:96). In simple terms, the process of interpretation revealed the meanings of Africa and Africanness in the textbooks.

Explanation: Verbal and visual text

The final dimension of my textbook analysis was explanation in which I made sense of the interpretation of the findings in relation to discourses emanating out of the context. This kind of analysis is done as illustrated in Fairclough’s Box 1 in Image 1 (Janks, 1997). In practising social analysis I was looking at the dominant discourses as disseminated through educational discourse and use them to explain the findings. For example, the South African educational discourses are characterised by issues such as inclusion, human rights and democracy. However, the findings showed cases of both inclusion and exclusion when it came to South Africa’s African identity.

At the level of description and interpretation, I relied mostly on the conceptual framework of African consciousness to make sense of the data. It is at the level of explanation that the theoretical framework of discursive postcolonialism became of invaluable relevance. I therefore used the theory (discursive postcolonialism) to explain the concept (African consciousness). For instance, postcolonialism speaks to the hybridity of Africa and the African being as a result of the colonial experience. It also explains the nature of the postcolonial textbook in postcolonial Africa. Therefore, applying CDA as a methodology meant that I not only described my findings but I was able to theorise them.

Methodological reflections

My initial understanding of the nature of text had a huge bearing on the methodological choices that I made at the outset. For example, I had bought into the argument by LaSpina (1998) and Väisänen (2008) that all data that is found in textbooks is text since it has a certain meaning that it conveys. This view, I had shown, had support from CDA scholars such as Janks (1997) who argued that text comprises signs which can be either verbal or visual. However, even though I worked under this premise, some complications were revealed as the analysis unfolded.

Most of the literature referred to on the nature of text focused mainly on language (and thus verbal text) and not visuals (Donlan, 1980; Frier, 1998; Paxton, 1999; Jeans, 2005; Foster & Crawford, 2006). The descriptions and interpretations of findings demonstrated that the data from the verbal and the visual text spoke to basically the same themes although in comparison, the visual text produced less data. For example, the visual data on the spatial notion of the African being was minimal compared to the verbal data. Therefore, visuals in the analysed textbooks can be argued to have been more complementary to the verbal text than saying their own stand-alone representations (Frier, 1998; Osler, 1994). This study therefore revealed that although visuals can be considered text, it is more worthwhile to study them together with verbal text since some visuals do not have detailed captions and on their own might be easily misinterpreted. A case in point is the collage in *Textbook 1* (77) showing negative experiences such as war, famine, abuse and dictatorship. On their own they quickly construct Africa negatively and it takes the explanations in the verbal text to understand that the textbook is attributing such negativity to the Western world. In addition, the application of CDA to visual text was even more subjective than it was to the verbal text. For example, I interpreted a picture of children at school not wearing school uniforms as a sign of material poverty (*Textbook 4:94*). However, in reality and depending on the context, some children do not wear school uniforms simply because their schools do not have school uniform policies or they are opposed to rigid educational systems. Therefore it is subjective to view lack of school uniforms as signalling material poverty and this interpretation is informed by my contextual understanding. Faced with such subjectivity, I had to rely on the findings from the verbal text to contextualise the meaning of such visual text. Therefore, I arrived at the conclusion that while verbal text can construct deeper meanings on its own, some visual text will require

complementary verbal text to construct comprehensive representations.

Another of the methodological complications in the analysis was the realisation that not all the visuals in the textbooks were actually produced by the textbook publishers. This was especially so for pictures of which some are in the public domain thus diminishing what, according to Paxton (1999:318), can be termed as “authorial voice.” Although it can be acknowledged that the textbook publishers did not necessarily create all the visuals in the textbooks, I maintain their selection is not innocent either. In addition, if the visuals were already in the public domain, it then implies that the textbooks are confirming the discourses in the public already and not really constructing new ones (Osler, 1994). This then supports the argument that discourses at a macro-level and micro-level can influence discourses at the meso-level of history textbooks.

From my analysis of the textbooks I also noted, that sometimes silences can be telling. This was not new knowledge as literature shows that inclusion and occlusion both work to evince particular constructions in the textbooks (Millas, 1991; Wertsch, 2000). It was significant in this study that although Fairclough’s CDA focuses on linguistic choices and visual representation, silences are equally important. For example, without noticing the omission of islands from the meaning of Africa or the silences on South Africa, it would have been difficult to understand the exceptionalism that is promoted in the textbooks. Therefore although Fairclough’s CDA was largely useful, there were certain aspects that could not be fully encompassed.

There were also other aspects of CDA that I did not fully utilise since they did not completely relate to the phenomena on which I was focusing. For example, although I did transitivity analysis as suggested I did not apply it fully on the basis of Janks’ (1997) advice that a full application is for very large scale studies. It should also be noted that I had found very limited evidence of the application of CDA in textbook analysis. I therefore had to adapt the methodology to my study. For example, while Fairclough’s CDA suggests that the three levels of analysis (description, interpretation and explanation) be done and presented simultaneously, I separated them. In doing so, I had to engage with the deeper meanings of description, interpretation and explanation. Doing all of them together would have been easier had I been analysing very limited text, but for a large scale study, presentation of such data would have been cumbersome. It was my view that separating the three methodological moves would make the findings more comprehensible and

also conform to the general structural conventions of writing research reports.

Finally, while conducting CDA, the temptation was to become attracted to other forms of CDA. Indeed, many new forms of CDA have emerged since the rise of functional linguistics (Gee, 2004; Rogers, 2004; Breeze, 2011; Tenorio, 2011). Therefore, the type of CDA that I used was basic. In fact, Fairclough (2013) himself has also further published new developments of his CDA; however his CDA is still rooted in the basic functional linguistics although he places more emphasis on hegemony and relational discourses in a capitalistic world. I decided to adhere to one form of CDA in order to keep my focus. I therefore chose the CDA positioning that served the purpose of my study in terms of understanding representation in text.

Conclusion

While there are many aspects to explore in history textbook research, this article's focus is on the application of CDA as an alternative methodology for the analysis of history textbooks. While the details of the larger-scale study can be accessed in other papers, in this paper I only reflected on my methodological choices. The reflection shows that applying CDA in history textbook analysis studies is fraught with challenges that mainly stem from its roots outside history education. The existence of multiple CDA positionings also reflects how scholars have tried to adapt it to fit different fields and studies. I take this, not as a weakness, but an availability of methodological options for different studies. My rationale for applying CDA was strong enough to make me adapt its basic tenets to my study. On reflection, I conclude that CDA can still be applied to worthwhile effect in the analysis of history textbooks if it is adapted fittingly and justifiably to the particular study.

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USING GENRE TO DESCRIBE THE PROGRESSION OF HISTORICAL THINKING IN SCHOOL HISTORY TEXTBOOKS

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Abstract

The focus of this paper is to describe how progression in historical thinking manifests across seven South African textbooks, one each from Grade 3 to Grade 9. This paper argues that one way in which progression in historical thinking is signalled in textbooks is by the genre type of the texts with which learners are required to engage. Our starting premise is that the development of historical thinking requires both substantive and procedural knowledge, or both first order and second order historical concepts. This paper presents only the genre analysis of a broader study which is informed by a combination of concepts from the fields of history education, sociology of knowledge and the genre approach of Systematic Functional Linguistics. The findings indicate that in terms of the texts that learners must read, there is a clear movement from the recording genre to the explaining genre and then to the interpretation genre across the seven books. The complexity of the substantive knowledge also increases as it moves from local contextualised knowledge to knowledge that is removed from the learner's context in both geography and time (decontextualized knowledge). In terms of writing demands, it is only in Grade 6 that learners commence writing explanations and thus engaging with the concept of cause and effect. It is only in Grade 9 that learners are expected to engage with writing multi-perspectives or to interpret and argue for a particular perspective as they are introduced to a range of different sources. This paper argues that using genre as a methodological tool can illuminate some aspects of progression of both first order and second order concepts in history.

Keywords: South Africa; History textbooks; Progression; Historical thinking; Genre; History Curriculum.

Introduction

The purpose of this paper is to show how progression in historical thinking is reflected in a range of seven history textbooks, from Grade 3 to Grade 7, using methodological tools provided by a genre approach. School subjects such as mathematics and the natural sciences generally show progression through the grades by the learning of more complex and abstract concepts which are built up sequentially. The school subject of history finds progression both through the development of much more semantically dense substantive knowledge as well as through procedural knowledge, or what is termed “historical thinking”. The substantive knowledge and procedural knowledge of school history is presented and assessed through language, thereby making language the key challenge to learner progression in history, because the language of history becomes increasingly complex and abstract as learners experience the grades (Schlepeggrell *et al.*, 2012). In this paper we argue that (for this sample of seven textbooks) progression across the grades can be seen in the type of texts that learners must read and produce as evaluation tasks, as well as in the shift from local to unfamiliar contexts, and from contextualised to decontextualised knowledge.

The context for the study is post-apartheid South Africa and the object under study is a sample of history textbooks that carry the official history curriculum into the classroom. In this paper we first provide an overview of the South African history curriculum, provide a brief review of textbook analysis studies and describe the external language of description that was used to analyse a section of each text book. We then present the findings of the analysis of the seven textbooks, and show how using genre as a methodological tool enables us to describe the progression of some aspects of historical thinking.

Changes in the South African history curriculum

It was clear that the history school curriculum would need substantial reform in the post-apartheid era, as the subject had been used to promote Afrikaner nationalism (Dean, 1983; Du Preez, 1983). The first curriculum reform (launched in 1998) was called Curriculum 2005. It combined history with geography in the primary school (Grades R-9) and stripped history of specific content that needed to be taught (Seleti, 1997). The curriculum provided teachers only with a set of learning outcomes which learners could ostensibly meet using any content chosen by the teacher. A review of this

radical outcomes-based curriculum noted that the curriculum needed greater structure. As a result, the Revised National Curriculum Statements separated history from geography within the learning area of Social Science and provided each subject with its own list of content, outcomes and assessment standards (Chisholm, 2005).

A third iteration of the national curriculum is currently used in schools: the *National Curriculum Statement Grades R-12, Curriculum and Assessment Policy Statement (CAPS)*. The CAPS for *Social Sciences* (Department of Basic Education, 2011) is informed by the principles of social transformation, active and critical thinking, high knowledge and high skill as well as progression. From Grade 4 to Grade 9, history is taught alongside geography in the subject of Social Sciences. The main change is that the curriculum is no longer organised around outcomes and assessment standards.

The post-apartheid curriculum also made a shift away from the “great tradition” where school history focused only on what happened in the past to an “alternative tradition” which emphasises the importance of learners “doing” history. This was influenced by the constructivist model of history which focused on historical skills in Britain in the 1970s (Shemilt, 1980). The vision of the official curriculum is that learners should be taught to embrace historical ways of thinking and sources had to be used in specialised ways so as to develop learner skills of inquiry and critical thinking (Bertram, 2008b). According to the CAPS Social Sciences document (DBE, 2011:11) the concepts in history are historical sources and evidence, the multi-perspective approach, cause-and-effect, change and continuity, time and chronology. These concepts bear a strong semblance to the historical thinking benchmarks described by Seixas (2006) and the second-order concepts described by Lee and Ashby (2001). The change from memory-history to disciplinary history (Lévesque, 2008) has impacted on school history, in that the curriculum requires a focus on the procedures of the discipline as well as replacing nationalistic Afrikaner history and heroes from the apartheid era with the stories of the democratic era and its new heroes.

Textbook studies

Since “school textbooks are the dominant definition of the curriculum in schools” (Crawford, 2003:3), they are seen to play an extensive role in the South African classroom (Report on History and Archaeology, 2000;

Chisholm, 2013). LaSpina (1981:1) maintains that “History textbooks seem to occupy a place in education that is similar to traditional religious sacred books, transmitting our past and cultural heritage” and this has not changed much in most South African classrooms, regardless of technological advancement, e-learning and internet access in some schools.

In South Africa the vast majority of studies about textbooks are engaged in exploring the nature of the substantive knowledge that is presented in them. Textbooks prescribed before democracy in 1994 propagated the ideals of the apartheid government (Chisholm, 2008). The shape and content of history is inexorably tied to those who were in power. Many studies have focused on areas such as prejudice and in writing a new history for South Africa (Bam & Visser, 1996), concept representation (Matoti, 1990; Ranchod, 2001), national narratives (Van Eeden, 2008, 2010), ideology and citizenship (Chisholm, 1981, 2008). There are some studies that have focused on curriculum and knowledge (Bertram, 2008a; Bharath, 2009; Bertram & Bharath, 2011; Firth, 2013), historical consciousness (Van Jaarsveld, 1989; Kwang-Su, 1999; Beek, 2001; Mazabow, 2003) and historical literacy (Wasserman, 2008; Maposa & Wasserman, 2009; Waller, 2009).

A diverse bank of international literature that is also available at the Georg Eckert Institute for Textbook Research in Braunschweig, Germany, ranges from analysing teaching practices using printed textbooks in Argentinian Elementary Schools (Romero, 2014) to historiographical work in Chilean textbooks (Minte, 2014). However, there are few studies that focus on how textbooks show progression in historical thinking.

Knowledge structures and progression in school history

This paper does not engage with the discourses of bias, prejudice or stereotyping in the substantive history that is represented in South African textbooks, but focuses on the ways in which progression in historical thinking can be tracked through the genre of texts. The study is broadly informed by the field of sociology of knowledge and knowledge structures.

The theoretical starting point is the distinction that Bernstein (1971) makes between everyday knowledge and school knowledge. He classified school knowledge as “formal and specialised” while everyday knowledge was more personal and localised where the context of the home plays a significant role in developing what the learner knows before they come to school. According

to Bernstein (1999), school knowledge (academic) is categorised as a vertical discourse and everyday knowledge is categorised as a horizontal discourse. These discourses are differently structured and thus acquired differently.

The vertical discourse described by Bernstein has the capacity to produce knowledge at increasingly higher levels of abstraction, generality and integration and hence are able to produce progression in knowledge (Moore, 2008). Within vertical discourses, school subjects may have a horizontal or a vertical knowledge structure. Martin (2008) maintains that both school history and English have horizontal knowledge structures while the sciences possess a hierarchical knowledge structure. Vertical knowledge structures such as the physical and biological sciences find progression in clearly sequenced knowledge and make clear moves from the concrete to progressively more abstract concepts. Theory develops through integration, towards more integrative and general propositions. On the other hand, progression in horizontal knowledge structures occurs not through more integrated and generalisable theory (Muller, 2008) but rather through the introduction of new languages which construct a new perspective, new questions and new connections. Because these languages are incommensurable, they defy incorporation at the level of integration and thus knowledge progression does not happen by developing more general propositions (Muller, 2008). If this is the case, then the critical question is “how does history as a horizontal knowledge structure build progression or verticality”?

When describing the process of progression, it is useful to use the distinction of substantive and procedural knowledge. Since the structure of the discipline of history or the nature of historical knowledge is said to be composed of two inter-twined strands which are the process and content dimensions (Dean, 2004), progression would mean the advancement of both. Procedural knowledge is the “know how”, the methodology of historians or the procedures for conducting historical investigations and the substantive knowledge is the “know that”, the statements of fact or concepts of history. To be inducted into the discipline and to develop ways of thinking historically requires the acquisition of both (Bertram, 2008b, 2012).

Substantive history knowledge can be sequenced in a range of different ways, with chronology of events being the most common. Regarding substantive knowledge, the concepts of contextualised and decontextualised knowledge are useful principles for working with progression in history. The principle is one of starting in the lower grades with narratives that are concrete and

embedded in learners' lives rather than concepts that are abstract and often ideological. It would mean starting with history content that is close to the learners' everyday world, such as their family history or the history of the local community where they live. These progression principles reflect the learning theories that suggest that learning involves moving from concrete to abstract concepts, from local to more universal knowledge.

History as a horizontal knowledge structure also finds progression in the development of procedural knowledge. Lee & Shemilt (2003) advocate that "progression" came to focus on the way in which pupils' ideas about history and the past develop, that is "historical thinking". Hence Lee & Ashby (2000) argue that the acquisition of more powerful procedural or second-order ideas is perhaps the best way of giving sense to the notion of progression in history.

Seixas (2006) describes historical thinking as having six structural and procedural benchmarks which are: to establish historical significance, use primary source evidence, identify continuity and change, analyse cause and consequence, take historical perspectives and understand the moral dimension of historical interpretation. According to Van Drie & Boxtel (2008:88), scholars have linked historical thinking and reasoning to historical consciousness or literacy (e.g. Seixas, 1993; Spoehr and Spoehr, 1994; Husbands, 1996; VanSledright & Franks, 2000; Wineburg, 2001; Schreiber *et al.*, 2006). The progression-model advanced by Ford (2014) in the United Kingdom moves away from a linear way of thinking about progression and uses an approach of non-linear conceptual mastery, again focusing on the second-order concepts.

"Progression" is not movement on a linear scale of reasoning from lower-order thinking to higher-order thinking. Lévesque (2008) argues that "progression" in historical thinking is simultaneous "within each" domain of knowledge and not from one to another. Sophisticated historical thinkers are not those who have successfully moved from content acquisition to mastery of procedural knowledge but those who have made significant progress in understanding both the substance of the past and the procedures and second-order concepts necessary to make sense of it. This study aims to make visible how the substantive and procedural concepts of history knowledge shift across the grades, and signal progression in the seven sampled textbooks.

Conceptual framework for the study

This paper reports on how the seven textbooks under study develop progression, using the conceptual lens of genre and language. The study analyses the genre of texts which learners must read, and the genre of the texts which learners must produce, using an analysis tool which is shown in Table 1.

Theories from history education and descriptions of historical concepts (Shemilt, 1976; Lee & Ashby, 2001; Lévesque, 2008), the sociology of knowledge structures (Bernstein, 1996) and Systemic Functional Linguistics, language and genre approaches (Coffin 2006; Martin, 2013) were integrated to develop a conceptual frame of the broader study.¹

Coffin (2006c) distinguishes between the language demands of school which are specialised and academic when compared to the language of everyday life, which is spontaneous and context-bound. The language of texts, called academic language, presents information in new ways, using vocabulary, grammar and text structures that call for advanced proficiency in this complex language (Schlepegrell, Greer & Taylor, 2008).

Martin (2013) views these technicalities and abstractions in subject-specific discourses in relation to high-stakes reading and writing. He describes the transition from primary to secondary phases of schooling as a shift from basic literacy to subject-based learning which is composed of specialised discourse. This in turn has impacted genre-based literacy programmes aimed at mastering writing for different purposes (e.g., recount, narrative, report, procedure, explanation, exposition) (Martin, 2013). Derewianka (2003) contends that genre-based teaching is very influential as genres are opportunities to teach grammatical structures in context.

Coffin (2006c) maintains that history, like other school subjects has a specific language and that each piece of writing in history has a distinct purpose relating to wider disciplinary practices, which she labels as “genre”. She indicates that Systemic Functional Linguistics (SFL) is an area in which linguists have developed tools to analyse how language functions as the means through which knowledge and skill are transmitted. Disciplinary knowledge is re-contextualised for school use and that the disciplinary purposes are played out in language via the texts students are required to read and write (Coffin, 2006c).

1 Bharath's forthcoming PhD study entitled: *An investigation of progression into historical thinking in South African History textbooks*.


Building on Coffin's ideas, Schleppegrell (2012) explains how a narrative uses different kinds of grammatical resources as the text unfolds which are more active doing processes in the main part of the story and more reflective being and sensing processes in the final evaluative stage. The focus of the SFL lens on a narrative text allows teachers to identify how grammar functions to make different kinds of meaning at different points in a text. Apart from grammar patterns signalling progression, Fang & Schleppegrell (2010) argue that school knowledge reflected in the language transmitting it, becomes increasingly abstract, dense and complex. Textbooks used in earlier years are described as non-technical and involved simple clauses which could be read with ease while texts engaged with in later years tend to present technical, abstract vocabulary with dense, compacted information. Autobiographical recounts in school history are normally written in the first year of schooling (or indeed primary schooling) and as a result, they have a relatively simple style. The lexical density (i.e. the number of lexical items per clause) is often low for written language in the early grades (Coffin, 2006a).

The historical genres are mainly divided into two groups: the "chronological" group consists of recounts, empathetic autobiographies, biographical recounts and historical recounts, as well as accounts, while the "non-chronological" genres consist of site and period studies (Derewianka & Jones, 2012). In addition, students at a certain level of maturity start using diversified ways to realise attitudinal lexis and grammatical metaphor. They exploit processes which become diverse and specialised. According to Greer (1988, cited in Schleppegrell, 2012), it is through writing that we learn to think and make meaning and that writing has specific characteristics relevant to the subject. Thus, in relation to history, writing needs to reflect the disciplinary thinking of constructing arguments and reaching conclusions through the use of evidence, critical thinking, and a detailed analysis of the context and origin of the evidence.

For this study, Martin's exemplars are merged and reworked with Coffin's terminology into a single analysis tool (represented in Table 1) which is used to identify and classify genre in the textbooks. Martin (2007) argues that the principle of learners reading and engaging with a set of genres in school stimulates textured and structured writing production. He presents two useful exemplars to classify genres. The first shows how history as a set of genres is ordered, carving a learning pathway. It commences with genres similar to those that students are familiar with in the oral culture outside the school and moving on through those particular to history, including various chronicling genres

moving on to argumentation genres. The second arrangement of genres, drawn from Coffin (1997, 2000); Martin (2002); Martin & Wodak (2004); Martin & Rose (2005) is represented on a vertical topological vector running from common to uncommon sense. Table 1 represents the combination of these ideas.

Table 1: Genre types in school history

Genre Type	Alternative Names or Sub-genre types	Informal Description	Learning Pathway
Autobiographical Recount: One-sided or first person	Recording or explaining Genre	The story of my life [oral history]	Common Sense
Biographical Recount: Third person/Alternative side		The story of someone else's life	
Historical Account: Explaining/Argumentative/ Interpretation Genre Many people One-sided and multi-sided perspective	Factorial Explanation	Complexifying the notion of what leads on <u>to</u> what	
	Consequential Explanation	Complexifying notion of what leads on <u>from</u> what	
	Exposition	Problematic Interpretation that needs justification	
	Multi-Sided Perspective	Evaluating conflicting accounts. Personal Rebuttal	
			Uncommon Sense

Source: Martin, 2007 & Coffin, 2006c

Research design and methodology

The methodology is that of content analysis, using qualitative analysis to understand how historical knowledge in textbooks signals progression. Data was generated through different categories, and this study reports on the analysis of two key aspects, namely the genre type of the reading texts and the genre type of the writing tasks that learners are required to do.

Since it was not possible to analyse the entire textbook, a selection of one chapter from each book was made. These are the topics on the history of a South African past, from its early inhabitants to democracy.

Table 2: The titles of the chapters that were analysed in each textbook

TOPIC	GRADE	BOOK
1. About me and how people lived long ago	3	A
2. Local History	4	B
3. Hunter-Gatherers and Herders in South Africa	5	C
4. An African Kingdom long ago in Southern Africa's Mapungubwe	6	D
5. The Colonisation of the Cape in the 17th and 18th centuries	7	E

6. The Mineral Revolution in South Africa	8	F
7. Turning points in South African history 1960, 1976, 1994	9	G

There are minimal ethical considerations due to the fact that textbooks are readily available documents which are already in the public domain. The national Department of Education in South Africa selects a range of textbooks from those submitted by publishers to appear on the list of approved textbooks. Teachers may choose any textbook from this list. The official policy on textbooks is that every learner should have a textbook paid for by the Department of Basic Education. The seven books in the study sample are purposively selected as those which are popular choices at various primary and secondary schools in Pietermaritzburg, KwaZulu-Natal. The popularity of the books was established by the first author's attendance at teacher development workshops, meetings and networking.

Findings and discussion

Text genres in the seven History textbooks

There is clear movement from the recording genre to the explaining genre and then to the interpretation genre (Coffin, 2006a) across the seven books. In earlier grades, there is the absence of a chronological framework and the structure of the information in the textbook is fairly everyday (common sense). There is no historical event description but the focus is on personal event description. There are more generalised participant descriptions in lower grades which advance to more detailed biographies of specialised participants like Nelson Mandela (Grade 9) and Pius Langa (Grade 6). The Grades 6, 7, 8 and 9 books take on a purposive chronological sequence in historical events. This is an abridged version of events merely highlighting the beginning, middle and end of the event. Grade 9 progresses to include effects of the event in greater detail.

The number of events under study increases and these are studied from various perspectives. The number of people involved in the events also increases, therefore both general and specific participants in the events are scrutinised. The Grade 9 text has various sources ranging from extracts from books, autobiographies, speeches, interviews with eye-witnesses to events to deliver this multi-perspective approach. The learners have to read and draw conclusions about the authenticity and bias of the sources and construct

their own narratives. Through interacting with a variety of texts, learners also extend their use of vocabulary.

The reading demands of the learner in the earlier grades are to understand their immediate context in their present lives (Grade 3) then progresses to the local history of their environment in Grade 4. Image 1 below shows how Grade 3 learners are presented with a timeline of the life of a boy named Rishon. The time-line is used to show a Grade 3 learner how one's personal experiences and milestones may constitute a story about a person's early life and history. It integrates the autobiographical and biographical recount as the experiences of Rishon and these are paralleled with the learner's own milestones, showing its relevance. The time-line in history is used to chronicle one's own life experiences. The learner is not required to produce any written work. The text is intended as oral discussion.

Image 1: A timeline for Grade 3 learners

★ ★ ★
★ ★ ★ **Unit 1 About Me**







WEEK 1
Activity 3

What is a timeline?

Rishon's history

A timeline enables you to see important information about your past life, to recognise achievements you have made and helps you plan what you would like to do in the future.

Read the story of Rishon's history.

2011	baby sister was born	
2010	family moved to a new home	
2009	started going to crèche	
2008	fell and broke his arm	
2006	celebrated first birthday	
2005	born in Umhlali	

Read the events of Rishon's history.
Do you see how the timeline tells a story?

Unit 1: About me 1

Source: Scanned from Book A, Grade 3 Learner's Book, p. 1.

Grade 3 learners interrogate colourful, everyday pictures of families and people and are also introduced to black-and-white photographs to show them how “historical” images first appeared. As reading advances to Grade 4, learners read about how stories can be constructed by gathering information from objects in the environment (evidence). They are shown how visual, written and oral elements obtained from magazines, newspapers, interviewing people etc. can be used to glean information. In Grade 5, learners read about the San people by studying pictures of the San and drawings of archaeological findings that enable them to construct history knowledge on the San. The example in Image 2 from the Grade 7 text represents an historical account, more specifically the sub-genre of consequential explanation. This section deals with the slave trade and the resistance movements which grew out of the slave experience. A firm portrayal of cause-and-consequence is seen against the background of serious revolts. The chapter initially presents the origins and background of the Transatlantic Slave Trade as a historical account and is also structured to present the causes and effects of the slave trade, culminating in emancipation with reference to laws at that time.

Image 2: An historical account for Grade 7 learners that deals with the slave trade and the resistance movement

Word bank A B C
manumitted when a slave is freed

Source C
A modern historian talks about how an Afrikaans man tried to free a slave woman and his two children:

No one could marry a slave: she first had to be manumitted. At the end of the 18th century Willem Klomphaan [an Afrikaner] tried to manumit his slave mistress and his two children but died before he could pay the full sum.
(Source: Gilmore, H. and Mbenga, B. (2007). *New History of South Africa*. Cape Town: Tafelberg. Page 59.)

Classroom activity 6.7
Work with a partner. Read **Source C** and answer these questions.


1. Why could Willem Klomphaan not marry the woman?
2. Why was he not able to manumit her?
3. How do you think the woman and her two children felt when he died?

Causes and effects of slave resistance at the Cape

The slaves at the Cape resisted being slaves. They had to stick to strict rules that did not allow them to form groups. This meant that it was difficult for slaves in the towns to get together to plan an uprising against the slave owners.

Most slaves lived in Cape Town, which had soldiers to protect it. The soldiers also guarded the citizens from the slaves, so the slaves were not likely to rebel. The slaves in the rural areas lived far away from each other, so it was also difficult for them to plan action together.

As individual people, slaves resisted their masters by working badly or slowly and showing that they did not want to work. (You learnt about this in Topic 4.) Some even killed their masters, although they would be tortured and killed if they were caught. Some slaves even committed suicide.



Slaves would be severely punished for hitting or killing slave owners.

132 Topic 6 Colonisation of the Cape 17th–18th centuries

Source: Scanned from Book E, Grade 7 Learner's Book, p. 132.

Reading demands become more intensive in Grade 8 with the introduction of diagrams and political cartoons which require greater analysis, explanation and interpretation. Time-lines advance to include additional information across larger time periods about events out of the learners’ context (decontextualisation). The number of photographs and posters for reading and analysis increase which require an informed critical reader. At Grade 9 level, there are extracts from autobiographies, interviews and speeches which require that a learner be proficient in reading in order to engage with high-level tasks. The tasks have to be read and require learners to be able to read at advanced levels so as to undertake study of the background of events such as the Sharpeville massacre, Soweto uprising and the circumstances at Langa, Evaton and Vanderbijlpark. The reading here takes the learner into an entirely new context with a number of integrating events. Temporal and spatial advancement presents decontextualisation. It is clear that the language moves from informal everyday language to one where the language competence is advanced which is more “academic” in nature. This progression shows that knowledge advances from common-sense knowledge (immediate) to uncommon-sense knowledge (decontextualised) across the grades (Bernstein, 1975).

Table 3 below demonstrates how the genre of the texts that must be read increases in the complexity of the substantive knowledge, which moves from local knowledge to knowledge that is removed from the learner’s context in both geography and time.

Table 3: Summary of the reading demands made on learners according to genre type

Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 9
<ul style="list-style-type: none"> -Time-line of Rishon’s history. -Describing photos of present and past. -Extract on a painting and its representation of the past forms of transport. 	<ul style="list-style-type: none"> -Pictures, photographs and paragraphs of information on how local history is constructed. 	<ul style="list-style-type: none"> -Pictures, snippets of information on San lifestyle, social organisation, beliefs and religion, how local history is constructed from objects belonging to San. 	<ul style="list-style-type: none"> -Early settlements in the Limpopo Valley. -Maps, pictures, drawings and information about early African societies and development of trade. -Appearance of event description and chronology 	<ul style="list-style-type: none"> -Location of indigenous inhabitants of the Cape in the 17th century -Colonisation and dispossession -Protracted struggle and clashes for land and cattle. -Summarised chronological events. 	<ul style="list-style-type: none"> -Maps, photographs, pictures, painting, diagrams, cartoons, time-lines, and sources of interviews, posters, mind-maps, -Abridged version of the chronological events that led to the Mineral Revolution in South Africa. 	<ul style="list-style-type: none"> -Event chronological dismantling. -Background and events: Sharpeville massacre, Soweto uprising, Langa, Evaton, Vanderbijlpark, Black Consciousness -Sources: books, autobiography, interviews, speeches, time-lines on the event cartoons, posters.

Table 4 below summarises the genre type across the seven textbooks, showing clearly the move from a recording genre to explaining to interpretation and argument. In terms of chronology, there is no mention of this in the Grade 3, 4 and 5 textbooks, and a chronological framework only becomes clear in the Grade 6 textbook. Similarly narrative texts and detailed description of specific historical events only start appearing in the Grade 6 textbook. It seems that learners in Grade 3, 4 and 5 are hardly being inducted into the key concepts of history such as narrative, chronology and specific historical events.

Table 4: Summary of genre types across Grades 3-9 textbooks

	Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 9
Genre	Recording. Autobiographical personal recount.	Recording	Move from recording to explaining genre.	Move from recording to explaining genre.	Move from recording to explaining genre.	Move from explaining genre to interpretation.	Move from explaining genre to interpretation and argument.
Chronology	Absence of chronological framework	Absence of chronological framework	Absence of chronological framework.	Advent of purposive chronology	Purposive chronology	Purposive chronological discussion of gold mining	Purposive chronological/ sequenced event description.
Narrative	No narrative text	Absence of narrative text structure (no beginning, middle or end).	Absence of narrative text structure (no beginning, middle or end).	Appearance of narrative text structure: beginning, middle or end of traditional societies).	Clear narrative text structure beginning, middle or end).	Clear narrative text structure: beginning (background), middle or end.	Clear narrative text structure: beginning (background), middle or end.
Nature of participants	Personal	Remote generalised participants.	Remote generalised participants: San.	Specific participants: King, Chief, Marco Polo, Mandela, Thabo Mbeki	Specific participants: Galant, Wilhelm Bleek generalised participants: Khoi-khoi, settlers	Specific participants: Mahadu Nkadimeng Generalised participants: miners, migrant workers.	Specific participants: Steve Biko, Nelson Mandela, Phillip Kgosana, Tsitsi Mashinini, Generalised participants: ANC, PAC, Cosatu, Black people, white people, and freedom fighters.

Event description	Absence of event description.	Absence of event description.	Absence of event description	Appearance of event description	Clear event description (abridged, summarised)	Clear description of many events (abridged, summarised)	Clear description of many events (abridged, summarised and bulleted for easy reference on turning points)
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It could be argued that interpretation and argumentative texts should be introduced earlier than Grade 9, as these are vital to developing an understanding of history from a range of different perspectives (multi-perspectivity). Similarly it seems problematic that learners in Grade 3, 4 and 5 are in fact hardly being inducted into the key second order concepts of history such as narrative, chronology and specific historical events. It appears that it is only in Grade 6 that these concepts become explicit in the sampled textbooks.

Writing expected in graded history textbooks

This aspect of the analysis shows a clear pathway of development as learners in Grade 3 are not required to produce any writing, while in Grade 9 learners must produce extended writing in various genres. The activities in the earlier grades require more oral response and teacher-led engagement. Grade 4 learners are required to tabularise and list, after recognising objects that contribute to local history construction. They are also involved in drawing up questions for interviews and in recording observations of their visits to local buildings, historical sites, etc. These are very practical tasks which require simple sentence construction. Grade 5 learners are introduced to an aspect of the discipline of school history where they construct very simple but longer texts about the San lifestyle and practices by describing and listing archaeological findings and then relating the artefacts to how the San lived.

Grade 6 writing production involves greater details and complexity around map study and there is an increase in length of writing about exploration and trade. This is gauged from the type/level of the questions asked, which require detailed explanation. Shifts in context and understanding require more description and reasoning.

An example from a Grade 6 textbook, from a later chapter, requires learners to write a biographical recount. Learners are required to research and write the biography of either Fathima Meer or Pius Langa or any person who

worked to build a democratic South Africa in a specially designed project format with clear headings constituting the “Early Life”, “What they did to help build democracy in South Africa”, “How their actions made a difference” and “What I learnt from their history”. The requirements here clearly show a build-up of both substantive knowledge as well as procedural knowledge. The second-order concepts can be inferred from what the headings intend for the learner to acquire. The “Early Life” to “What they did to build democracy in South Africa” develops this idea of “continuity- and- change” while the “How their actions made a difference” develops understanding around “cause-and-effect” and this development is concluded with “What I learnt from their history” which is demonstrative of “historical-significance”.

The Grade 7 textbook requires learners to write explanations and produce paragraphs on their understanding of “colonisation” and the “warfare between indigenous populations and the immigrants”. The writing the Grade 7’s produce is also the result of comparing different maps. These activities require understanding of different sub-components or elements such as rainfall patterns, climate, population distribution and temperature which influenced the lifestyle and location of the people in South Africa. These circumstances resulted in competition for land, resources and subsistence as people of that time produced their own food. The advanced and complex thinking in this particular written activity requires an understanding of a combination of factors which would denote a highly proficient learner whose ability must be aligned with task expectation.

Complexity in Grade 8 written tasks is far more intense as learners are required to create time-lines, posters and mind-maps which require understanding of the dimensions, content, style, criteria and structure of the text in order to produce it. Knowledge and understanding of the event must proceed before the learner tackles the task. Learners have to write definitions and explanations which involve comprehensive understanding of the background, changes to the economy, context and circumstances surrounding the Mineral Revolution. They have to provide reasons for and evaluate the circumstances of the event. Writing production required in Grade 9, in this sample of textbooks, is the most complex with learners required to write essays on the background, causes, results and effects of a particular event.

These analysed texts demonstrate progression in the genres by first engaging the autobiographical genre (Grade 3: my life history) to the biographical genre (Grade 6: Fatima Meer), to the background, context, causes and

evaluation of the event of the Mineral Revolution (Grade 9). When academic disciplines are recontextualised as school subjects, Coffin (2006) argues that the disciplinary purposes are played out in language via the different types of texts students are required to read and write. She identifies important genres of recording, explaining and arguing in history to span the development phases of learners in history so that learners are able to sequence past events. The genres have distinct lexical and grammatical choices which allow learners to build a record of past events in order to develop a historical understanding of events. Learners are also required to produce mind-maps, present debates and posters on the topic in a very structured manner. These require time to plan, design and present. Increasing complexity is the overall trend of the advancing grades. The use of source analysis, bias detection and critical argument in the type of essays learners are required to write is in line with Greer’s (1988:21) contention that writing in history, “needs to reflect the disciplinary thinking of constructing arguments and reaching conclusions through the use of evidence, critical thinking, and a detailed analysis of the context and origin of evidence” (cited in Schleppegrell *et al.*, 2008).

Table 5 below summarises the findings and shows how there is an increase of writing demands from descriptions of events to explanations, which develops learners’ understanding of cause and effect.

Table 5: Summary of the writing demands made on learners according to genre type

Grade 3	Grade 4	Grade 5	Grade 6	Grade 7	Grade 8	Grade 9
Does not require any written activity.	Tabling/listing sources/ objects that contribute to local history. Formulating questions for survey. Recording observations.	Listing San objects that contribute to their history. Describing San life-style and practices from pictures and information.	Written descriptions of early settlements and their lifestyle and livelihood. Explanations of how trade advanced and expanded.	Descriptions of life-style and location of indigenous inhabitants. Explanations for colonisation and clashes.	Writing definitions, explanations, providing reasons, describing background and changes to the economy. Planning/writing presentations. Creating time-lines, posters, mind-maps.	Explanations/ reasons for events. Essay writing on background, causes, results and effects of events. Mind-mapping, preparing debates, presenting posters. Source interrogation.

It appears that the second-order concept of multi-perspectivity is not well developed within this sample of textbooks, except in Grade 9. This is unfortunate, given that only about 20% of learners proceed to select history

in Grade 10 (based on the figures from the 2013 National Diagnostic Report that 109 046 wrote the Grade 12 history examinations in 2013 of a total of 562 12 full time candidates). It means that the majority of South African learners who do not study history beyond Grade 9, are not developing a deep understanding of history as a discipline which requires one to see a range of perspectives.

Conclusion

The study concludes that one method of tracking progression of historical thinking in textbooks is by analysing the genre of texts. This study has showing that genres are effective in learners' structuring reading and writing demands, and thus developing historical thinking in textbooks. With regard to the structure of historical knowledge, progression is observed in substantive knowledge, where a shift from contextualised knowledge in Grade 3 and 4 to decontextualised knowledge can be seen across the seven textbooks. The analysis finds that the genre of texts that learners must read increases in complexity, starting with contextualised, local knowledge in Grades 3 and 4, and moving to more decontextualised knowledge in Grade 9. The study shows that the genre of the texts shifts from recording genres in the early grades to explaining, and then interpretation and argument in Grade 9.

In terms of writing demands, learners commence writing explanations and thus start engaging with the concept of cause and effect only in Grade 6. It is only at Grade 9 that learners are expected to engage with writing multi-perspectives or to interpret and argue for a particular perspective as they are introduced to a range of different sources. Thus a genre analysis shows that there is some progression in the second order historical concepts but that multi-perspectivity is only engaged with in Grade 9. It seems that learners in Grade 3, 4 and 5 are hardly being inducted into the key concepts of history such as narrative, chronology and specific historical events.

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THE ROLE OF HISTORY TEXTBOOKS IN PROMOTING HISTORICAL THINKING IN SOUTH AFRICAN CLASSROOMS

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Abstract

This article focuses on the analysis of three textbooks that are based on the Curriculum and Assessment Policy Statement (CAPS), a revised curriculum from the National Curriculum Statement which was implemented in 2008. The article uses one element of a historical thinking framework, the analysis of primary sources, to evaluate the textbooks. In the analysis of primary sources the three heuristics distilled by Wineburg (2001) such as sourcing, corroborating and contextualizing are used to evaluate the utilisation of the primary sources in the three textbooks. According to the findings of this article, the writing of the three textbooks is still framed in an outdated mode of textbooks' writing in a dominant narrative style, influenced by Ranké's scientific paradigm or realism. The three textbooks have many primary sources that are poorly contextualized and which inhibit the implementation of sourcing, corroborating and contextualizing heuristics. Although, some primary sources are contextualized, source-based questions are not reflecting most of the elements of sourcing, corroborating and contextualizing heuristics. Instead, they are mostly focused on the information on the source which is influenced by the authors' conventional epistemological beliefs about school history as a compendium of facts. This poor contextualization of sources impacted negatively on the analysis of primary sources by learners as part and parcel of "doing history" in the classroom.

Keywords: Sourcing; Corroboration; Contextualisation; Realism; Epistemological belief; "Doing History".

Introduction

This article articulates a source-based approach in the writing of textbooks in South Africa and evaluates the extent to which textbooks reflect one of the critical elements of historical thinking and the notion of "doing history" which

is in keeping with the knowledge construction pedagogical approach advocated by social and cultural constructivists. “Doing history” in history classrooms implies a teaching strategy that enables the teachers and learners to reflect on the sophisticated knowledge of the discipline. According to White, one of the literary theorists, history can be used to provide the theoretical arguments that justify the instrumentalisation of historical memory by nationalist elites in their sometimes genocidal struggles with their opponents (Cited in Moses, 2005:311). The historians such as White, Nietzsche and Seixas (Stearns, Seixas & Wineburg, 2000; Cited in Moses, 2005:11) have accommodated the need for collective memory or best stories of the nation but have also cautioned against the abuse of history to alienate other nationalities. In South Africa it is critical that curriculum developers and textbook writers should keep the balance between the “best story” which is the “road to democracy” and elements of historical thinking such as the analysis of primary sources. It is therefore necessary for the learners to be engaged in the cognitive analysis of sources in order to ascertain facts about the past and to establish what actually happened. This article focuses on the analysis of primary sources and uses the three heuristics, “sourcing”, “corroborating” and “contextualising” in order to evaluate the authenticity and trustworthiness of sources as historical sources. The article also utilises the three heuristics to evaluate the variety of sources and source-based questions on these three textbooks to ascertain whether questions posed require learners to analyse sources by the reflecting on the elements of historical knowledge construction such as “sourcing”, “corroborating” and “contextualising” (Wineburg, 2001; Seixas & Morton, 2013).

Research problem

Textbooks writers in South Africa are in a dilemma: they should reflect the “best story” of the struggle such as the road to democracy and the role played by the ruling party in the struggle against apartheid and yet they are expected to reflect elements of historical thinking such as analysis of primary sources and other disciplinary skills. In addition, if they focus on the activities that relate to knowledge construction, they would be delaying learners because the examination question papers are assessing the superficial knowledge of the sources and compromise critical aspects of sources such as the sourcing heuristics (Standardised National Question Paper, 2014). Therefore, the struggle of teaching historical thinking would be won, if textbook writers

strike a balance between prescribed content and historical thinking or “doing history”. The analysis of primary sources to reflect historical thinking or the notion of “doing history” is critical because according to Seixas and Morton (2013), primary sources are the raw materials for the construction of historical knowledge and therefore it is necessary that textbooks provide learners with the opportunity of the reading and analysing of primary sources.

Research question

The question driving this article is as follows: *To what extent are prescribed text books reflecting elements of historical thinking such as the analysis of primary sources?* The formulation of this question is encouraged by the call by history education experts (Wineburg, 2001; Morton & Seixas, 2013) who prioritised the use of primary sources in the teaching of history. The shift from the transmission model of teaching to construction of historical knowledge in the classroom was influenced by the new learning theorists by the socio-cultural constructivists who considered the transmission model as inadequate in the teaching of the elements of historical thinking (Gallimore & Tharp, 1988; Bain, 2008). The construction of the theoretical framework to analyse sources was encouraged by the new learning theory which inspires historians to ensure that learners and teachers reflect the sophisticated knowledge of the discipline in the class rather than regurgitate the narrative constructed by historians (Morton & Seixas, 2013).

Methodology

The qualitative paradigm is epitomised by the interpretive strand to research and focuses on understanding, interpretation, and social meaning. This is considered an appropriate design for this research. Thematic analysis has been used for the encoding of qualitative information (Boyatzis, 1998) and a conceptual framework of historical thinking has been used to analyse data which would be based on the analysis of three prescribed textbooks. Three main textbooks that are prescribed and that comply with the requirement of CAPS have been selected for this study. The following textbooks were analysed, namely *Via Africa History Grade 12* (Grove, Manenzhe, Proctor, Vale & Weldon, 2013) and *Focus History Grade 12* (Fernandez, Wills, McMahon, Pienaar, Seleti & Jacobs, 2013), *Spot On History Grade 12* (Dugmore,

Friedman, Minter & Nicol, 2013).

Wineburg (2001), an educational psychologist and historian, has contributed immensely to developing a framework for engaging young learners in the cognitive process of analysing sources. He, along with other experts such as Seixas and Morton (2013) and Reisman (2012), advocate the use of primary sources in the classroom in order to engage learners in the sophisticated process of producing historical knowledge. In responding to this new approach, Wineburg (1999) identifies in historians an epistemological orientation toward texts that regard them as human constructions, who probably can and should be interrogated (Reisman, 2012). Wineburg distilled three heuristics namely “sourcing”, “corroborating” and *contextualizing* in order to engage students in the cognitive analysis of sources. This framework by Wineburg is designed to engage learners in the epistemological analysis of text to enable them to think critically and historically about primary sources. Learners are therefore encouraged to “read like historians”.

The cognitive analysis of the sources focuses on the theme of the Vietnam War 1968 to 1969. The reason for the choice of the theme is that sources that are used in this theme are mostly primary sources or secondary sources which are autobiographies of the participants in the war. This theme demonstrates the power of primary sources when listening to the emotions of those who participated in the war compared to a historian who represented the events through the eye of the eye-witness or participant and therefore it is primary sources that provide an accurate insight into what actually happened during the Vietnam War. Although twenty-five sources were analysed, only fourteen were evaluated in detail across the three textbooks in order to provide empirical evidence about the use of primary sources in the representation of the Vietnam War. Wineburg (Cited in Mayer, 1999) has likened the historian’s work to that of a necromancer. Wineburg emphasises that “good historians bring back the dead, get them to talk with one another, and leave us with the yarn” (Cited in Mayer, 1999:66). In support of his perspective, Wineburg, argues that “by using primary documents such as diaries, letters, newspaper accounts, and oral interviews, students hear the arguments put forth by historic actors and directly experience the tensions and inner motives which lie at the heart of a given narrative” (Cited in Mayer, 1999:66).

An instrument containing the framework of historical thinking, developed by Seixas and Morton (2013) and Wineburg (2001) was designed to evaluate the three textbooks. The instrument comprises three heuristics and various

forms of sources. The items were divided into three categories, variety of sources, primary sources, source-based questions, “sourcing”, *corroboration* and *contextualization* and the criteria is divided into three levels, namely, weak, moderate and powerful use of elements of primary sources (Refer to Annexure A).

Interrater-reliability has been utilised in this study in order to promote the credibility, dependability and trustworthiness of the findings. A subject specialist who majored in history and who possesses extensive teaching and moderation experience in the subject at national level was used to apply the criteria of evaluation on the three textbooks. The specialist was briefed by the researchers in terms of the criteria as articulated by Seixas and Morton (2013) and Wineburg (2001) and he used the same instrument to judge the textbooks. His scores were used to corroborate the scores of the researchers to promote the reliability of the outcomes.

Literature review

In this section four studies will be analysed which are based on the three heuristics developed by Wineburg. Two of the studies are from international research and are based on the analysis of primary and secondary sources. The studies are conducted by Wineburg (2001) and Mayer (1999). The other two studies are based on the South African context and are focused on the analysis of sources and source based questions in Grade 10 textbooks and school-based examination question papers developed across three schools in KwaZulu-Natal.

Utilising the three heuristics that he has developed, namely, “sourcing”, “corroborating” and “contextualising”, Wineburg (2001) compared eight historians and eight high school students, using a “think aloud” strategy to evaluate their cognitive thinking when working with sources. Wineburg (2001) notes that historians identified a document’s subtext or hidden message by considering it as both a rhetorical artefact and as a human instrument. Wineburg (2001) explains the meaning of the subtext by indicating that the subtext is not the literal text but the text of hidden and latent meaning. For a historian to be able to identify the subtext, he needs the background knowledge or factual knowledge of the period outlined by the source. Students on the other hand failed to identify a subtext. Another paradox between historians and high school students related to beliefs about the texts and the conception

of the primary documents. Whereas historians considered information about the text, such as who wrote the text and at what time, to be very important; students focused on the information in the text. Reading texts seemed to be a process of gathering information for students, with texts serving as bearers of this information. On the other hand, historians seemed to view texts as social exchanges to be understood, puzzled about regarding the intentions of the author, and situated in a social context. Historians also managed to use corroboration heuristic influenced by their epistemological beliefs about the nature of historical evidence (Van Boxtel *et al.*, 2007). For historians, corroboration was indispensable because every account was seen as reflecting a particular point of view while students focused on issues of bias. In addition, the students gave more importance to textbooks, whereas the experts ranked primary sources higher (Van Boxtel *et al.*, 2007; Wineburg, 2001).

Mayer (1999) is an education expert who utilises the cognitive framework of analysing historical sources developed by Wineburg. The study is about two primary documents, namely, a diary written by David Golighdy Harris, a middle-level white planter from South Carolina and the second source is a record of testimony given in the U.S. Senate by Henry Adams, a freed slave and African-American activist living in Louisiana. According to Mayer (1999) these particular documents were written in the second half of the nineteenth century and represent two opposing perspectives on the events occurring during the era of reconstruction. Students begin the process by considering the documents themselves and the documents' authors in order to identify aspects of sourcing heuristic. Later students were asked to reconstruct the basic message of each author and then examine similarities and differences in the messages in order to corroborate the information in the two sources. Although the documents were coming from diametrically opposing vantages, there are indeed issues that Adams and Harris agreed upon. Both observed and reported violence against the freed slaves. Both noted that the freed slaves did not trust their former owners and finally, both discussed the fact that the freed slaves had a tendency to run away from the plantations on which they had previously worked (Mayer, 1999:68). There are also disagreements and Mayer asks questions as to what needs to be done if there are differences identified during the process of corroboration: What do historians do when documents present differing perspectives? What should students do? To make sense of differing perspectives contained in primary documents, Mayer argues, historians employ a third heuristic: contextualizing. That is, they place documents within the frame of a particular time. The contextual knowledge

students bring to the documents will aid them in reconciling differences between the two reports and ultimately aid in generating an overall account (Mayer, 1999:68).

Waller (2009), a master's degree student at the University of KwaZulu-Natal explored Grade 10 textbooks in a dissertation entitled "How does historical literacy manifest itself in South African Grade 10 textbooks?". The purpose of the study was to identify and explain historical literacy and its various forms in Grade 10 textbooks. She used a conceptual toolkit developed from the theories of Taylor, Wineburg and Lee as conceptual framework that includes amongst others, knowing and understanding historical events, historians' craft, narratives of the past, historical concepts, empathy and so on. She evaluated the preface, three purposive activities and the jacket cover of the three Grade 10 textbooks namely, *New Generation Textbook 10*, *Looking into the Past* and *Marking History Grade 10* and compared these with textbooks written prior to 1994 (Waller, 2009). Seven textbooks writers were interviewed on the role of school history. The research under the heading historical craft focuses on the three heuristics such as "sourcing", "corroborating" and *contextualizing* which are used by historians to analyse sources. In her attempt to outline the cognitive analysis of sources through the use of the three heuristics, Waller (2009) does not provide evidence for the existence of "sourcing" in textbooks and the importance of primary sources has not yet been emphasised in historical literacy because primary sources are also a manifestation of the most reliable information because the producers of the sources are either participants or eye witnesses. The heuristics of *corroboration*, although thoroughly explained, was addressed in a superficial manner and there was no indication whether primary sources were corroborated with other primary sources or secondary sources because without this process the historical literacy would be considered to be unreliable.

Bertram (2008) is another author who evaluated activities that relate to the implementation of the National Curriculum Statement. She used the learning outcomes and assessment standards in order to evaluate the assessment tasks and tests from three sampled schools in KwaZulu-Natal namely, Enthabeni High School (rural school with African learners), Lincoln High (in a middle class white suburb and learners mostly whites) and North High (with Indian staff and a majority Black and few Indian learners). The schools selected performed between 80% and 100%. She analysed tests that were set by each school as well as the exemplar set by the then Department of Education. She

evaluated 72 sources and according to her, the sources were fully referenced because learners were given the name, the occupation of the writer, the purpose for which the source was produced and the date on which it was produced. According to her findings level one questions requiring simple extraction of information were endemic across the schools. The strength of the research was that the author managed to use “sourcing” information in order to judge the effective use of sources. The shortcoming of this study is that there was no evidence of the use of “corroborating” and *contextualizing*. There is no mention of comparisons across the sources, be they primary sources or secondary sources. The author arrived at an inference that “doing history” compromises “knowing history”. The “knowing history” perspective is anathema to a social and cultural constructivism which advocates knowing through doing. As Von Glasersfeld himself says, “knowledge is the result of an individual subject’s constructive activity, not a commodity that somehow resides outside the knower and can be conveyed or instilled by diligent perception or linguistic communication” (Von Glasersfeld, 1990:37).

The four studies provide evidence of how the three heuristics were utilised in the analysis of primary and secondary sources. In the first study, the students had to identify the sub-text and rank documents in terms of their trustworthiness and in the second study, the students were required to identify the sourcing heuristics and apply the *corroboration* and *contextualizing* heuristics. *Contextualizing* was utilised to make sense of the differences in documents and this can be done by exploring the ideologies that were at play during the production of the sources. The two studies emphasise the importance of primary sources as authentic sources in the reconstruction of historical knowledge. The third and fourth studies that are based in South Africa were more focused on the “sourcing” heuristic and there was limited evidence of the use of *corroboration* and *contextualization* heuristics.

Conceptual framework

There are two epistemological stances or beliefs in the construction of historical knowledge, namely, a conservative realism and radical deconstructionist or relativist. Conservative realism advocates a scientific approach that conceptualized the discipline in terms of its ability to represent the knowable past. The radical deconstructionist on the other hand posits that reality is constructed. Ginzburg (Cited in Neumann, 2010:491), one of

the historians, warns that the focus on history as “representation” leads to “a general rejection of the possibility of analysing the relationships between these representations and the reality they depict or represent; this is dismissed as an unforgivable instance of naive positivism. He is supported by Neumann and VanSledright. In his work with fifth-grade students, VanSledright (Cited in Neumann, 2010:491) uses a less radical epistemology. Although influenced by a deconstructionist epistemological stance Neumann recommends a radical realism as a compromise between the two paradoxical pools, conservative realism and radical deconstructionist perspectives. According to Neumann, critical realism rejects the possibility of “objectivity” as naïve and instead recognises that an interpretation is never free from the reader’s presuppositions and is subject to revision, but simultaneously insists that an interpretation can bear an adequate correspondence to the past. Critical realists assume further that the identity of the author and the historical context in which the author originally composed a text are relevant in determining meaning. Cautious, critical reading of texts does potentially yield an accurate, though tentative reconstruction of the past. The critical realism is congruent with the framework of the cognitive analysis of sources (Neumann, 2010:491). Critical realism as the epistemological stance that offers a balanced reading of sources was followed when dealing with sources in this article.

A conceptual framework for historical thinking has been conceptualized by Seixas and Morton (2013) in a book entitled the “Big six concepts of historical thinking”. According to Seixas and Morton, historical thinking is a creative process that historians go through to interpret the evidence of the past and generate the stories of history. Historians use primary sources as evidence and ultimately the foundation for all claims in history are the traces left over from the times in which past events occurred; marking a historical claim that others can justifiably believe, then, requires finding, selecting, contextualizing, interpreting and corroborating sources for an historical argument (Morton & Seixas, 2013). This article will focus on one of the critical elements of historical thinking – the analysis of primary sources and would use the cognitive evaluation of sources designed by Wineburg (2001) as a conceptual framework. The cognitive analysis of primary sources is critical and demonstrates a sophisticated nature of the discipline of history that should be reflected in the classroom and therefore learners should be engaged in this rigorous process of constructing historical knowledge (Morton & Seixas, 2013, 2013). The cognitive analysis process comprises three heuristics distilled by Wineburg (2001) and supported by Seixas and Morton (2013),

namely, “Sourcing”, *Collaborating* and *Contextualizing* and these would be used to evaluate the use of sources in these three textbooks.

It is critical to explain the three heuristics in detail because these would be used as criteria to judge the trustworthiness of the sources. “Sourcing” according to Seixas and Morton (2013) is the first step in analysing any source. “Sourcing” begins with straightforward queries: When was this written? Who wrote this? What were his or her positions? Many accomplished students will move on to difficult questions to answer: Towards what was the author’s attitude? It involves inferring from the source the author’s or creators’ purposes, values and world view, either consciously or unconsciously (Seixas & Morton, 2013).

Contextualizing the documents encourages historians and students to analyse sources by considering the perspective of the time and the society in which they were created (Seixas & Morton, 2013). The context can assist historians or students to understand their situation and interpret their words accurately. The following questions can assist the students to contextualize sources: What was going on in this society at the time the picture was taken that might help students interpret the photograph? A source should be analysed in relation to the context of its historical setting: the conditions and worldviews prevalent at the time in question (Morton & Seixas, 2013).

Corroboration, according to Wineburg (2001), is the general skill of checking facts or interpretations from a particular document against other, independent sources. *Corroboration* involves directly comparing the information from the various sources to identify which important statements are agreed on, which are uniquely mentioned, and which are discrepant. Students must be able to handle the multiple documents, to assess whether they reinforce each other and also where and why they contradict each other (Morton & Seixas, 2013). Often, however, information is not corroborated, and as a result the student may judge information to be tentative until corroborating information is located (Wineburg, 2001).

Findings on the analysis of textbooks

Discussions on the findings based on the Vietnam War 1968 – 1969

The tables below attempt to analyse four to five sources in textbooks in terms of their sourcing information as well as the message that is communicated by the sources. Photographs, cartoons and extracts have been described and the

messages they are communicating have been recorded on the table. The page numbers in which the sources are located in the textbooks are indicated on the tables. Sources are named as sources 1 to 5 in each table. However, these sources are named differently in different textbooks. Some of the extracts will be reflected word for word from the textbooks in order to demonstrate the inability of the authors of the textbooks to utilise the “sourcing”, *corroboration* as well as *contextualization* heuristics. The researchers will also provide examples of how some of the sources could have been used in order to reflect “sourcing”, *corroboration* and *contextualization*.

Table 1: *Via Africa History*

This table indicates elements of sourcing as well as the description of the information on the sources, numbering of sources as well as the page numbers where these sources can be located in *Via Africa History* textbook.

Source No	Description of the source and its purpose	Sourcing information	Page No
1	A photograph depicting confused US troops looking up for Vietnam snipers firing at them	Producer of the source not mentioned but the year in which the photograph is taken is mentioned (June 15 1967)	70
2	A photograph of a South Vietnamese woman mourning the death of his husband, found with 47 others in a mass grave near Hue	The date is not fully captured, it is mentioned as April 1967, the exact date not mentioned, the author not mentioned	71
3	A Loan shooting suspected Viet Cong officer, Nguyen Van Lem in the head on a Saigon Street	The photograph appeared on the front page of the New York times the next day. The photograph was taken by Associated Press Photographer Eddie Adams and the date is 1 February 1968	73
4	A photograph showing students in New York demonstrating at UN against the US involvement in the Vietnam War	The source is Ullstein Bild and the year of taking the photograph is not mentioned. There is also little information about the producer of the source	73
5	A cartoon depicting an American soldier with his boot on top of the body of a wounded helpless woman lying flat on the ground with blood oozing through her mouth. The helpless woman is commanded to repeat the words: “We are here to bring democracy, repeat it after me De-mo-cra-cy”.	The cartoonist is Carlos Latuf, a Brazilian Freelance political cartoonist (81). His works deal with an array of themes, including anti-globalisation, anti-capitalism and anti-US intervention.	81

These photographs that are used in *Via Africa* textbook are suitable for effectively teaching historical skills such as analysis of primary sources because they provoke emotions and come from a participant or eye-witness. However,

what is rather disquieting is that these sources have not been identified as sources and there are no activities relating to these photographs, instead the authors grouped six cartoons as sources 1 to 6 in which the source-based questions are based. Photographs are primary sources and a cartoon is an opinion by the cartoonist and the person drawing it and is mostly not a participant or eye witness and can easily be classified as secondary source. The six cartoons that are being used are mostly anti-Americans and there is no balanced perspective. The authors should have used a combination of cartoons and photographs in the chapter as well as extracts of speeches of American leaders which would be biased towards America. What is the purpose of having photographs that were not used in activities to corroborate the narrative constructed by the authors with the cartoons or other primary sources produced by eye-witnesses?

Another challenge about the photographs is that the producers of the sources are not mentioned and the absence of this information leads to speculation about the author and his or her ideological affiliation. The absence of the period in which the photographs were taken undermines them as primary sources and as authentic photographs depicting an accurate picture of what happened during the Vietnam War. There are many questions that can be asked. What was the positioning of the photographer during the war? What was the photographer's intention in taking these photographs that demonstrate cruelty of the Americans troops in Vietnam? Was the photographer a South Vietnamese, North Vietnamese or an American? What is clear is that these photographs demonstrate anti-American sentiments. Why are these photographs not showing the American soldiers making progress during the course of the war? Is it because some Americans sympathised with the Vietnamese or fellow soldiers who were suffering in Vietnam or was the photographer a communist who wanted to expose the cruelty of the Americans troops? The information about the producer of the sources is critical in order for historians, learners and teachers to understand the purpose of the source and what the source is doing (Wineburg, 2001). It seems that these sources were influencing people against America during the war.

Source 5 has more information about the author of the cartoon who is a Brazilian with an anti-capitalist political perspective and it is clear he was against the US and against capitalism and the message on the cartoon mocks the United States. This cartoon depicts an American soldier with his boot on top of the body of a helpless and wounded woman lying flat on the ground

and commanding her to say the words “we are here to bring democracy” and asking the woman to repeat the word “De-Mo-Cra-Cy”. The only information lacking, is the date on which the cartoon was drawn and the newspaper in which it was published. This weakness is endemic in all six cartoons used in this chapter (Grove *et al.*, 2013:80). The period is important because it may provide the information about whether the cartoon was a protest against the attack on Vietnam in order to provoke people against the war or after the war in order to shame the Americans.

The source- based questions posed on these cartoons are as follows: What is the message of the cartoonist? Is the message biased? Provide evidence from the source to substantiate your view. Explain the usefulness of the sources to historians studying the war. These are simple questions, not challenging and they would not enable learners to reflect on the sophisticated nature of the discipline.

Table 2: *Spot On History*

This table indicates elements of sourcing as well as the description of the information on the sources, numbering of sources as well as the page numbers where these sources can be located in *Spot On History*.

Source No	Description of the source and its purpose	Sourcing information	Page No
1	A poster from North Vietnam which states “Imperial America is the enemy with whom we cannot live under the same sky”. The top slogan is: “We are determined to defeat the American aggressors”.	It is taken from a secondary source which was published in 1982 by the photographer, Lee Lockwood. It was a photographed poster and the photographer is therefore not the original producer of the source	68
2	An account of the war as experienced by a Viet Cong soldier.	There is no information as to when the interview took place and who interviewed this soldier. This appeared in a book entitled the Vietnam Experience published in 1987. It is written by the soldier which is a testimony about his experience in fighting in the war on the side of Vietnam.	68
3	Photograph depicting the wounded Americans troops	The photographer is an American; there is no date mentioned as to when it was taken.	69

4	An American Soldier's account about the Vietnam War	The account is from a soldier and appeared on the secondary source: Introduction to the American history by Farmer and Stander. This is a secondary source and an American soldier has been interviewed by the authors.	69
5	A book written by O' Bien who was one of the American soldiers and he gives a testimony about the difficulty and frustrations he and fellow soldiers experienced during the Vietnam War, the challenges of land mines which were planted everywhere where they did not know where to stand and where to sit and indicating that "he is ready to go home".	Source: <i>If I die in Combat Zone, Box me up and ship me home</i> published in 1973 four years after the war. This is the book written by O' Bien and shares his memories of the Vietnam War. He is the participant and the eye-witness of the war. Date of the recording of his diary is not mentioned and perhaps this information is cited in the book but it is not indicated on this textbook.	69

Source 1 is a poster but it was photographed and the photographer is not the primary producer of the source because the composer of the poster appears to be the Viet Cong. The message clearly shows that the poster was developed by the Vietnamese who wanted to encourage people to rise against the American attack. The poster must have been issued during the war. The absence of critical information leads to this type of speculation (Morton & Seixas, 2013). Source 2 is a primary source, namely, *Vietnam Experience* written by a Vietnamese soldier. Although it was written by the participant, the exact date on which the soldier wrote the information is not mentioned and what is stated is only the date in which the book was published. If the book was written based on memories and the soldier did not keep a diary, some information may be distorted and exaggerated to present the Americans in a bad light because the writer was a Vietnamese soldier. A photograph of the wounded American troops was taken by an American whose intention might be to expose the suffering of the American troops in Vietnam in order to encourage the American citizens to protest against the war as it is endangering its own soldiers in pursuit of the so-called democracy. Source 4, is a secondary source: *Introduction to the American History* and the account by the soldier is an extract from the secondary source but the information is relevant and can be used to corroborate other sources. Source 5 is written by an American soldier who participated in the war and the title is very emotional - *If I die in Combat Zone, Box me up and ship me home*. This title relates to the message about the agony suffered by American troops. It is necessary to ask the following questions: When was the source written? Did the soldier keep a diary of the war as it unfolded or were memories recollected after the war? It is common place that some soldiers do keep a war diary. How accurate are these sources

that were written by participants but published long after the war?

It is necessary to establish the reliability of information about the war and testimonies of the soldiers that wrote about the war need to be corroborated. Two of the three sources will be used as an example of the *corroboration* which was missed by authors of *Spot On History*:

Source 1 (Labelled in the book as Source B): An account of the war as experienced by a Viet Cong soldier:

Because we were weaker than the Americans, not even as armed as the North Vietnamese soldiers, we had to be patient and use our intelligence. We laid traps, ambushes, using simple deadly weapons – sticks smeared with excrement, arrows tripped off by the unwary soldiers. His automatic rifle and grenade would keep us in firepower for weeks. The Americans were well armed and clumsy, they had firepower that we feared, so we stayed hidden and out of range. They were elephants, especially when moving through the jungle. We moved in cells of three, lightly armed but traveling silently and quickly. If we wounded or killed only one of theirs and lived to fight another day, it was a victory. Like the drop of water that wears away the stone we would wear away the American army (Dugmore et al., 2013:69).

Source 2 (labelled in the textbook as Source E): Tim O' Bien served in the Vietnam War. His book entitled, *If I die in a Combat Zone Box me and Ship me home*, is an intense personal account of his time of duty from 1968 to 1969 during the war:

You look ahead a few paces and wonder what your legs will resemble if there is more to the earth in that spot. Will the pain be unbearable? Will you scream or fall silent? ... Once in a while we would talk seriously about mines. "It's more than the fear of death that chews on your mind; one soldier, nineteen years old, eight months in the field, said- It's an absurd combination of certainty and uncertainty: The certainty that you're walking in mine fields, walking past the things day after day, uncertain of your every movement, of which to shift your weight, of where to sit down. There are so many the VC can do it. I'm ready to go home (Cited in Dugmore et al., 2013:69).

Source 3 (labelled in the textbook as Source D): An account of the war experienced by an American soldier:

American troops have been told we were defending a free democracy. What I found was a military dictatorship rife with corruption and venality (greed) and repression. The premier of South Vietnam openly admires Hitler. Buddhist priests who partitioned for peace were jailed or shoot down in the street. Extract from: Introduction to the American History, 2002, Author Farmer and Stander (Cited in Dugmore et al., 2013:69).

A careful analysis of the three sources is that two of them are books written by participants and source 3 is a secondary source where the American soldier's account was recorded. Between the three sources, which source can be corroborated? Sources 1 and 2 by soldiers from Viet Cong and America can be corroborated. Although from diametrically different vantage points, there are similarities between the two sources. Both sources confirm that the American troops were traumatised by traps and mines, both agree that Americans troops were being killed slowly and both confirm that Viet Cong were winning the war. There are minor differences; the Viet Cong soldier mentions traps while the Americans express agony and fear of being wounded by the traps and to reconcile the two sources background information about the American strengths in aerial bombardment and Vietnamese strengths in Guerrilla War tactics can assist to reconcile the two minor differences identified. Both sources are primary sources and it is very effective to corroborate two primary sources as demonstrated by Mayer's (1999) study of the two primary sources developed from different perspectives. However, the author of *Spot on History* did not corroborate the two sources but attempted to corroborate Source 2 and Source 3 labelled in the book as sources B and D respectively. In an attempt to ask the question based on two sources, the following question was asked: Both sources A and B are eye witness accounts of the war experienced in Vietnam. How reliable are both sources as accounts of the Vietnam War? The corroboration is that both were Americans troops and both were unhappy about their roles in the Vietnam War and there is some form of *corroboration*. However, the question is not asking for corroboration or comparison but requires the students to indicate whether they are reliable or not. The learners would indicate that both soldiers were participants in the war and the information provided should be reliable. The question requiring *corroboration* should have been framed in this fashion: In what ways is Source B supporting the information in source D? However, sources B and D are not related except for the fact that they were testimonies by two American soldiers but are focused on different subjects: one on the regime of South Vietnam and another on the war and it is difficult to employ *contextualization* heuristic if sources that are being compared are not reflecting the same event.

Table 3: Focus History

This table indicates elements of "sourcing" as well as the description of the information on the sources, numbering of sources as well as the page numbers

where these sources can be located in *Focus History*.

Source No	Description of the source and its purpose	Sourcing information	Page No
1	A text communicating a message about the drafting of Afro-Americans to enforce democracy in Vietnam when they do not experience it in America	Secondary Source: <i>Superpower Rivalry</i> (70) published in 1966	70
2	A photograph of a man carrying a child victim of Napalm. The child is physically defaced	Source producer not mentioned and there is no date of the taking of the photograph and the secondary source where the photo was taken from was not mentioned	70
3	Photograph depicting anti-war demonstration at Berkley, at the American college	Source producer not mentioned and there is no date of the taking of the photograph and the secondary source where the photo was taken from was not mentioned (70)	70
4	Testimony about the Vietnam War which decries the use of Napalm on villages and hamlets by sheltering civilians, it does not reflect Americans' course of pursuing righteousness in Vietnam.	The producer of the source is Richard Hammer, an eye-witness in Vietnam during the war, taken from a secondary source: <i>The Great Power Conflict</i> after 1945 by Fisher published in 1988.	69

The analysis of the information shows that information from primary sources such as testimonies of participants and photographs demonstrated a high level of emotions which are not found in secondary sources. Source 1 is from a secondary source: *Superpower Rivalry* and the extract message is encouraging Afro-American citizens to be drafted into the army. Source 2 is a photograph which is emotional because it shows a child who has been deformed by Napalm. The sourcing information about the photograph is lacking and it is, therefore, an obstacle to be used for *corroboration* and *contextualization* because sources that are used for these heuristics must have been produced simultaneously. Source 3 is a photograph depicting anti-war protests by students and the photographer and the period in which the photograph was taken are not mentioned. Source 4 is a secondary source but written through the eye of an eye witness of the Vietnam War, Richard Hammer who is featured in a book entitled *The Great Power Conflict* after 1945 written by Fisher. In the source Richard Hammer, criticises the use of Napalm by the American troops. Source 2 and Source 4 can be corroborated because both address the issue of Napalm. The only challenge is that “sourcing” information about the producer of Source 2 is lacking and therefore it can be dismissed as unreliable.

The following extract is an example to demonstrate how sources could be used to employ *corroboration* heuristic: Source 4 (labelled in the textbook as Source F): Richard Hammer, an eye-witness in Vietnam during the war,

comments on American policies:

*One does not use napalm on villages and hamlets sheltering civilians ... If one is attempting to persuade these people of the rightness of one's cause. One does not blast hamlets to dust with high explosives from jet planes in the sky without warning – if one is attempting to woo the people living there to the goodness of one's cause ... One does not defoliate (destroy vegetation in) a country and deform its people with chemicals if one is attempting to persuade them of the enemy's evil nature. (Fisher, *The great power conflict after 1945*, Cheltenham: Tanley Thomas, 1998:60) (Cited in Fernandez et al., 2013:69).*

Source 1 (labelled Source A in the textbook): An extract from the statement of a civil rights group in the civil rights movement and war in Vietnam, 1966:

*We maintain that our country's cry of 'preserve freedom in the world is a hypocritical mask' ... 16% of the draftees from this country are negroes called on to preserve 'democracy' which does not exist for them at home (J Brooman & S Judges, *superpower rivalry*, Harlow: Longman, 1994:28) (Cited in Fernandez et al., 2013:70).*

The two sources are secondary sources, source 4 featured an eye-witness and not a participant and it is difficult to locate the role of this witness. For example, who is Richard Hammer? What was his role or position during the war? Is Hammer an American, British or Russian? The absence of “sourcing” information leads to speculation. Source 1 is a secondary source and members of civil rights movement were against the war and were fighting for the rights of the Afro-Americans. It is difficult to corroborate secondary sources and it is necessary that more primary sources should be used by textbooks' writers in order to engage learners in the analysis of sources.

Summary of the findings

Variety of sources

- a. Authors of the *Spot On History* textbooks have used a variety of sources from primary sources to secondary sources and have also used extracts, cartoons and photographs and these primary sources are made available to the learners' teachers to construct historical knowledge in the classroom. *Focus History* used mostly secondary sources although there was a quotation made by an eye-witness. This was not adequate in demonstrating sufficient use of primary sources. *Via Africa History* on the other hand uses sources such as cartoons and photographs that reflect the events and there is limited use of extracts from the soldiers and eye witnesses.
- b. There is evidence of the use of primary sources across the three textbooks even

though these sources do not reflect all the characteristics of primary sources or “sourcing” heuristics. *Spot On History* uses primary sources that were better contextualized compared to *Focus History* and *Via Africa History*.

- c. The three textbooks used testimonies of the participants or soldiers and eye-witnesses in sources which demonstrated some characteristics of primary sources.
- d. *Spot On History* uses testimonies of both the Vietcong and American soldiers which were useful in providing a balanced perspective.
- e. There was a limited use of photographs. The three textbooks prefer to use cartoons and extracts and photographs have been used only by *Focus History* in one instance.

Source-based questions

- a. *Spot On History* and *Focus History* use a variety of sources and activities and questions were asked on the variety of sources. However, *Via Africa History* uses six cartoons and ignored photographs in the source-based exercises and the textbook was deficient in the use of extracts from participants and eye-witnesses.
- b. The questions posed by *Spot On History* in the comparisons of sources between the two testimonies did not accurately address the *corroboration* heuristic and the authors missed an opportunity of “corroborating” evidence between the testimonies of two soldiers from Viet Cong and US perspectives. The two testimonies should have corroborated effectively because the American soldier laments the agony of fighting in the Vietnam War while the Viet Cong soldier articulates the effectiveness of the traps and there is irony in the two sources, Viet Cong soldiers were celebrating the victory and the Americans were lamenting the loss. The contrast should have encouraged the authors to use *contextualization* heuristic in order to defuse this tension as demonstrated by Mayer (1999). These types of sources are useful because they are coming from opposing perspectives and there is agreement and disagreement between them.

Sourcing heuristics

- a. All three textbooks do not reflect all the characteristics of “sourcing” such as the name of the producer of the source and the date in which the source was produced. Some mentioned the year in which the photograph was taken but not the exact date.
- b. There was an attempt by *Spot On History* in the four sources analysed to provide

- the information about the producer of the source, the date of the source and the position of the producer of the source but this was not widespread in other sources. For example the three accounts by soldiers who participated in the war, the information about the name (Soldiers), position (Vietnam soldier or US soldier) were provided and so two elements were complied with but there were no dates in which the sources were produced because the dates mentioned are for publication of the books written by the two soldiers from different vantage points.
- c. *Focus History*, was very deficient in its presentation of photographs without the photographer and the date in which they were published and this is evident in the photograph of the child who was a victim of Napalm and two other photographs that are based on the Vietnam War (Fernandez *et al.*, 2013:70). However, the extract used on Napalm was better contextualised.

Corroboration and contextualization

- a. Among the three books only *Focus History* posed an activity that relates to *corroboration* between a photograph showing the child wounded by Napalm and an extract from an eye-witness decrying the effects of Napalm on innocent civilians. The shortcomings of these sources are that the photograph was not properly contextualized, because the name of the photographer and the date on which it was taken are not mentioned.
- b. There was no evidence of *contextualizing* because of the lack of the date in which sources were produced. The date is essential in providing the background of the period when events were taking place. Another obstacle was the comparison between sources that are not focused on the same event as evidenced in the *Spot On History* about the source which focuses on the regime and another focusing on the war. *Spot On History* also missed an opportunity to engage in *corroboration* and *contextualisation* because the sources selected by the authors were suitable for these two heuristics.
- c. *Via Afrika History* demonstrated no evidence about *corroboration* and *contextualisation* and the sources selected in the Vietnam theme were also not suitable for the engagement of learners in the two heuristics.

Epistemological beliefs

The analysis of the sources across the three textbooks on the Vietnam War reveals an epistemological belief of authors who wrote the textbooks. There seems to be a conception about history as a compendium of historical facts or a mere listing of events and this is evident in the manner in which the authors

dealt with sources where the focus was on the information on the source rather than the producer of sources. It is a concept which has influenced the writing of history in the past about knowing historical facts as opposed to constructing historical knowledge. For a shift to take place there is a need for a change in the epistemological belief by authors of textbooks to accommodate a critical realism which embodies both elements of realism and relativism.

There has been a shift in the writing of textbooks with the inclusion of a source-based approach but the deficiency in the accommodating primary sources with all the “sourcing” information clearly shows that sources are just treated as another form of narrative or story which contain facts that need to be assimilated and therefore the constructive perspective which is congruent with “doing history” in the classroom has been undermined by the three textbooks on this theme of Vietnam War.

Conclusion

In conclusion the analysis of the three textbooks clearly shows that they are still framed in an outdated mode of writing textbooks even though all three contain sources and source-based questions. With special focus on the theme on the Vietnam War, regarding the use of sources and primary sources in *Spot On History* were better contextualized than other sources and the authors of this textbook also used a variety of primary and secondary sources which include cartoons, testimonies of soldiers who participated in war on both sides of Vietnam and US. The sources attempt to provide a balanced perspective about the war. There were opportunities for corroboration and contextualization of sources but opportunity was not utilised by the authors. With regard to *Focus History*, photographs were poorly contextualized and only extracts from secondary sources were properly contextualized and there were limited primary sources used by this textbook and this is considered an obstacle to the construction of historical knowledge. The *Via Afrika History* contained suitable photographs which contained some sourcing information but these were not used in the source based activities, instead cartoons were used in the analysis of sources.

What is common across the three textbooks is that there was more attention focused on the information on the sources and questions were based on comprehension of the information on sources rather than on the “sourcing” heuristics about who produced the source and when the source was produced.

This was caused by the epistemological belief of authors about history as a corpus of historical facts rather than the manifestation of historical thinking skills and therefore sources are merely seen as another collection of facts. There was also limited evidence of the use of *corroboration* and *contextualization* heuristics across the three textbooks. It is recommended that the Department of Basic Education should introduce the cognitive framework in analysing sources which should be embedded in its curriculum documents as well as in textbooks. DBE should encourage textbooks' writers to develop resource packs that contain primary sources that are fully contextualized in order to complement the textbooks that appear to be deficient in dealing with primary sources.

Annexure A: Criteria used to evaluation the four textbooks

Focus History

Rating Scale

HISTORICAL SKILL	PERFORMANCE DESCRIPTORS	RATING WEAK	MODERATE	RATING POWERFUL
Variety of Sources	The use of extracts, photos and cartoons	1	2	3√
Primary Sources	Use of more primary sources than secondary sources	1	2	3√
Source-Based Questions	Were source-based questions engaging learners in sourcing, corroboration and contextualization? Or Were based on the information on the source	1	2√	3
Sourcing	Were learners provided the opportunities for analysing sourcing information such as dates, producer of the source, positioning of the producer of the source and ideological background of the producer of the source?	1√	2	3
Contextualising	Were sources properly acknowledged to enable learners to contextualize sources by keeping in mind the conditions and world views prevalent at the time the source was created?	1√	2	3

Corroboration	Were sources providing competing accounts for Learners to corroborate inferences from a single source with information from other sources (primary and secondary) and express the degree of certainty about those inferences?	1	2√	3
Comments	<i>Corroboration</i> of a photograph showing the Victim of Napalm and an extract showing the effects of Napalm “Sourcing” of sources was very poor only one source was fully contextualised			

Spot On History

Rating Scale

Historical Skill	Performance Descriptors	Rating Weak	Moderate	Rating Powerful
Variety of Sources	The use of extracts, photos and cartoons	1	2	3√
Primary Sources	Use of more primary sources than secondary sources	1	2	3√
Source-Based Questions	Where source-based questions engaging learners in sourcing, corroboration and contextualization Or only based on the information on the source	1	2√	3
Sourcing	Were source-based questions engaging learners in sourcing, corroboration and contextualization? Or Were based on the information on the source	1	2	3√
Contextualizing	Were learners provided the opportunities for analysing sourcing information such as dates, producer of the source, positioning of the producer of the source and ideological background of the producer of the source?	1√	2	3
Corroborating	Were sources properly acknowledged to enable learners to contextualize sources by keeping in mind the conditions and world views prevalent at the time the source was created?	1√	2	3
Comments	<i>Corroboration</i> of information in the sources was poor while there were extracts that were suitable for <i>corroboration</i> but were not used for this purpose. There were elements of “sourcing” in some sources such as sources 2 and 4 testimonies which are of by soldiers, the positioning and the name of producers of the sources are mentioned. There was a great attempt by these authors and this is the reason for high score despite the absence of little “sourcing” information such as date which is of course very critical.			

Via Africa History

Rating Scale

Historical Skill	Performance Descriptors	Rating Weak	Moderate	Rating Powerful
Variety of Sources	The use of extracts, photos and cartoons	1	2	3√
Primary Sources	Use of more primary sources than secondary sources	1	2	3√
Source-Based Questions	Were source-based questions engaging learners in sourcing, corroboration and contextualization? Or Were based on the information on the source	1√	2	3
Sourcing	Were learners provided the opportunities for analysing sourcing information such as dates, producer of the source, positioning of the producer of the source and ideological background of the producer of the source?	1	2√	3
Contextualising	Were sources properly acknowledged to enable learners to contextualize sources by keeping in mind the conditions and world views prevalent at the time the source was created?	1√	2	3
Corroborating	Were sources providing competing accounts for Learners to corroborate inferences from a single source with information from other sources (primary and secondary) and express the degree of certainty about those inferences?	1√	2	3
Comments	Out five sources only two sources are contextualised to large extent No evidence of “corroborating” and <i>contextualizing</i> of sources			

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RECOGNISING THE ACADEMIC AND POLITICAL PURPOSES EMBEDDED IN HISTORY TEXTBOOK ASSESSMENT TASKS

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Abstract

This paper explores the nature of history as a school-based discipline and how history is recontextualised in the South African History Curriculum and Assessment Policy Statement (CAPS) and Grade 10 history textbooks, with a particular focus on what the assessment activities and questions require of learners. The conceptual tools used in this document analysis were inspired by Morgan and Henning (2013) and came from Wertsch (2002), Anderson (2005) and Krathwohl (2002). The findings indicate that within the 'doing school history' construct, there is both an academic and a political dimension. These two projects may appear to be at odds with one another, but we argue that the study of history is strengthened when both are given their due respect.

Keywords: Knowing history; Doing history; History textbook assessment tasks; Source-based tasks; Academic project; Political project; Collective memory; Historical thinking.

Introduction

Paxton (1999) states that learners are often constrained in their understanding of history by the parameters of assignments or assessment tasks embedded in history textbooks. This paper explores how the assessment tasks and answer guidelines in Grade 10 history textbooks enable and constrain learners' access to understanding the discipline of history. To expose the issues, the literature review explores two sets of distinctions – between learning the “facts of history” compared to the “unique skills of history” (Osborne, 2004) on the one hand, and between the “academic” and “political / citizenship” projects embedded in school history on the other (Wertsch, 2002). The data presented

shows that both general academic and uniquely historical skills are developed through the assessment activities that students are expected to complete and moves on to analyse the weighting given to the academic and political projects respectively. In the discussion, we reflect on the tensions generated by the need for the tasks in history textbooks to fulfil such different demands. We conclude by making a case for balancing the academic and the political / citizenship projects, so that both can be strong.

Literature review: Conflicting purposes for school history in the field of recontextualisation

Disciplinary knowledge is generated in what Bernstein (2002) calls “the field of production” at universities and research institutes. Before it is taught in schools, which make up “the field of reproduction”, the knowledge undergoes a process of transformation in “the field of recontextualization”. The field of recontextualisation consists of politicians, education policy-makers, curriculum developers, publishers, textbook writers, assessment processes, etc., whose responsibility it is to reorganise disciplinary knowledge into school curricula and textbooks for teaching purposes.

The content, skills and political agenda presented in curricula need to be exemplified in textbooks (Osborne, 2004:28). Most teachers and learners assume that textbooks authentically recontextualise that which is in the curriculum, and many believe uncritically in the worth of textbooks as helpful foundations for teaching and learning (Osborne, 2004:28). Textbooks clearly serve a central role in the history classroom, whether they validly reflect the paradigm of history as stated in the curriculum or not (Paxton, 1999:327). In the South African educational context this is particularly true “where many teachers [and learners] have no access to any other media or subject knowledge” (Morgan & Henning, 2011:169). Quoted in Morgan and Henning (2011) the South African Minister of Education in 2009 stated that, “history textbooks cannot but remain central to the cause of an improved history education”. Therefore, any study of South African history textbooks needs to investigate in what ways the textbooks create opportunities for learners to know and do history and whether the nature of the political project supports the academic project.

Differing academic perspectives on school history

In the field of production there is an ongoing debate about the nature of historical writing. Traditionally, positivists believed that the more historical facts collected, the more real a picture of what happened in the past could be presented. They assumed that facts need to be learned and that they stand apart from the historian and speak for themselves to objectively portray the past. In reaction, empirical-reconstructionists like Carr (1961) argued that history is an empirical-analytical undertaking, with historians as selectors and interpreters of historical facts to build an understanding of the past. In contrast, post-modernists insist that history is a literary artefact (Munslow, 2011), i.e. a complex narrative discourse, moulded by the rhetoric, metaphors and ideological strategies of explanation employed by the historian. As such, "... history is as much invented as it is found" (Munslow, 2011:9). While the field of production has generally rejected the positivist tradition, the debate between history as an empirical reconstruction vs. history as a literary artefact has continued.

In the field of recontextualisation the debate has taken a slightly different form. The "knowing history" approach has maintained a presence in curricula and textbooks, while simultaneously both empirical-reconstructionist and post-modernist approaches have foregrounded and influenced a "doing history" approach. Bertram (2008) contrasts the focus on knowing history as a chronologically ordered narrative of past events which pupils needed to internalise (2008:156), with the focus on doing history, which sees history as a vehicle for the teaching of critical literacy and developing the skills of historical enquiry (2008:157).

The doing history approach emphasises constructivist modes of engagement with the past, with a focus on understanding perspective and engaging with certain historical skills (Bertram, 2008:156-157). Doing history should bring students to so-called historical ways of thinking that include critical reading and interpretation of source material, the identification of bias and the practice of inquiry skills (Bertram, 2008:157). Osborne (2004) identifies unique historical skills that are foregrounded in the doing history approach, such as: "...the ability to work with historical data, to interpret and evaluate primary and secondary sources, to analyse historical arguments and narratives, to evaluate the credibility of data, to assess historical significance, to empathise with people in the past, to understand the ways in which the past differs from the present, to use historical knowledge to explore contemporary problems,

and the like” (Osborne, 2004:5).

These unique skills are also described by Seixas (1999) and Barton and Levstick (2003). They emphasise how important it is for learners to understand how history is constructed. This is achieved through historical investigations that stress both primary and secondary source analysis, point out the relationships between historical evidence and constructed historical accounts, present an understanding of multiple perspectives that are often divergent in nature, and enable an appreciation of how people in the past held differing outlooks on events than we have today (Barton & Levstick, 2003:359).

Doing school history should not mean a rejection of the need to know historical knowledge, chronology and explanation (Bertram, 2008). Seixas (1999), drawing on Shulman (1987), describes a symbiotic relationship between content and skills. It is an ability to work with historical content and skills that forms the core of what it means to do history and makes up its academic project.

Differing political perspectives on school history

In addition, the field of recontextualisation is concerned with a debate about which political perspective on history should be emphasised. In the South African context, Morgan (2010) emphasises how curriculum policy places a dual purpose on school history: an academic project promoting the skills of historical enquiry, as well as a political project of citizenship education that unlocks the potential of learners to influence the societies in which they live. Writing in a Canadian context, Osborne (2004:7) stresses the underlying nationalistic goals of school history curricula that strive to instil in learners a sense of national identity, while simultaneously encouraging, often through debate, an appreciation of the multi-cultural nature of society. The importance of citizenship education as a purpose of school history is also highlighted by the American scholar Paxton (1999), who argues that the field of recontextualisation imposes a political agenda on the teaching of school history (1999:325). Thornton and Barton (2010:2472) show how school history curricula have been a target of politicians and other pressure groups who seek to revise curricula to support certain political projects of the day. These political imperatives are then transferred onto textbook writers and publishers. For Paxton (1999:325), the danger is that the academic purpose of the discipline of history and history textbooks can take a back seat to a history

designed to transmit ideas related to a political agenda, be it patriotism, the benefits of democracy, or more exclusionist goals.

The current South African History Curriculum

The FET (Further Education and Training) History CAPS (Curriculum and Assessment Policy Statement) (2011:8) explicitly mentions both the political and the academic projects. The political project emphasises citizenship within a democracy that upholds the values of the constitution, respects the perspectives of a broad spectrum of society, encourages civic and environmental responsibility, promotes human rights and peace, and prepares young people for local, regional, national, continental and global responsibility. The academic project consists of eight skills of history that emphasise history as a process of enquiry. They are: understanding a range of sources, extracting and interpreting information, evaluating the usefulness and reliability of sources, recognising more than one perspective, explaining why different interpretations exist, participating in constructive and focused debates, organising evidence to substantiate arguments, and engaging critically with issues of heritage (2011:8-9). The academic project thus requires learners to strive for an understanding of content knowledge and skills. Next is an explanation of key historical concepts that learners must understand: historical sources and evidence, multi-perspectivity, cause and effect, change and continuity, and time and chronology (2011:10), which also fit in with the academic project.

Later in the document (2011:33) a table is provided to highlight the cognitive levels and abilities that need to be covered during formal source-based assessments. These cognitive levels emphasise that all assessment tasks should assess both “doing” and “knowing” history (2011:32), so that learners can display their ability to select, arrange and connect evidence to solve historical problems. These are:

Table 1: Cognitive levels of source-based assessment questions (History CAPS, 2011:33)

Cognitive Levels	Source-based assessment questions and tasks
LEVEL 1	<ul style="list-style-type: none"> • Extract evidence from sources
LEVEL 2	<ul style="list-style-type: none"> • Explain historical concepts • Straightforward interpretation of the sources • What is being said by the author or creator of the source? What are the views or opinions on an issue expressed by a source? • Compare information in sources
LEVEL 3	<ul style="list-style-type: none"> • Interpret and evaluate information and data from sources • Engage with questions of bias, reliability and usefulness of sources • Compare and contrast interpretations and perspectives within sources and by authors of sources

CAPS thus emphasises history as a study of processes of change and development over time, to be conducted in a “disciplined” (2011:8) way because an understanding and appreciation of history can only be developed through a process of enquiry using the skills of history, coupled with an understanding of historical concepts, and the knowledge of how to use historical sources of evidence. In contrast to Curriculum 2005, the History CAPS has sought to re-impose the disciplinary nature of history as a subject within schools through a re-emphasis on content knowledge within the “doing history” approach. Yet the History CAPS makes little effort to show how the political project and the academic project are integrated. Each aspect of doing school history is neatly listed and compartmentalised, but the details of the integration and where to place the emphasis, is relegated to the textbook writers. By offering no criteria or examples of what it might mean to “engage critically with issues of heritage” or “engage with questions of bias, reliability and usefulness of sources”, it provides little guidance regarding, for example, what is considered to be a reliable or unreliable source, a biased or a well-reasoned source, or a valid or invalid interpretation of sources.

The distinction offered by Wertsch

Wertsch (2002) offers a useful distinction for understanding that the perceived clash between political and academic projects need not be inevitable and that there are criteria for what is an appropriate political perspective. He achieves this through an analysis of modes of historical thinking.

Table 2: Modes of historical thinking (Wertsch, 2002:4)

Modes of Historical Thinking (Wertsch 2002)	
Collective memory	History
“Subjective”	“Objective”
Single committed perspective Reflects a particular group’s social framework Unself-conscious Impatient with ambiguity about motives and the interpretation of events	Distanced from any particular perspective Reflects no particular social framework Critical, reflective stance Recognises ambiguity
Focus on stable, unchanging group essence	Focus on transformation
Denial of “pastness of events” Links the past with the present Ahistorical, anti-historical	Focus on historicity Differentiates past from the present Views past events as taking place “then and not now”
Commemorative voice Museum as a temple Unquestionable heroic narratives	Historical voice Museum as a forum Disagreement, change, and controversy as part of on-going historical interpretation

Wertsch provides two categories (not hierarchies) to identify history that is used to promote collective memory thinking compared to history that promotes historical thinking. Collective memory is the product of attempts by those in a position of power (political leaders, publishing houses, authors etc.) to create a usable past that serves certain political and identity needs (Wertsch, 2002). Wertsch argues that historical texts that seek to promote a collective memory are subjective in nature, static in perspective, seek to commemorate that which is deemed noteworthy by authority, and attempt to use the past in the present for certain political purposes. Texts that fall into the collective memory category are seen to be ahistorical or anti-historical in nature. A consequence of this is often a “propensity to sacrifice accuracy in the service of providing a usable past” (Wertsch, 2002:e-book ref.572).

On the other hand, texts that promote historical thinking are “objective”, i.e. historical thinking acknowledges a multitude of perspectives, not just one subjective “reality” (Wertsch, 2002:e-book ref.635). This historical voice clearly differentiates between the past and present, and sees historical thought as characterised by disagreement, change and controversy (Wertsch, 2002:e-book ref.649). Wertsch’s “history” category emphasises multi-perspectivity and aligns strongly with the academic project of doing history. It can also align with the political project of the South African history curricula of the past decade, as Bertram (2008:173) points out: the FET History National Curriculum Statement (NCS) provided history with the political

project of promoting non-discrimination and encouraging learners to debate and grapple with a broad range of social and environmental issues.

Wertsch (2002) makes it possible to see how different modes of historical thinking stand in a different relationship to the academic project. When textbooks promote a collective memory perspective, the required academic skills are limited to rote learning about the past from a prescribed perspective that contains heroic or commemorative narratives, and there is no need to understand what forces influence change and continuity over time, nor to deal with ambiguity, nor to consciously interpret events. In that case, the political project works against the academic project of reasoned argument in a society of multiple perspectives. Yet when textbooks promote historical thinking, the ability of a learner to understand multi-perspectivity as a concept and to recognise more than one perspective is an important step towards developing the good citizenship characteristic of respecting the perspectives of a broad spectrum of society. Learning to differentiate between what happened in the past and what are the possibilities in the present for the future, or how to reason a particular interpretation of events while acknowledging the presence of alternative interpretations, requires the higher level cognitive skills as described in Table 6 below. When school history is planned and enacted from historical thinking, it can be a vehicle both for the promotion of human rights and democracy, and for the development of key academic skills (Morgan, 2010:302). In this way, the academic and political projects can be successfully and meaningfully integrated to achieve the goals of school history.

Methodology: Constructing a conceptual lens for analysis

In this section we briefly present the data sources, and then provide detail on the conceptual lens through which we analysed the assessment tasks. Thirdly, we show how the conceptual lens was made operational in order to extrapolate the key findings related to the academic and political projects of the doing school history construct.

Data sources

We conducted a document analysis of the CAPS history curriculum and three of the four nationally prescribed history textbooks for Grade 10. The fourth was unavailable in bookshops at the time of the research.

Table 3: Sources of data for the study

History CAPS Document, Grade 10, 2011 (Department of Basic Education)
<i>In Search of History, Grade 10.</i> J Bottaro, P Visser, N Worden. 2011. Oxford University Press + Teacher's Guide (same authors).
<i>Focus History, Grade 10.</i> B Johanneson, M Fernandez, B Roberts, M Jacobs, Y Seleti. 2011. Maskew Miller Longman + Teacher Guide's (same authors).
<i>Viva History Textbook, Grade 10.</i> KL Angier, JT Hobbs, EA Horner, RL Mowatt, G Natrass, JA Wallace. 2011. Vivlia Publishers and Booksellers + Teacher Guide (same authors).

We narrowed the content focus to chapters on *European expansion and conquest in the 15th to 18th centuries*. This chapter was chosen as an example of a strong version of both the academic and political projects: academically, it relies on the analysis of a wide range of source documents, and politically, it upturns a perspective on colonisation that was predominant prior to democracy in South Africa. Yet it is a small sample – so the findings cannot be used to generalise across other history textbooks by the same publishers or even across other topic areas within the sampled textbooks (Pingel, 1999).

The table below indicates the number of pages the *European expansion* chapters occupy in each textbook relative to the other content topics.

Table 4: Number of pages for the *European Expansion* chapters

GRADE 10	Overview of History topics (CAPS, 2011:12)	Oxford	Focus	Viva
Topic no.	Topic Title	Pgs. per topic	Pgs. per topic	Pgs. per topic
1	The world around 1600	26	24	42
2	Expansion and conquest during the 15th -18th centuries	27	33	56
3	The French Revolution	34	47	46
4	Transformations in southern Africa after 1750	28	40	65
5	Colonial Expansion after 1750	23	47	43
6	The South African War and Union	32	43	65

According to the statistics presented in the table above, for both *Focus History Grade 10* and *Oxford History Grade 10* the “Early European Expansion and Colonisation” chapters are at the lower end of page numbers, while for *Viva History Grade 10* it is one of the longer chapters. This could provide us with an indication of the relative importance ascribed to the chapter in the eyes of the different textbook publishers.

The next table indicates the number of activities and individual questions analysed. Each activity was made up of a number of individual questions.

Table 5: Activities and questions per *European expansion and conquest* chapter in each textbook

Textbook name	Number of assessment activities	Number of individual assessment questions
<i>Oxford In Search of History Grade 10</i>	18	91
<i>Focus History Grade 10</i>	23	104
<i>Viva History Grade 10</i>	15	65

The tasks analysed were predominantly source-based and were placed throughout the chapters to provide regular assessment opportunities for learners.

Conceptual lens for analysis

The analytical lens was provided by Morgan and Henning's (2013) five-dimensional tool for analysing history textbooks: making own/personal historical knowledge (A), learning empathy (B), positioning a textual community (C), fashioning stories (D), and how form, space, design and composition of the textbook orientate the reader (E). As this study specifically analysed how the historical knowledge and skills required by the textbook assessment tasks and accompanying answers in the Teacher Guides mediated the academic and political projects, we used only dimensions A and C. Dimension A (Morgan & Henning, 2013:53) is concerned with how texts mediate (and in this case, whether assessment tasks require) analytical skills that allow learners to 'own' and produce historical knowledge (rather than simple rote learning), and how they increase the capacity of learners to use these established skills, i.e. the academic project. Dimension C (Morgan & Henning, 2013:56) focuses on textbooks as agents of social action that deliberately create uses for the past in the present i.e. the political project. It assumes that textbook authors write from a certain ideological disposition, which positions teachers and learners in a certain way, and Dimension C highlights the need to uncover what this disposition is. This is important because, as Loewen (2007) points out, "even if they do not learn much history from their textbooks, students are affected by the book's slant" (2007:344).

Additional textbook assessment task analysis tools were required to create a finer grading of Morgan and Henning's dimensions. For Dimension A, we drew on Bloom's Revised Taxonomy (2005) in conjunction with the History CAPS cognitive levels for assessment and key historical concepts (Grade 10

History CAPS, pp. 10 and 33). The assumption was that if tasks required learners to answer analytical, synthesising and creating questions, learners were more likely to arrive at a skill level which enabled them to “own” their understanding of history. For Dimension C, we followed Morgan and Henning by drawing on Wertsch’s (2002) Table of Collective Memory and History, in conjunction with the descriptions in the History CAPS that espouse the political project.

The academic project

Morgan and Henning’s Dimension A was operationalised by coding the historical conceptual knowledge focus of each assessment task heading, as well as the cognitive skill level of each question in each assessment activity. We decided to work with both the CAPS cognitive level descriptors and the Revised Bloom’s Taxonomy, as jointly they provided a more nuanced tool for analysis. This was done across each of the three Grade 10 *European Expansion* chapters.

Table 6: Correlating the levels of cognitive skills required by the CAPS and the Revised Bloom’s Taxonomy (Krathwohl, 2002; Anderson, 2005) to use for coding the assessment tasks in the Grade 10 *European Expansion* chapters

CAPS Cognitive Levels	CAPS Cognitive level descriptors for source-based assessment questions and tasks (p. 33)	Revised Bloom’s Taxonomy levels	CAPS Weighting (Grade 10)
LEVEL 1 (L1)	<ul style="list-style-type: none"> Extract evidence from sources 	Level 1 (Remember) Recognising, Recalling	40%
LEVEL 2 (L2)	<ul style="list-style-type: none"> Explain historical concepts Straightforward interpretation of the sources What is being said by the author or creator of the source? What are the views or opinions on an issue expressed by a source? Compare information in sources 	Level 2 (Understand) Interpret, highlight, classify, summarise, imply, compare, explain Level 3 (Apply) Executing, Implement	40%

<p>LEVEL 3 (L3)</p>	<ul style="list-style-type: none"> • Interpret and evaluate information and data from sources • Engage with questions of bias, reliability and usefulness of sources • Compare and contrast interpretations and perspectives within sources and by authors of sources 	<p>Level 4 (Analyse) Differentiate, organise, attribute</p> <p>Level 5 (Evaluate) Check, critique</p> <p>Level 6 (Create) Generate, plan, produce</p>	<p>20%</p>
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Using the table above, we coded the cognitive skill required for each assessment activity by allocating each question to a level. It is interesting to note that while the *creation* of “an original, coherent and balanced piece of historical writing” (Department of Basic Education, 2011:9) is demanded of learners in the eight skills of history (a skill echoed by other theorists of the *doing history* approach), this skill does not appear in any of the three cognitive levels for formal assessment outlined on page 33 of the History CAPS (2011) document. This is unusual, because source-based tasks (which most of the activities were) generally require learners to create concise, substantiated arguments, particularly when prompted by questions that ask for an evaluation of issues raised in a source or an evaluation of the usefulness or reliability of the source itself. It appears that the CAPS cognitive levels were constructed in conjunction with the original Bloom’s Taxonomy; hence there is no specific mention of learners needing to use evidence to generate and argue their own point of view. However, our comparison in Table 6 above shows that if learners use CAPS level 3 skills to create an answer that requires them to argue a point based on evidence provided, it means they will also be working at Revised Bloom’s level 6.

Within the Revised Bloom’s Taxonomy, Krathwohl (2002) also highlights knowledge dimensions evident in subject disciplines. However, we did not use the knowledge dimensions for analysis, as historical knowledge is primarily concerned with factual and conceptual knowledge, and these are often used in an integrated manner. It is therefore not valuable to distinguish between them as far as assessment activities are concerned. Yet, what is of value as far as history assessment tasks are concerned, are the historical concepts as developed by historians and outlined by the CAPS (2011:10). This involved specifying the historical conceptual focus of each assessment activity heading, to determine which concepts were promoted by the textbooks in the *European Expansion* chapters and how these aligned with the key historical concepts specified by CAPS.

Here is an example of how we coded assessment task headings in order to determine the historical conceptual knowledge focus.

Table 7: An example of coding activity headings

Activity	Assessment activity heading	Historical concept	Explanation
<i>Focus History:</i> Activity 8, p. 55	Extracting and interpreting information about the impact of colonisation on indigenous societies	Effect / Consequence	Emphasis on key concept of historical change or consequences caused by certain actions in history

The Political Project

Morgan and Henning’s Dimension C is concerned with how textbook authors see their audience, i.e. how they expect their readers to respond to what is presented as the purpose and nature of school history. When history curricula or textbook authors view the past as something to be used for specific purposes in the present, be it to re-inforce contemporary power relations in society or to reflect more ‘acceptable’ historiographies, the implication is that they view their readers as uncritical thinkers ripe for ideological manipulation, with the consequence that the intellectual value of history is undermined. When history curricula or textbook authors view history as a means for portraying the complexities of multiple perspectives, disagreement, change, controversy and power relations over time, the implication is that they view their readers as being able to become critical thinkers with an ability to question and a respect for alternative perspectives. Wertsch’s (2002) distinction between Collective Memory and History provided a useful tool of analysis to operationalise Morgan and Henning’s Dimension C, so we used Table 2 as presented above.

For Dimension C, it was insufficient to look at the assessment tasks in the textbooks for learners; we also needed to analyse the answer guidelines provided in the teacher guides, as well as the general texts and sources attached to activities in the learner books. It was here that we were better able to see where textbook authors mainly sought to embed and transmit, implicitly or explicitly, a particular political message through a pre-determined dominant historical narrative.

We classified questions, assessment tasks and accompanying answer guidelines as having a strong political use of history (Wertsch’s “collective memory” category) whenever there was prevalence of subjectivity, or impatience with ambiguity in perspective, or a clear attempt to conflate the past with the

present. Dominance of these characteristics could indicate a textbook and teacher guide that is a tool to commemorate the suffering of a particular group. The political stance was categorised as weak (aligned to Wertsch’s “history” category) whenever there was an effort to recognise ambiguity in a perspective, or a clear differentiation between the past and the present. Prevalence of these characteristics could indicate a learner book or teacher guide that is a forum for contestation of historical issues and perspectives.

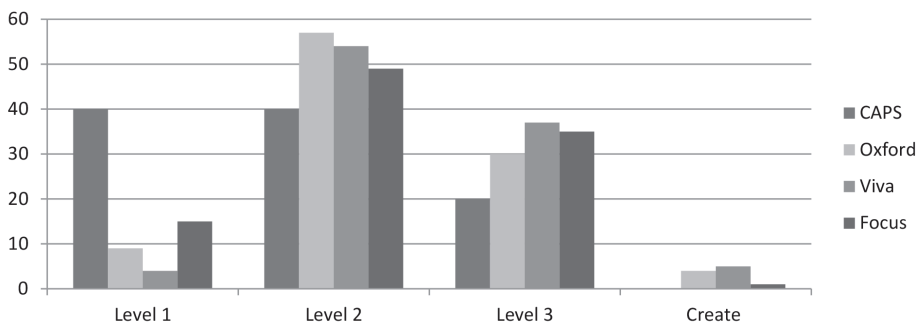
Data presentation

Here we present how the academic and political projects are portrayed in the assessment tasks of the *European Expansion* chapters, and in the corresponding answers in the teacher guides.

The academic project as expressed in cognitive levels

The textbook analysis revealed a similar pattern across the three chapters regarding the spread of cognitive levels (see Image 1).

Image 1: Percentage of questions per textbook chapter that corresponded to Grade 10 History CAPS cognitive levels



The assessment tasks in the *European Expansion* chapters primarily assessed CAPS level 2 cognitive skills of understanding and application. A substantial number also focussed on CAPS level 3 analysis and evaluation type questions. The least focus was on skills at opposite ends of the hierarchy, i.e. the skills of remembering and extraction, and the ability of learners to create and own their knowledge of history. Yet, compared to the curriculum, all three textbooks had a greater emphasis on Level 3 skills (analyse, evaluate) than suggested by

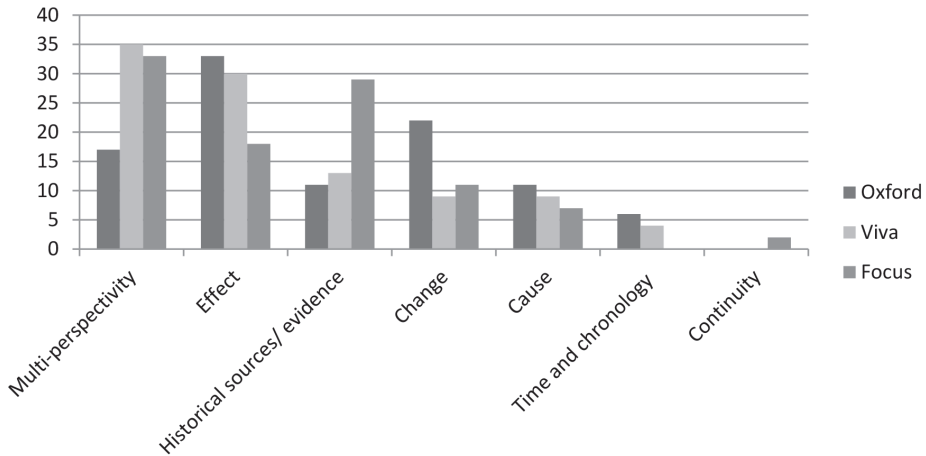
CAPS and in addition, included “create”, which CAPS had not. In addition, focus on lower-order cognitive skills was at Level 2 (comprehend), rather than at Level 1 (remember/extract). Yet, even though the cognitive level spread in the textbook assessment tasks suggested more academic rigour than that proposed by CAPS, there was still a greater emphasis overall on levels 1 and 2 skills (over 60% of activity tasks).

It can be argued that skills like comprehension and application (level 2) are “generic” academic skills. Osborne (2004:5) defines as “generic” academic skills those that involve extracting information, remembering, understanding and application, because they are shared with other subjects. Yet while these skills are “generic”, they are nonetheless important in history as they are concerned with knowing the facts. These “generic skills” dominated across all three textbooks as well as CAPS. Osborne (2004) also states that the discipline of history has its own particular skills. These skills may become academically “generic”, but they are uniquely developed by history, such as the ability to analyse texts and pictures from the past or to evaluate the worth of sources of evidence, through questions like, “to what extent is this source reliable in teaching us about...?” These “unique historical skills” are required by the “doing history” approach. So, in order to encompass the entire academic project of school history, both the skills of knowing and doing history need to be assessed.

The academic project as expressed in conceptual knowledge

CAPS prescribes five key historical conceptual knowledge foci: historical sources and evidence, multi-perspectivity, cause and effect, change and continuity, time and chronology (2007:10). The assessment tasks in the textbook chapters clearly attempted to cover these forms of conceptual knowledge and encapsulated them in the assessment task headings.

Image 2: Percentage of assessment task headings across all three textbook chapters that focussed on key historical concepts



Analysing the assessment tasks in relation to the CAPS key historical concepts, it emerged that all three textbooks emphasised the two conceptual knowledge foci of multi-perspectivity and effect / consequence. The frequency of these concepts is significant. Understanding multi-perspectivity is fundamental to what historians do (Barton & Levstick, 2003). An emphasis on multi-perspectivity links well with the CAPS Level 3 cognitive skills that require learners to demonstrate an ability to compare and contrast interpretations and perspectives within sources. It also links to Wertsch’s idea of a historical mode of thinking that requires a critical, reflective stance by the learner. Understanding effect is particularly necessary for chapters that deal with the impact of conquest on indigenous peoples. Little emphasis was placed on chronology, which we ascribe to CAPS prescribing a broad chronology across the three years of the FET phase, but not within a topic.

The political project

Alongside the conceptual skills required for extracting and interpreting historical knowledge, the History CAPS for FET emphasises citizenship education by referring to how the curriculum has an important role in realising the Constitution’s purpose of healing past divisions, establishing a democratic society and building a united South Africa (2011:8), as well as correcting educational imbalances (2011:4). The curriculum mentions the need for

education for human rights, inclusivity, environmental and social justice, sensitivity to issues of diversity, poverty, inequality, race, gender, language, age and disability, as well as the importance of indigenous knowledge systems (2011:5). These issues need to be taught in ways that reflect the perspectives of a broad social spectrum, promote human rights and challenge prejudices (2011:8). The political project in the History CAPS is thus strong.

The political / citizenship project showed up in the textbooks through the:

- Construction of questions and answer guidelines that explicitly used the past to develop an understanding of the present.
- Use of empathy questions to develop learner sensitivity to issues of diversity of perspective, and by extension, to promote the democratic value of tolerance of differing competing viewpoints.
- The presence of activities that highlighted the role of diverse groups in society; as well as the selection of sources that promoted an understanding of the diversity of role-players in historical events.
- The presence of activities / questions that promoted democratic values in general.

The coding focused on the answer guidelines provided in the Teacher Guides. These answer guidelines shape the teachers' responses and marks for learner answers. We categorised the answer guidelines according to Wertsch's categories. Here are four examples:

Example 1: Classified as “collective memory”: Impatience with ambiguity

Question	Answer guideline on p. 42 of Teacher Guide	Wertsch category
<p><i>Focus History, Grade 10</i> Activity 2, p. 45, Question 2.1.</p> <p>“Look at the painting in Source B (see below). How would you describe the way in which Columbus and the Spanish are drawn?”</p>	<p>Powerful heroes bringing the Christian message.</p>	<p>Collective memory</p>

The reason for this choice was the impatience with ambiguity evident in the answer. The simplistic answer guideline provides little scope for varied points of view. The picture contains detail that could allow learners to express a variety of opinions on how the Spanish are portrayed. The answer guideline is

impatient with ambiguity in its suggestion that there is only one right answer. Also, no substantiation of opinion is required by the answer guideline. This runs counter to the construct of doing school history.

Example 2: Classified as “collective memory”: Emphasis on anti-colonial narrative

Question	Answer guideline on p. 45 of Teacher Guide	Wertsch category
<p><i>Focus History Grade 10, Activity 4, question, 1.2, p. 48.</i></p> <p>What does the picture show? What does it tell us about the past?</p>	<p>The picture shows Spanish conquistadors hunting the indigenous population for sport; beating, raping, torturing, killing, and then using the bodies as food for their hunting dogs. The picture shows how the Spanish regarded the Native American population.</p>	<p>Collective memory</p>

The source document was a picture drawn by Theodorus De Bry in 1590, based on first-hand stories told to him by returning European explorers. The picture was reproduced in a modern newsletter called *The Indian Times*, which campaigns for the rights of the few Native Americans left today. In the context of the historical narrative of anti-colonialism in the chapter, this answer emphasises the extreme negativity of Spanish rule and resorts to generalisation (“the Spanish...the Native American...”), which creates a simplistic understanding of relations between coloniser and colonised. There is evidence of a particular narrative that plays a role in commemorating the suffering of indigenous peoples.

Example 3: Classified as “history”: Complexity of several interlocking causes

Question	Answer guideline on p. 22 of Teacher Guide	Wertsch category
<p><i>Viva History Grade 10, Activity 2.4, Question 5, p. 74.</i></p> <p>Write a paragraph of approximately 10-15 lines using the information in the section ‘The siege of Tenochtitlan’ explaining why Cortes and the Spanish were able to defeat the Aztecs.</p>	<p>The paragraph must be written in full sentences and include the following information from the learner book. Possible reasons:</p> <ul style="list-style-type: none"> Aztec mythology Aztec superstitions Indigenous allies for Spanish Timing of the Spanish attack Superior Spanish weaponry Impact of disease Spanish siege tactics <p>Accept any other relevant answer.</p>	<p>History</p>

A detailed answer is provided which acknowledges the complexity in interpretations regarding the defeat of the Aztecs. The answer presents factors that apportion causes to the Spanish and to the Aztecs. It also includes a caveat instructing the teacher to allow learners to write outside of what is specified in the answer. Thus there is an acknowledgement of the ambiguous nature of historical thinking and an attempt to break away from a simplistic narrative.

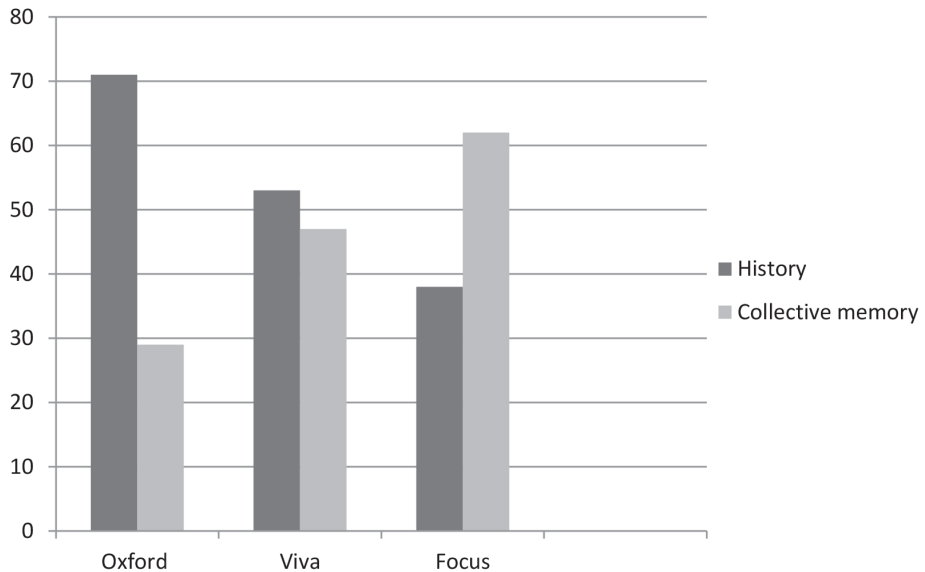
Example 4: Classified as “history”: Acknowledgment of multiple arguments regarding European motives for colonisation

Question	Answer guideline	Wertsch category
<p><i>Oxford History</i> <i>Grade 10, Activity 1,</i> Question 1, p. 39.</p> <p>Identify the different arguments historians have given about the reasons for European expansion.</p>	<p>P. 29 of Teacher Guide.</p> <p>The different arguments that historians have given for European expansion are:</p> <ul style="list-style-type: none"> • European culture and religion were superior and therefore they had the God-given right to spread Christianity across the world. • When the Ottoman empire blocked overland trade routes from Asia, the Europeans had to find another way to Asia. It was an economic motive that started their voyages. • Compared to the powerful empires in the East, Europe was poor and desperate. It needed to find new sources of wealth. • As a result of improvements in maritime (naval/sea) technology, Europeans began to explore the oceans. • After the new ideas of the Renaissance (for example that the world was round), courageous Europeans wanted to know more about the world. 	<p>History</p>

The answer guide provides a variety of arguments suggesting a need to understand the complexity involved in thinking about historical processes. The arguments provided also acknowledge the multi-disciplinary nature of history as they suggest political, economic, anthropological or technological interpretations. Thus, the answer does not seek to foreground any particular argument, and echoes the objectivity of Wertsch’s history thinking.

When all the answer guidelines in the Teacher Guides had been coded, the following pattern of frequency emerged across the three textbook chapter answer guidelines:

Figure 3: A comparison of the prevalence (in percentages) of Wertsch's categories across all three textbook chapter answer guidelines



The distribution of answer guidelines is significant, as textbook chapters can only have a limited number of assessment activities, and the types of answers expected, and thus the cognitive skills developed when producing these answers, can have a profound ideological impact. The Teacher Guides for *Oxford* and *Viva* contained a noticeably greater prevalence of Wertsch's history category than did the *Focus* Teacher Guide. The quality of the answer guidelines also differed. In the *Oxford* and *Viva* Teacher Guides, more effort was made to provide answer guidelines that demonstrated development of thought through the expression of opinion and the provision of substantiation. Yet many of the *Focus* answer guidelines were skeletal and prescriptive in nature, and did not require substantiation of opinions.

Discussion

Does the spread of cognitive levels demanded by the assessment tasks aid or hinder the development of historical thinking?

The distribution of cognitive skill levels of the textbook tasks lies predominantly at Levels 1 and 2. More “generic” academic skills (like comprehension) rather than specifically historical skills dominated across all three textbooks

and CAPS. Osborne (2004:5) makes a convincing argument for “unique historical skills” required by the “doing history” approach. Although he agrees that history shares ‘generic’ academic skills, such as extracting information, remembering, understanding and application, with other subjects, he stresses the skills particular to history, such as the ability to analyse texts and pictures from the past or to evaluate the worth of sources of evidence. Could it be argued that all three textbook chapters actually undermine the development of historical thinking through their predominant focus on “generic” skills? We think not. Textbooks need to account for the differing academic abilities of learners by providing “easier” questions to scaffold the development of their historical skills. Teaching historical skills requires a systematically arranged hierarchy and movement back and forth between different levels of questions. An overwhelming focus on Level 3 skills and the skill of creation¹ could disrupt learning and put school history out of reach of most learners. Also, by not neglecting the need for learners to “know” history (Bertram, 2008), the textbooks’ emphasis on Level 1 and 2 skills provides the foundations for learners to “do” history.²

The analysis also showed that the History CAPS key skills for assessment for grades 10, 11 and 12 do not prescribe asking open-ended questions and creating original, coherent pieces of historical knowledge, which are skills seen as vital by doing history theorists. Teachers may come to the conclusion that these skills are not required in the doing school history construct. This may be a case of CAPS inadvertently constraining teachers’ and learners’ understanding of history (Paxton, 1999) and creating a limited understanding of history as a discipline of enquiry. The few textbook assessment tasks that encourage asking open-ended questions or the creation of historical knowledge (4% in Oxford, 5% in Viva, 1% in Focus) play a vital role in repairing this flaw in the construct of history portrayed in the History CAPS. In light of this, we argue that because the levels of cognitive demand and the historical skills assessed in the textbooks go beyond what is demanded by CAPS, they go some way towards aiding historical thinking.

1 It appears that CAPS is not asking for learners to “create”. However, although CAPS does not require learners to create historical knowledge by finding and analysing new sources, it does require learners to create essays that offer clear conceptual explanations of historical events.

2 This claim is based on findings from one chapter and cannot be made for the whole of the textbooks, as the pattern might have changed had we analysed all the chapters across each textbook. Therefore, the generalizability of this trend beyond the chapters under investigation is not possible.

The relationship between assessment questions and answer guidelines

The assessment tasks predominantly covered four historical concepts: multi-perspectivity, bias, reliability of sources, and effect or consequence. Appropriate to the content focus on *European expansion and conquest in the 15th to 18th centuries*, about 30% of the assessment tasks (17% in Oxford, 35% in Viva, 33% in Focus) required an answer using multi-perspectivity. This fits well with the doing history approach portrayed in the CAPS.

In terms of the academic project, it was interesting to note an occasional disconnect between questions and answer guidelines. Particularly in the *Focus* textbook, which has 33% of chapter questions related to multi-perspectivity, the answer guidelines generally consisted of one-liners that did not explain the situation. In example 1 above, the answer guideline reneges on the responsibility to explain the multi-perspectivity embedded in the picture by not showing how learners can recognise and explain the perspective in the picture nor justifying why this picture is understood very differently in the present than it was in the past. In this way, such one-dimensional answer guidelines undermine the development of reasoned argument and debate in the classroom, thus inhibiting both the academic and the citizenship projects. Fortunately, the Teacher Guides by *Oxford* (example 4) and *Viva* (example 3) were better in this respect.

Modes of historical thinking

Wertsch's (2002) distinction between "collective memory" and "history" enables an evaluation of whether history textbooks and the CAPS encourage debate or commemoration. The political citizenship project in CAPS promotes democracy and diversity, which aligns with the Wertsch "history" category, particularly in light of the doing history approach that emphasises multi-perspectivity. Yet the lack of explicit instruction in CAPS on how to integrate the political and academic project may undermine this. CAPS is subject to interpretation by textbook writers and teachers, so the type and interpretation by these agents could see a history emerge that promotes the production of "collective memory". We argue that this in fact has happened within the textbook chapter assessment tasks under review.

In all three textbook chapters' assessment tasks, an anti-colonial narrative was emphasised, with little effort made to expose learners to other perspectives. However, the Oxford and Viva chapters contained more empathy activities,

which allowed some opportunities for learners to develop an understanding of the “other side” (e.g. Oxford textbook, Activity 2, p. 57, question 6). In the chapters under investigation, the dominance of a particular narrative suggests that these chapters veer towards being temples for the commemoration of the suffering of indigenous peoples, and therefore promote “collective memory” thinking. A more authentic commitment to multi-perspectivity, and the history mode of historical thinking, would be to debate across perspectives, rather than within a single imposed one. That would help to develop learners’ respect for diversity of opinion and to strengthen their ability to explain, justify, have empathy with and challenge alternative perspectives – abilities which are cornerstones of democratic citizenship education.

Morgan and Henning (2011) found a similar trend in Grade 11 NCS History textbooks, which began with a stated position of seeing learners as active participants in knowledge construction, yet the content delivery in the textbooks did not support this position. Learners were not taught how to entertain a different line of thinking, and so critical thinking became a “mere pretence” (Morgan & Henning, 2011:182). The emphasis on a single historical perspective, coupled with one-dimensional answer guidelines (particularly in *Focus*) could have negative implications for the development of skills and values central to history as it is prescribed in the CAPS.

Conclusion

This paper has explored the nature of history as a school-based discipline and how history is recontextualised in the South African History CAPS and Grade 10 history textbooks, with a particular focus on what is required of learners by the assessment activities and questions. Three interesting findings emerged. Firstly, that all three textbooks went beyond what was demanded by CAPS with regard to levels of cognitive demand in the assessment questions. Secondly, that the quality of answers in the Teachers’ Guides differs widely, and depending on how they are written, these can support or undermine the academic project, especially for higher cognitive level questions. Thirdly, with regard to the two modes of historical thinking within the political dimension, it appears that the emphasis on a particular narrative across all three textbook chapter assessment tasks suggests an over-arching promotion of “collective memory” thinking, even if some individual textbook tasks do assess multi-perspectivity and therefore promote Wertsch’s “historical” thinking. This

finding suggests a tension or misalignment between the political project in CAPS that promotes multi-perspectivity through a focus on democracy and diversity, and how it is recontextualised in the textbooks. Addressing this tension should be a key aim of curriculum and textbook writers given that respect for democracy and the thoughts and rights of others is a key political goal of the CAPS.

We conclude by arguing that in South Africa, both the academic and the citizenship projects of history need to be strong. Learners need to develop the generic and unique skills offered by history so as to become able to understand and analyse the complexities of how the past shapes, but does not determine, the present. Learners also need to develop the skills of empathy – the ability to simultaneously understand several perspectives while maintaining a position - which are required for being a citizen in a multi-cultural society. The history curriculum, textbooks, teaching and assessment tasks need to encapsulate both academic rigour and empathetic multi-perspectivity – they cannot afford to undermine either. If textbook writers aligned more closely with Wertsch's "history" category, which proposes respect for different perspectives and a culture of debate, it would simultaneously strengthen both the academic and the political projects of school history in South Africa.

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SOUTH AFRICAN HISTORY TEXTBOOK RESEARCH – A REVIEW OF THE SCHOLARLY LITERATURE

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Abstract

School history textbooks are seen to embody ideological messages about whose history is important, as they aim both to develop an ‘ideal’ citizen and teach the subject of history. Since the 1940s, when the first study was done, there have been studies of South African history textbooks that have analysed different aspects of textbooks. These studies often happen at a time of political change (for example, after South Africa became a republic in 1961 or post-apartheid) which often coincides with a time of curriculum change. This article provides an overview of all the studies of South African history textbooks since the 1940s. We compiled a data base of all studies conducted on history textbooks, including post graduate dissertations, published journal articles, books and book chapters. This article firstly provides a broad overview of all the peer-reviewed studies, noting in particular how the number of studies has increased since 2000. The second section then engages in a more detailed analysis of the studies that did content analysis of textbooks. We compare how each study has engaged with the following issues: the object of study, the methodological approach, the sample of textbooks and the theoretical or philosophical orientation. The aim is to provide a broad picture of the state of textbook analysis studies over the past 75 years, and to build up a database of these studies so as to provide an overview of the nature of history textbook research in South Africa.

Keywords: History textbooks; School history; South Africa; Scholarly literature.

Background and introduction

The production of textbooks, from conception to distribution to use, is a politically and educationally contentious activity. In light of the above, “the politics of the textbook” is never far removed from the public sphere as three cameos from the South African context will reveal: The Inkatha Freedom Party

publically burned copies of an Oxford Grade 12 History textbook arguing that their leader, Mangosuthu Buthelezi, was portrayed in an unfavourable light (Wassermann, 2009); in his 2011 state of the nation address President Jacob Zuma emphasized the key role of textbooks when he foregrounded them amongst the three Ts (teachers, textbooks, and time) needed to be prioritised in uplifting the education system (*SA News*, 2011); the so-called “Limpopo textbook scandal” whereby some schools in the province did not receive textbooks caused a public outcry and the angry public response that followed forced the government to act, not only in Limpopo, but also in the Eastern Cape (Chisholm, 2013).

In the context of the above, textbook research in general, and History textbook research specifically, is understandably not a recent phenomenon. In fact, since the First World War (1914-1919), History textbooks have been studied as powerful sources of educational media with the ability to shape the views and consciousness of generations of learners. Research in this regard was not only conducted by individual authors but also driven by international organisations such as the League of Nations and UNESCO. Most of the subsequent research into History textbooks has been centred in Europe and North America but pockets of investigation can also be found in the Far East, Australasia and South Africa. As South African academics involved in textbook research, and the supervisors of post-graduate students studying the genre, we have read much of the local literature as well as that emanating from other parts of the world. We began asking a range of questions about the growing field of History textbook research in South Africa, including: What research has been done in this regard? Who has been doing the research? When was it done? What was the focus of the research? Which methodologies were employed? These questions were the catalyst and motivation, both on a professional and a scholarly level, for us to do three things in this article.

Firstly, we conducted a search of the literature in order to map the completed scholarly research into History textbooks in South Africa in a database. In the process we hoped that the “big picture” of scholarly work done on History textbooks in South Africa would emerge. We deemed a literature search to be a necessary initial step since, to our knowledge, no study exists that provides an overview of the studies already done on History textbooks. The database was then to be subjected, for the purpose of this article, to two levels of analysis. To begin with we answered the following broad questions - who did what (author), when (time), where (location), about what (focus), how

did they do it (methodology) and why did they do it (motivation)? Secondly, based on the trends and patterns that emerged from the broad overview, we extracted the studies which had engaged with analysis of History textbooks and drilled deeply into these works by examining the sample size, object of study, the methodologies and the theoretical/philosophical approach. Thirdly, the review yielded a further outcome, namely a database of research conducted on History textbooks in South Africa. We have included this database as Appendix A at the end of this article to allow other researchers access to what we deem to be a workable database which they can challenge, alter, use and expand.

In what follows we will unpack the research methodology employed in doing this study, the quantitative “big picture” analysis and the qualitative deep drilling into articles that actually analysed History textbooks. The article will then be concluded with a discussion of the findings and the database contained in Appendix A.

The research methodology of reviewing the literature on completed studies on South Africa History textbooks

According to Boote and Beile (2005), a literature review transcends the simple search for information as it is a consideration of scholarly works relating to a specific study - in the case of this article, to completed scholarly research on South African History textbooks. The extensive literature search we conducted was thus a means of building on previous knowledge by using existing knowledge (Creswell, 2009) and in so doing reaching an understanding of what came before. What we did, therefore was a “scholarship review” (Mouton, 2001:87) starting as far back in time as we could go.

We started the literature search by drawing on the professional knowledge we had on scholarly work already completed on South African History textbooks. This we tabulated under the following headings: author; year published; title of publication; place of publication and nature of publication. We then employed a student assistant to do a thorough desktop search of all databases subscribed to by the University of KwaZulu-Natal library system as well as a general Internet search. The key words used for the search were “history textbooks” and “South Africa”. However, in cases of uncertainty where it was felt that the key words were not serving us well, literature was skim read to ascertain its appropriateness to the study. In a cross-checking exercise we also

searched the available databases ourselves. This served for example, to capture theses and dissertations written in Afrikaans that were previously overlooked. Additionally, being aware of the vagaries of desktop searching, we approached Rob Siebörger, Katalin Morgan and Elize van Eeden, all fellow academics involved in some way or another in History textbook research, to scrutinise our evolving database. Their critique of and additions to the database proved invaluable.

We grappled with the questions of what to include and what to exclude and how to justify such choices. After some debate we settled on the principle that literature reviews are about peer reviewed scholarly work – that is works vetted by fellow academics for their suitability and adherence to the expected standards of the discipline. This principle was married to our key search terms “history textbooks” and “South Africa”.

Using the criteria of peer reviewed scholarly works on South African History textbooks meant certain publications were excluded. These included newspapers, popular and professional articles¹, conference presentations and conference proceedings and Honours projects.² This was based on the fact that the Department of Higher Education and Training views Masters and Doctorates but not Honours projects as research publications. Conference proceedings were excluded quite simply because it proved difficult to ascertain which ones were truly peer reviewed and thus of scholarly standing and which were not.³ Furthermore, since we have focussed somewhat pedantically on research which contained the terms “history textbooks” and “South Africa”, scholarly works which did not directly use these keywords were also not included as we regarded them as peripheral to our focus.⁴ The data base thus comprised postgraduate scholarship in the form of dissertations and theses, journal articles, books and book chapters. These three genres were used to organise our database in a chronological manner starting with the earliest

1 See for example: GJ Thirion, “Die geskiedenisboek – ‘n onmisbare ergernis”, *Yesterday & Today*, 19, 1990, pp. 17-19. What must be pointed out is that the *Yesterday & Today* has substantially changed since then and is now an accredited journal.

2 For excluded Honours projects see for example: LK von den Steinen, *Three decades of SA school history textbooks: Historiographical influence, change and continuity from the 1970s to the 1990s* (BA (Hons) Project, UCT; Center, Z 2005), 1997. *When Textbooks turn Yellow. The difficulty of implementing a New History Curriculum into a Rural High School of the Eastern Cape*. BA (Hons) Project, UCT.

3 For excluded conference proceedings see for example: A Engelbrecht, *Textbooks in South Africa from apartheid to post-apartheid: Ideological change revealed by racial stereotyping* (Paper presented at the “Education, Social Cohesion and Diversity Conference”, Washington DC, 2005); S Polakow-Suransky, “Historical Amnesia?”, *The politics of textbooks in post-apartheid South Africa* (Paper presented at the “American Educational Research Association”, New Orleans, 2002).

4 See for example: AF Chiponda and JM Wassermann, “Women in History textbooks – What message does this send to the youth?”, *Yesterday & Today*, 6, 2011, pp. 13-27.

works. In the process the database kept on evolving as we became aware, sometimes by chance, of other scholarly works on South African History textbooks. Within these parameters Appendix A – “Database of Studies on South African School History Textbooks” was developed.

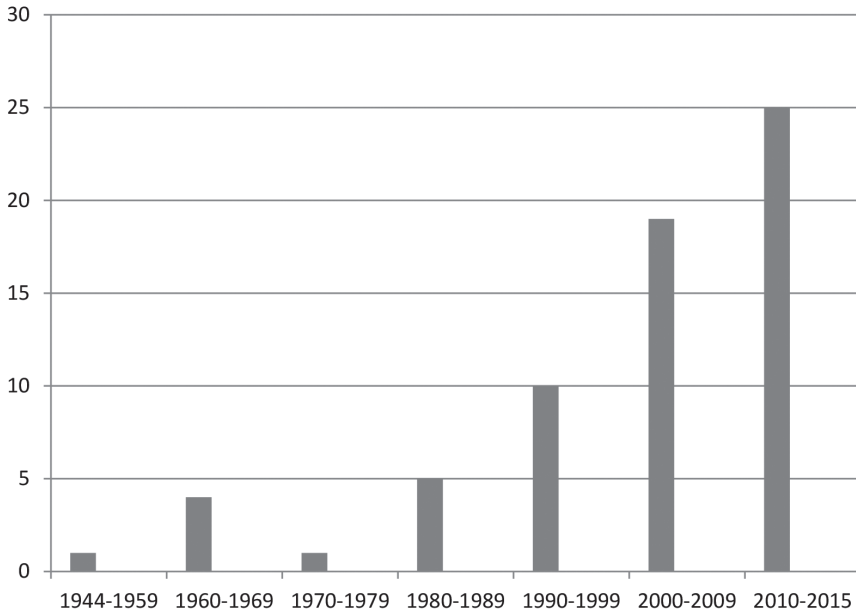
The next methodological step was the quantitative analysis of the literature as captured in the database. This was done by engaging with who did what, when, where, about what, how did they do it and why did they do it? The when was done by tracking the dates of publication/completion of a scholarly work included in Appendix A. This was supported by the what (genre of research) which tied in with the time (when) and spatial (where) frames. This was followed by engaging with who undertook the research. As part of this first level of analysis we tried to theorise why research on South African History textbooks as part of the “big picture” happened. For the most part the answers to the above research questions are presented graphically, statistically and discursively in a blended manner.

The second level of analysis consisted of extracting the South African History textbook studies from Appendix A which had engaged with content analysis of History textbooks. We then examined the object of study, sample size, the methodologies and the philosophical/ theoretical orientations of these studies. The abstracts/summaries of the whole book, dissertation/theses or journal article were analysed. These were usually excellent units of analysis although we did come to accept that this method had its flaws as some abstracts/summaries were flimsy and revealed little. The results of the second level of analysis are presented analytically in a narrative style.

The BIG picture of South African History Textbook research – 1944-2015

According to our literature search a total of 65 peer-reviewed academic research works on South African School History textbooks have been completed thus far (Appendix A). Of these 25 were postgraduate degrees leading to higher academic qualifications; 19 were Masters and six Doctoral degrees. A further 10 were books or book chapters and 30 were peer-reviewed academic articles aimed exclusively at enhancing the existing knowledge base. However, for a more nuanced understanding beyond the mere figures it is necessary to view the 65 academic research works in a temporal context as outlined in Tables 1 and 2 below.

Image 1: South African School History textbook research by decade and total



Scholarly research into History textbooks in South Africa started in the 1940s with a Masters dissertation which was the first ever such research endeavour in 1944. This was followed by an article and two postgraduate studies in the 1960s one of which, *The power of prejudice in South African education: an enquiry into history textbooks and syllabuses in the Transvaal high schools of South Africa*, by FE Auerbach, was published as a book in the same decade. This sudden mini-boom in History textbook research in the early 1960s coincided with South Africa becoming a Republic outside of the British Empire and the subsequent stronger emphasis of an Afrikaner Nationalist historiography in school history. After this, the field of History textbook research returned to its static state and during the 1970s and 1980s, only one dissertation, two books and three academic articles saw the light of day. Thus, during the oppressive heyday of Apartheid, in which History textbooks were dominated by an Afrikaner Nationalist historiography, little reason seemed to exist to engage in scholarly research in History textbooks. This was so because the Afrikaner Nationalist agenda allowed little critique or critical engagement with the texts that learners studied and teachers used to teach.

The dawning of democracy in the 1990s also left its mark on History textbook research and the greater openness birthed ten studies – one less than was completed during the previous five decades. The end of Apartheid created

a belief and optimism that school History could be reimagined and remade (Siebörger, 1994, 1995; Bam & Visser, 1997). There was a growing realisation of the power of History textbooks as educational media that could profoundly influence society. The research momentum into History textbooks continued into the 2000s as can be gleaned from Tables 1 and 2. During this decade (2000-2009), 19 studies, two less than the combined efforts of the previous 60 years, were completed. These 19 studies also serve to mirror the strengthening grip that the knowledge economy was starting to exercise on academics, for nine of the 19 studies were now peer reviewed academic articles – almost twice as many as during the previous six decades. The growth trend in School History textbook research continued into the 2010s, a decade that is but six years old. During these six years, 25 peer reviewed scholarly works, 14 of them academic articles, were published. Particularly noticeable in this time period (see Table 1) is the escalation in the production of academic articles to the detriment of books and book chapters. This escalation, alongside that in postgraduate work with ten Masters Degrees being awarded for studies on History textbooks since 2010, is indicative of what is expected from academics in the current context – greater research and supervision outputs.

Table 1: Genre of South African History textbook research expressed in a temporal dimension

Decade	Dissertations & Theses	Books / Chapters	Academic Articles	TOTAL
1940 - 1959	1	0	0	1
1960 - 1969	2	1	1	4
1970 -1979	1	0	0	1
1980 -1989	0	2	3	5
1990 - 1999	5	2	3	10
2000 - 2009	6	4	9	19
2010 - 2015	10	1	14	25
TOTAL	25	10	30	65

What is particularly noticeable since 2000 is the decline of books on History textbooks in South Africa with the last book addressing the topic appearing in 2011 which is Nishino's reworked 2006 Ph.D. being published. This tendency is to a certain extent a fall-out of the growing neo-liberal knowledge economy in South African higher education whereby financial incentives and rewards in terms of subsidies for books are similar to those for accredited journal articles. One possible result of this post-1994 was an upward turn in the output of academic articles in South African History textbooks as the

dominant research genre in this field. In short the post-Apartheid societal change heralded an increase in the research into History textbooks with academic articles predominating. However, what must be pointed out is that a substantial number of the academic articles that appear during this time, probably as many as twelve out of the 30 published articles (40%) having roots in dissertations and theses. This is not only indicative of the requirement for academics to publish journal articles but also the relatively strong relationship between published journal articles and postgraduate studies.

The 30 academic articles referred to above, bar two, by Carpentier (2000) and Lieven (2000), were authored by South African-based academics. The journals that attracted the largest number of these articles (five) were the *South African Historical Journal*, a publication that specialises in History followed by *Yesterday & Today*, a History Education journal, with four articles. Overall, the 30 articles on History textbooks generated since 1962 appeared in 17 different journals of which eight are international in origin and nine South African. These journals covered fields ranging from Education and History to Archaeology and Qualitative Research. The above provides a sense of inter-disciplinarity in South African History textbook research.

English dominated as the language of publication with only two articles appearing in other languages – an Afrikaans article by De Wet (2001) and one in French by Carpentier (2000). All books and book chapters were also published in English. The dominance of English as a research language was also mirrored in the completed dissertations and theses with only three authors, Raubenheimer (1944), Du Plooy (1965) and Schutte (1990) completing their studies in a language other than English, namely through Afrikaans.

It would, however, be myopic to attribute the change in research patterns into History textbooks to socio-political forces only as individual researchers also played a significant role in increasing the research post-1994. In this regard the work of two scholars stands out, namely Siebörger (1994, 1995, and 2006) and Morgan (2010, 2011, 2012, 2013, and 2014). The former had contributed to three books or book chapters and two accredited articles and the latter a Ph.D. (2011) and nine accredited articles. Thus between them they have had an intellectual hand in 15 or (23%) of the studies contained in Appendix A. The remaining books, book chapters and accredited journal articles were shared amongst a total of 28 authors all of which, except for Dean, Hartman, Katzen (1983), Carpentier (2000) and Lieven (2000) and Nishino (2006, 2011) are South African based. Thus the scholarship on South

African History textbooks is generally dominated by South Africans, except for books and book chapters.

In terms of the institutional affiliation of those who had completed dissertations and theses on South African History textbooks, no clear patterns emerged from our analysis of the compiled database. In total the postgraduate scholars came from nine different South African universities and the University of Western Australia. However, eight postgraduates completed their studies at the University of KwaZulu-Natal since 2009, which points to an emerging institutional leadership in scholarship on History textbooks. This was brought about by several factors including an interest in textbooks spurred on by engagement with the Georg Eckert Institute for textbook research in Braunschweig, Germany and increasing administrative demands around securing ethical clearance for research involving human subjects.

An overview of the literature data base shows that there has been an increase in scholarly publications in the last fifteen years. From the 1940s up to 1999, there were 21 publications on history textbooks, which increased to 44 publications between 2000 and 2015. We attribute this to the post-apartheid social and political shifts, as well as to a growing neo-liberal hold on universities which emphasises academics' measurable accountability in terms of publications and student graduations.

Detailed analysis of studies which analyse history textbooks

The next section of the article presents a more detailed analysis of the studies that analysed textbooks, and does not include publications which describe the role of the textbook in schools, or the making, selection and distribution of textbooks, or theoretical and methodological issues (these publications are shaded in the database in Appendix A). The table below shows the number of publications analysed for each section of this article.

Table 2: Number of publications per genre analysed for each section of this article

	Dissertations & Theses	Books / Chapters	Academic Articles	TOTAL
Number of studies analysed for the "big picture" overview (all studies shown in Appendix A)	25	10	30	65

Number of studies which present findings from content analyses of textbooks (non-shaded studies in Appendix A)	23	5	20	48
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The object of study

In most of the textbook analysis studies, the object (or phenomenon) of study is overwhelmingly that of nationalism (specifically African and Afrikaner nationalism) and race, which are studied in thirteen of the twenty journal articles. Within the post graduate dissertations, eight of the twenty three studies deal with these phenomena. Sometimes, these two concepts of nationalism and race are inter-twined in the same study. These phenomena are linked with broader concerns of prejudice, bias, ideology and master symbols. This is unsurprising given the role that history plays in carrying official messages about the story of the nation. Pingel notes that “History and Geography textbooks attempt to explain our roots, how and why we happen to be living in a certain place and how that place can be described and characterised – in other words, who we really are” (Pingel, 2010:7).

The study by Auerbach (1964) was prompted in part by the political change brought about by the new Republic in 1961. He was interested in the ways in which the messages conveyed in Afrikaans and English textbooks were the same. His findings showed that Afrikaans textbooks that he analysed in the early 1960s show a strong Afrikaans ethnocentrism, and the use of the word “volk” excludes all other population groups in South Africa, which mitigates against the “fostering of national unity and racial co-operation” as proposed by the Transvaal Education Ordinance of 1953.

During apartheid, studies on nationalism were concerned with the power of Afrikaner nationalism. After 1994, the emphasis of some studies shifts to look at African Nationalism, with both Pretorius (2007) and Engelbrecht (2008) arguing that there has been a role reversal and that the ideology of Afrikaans nationalism which was so strong during apartheid has been replaced by African nationalism.

Another new focus post-1994 is reflected in the studies by Chisholm (2008) and Maposa (2014) which look at how other countries in Africa are represented in South African textbooks. In total, 22 of all the studies that did a content analysis of textbooks focus on nationalism, race or ideology as the object of study.

Some studies take particular events or people, and the way in which these are represented in the textbooks as their object of study. For example, van Niekerk (2014) analyses three textbooks for how they represent the person of Nelson Mandela. Koekemoer (2012) focuses particularly on dominant discourses about the holocaust, Morgan (2011) analyses how the topic of Nazi Germany is represented, and da Cruz (2005) examines how the person of Shaka is represented and the discourse about the “empty land”. Both Smith (1983) and Mazel and Stewart (1987, 1989) focus on how textbooks represent the San hunter-gatherers and what Smith terms “aboriginal peoples”. Nishino’s (2008) chapter is one of the few studies that engages specifically with historiography. His study analysed 16 Standard 6 textbooks’ treatment of the fifth “frontier” war of 1818-19, to ascertain the influence of the pro-settler historiography in the description of the war. There are four studies which focus on gender, one which engages with the representation of “big men” in textbooks (Naidoo, 2014), and three which describe the representation of women (Nene, 2014; Schoeman, 2009; Fardon & Schoeman 2010).

There are far fewer studies that focus on the procedural aspect of history, or focus on historical literacy as the object of study. These kinds of studies emerged after 1994, when the South African history curriculum embraced an understanding of school history as preparing learners to think historically and to “do history” as historians do (Bertram, 2006). Waller’s (2009) study focused on how historical literacy manifests itself in grade 10 history textbooks, and Morgan’s (2014a) article focuses specifically on the learning of empathy (which is seen as one of the aspects of historical thinking) through textbooks.

There are three dissertations (Bharath, 2009; Firth, 2013; Job, 2015) which take as the object of study the way in which knowledge is represented in the textbooks, drawing on the concepts of Bernstein on knowledge that is specialised to the discipline (strongly classified) or knowledge that is more integrated and everyday (weakly classified).

Table 3: The Object of Study

Object of Study	No of Articles	No of Dissertations/ Theses	No of Books / Chapters	Total
Nationalism (African/ Afrikaner); ideology; bias; master symbols; African consciousness; race	11	7	3	21

Representations of specific events or people (e.g.; Nazi Germany; the Holocaust; San hunter-gatherers; Nelson Mandela, Frontier war 1818-19)	3	4	2	9
Representations of gender	2	2	0	4
Representations of heritage	1	1	0	2
Specialisation of knowledge	1	3	0	4
Design features of the text; language accessibility	1	2	0	3
Historical literacy; mediation of empathy; "doing history"	1	3	0	4
Information not available (not in abstract)	0	1	0	1
TOTAL	20	23	5	48

Methodology of the studies

Nicholls (2003) argues that methods for textbook research are fundamentally underdeveloped. UNESCO has recently produced a second edition of their methodological guidebook (Pingel, 2010). Pingel describes both quantitative and qualitative techniques and stresses that these are complimentary methods. He describes a range of qualitative methods, such as hermeneutic analysis, linguistic analysis and discourse analysis. Nicholls notes that there are other methods that Pingel does not mention, such as disciplinary or historiographical analysis, visual analysis, question analysis, critical analysis, structural analysis and semiotic analysis.

Many of the journal articles in our database do not provide a description of the methodology used for the analysis, while the post graduate dissertations and theses generally do so. The two methods of analysis used most often are discourse analysis and content analysis. Within the studies which use content analysis, some use an inductive, open set of coding (such as van Niekerk 2014) and others use deductive categories for coding. At least three of the dissertations (Auerbach, 1963; Evans, 1991; Chernis, 1990) use the indicators and criteria developed by the Georg Eckert Institute and the UNESCO report to analyse textbooks. Three studies (Bharath, 2009; Firth, 2013; Job, 2015) use the concepts of classification and framing of knowledge which are drawn from the work of sociologist Basil Bernstein.

Otherwise there is a huge variability in the criteria used to analyse the textbooks. There is little indication that the studies build on work done previously with regard to the kinds of deductive categories that are used to code

the texts. Two exceptions are Firth (2013) who develops the coding categories used by Bharath (2009), which were based on Bernstein's classification of specialised or everyday knowledge and Mackenzie (2014), who draws on the model developed and described by Morgan and Henning (2013).

Many of the studies published before the 2000s do not make explicit their methodology or tools of analysis. Over the past 15 years, there is a growing focus on making methodology explicit and Morgan's (2011) Ph.D. developed an interdisciplinary model for text analysis which draws from hermeneutic analysis, discourse analysis, visual analysis, question analysis, critical analysis and semiotic analysis.

Table 4: Methodology of the History textbook studies

Methodology	Number of Articles	Number of Dissertations and Theses
(Critical) Discourse analysis	3	4
Content analysis	4	10
Visual analysis	1	1
Information not provided in abstract	12	8
TOTAL	20	23

Sample size

Of the journal articles, the biggest study analysed 70 books (De Wet, 2001), and the next largest sample was 27 (Engelbrecht, 2005), and then twenty textbooks (Carpentier, 2000). A similar trend is seen in the post graduate dissertations, where three Ph.D. studies have large samples. Du Plooy (1964) analysed 52 textbooks which were published between 1938 and 1963 and were used in Transvaal schools (a period of 25 years), Chernis (1990) analysed textbooks from 1839-1990 (a period of 160 years) that were used in all four provinces and Nishino's (2006) study focused on 60 textbooks used in South Africa and Japan between 1945 and 1995 (a period of 50 years). These three studies are unusual amongst dissertations and theses in that they have both a sample size of more than 50 books, and they analyse textbooks published over a number of years.

Aside from the examples mentioned above, the sample of textbooks analysed in the studies is generally small. Nine of the studies published in journals, and 14 of the dissertations present data from the analysis of one to four textbooks. Since most postgraduate studies are at the Masters' level, the tendency is for

students to analyse between two and four books. The predominance of small scale qualitative studies makes sense for a post graduate student, and for the methodology of the studies which tend to be in-depth, qualitative analyses. This mirrors an audit of education research commissioned by the National Research Foundation which found that 94% of education research in South Africa was small scale research (Deacon, Osman, & Buchler, 2009). However, it does mean that findings cannot be generalised beyond the particular sample of books that were analysed.

Table 5: The sample size of textbooks analysed

No of Textbooks Analysed	Journal Articles	Dissertations & Theses	Books/ Chapters	Total
1 - 4	9	14	0	23
5 - 10	6	4	0	10
11- 25	3	1	2	6
26 - 50	1	0	1	2
More than 50	0	3	2	5
Information not avail	1	1	0	2
TOTAL	20	23	5	48

In line with the small sample sizes, the vast majority of studies tend to compare three or four textbooks written for the same grade, published at a similar time. There are a handful of large-scale diachronic studies, such as Du Plooy (1964), who analysed books written between 1938 and 1963, Nishino (2006, 2011) who compared Japanese and South African textbooks which were published between 1945 and 1995, Smith (1983) who analysed textbooks published between 1914 to the 1980s, De Wet (2001) who analysed books published from the 1940s to the 1990s and Chernis (1990) who analysed books published from 1839-1990. More recently there have been some smaller scale studies which compared textbooks used during apartheid with those published post-apartheid (after 1994). For example, Carpentier (2000), Bharath (2009) and Naidoo (2014) use this selection for their sample.

It is also noticeable that all the studies, save for Nishino, analyse only South African textbooks. There appear to be no other studies that compare South African textbooks with those from other countries.

The other noticeable pattern regarding sampling is that most of the studies analyse high school textbooks (that is, what is currently named grade 10-12). Eight of the studies published in journals focus on high school textbooks, three on primary school books and two studies include both. Of the dissertations and theses, sixteen analyse high school textbooks (with a particular emphasis

on Grades 10-12), two studies analyse both primary and high school books, and only one study focuses on primary school books. Thus there is a strong research focus on high school texts, particularly Grades 10-12, and very little attention is paid to primary school textbooks. This reflects the strong emphasis in South Africa on the final years of schooling, which is somewhat ironic, given the statistics that show that only approximately half the million learners who start primary school will in fact write the Grade 12 National Senior Certificate exam (Spaull, 2013). Only one fifth of high school learners choose to take History as a Grade 12 subject (based on the figures from the 2013 National Diagnostic Report that 109 046 wrote the Grade 12 History examinations in 2013 of a total of 562 112 full time candidates), thus it may be important to shift our focus to the compulsory phase of History learning in the grades up to Grade 9.

Theoretical / philosophical orientations

Nicholls notes that there are four traditional philosophical perspectives which relate to textbook research which are positivism, critical theory, postmodernism and hermeneutics (Nicholls, 2005). Just as there are a range of analysis tools used in the South African studies, there is a broad variation in the philosophical orientations and theory that is brought to the studies.

Although the term post-positivist is often used now, rather than positivist, the ontological perspective that underpins this tradition is that of realism, of understanding that objects and subjects exist independently of one another. Thus using the scientific method can make it possible to discover patterns and relationships between objects (Nicholls, 2005:25). Earlier dissertations such as Raubenheimer (1943) and Du Plooy (1964) would probably fall into the positivist paradigm where the focus is primarily on quantitative analysis, and there is little engagement with the context in which the textbooks are written.

Nicholls (2005) explains that critical theorists see subjects as existing in a world of unequal and oppressive social relations and it is only the raising of consciousness that will overcome this alienation and oppression. In contrast to positivism, the socio-economic, cultural, historical and ideological context is vital, but similar to positivism, critical theorists argue that the objects in the world are governed by universal laws which can be known (p. 26). The studies published in the 1980s, such as Chisholm (1981), Smith (1983), Mazel and Stewart (1987), and Du Preez (1983), would fall broadly into a critical theory

framework, where issues of unequal social relations and powerful ideologies are foregrounded. This reflects the critical turn in sociology in white English universities at the time, when theorists such as Althusser and Gramsci were in ascendance.

The hermeneutic tradition is concerned with the relationships between language, meaning and interpretation (Nicholls, 2005:29). Researchers in this tradition recognise that all interpretations of reality have a subjective dimension. Ontologically, hermeneutic approaches do not believe that text represents an objective world, but that text is subjective and is socially constructed. A constructionist perspective is not only about language or text, but similarly argues that knowledge is relative and is defined through the perspective of the knower (Wheelahan, 2007).

Philosophical orientations to research are loosely informed by the university tradition from which the researcher comes (Hoadley, 2010). Many of the dissertations produced by students at the University of KwaZulu-Natal, School of Education tend to fall within the hermeneutic and social constructionist frame and use discourse analysis as the analysis lens. Examples are Maposa's (2014) study on the construction of African consciousness, Koekemoer's (2012) analysis of the dominant discourses of the holocaust and Naidoo's (2014) analysis of "big men". Morgan's (2011) study on race discourses in Grade 11 textbooks would also fall into this tradition, as would the studies by Schoeman (2009) and Fardon and Schoeman (2010) on the representation of women and gender bias.

The fourth philosophical tradition described by Nicholls (2005) is that of post modernism, whose adherents believe that there are no absolute facts and have no faith in science progress, rationality or the hierarchical structuring of knowledge (p. 28). None of the studies in this analysis are located within this tradition.

There is another research tradition that is reflected in a few of the studies here, and that is social realism. A social realist approach acknowledges that knowledge is a social product, and is thus fallible, but that an objective reality does exist and our job as researchers is to understand that reality, despite our knowledge being impartial and socially mediated (Wheelahan, 2007). The studies here that are informed by a sociology of knowledge perspective which focus on structuring and the specialisation of knowledge (Bharath, 2009; Firth, 2013; Job, 2015) would fall into the social realist approach.

Conclusion: What does this mean for the future of textbook research?

In this article we have created a database by means of a literature search of the research conducted globally on South African History textbooks. This database (Appendix A), which we do not claim to be incontestable, consists of 65 dissertations and theses, books and book chapters and peer reviewed academic articles. The analysis shows that we have a sizable body of research in the field of history textbook research, and forthcoming studies need to build on what we already know. However, what is not understood is the position of History textbook research in relation to other research conducted into textbooks in South Africa – a worthy future research endeavour.

One way of building a more coherent body of research into History textbooks is to use methodological and analysis tools that have been used previously in order to make these tools more robust and trustworthy, as well as to make philosophical paradigms more explicit. There is clearly a silence in the completed research on how teachers and learners actually use textbooks in their classrooms. Researchers seem to have a strong assumption that textbooks carry powerful messages, but we have little empirical work to show how teachers mediate these messages in their classrooms and in fact what learners actually learn about History as they use these textbooks. Another gap is that there is very little work on the historiography of the knowledge that appears in the textbooks. The research community does not seem to be asking: “Where do the textbook writers/producers find their sources?” and “Who is writing/producing textbooks”? Nishino’s chapter (2008) on the influence of Theal’s settler historiography actually names textbook authors, while the majority of studies use the name of the publisher to identify a book. In this way, authors become invisible, and the role of the textbook can be reduced to simply how compliant it is with the current curriculum requirements. In conclusion, we suggest that the field of History textbook research is healthy in South Africa, but that forthcoming research should strengthen and consolidate what knowledge has already been built in the field. Hopefully this article can contribute to this strengthening.

Appendix A

Database of Studies on South African School History Textbooks

Note: The shaded rows in the table represent studies which focus on the role of textbooks in school, their design, selection or distribution or on theoretical and methodological issues.

Non-shaded studies represent those which present findings of content analyses of textbooks.

1. Dissertations (MA/M.Ed.) & Theses (DPhil/Ph.D/D.Ed.) on South African School History textbooks^{5 6}

No	Author	University	Title	Date
1	Raubenheime AT	Pretoria (M.Ed.)	<i>Die geskiedenis-handboek op skool met besondere verwysing na Suid-Afrika [The history textbook at school, with special reference to South Africa]</i>	1944
2	Auerbach, FE	Witwatersrand (M.Ed.)	<i>An enquiry into history textbooks and syllabuses in Transvaal high schools</i>	1964
3	Du Plooy, WJ	Potchefstroom (D.Ed.)	<i>Die handboek vir geskiedenis in die Transvaalse middelbare skool [The history textbook in the Transvaal intermediate school]</i>	1965
4	Motshabi, EVN	Fort Hare (M.Ed.)	<i>The use of the textbook in the teaching of history in Bantu high schools with special reference to the Form II class</i>	1972
5	Schutte, MA	Potchefstroom (D.Ed.)	<i>Vakdidaktiese kriteria vir die seleksie van die geskiedenis-handboek vir die sekondêre skool [Subject didactics criteria for the selection of history textbooks for the secondary school]</i>	1990
6	Chernis, RE	Pretoria (D.Phil.)	<i>The past in service of the present: A study of South African school history syllabuses and textbooks, 1839-1990</i>	1990
7	Matoti, SM	Rhodes (M.Ed.)	<i>An analysis of some school history textbooks with special reference to styles of concept presentation</i>	1990
8	Evans, G	Witwatersrand (M.Ed.)	<i>Textbooks and the cultural reproduction of knowledge: A critical analysis of the South African history textbook, Timelines 10 and an assessment of responses from students</i>	1991
9	Gambushu, MD	Natal (MA)	<i>An examination of the relationship between matric history textbooks, matric history examinations and the matric history results, in the Port Shepstone region, 1985-1995</i>	1998
10	Mashiya, LN	Witwatersrand (M.Ed.)	<i>Can old history textbooks be used to promote the new democratic ideals in the curriculum, 2005?</i>	2000
11	Ranchod, KBD	Vista University (M.Ed.)	<i>The accessibility of the language used in grade 9 history textbooks</i>	2001
12	da Cruz, P	Cape Town (MA)	<i>From narrative to severed heads: The form and location of white supremacist history in textbooks of the apartheid and post-apartheid eras. A case study</i>	2005
13	Nishino, R	Western Australia (Ph.D.)	<i>A comparative historical study of Japanese and South African school textbooks ca. 1945-1995</i>	2006
14	Waller, BJ	UKZN (M.Ed.)	<i>How does historical literacy manifest itself in south African grade 10 history textbooks?</i>	2009

5 Auerbach's thesis was published as a book: E Auerbach, *The power of prejudice in South African education: An enquiry into history textbooks and syllabuses in the Transvaal high schools of South Africa* (Cape Town, Balkema 1965).

6 Nishino's thesis was reworked published as a book: R Nishino, *Changing histories: Japanese and South African textbooks in comparison, 1945-1995* (Göttingen, V&R Unipress, 2011).

15	Bharath, P	UKZN (M.Ed.)	<i>A study of knowledge representations in grade 6 history textbooks before and after 1994</i>	2009
16	Morgan, KE	Johannesburg (Ph.D.)	<i>Textbooks as mediators in the intellectual project of history education</i>	2011
17	Koekemoer, M	UKZN (M.Ed.)	<i>Analysing the dominant discourses on the holocaust in grade 9 south African history textbooks</i>	2012
18	Fru, NR	UKZN (M.Ed.)	<i>Heritage in contemporary grade 10 south African history textbooks: A case study</i>	2012
19	Firth, BW	Cape Town (M.Ed.)	<i>"Powerful Knowledge" in any textbook? An analysis of two South African History textbooks in pursuit of powerful knowledge</i>	2013
20	Nene, NP	UKZN (M.Ed.)	<i>An analysis of the visual images of women in grade 12 South African history textbooks</i>	2014
21	van Niekerk, A L	UKZN (M.Ed.)	<i>The representation of Nelson Mandela in selected grade 12 history textbooks</i>	2014
22	Naidoo, A	UKZN (M.Ed.)	<i>An analysis of the depiction of "big men" in apartheid and post-apartheid school history textbooks</i>	2015
23	Maposa, MT	UKZN (Ph.D.)	<i>An analysis of the construction of African consciousness in contemporary South African history textbooks</i>	2015
24	Mackenzie, BA	Witwatersrand (M.Ed.)	<i>Doing school history as portrayed in assessment tasks found in the European expansion and conquest in the 15th to 18th century units contained in a sample of Grade 10 South African CAPS-compliant history textbooks</i>	2015
25	Job, M	Cape Town (M.Ed.)	<i>The specialisation of knowledge in one content area in four Social Science textbooks under the CAPS curriculum</i>	2015

2. Books and book chapters on South African school History textbooks

No	Author(s)	Year	Title	Publisher & Place
1	Auerbach, FE	1965	<i>The power of prejudice in South African education: An enquiry into history textbooks and syllabuses in the Transvaal high schools of South Africa</i> , pp. 144.	Balkema: Cape Town
2	Dean, E; Hartman, P & Katzen, M	1983	<i>History in black and white: An analysis of South African history textbooks</i> , pp. 137.	UNESCO; Paris
3	Du Preez, JM	1983	<i>African Afrikaner. Master symbols in South African school textbooks</i> , pp. 106.	Librarius Felicitas: Alberton
4	Siebörger, R	1994	<i>New History textbooks for South Africa</i> , pp. 22.	Macmillan: Johannesburg
5	Reid, J & Siebörger, R (ed.)	1995	<i>From principles to practice. Proceedings of the workshop on school history textbook writing</i> , pp. 48.	UCT Press: Cape Town
6	Bam, J & Visser, P	2002	A sample chapter for a new history textbook in <i>A new history for a new South African</i> , pp. 154-195.	Kagiso: Cape Town

7	Hindle, D	2004	Textbooks in the classroom: challenges and possibilities. In Jeppie, S (ed.). <i>Towards new histories for South Africa – on the place of the past in our present</i> , pp. 189-195.	Juta: Cape Town
8	Siebörger, R	2006	The dynamics of history textbook production during South Africa's educational transformation, in Foster, S & Crawford, K (eds.) <i>What shall we tell the children? International Perspectives on School History Textbooks</i> , pp. 227-243.	Information Age: Greenwich
9	Nishino, R	2008	George McCall Theal and South African history textbooks: Enduring influence of settler historiography in descriptions of the fifth "Frontier War" 1818-1819. In Limb, P (ed.). <i>Orb and Sceptre: Studies on British Imperialism and its Legacies, in Honour of Norman Etherington</i> , pp. 6.1-6.17.	Melbourne: Monash University ePress
10	Nishino, R	2011	<i>Changing histories: Japanese and South African textbooks in comparison (1945-1995)</i> .	Göttingen: V&R Unipress

3. Peer reviewed journal articles on South African School History textbooks⁷

No	Author(s)	Year	Title	Journal info
1	Boyce, AN	1962	The criticism of school history textbooks.	<i>Historia</i> , 7(4):232-237.
2	Chisholm, L	1981	Ideology, legitimation of the status quo and history textbooks in South Africa.	<i>Perspectives in Education</i> , 5(2):134-151.
3	Smith, AB	1983	The Hotnot syndrome: Myth making in SA school textbooks.	<i>Social Dynamics</i> , 9:37-49.
4	Mazel, AD & Stewart, PM	1987	Meddling with the mind: The treatment of san hunter-gatherers and the origins of South Africa's black population in recent South African school history textbooks.	<i>South African Archaeological Bulletin</i> , 42:166-170.
5	Siebörger, R	1994	Reconceptualising South African school history textbooks.	<i>South African Historical Journal</i> , 30:98-108.
6	Siebörger, R & Reid, J	1995	Textbooks and the school history curriculum.	<i>South African Historical Journal</i> , 33:169-177.
7	Harris, K	1996	Transforming school history texts.	<i>South African Historical Journal</i> , 34:267-275.
8	Carpentier, C	2000	Rupture politique et enseignement de l'histoire en Afrique du Sud: Les manuels de l'enseignement primaire.	<i>International Review of Education</i> , 46(3-4):283-303.

⁷ Nishino's thesis was reworked published as a book: R Nishino, *Changing histories: Japanese and South African textbooks in comparison, 1945-1995* (Göttingen: V&R Unipress, 2011).

9	Lieven, M	2000	Bias in school history textbooks: Representations of the British invasion of Zululand.	<i>Paradigm-Journal of the Textbook Colloquium</i> , Vol. 2 (online).
10	Johannesson, B	2002	The writing of history textbooks in South Africa.	<i>Internationale Schulbuchforschung</i> , 24(1):89-95.
11	De Wet, C	2001	Die uitbeelding van swart mense in Suid-Afrikaanse skoolgeskiedenis-handboeke.	<i>Acta Academica</i> , 33(1):99-129.
12	Pretorius, F	2007	Unfair "affirmative action" in South African historiography.	<i>Yesterday & Today</i> , 1:1-8.
13	Engelbrecht, A	2008	The impact of role reversal in representational practices in history textbooks after apartheid.	<i>South African Journal of Education</i> , 28:519-541.
14	Chisholm, L	2008	Migration, citizenship and South African history textbooks.	<i>South African Historical Journal</i> , 60:353-374.
15	Van Eeden, E	2008	Transcontinental reflections in the Revised South African History Curriculum on globalism and national narratives (and its reflection in Grade 12 textbooks).	<i>Yesterday & Today</i> , 3:11-39.
16	Schoeman, S	2009	The representation of women in a sample of post 1994 South African school history textbooks.	<i>South African Journal of Education</i> , 29:541-556.
17	Fardon, J & Schoeman, S	2010	A feminist post structuralist analysis of an exemplar South African school history text.	<i>South African Journal of Education</i> , 30:307-323.
18	Van Eeden, E	2010	South Africa's revised History curriculum on globalism and national narratives in grade 12 textbooks.	<i>Historia</i> , 55(1):110-124.
19	Morgan, KE	2010a	Of "wealthy industrialists" and "white protestant Europeans" – the history of race racism as portrayed in a South African textbook.	<i>IARTEM, e-Journal</i> , 3(1):72-92.
20	Morgan, KE	2010b	Scholarly and values-driven objectives in two South African school history textbooks: An analysis of topics of race and racism.	<i>Historical Social Research</i> , 35(3):299-322.
21	Morgan, KE	2010 c	Reflexive grappling with theory and methods of text analysis: Race and racism represented in history textbooks.	<i>South African Historical Journal</i> , 62:753-770.
22	Bertram, C & Bharath, P	2011	Specialised knowledge and everyday knowledge in old and new Grade 6 History textbooks.	<i>Education as Change</i> , 15(1):65-82.

23	Morgan, KE & Henning, E	2011	How school history textbooks position a textual community through the topic of racism.	<i>Historia</i> , 56(2):169-190.
24	Morgan, KE	2012a	From Auschwitz to apartheid – conceptual representations in history textbooks.	<i>Education as Change</i> , 16(1):3-20.
25	Morgan, KE	2012b	Stereotypes, prejudices, self and “the other” in history textbooks.	<i>Yesterday & Today</i> , 7:85-100.
26	Morgan, KE & Henning, E	2013	Designing a tool for History Textbook Analysis.	<i>Forum Qualitative Social Research</i> , 14(1), Art 7.
27	Chisholm, L	2013	The textbook saga and corruption in education.	<i>South African Review of Education</i> , 19(1):7-22.
28	Fru, NR; Wassermann, J M. & Maposa, MT	2013	The contested nature of heritage in Grade 10 South African history textbooks: A case study.	<i>Yesterday & Today</i> , 10:77-100.
29	Morgan, KE	2014a	Learning empathy through school history textbooks: A case study.	<i>Rethinking History: The Journal of Theory and Practice</i> , 2014:1-25.
30	Morgan, KE	2014b	Decoding the visual grammar of selected South African history textbooks.	<i>Journal of Educational Media, Memory and Society</i> , 6(1):59-78.

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TEACHING WORLD WAR I: AN EXPLORATORY STUDY OF REPRESENTATIONS OF THE GREAT WAR IN CONTEMPORARY AFRICAN TEXTBOOKS

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Abstract

World War I (WWI) is widely recognised as an event of critical significance and far-reaching consequences, a violent episode of unprecedented magnitude which affected millions of lives and which brought lasting change to the world in which we live. One hundred years after the outbreak of this global war, successive younger generations across the globe have been taught about this watershed event in world history. This paper seeks to fill a notable gap in extant research on WWI by exploring the ways in which the history of this war is taught to Africa's younger generations through the findings of an exploratory study on representations of the Great War in recent African school textbooks. The study draws on an analysis of over 30 history and social studies textbooks from 15 different countries to investigate the core questions around which lessons on WWI are designed across the continent, and the specific knowledge conveyed and emphasised in the answers provided to these questions. The article demonstrates efforts, found across African textbooks, to reclaim and re-centre local historical agency, experiences, and views related to WWI, while also pointing to the possibility to better valorise this part of national, African and world heritage to learn meaningful lessons for the present and the future.

Keywords: World War I; Textbooks; African history; Colonialism; Representations; Historical consciousness; African consciousness.

Introduction

In the summer of 2014, the world marked the centenary of the outbreak of World War I (WWI). This watershed event in world history occupies a significant place in public memory – a memory now boosted by countless initiatives to commemorate and educate audiences about the war, among them memorials, publications, documentaries, films, and exhibitions.

World War I, also known as the First World War or the Great War, mainly evokes the horror of the trenches on the Western Front and thus is primarily perceived as an essentially (West-) European conflict. This is reflected in an academic historiography of the Great War which has traditionally been dominated by a Eurocentric perspective. A review of extant literature points to Africa's role, in particular, as one of the less studied aspects of WW1. For decades, Africa was neglected in narratives of WW1, the African front appearing at best as a mere "sideshow" to the war fought in Europe.¹

The largely untold story of Africa in World War I is both tragic and significant. The UNESCO's *General History of Africa* describes it as a "turning-point in African history",² which affected the lives of millions of people across the continent. First of all, Africa was an important stake of WW1 insofar as imperialism and colonial rivalry among European powers had been one of the causes of the rising tensions that eventually led to the outbreak of the Great War. Secondly, the African continent was a theatre of WW1 from 1914 until after the signing of the armistice of Rethondes on 18 November 1918. Military campaigns were conducted around the German colonies of Kamerun and Togoland in West Africa (modern-day Cameroon and Togo), German South-West Africa (modern-day Namibia), and German East Africa (modern-day Tanzania, Rwanda and Burundi) – territories which, after the defeat of Germany in the war, were redistributed among the victorious powers as agreed in the Treaty of Versailles of 1919. Thirdly, Africa served as a reserve from which to massively draw men and resources critically needed for the war effort. Many were mobilised, often forcedly, to fight in Africa as well as in Europe, while people on the home-front were forced to contribute to their *métropoles'* war economies, for instance by surrendering foodstuffs, which caused grave shortages and increased vulnerability to deadly diseases. Africa's involvement in WW1 was highly costly. Hundreds of thousands died, and societies and their economies were severely disrupted. The war also marked a critical turning point in the relationship between Europeans and Africans. The war for ever corroded the image of the white man as superior and undefeatable. It also instilled a sense of self-awareness and sowed the seeds of revolt that would eventually lead to African countries seeking, and

1 C Koller, "Historiography 1918-Today (Africa)," *1914-1918-online, International Encyclopaedia of the First World War*, ed. by U Daniel, P Gatrell, O Janz, H Jones, J Keene, A Kramer, & B Nasson, issued by Freie Universität Berlin, Berlin 2014-10 08 (available at <http://dx.doi.org/10.15463/ie1418.10426>, as accessed on 20 October 2015).

2 M Crowder, "The First World War and its consequences", AA Boahen (ed.), *General History of Africa, VII, Africa under colonial domination 1880-1935* (Paris, UNESCO, 1985), p. 309.

gaining, independence.³

The relatively marginal place of this story in the strongly Eurocentric historiography of WWI is reflected in mainstream European as well as American school textbooks and popular culture, which continue to nurture cultural bias and misconceptions among pupils by largely ignoring the devastating experience of war in Africa (and elsewhere) and by prompting students to generally view World War I “as a conflict that almost exclusively involved white soldiers fighting on European soil”.⁴ The widespread misconceptions on the negligible role of Africa in WWI appear to extend to African countries themselves. A research project I conducted a few years ago on historical consciousness among young people in Central Africa found WWI to be primarily understood as part of a “foreign history which does not concern us directly”, and of which most respondents seemed to have only the vaguest understanding.⁵

Written against this backdrop, this article explores how Africa’s education systems, understood here as important traditional vehicles of collective memory and group identity, have responded both to the longstanding marginalisation of Africa’s untold story of WWI in mainstream discourse and the concomitant increased interest, recently shown in African countries, to gaining ownership over this history and to promoting its remembrance.⁶ The article presents the results of an exploratory study of representations of the Great War in contemporary African textbooks, the aim being to complement international research on World War I and its teaching, and to broaden predominantly narrow western perspectives on such issues, by examining how, one hundred

- 3 On Africa’s role in WWI, see, among others, L Catherine, *Loopgraven in Afrika (1914-1918): De vergeten oorlog van de Congolezen tegen de Duitsers* (Berchem, EPO, 2013); J Frémeaux, *Les colonies dans la Grande Guerre: Combats et épreuves des peuples d’outre-mer* (Paris, Ed, 2006); H Liebau, et al. (eds), *The world in world wars: Experiences, perceptions and perspectives from Africa and Asia* (Leiden, Brill, 2010); M Michel, *L’Afrique dans l’engrenage de la Grande Guerre* (Paris, Karthala, 2013); ME Page (ed.), *Africa and the First World War* (New York, St. Martin’s Press, 1987); A Samson, *World War I in Africa: The forgotten conflict among the European powers* (London, I.B. Tauris, 2013); H Strachan, *The First World War in Africa* (Oxford, Oxford University Press, 2004). While such western scholars have made important contributions to the expanding scholarship on Africa in World War I, the perspectives of African intellectuals have remained peripheral.
- 4 SJ Foster & R Rosch, *Teaching World War I from multiple perspectives*, (no date) (available at <http://www.socialstudies.org/system/files/publications/se/6107/610711.html>, as accessed on 20 October 2015).
- 5 D Bentravato, “Narrating and teaching the nation: The politics of history, identity and education in the Great Lakes Region of Africa”, Ph.D, Utrecht, University of Utrecht, 2013.
- 6 Several African countries have seen the erection of monuments, the renaming of streets and squares, and the introduction of public holidays to commemorate African soldiers who fought and died during the war and to celebrate the victories gained. In Mali, for instance, one can find monuments in memory of “the Heroes of the Black Army” who fell in the battle of the Marne. In Senegal, the *Journée du Tirailleur* was introduced in 2004, while *Place de la Gare* was renamed *Place du Tirailleur* in their memory. Here, the colonial statue *Demba et Dupont* has been restored as a symbol of the heroic historical role and sacrifice of Africans for freedom in the world.

years on, the First World War experience is taught in schools across Africa. Ultimately, this study – the first of its kind⁷ – draws on narratives of the First World War presented in African textbooks to offer a more transnational narrative of this war and to allow for a more global and inclusive picture of events while also prompting reflection on meaningful ways of teaching this historical topic in present-day African classrooms and beyond.

Methodology

This article places school textbooks at the centre of the analysis, viewing them as important cultural and political artefacts and as carriers of what is considered to be legitimate knowledge in any given society. The analysis draws on the established tradition of history textbook research, and pays particular attention to such artefacts' mediated narratives of the past, notably of World War I, in order to examine and contrast what is told and how in national narrations and to illuminate their role in shaping young people's historical consciousness in the present. As ample research has demonstrated, the stories that nations have chosen to tell their younger generations, and which they have conventionally transmitted through state-approved school textbooks, typically are stories conveniently and purposely selected to promote a sense of collective identity founded on a group's presumed shared history and destiny, thus making textbooks key instruments of socialisation and nation-building.⁸

This article aims to shed light on such processes by critically examining perspectives offered in selected school textbooks from fifteen countries in Sub-Saharan Africa on the history of World War I. The sample, encompassing thirty-three primary and secondary school textbooks, books for revision and exam preparation, and teacher guides for the subjects of history and social studies, was selected after a cursory scrutiny of over one hundred schoolbooks available at the specialised library of the Georg Eckert Institute for International

7 Overall, research on how WW1 is taught around the world is rather scarce and scattered. An exception, providing examples from Europe, America, Asia and Sub-Saharan Africa, can be found in the special issue of *Historiens & géographes*, 369, 2000. Noteworthy is also the special issue of *Internationale Schulbuchforschung: Zeitschrift des Georg-Eckert-Instituts für Internationale Schulbuchforschung* 22(3) 2000 on "Erster Weltkrieg und Versailler Vertrag / The First World War and the Treaty of Versailles" edited by R Bendick and R Riemenschneider. Another interesting comparative research on the teaching of WW1 in Europe has been conducted by: J Müller & A Wagner, "Regards Croisés" – Ikonographie des Ersten Weltkrieges in aktuellen europäischen Geschichtsbüchern", *Yearbook of the International Society for History Didactics*, 2010, pp. 235-248.

8 See, among others: S Foster & K (eds.), *What shall we tell the children?: International perspectives on school history textbooks* (Greenwich, Information Age Publishing Inc Crawford, 2006); W Marsden, *The school textbook: Geography, history, and social studies* (London, Woburn Press, 2001); J Nicholls, *School history textbooks across cultures: International debates and perspectives* (Oxford, Symposium Books, 2006).

Textbook Research and in the author's extensive private collection. The sample included all the most recent books available in the two accessed collections that were considered relevant to this study, that is, all those which dealt, to various degrees, with WW1. Although a diachronic study would undoubtedly be worth conducting, this research, being exploratory, is limited to an analysis of contemporary African textbooks, which were published in the last two decades.⁹ In addition, the selection favoured textbooks produced specifically for Sub-Saharan Africa and written in accordance with national syllabuses, and included textbooks produced by national and international publishers alike (such as Macmillan, Longman, and Hatier).

With an eye to being as inclusive and diverse as possible in terms of regional coverage, care was taken to include textbooks from countries in West, Central, East and Southern Africa which are former English, French, German, Belgian, Italian and Portuguese colonies, or which were never formally occupied and colonised by European powers, notably Liberia (Table 1). At least one textbook was analysed from each of the following countries:¹⁰

- Cameroon, Ivory Coast, Liberia, Nigeria, Senegal and Sierra Leone in West Africa;
- DR Congo, Ethiopia, Kenya, Rwanda and Tanzania in Central and East Africa; and
- Angola, Mozambique, Namibia and South Africa in Southern Africa.

Table 1: List of textbooks analysed and the codes used for analysis and reference

Country	Title	Code used for analysis and reference
Angola	1. J Mendes Lopes, <i>História da 9a Classe</i> (Luanda, Texto Editores-Leya, 2014).	ANG1
Cameroon	2. ML Tazanu <i>et al</i> , <i>Ordinary Level History for Cameroon Schools, 2</i> (Buea, ANUCAM, 2008).	CM1
	3. R Fomenky & MB Gwanfogne, <i>Histoire du Cameroun. Cours Élémentaire: 3^e et 4^e Années des Ecoles Primaires</i> (Yaoundé, CEPER, 1998).	CM2
	4. R Fomenky & MB Gwanfogne, <i>Histoire du Cameroun. Cours Moyen: 5^e et 6^e Années des Ecoles Primaires</i> (Yaoundé, CEPER 1998).	CM3

⁹ The most recent textbook sampled was issued in 2014. It is important to note that new curricula might have overtaken some of the textbooks selected for this study, although the latter might still remain in use.

¹⁰ The selected textbooks were written in English, French, Portuguese or Afrikaans.

Dr Congo	5. Une reunion de professeurs [a team of teachers], <i>Histoire 6e Primaire. Le Congo (rd) en Afrique et dans le Monde. Des Origines à Nos Jours</i> (Kinshasa, New Scolot Ed, 2004).	DRC1
	6. S Longo Kazumba, <i>Histoire classes terminales</i> (Kinshasa, New Scolot Ed, n.d.).	DRC2
Ethiopia	7. M Dinko & M Adugna, <i>History. Student textbook, Grade 10</i> , Revised ed. (Addis Ababa, Mega Publishing Enterprise, 2005).	ETH1
Francophone West Africa (e.g. Ivory Coast, Senegal)	8. Une équipe d'enseignants africains [a team of African teachers], <i>L'Afrique et le Monde. Histoire, 3</i> (Paris, Hatier, 1995).	CI1
Ivory coast	9. Une équipe d'enseignants africains [a team of African teachers], <i>Histoire Géographie, 3</i> (Abidjan/Paris, CEDA/Hatier, 1999).	CI2
Kenya	10. A Gichema <i>et al</i> , <i>Secondary History and government. Form three students' book, 4</i> (Nairobi, Kenya Literature Bureau/Ministry of Education, 2011 [reprinted in 2013]).	KN1
	11. A Gichema <i>et al</i> , <i>Secondary History and government. Form four students' book, 4</i> (Nairobi, Kenya Literature Bureau/Ministry of Education, 2012 [reprinted in 2013]).	KN2
Liberia	12. JS Guannu, <i>A short History of the First Liberian Republic</i> . 3 (Monrovia, Star Books, 2010).	L1
Mozambique	13. JBH Fenhane, <i>História 10ª Classe</i> (Maputo, Diname, 2002).	MOZ1
Namibia	14. G Weldon <i>et al</i> , <i>MacMillan History for Southern Africa. Namibia edition</i> (Manzini/Swaziland, Macmillan Boleswa, 2012).	NM1
	15. C Kotzé & L Lang, <i>History for Namibian schools: A new perspective, Grade 10</i> (Windhoek, Gamsberg Macmillan, 1993).	NM2
	16. P Ranby, <i>Go for History, Grade 9</i> (Windhoek, MacMillan Namibia, 2012).	NM3
	17. D Goosen & A Du Preez, <i>Understanding History in context, Grade 9</i> (Windhoek, Longman Namibia, 2007 [reprinted in 2011]).	NM4
	18. B Cloete & C Dugmore, <i>Discover History. Grade 9, learner's book</i> (Sandton, Heinemann International Southern Africa, 2011).	NM5
Nigeria	19. A Bakare, A Belgore & E Harrison, <i>Social studies for Primary Schools, Book Five</i> (Onikan, Farafina Educational, 2008).	NG1

Rwanda	20. E Bamusananire <i>et al</i> , <i>Primary social studies, Pupil's book 6</i> (Kigali, Macmillan Rwanda, 2006 [reprinted in 2010]).	RW1
	21. C Gahima <i>et al</i> , <i>The History of Rwanda. A participatory approach. Teacher's guide for Secondary Schools</i> (Kigali, Republic of Rwanda, Ministry of Education, National Curriculum Development Centre, 2010).	RW2
	22. E Bamusananire & D Ntege, <i>New Junior Secondary, History Book 2</i> (Kampala, Netmedia Publishers, n.d.).	RW3
	23. E Bamusananire & D Ntege, <i>New Junior Secondary, History Book 3</i> (Kampala, Netmedia Publishers, n.d.).	RW4
Sierra Leone	24. JAD Alie, <i>A new History of Sierra Leone</i> (Oxford, Macmillan, 1990 [reprinted in 2005]).	SL1
South Africa	25. J Bartels, P Ellis & P Olivier, <i>Shuters History, Grade 11. Learner's book</i> (Pietermaritzburg, Shuter & Shooter, 2006 [reprinted in 2011]).	SA1
	26. J Bartels, P Ellis & P Olivier, <i>Shuters History, Grade 11. Teacher's guide</i> (Pietermaritzburg/ Cape Town/ Randburg, Shuter & Shooter, 2006).	SA2
	27. L Sikhakhane <i>et al</i> , <i>History, Grade 11. Educator's guide</i> (Overport, Durban, New Generation Publishers, 2007).	SA3
	28. L Sikhakhane <i>et al</i> , <i>Geskiedenis, Graad 11. Leerderse boek</i> (Overport, Durban, Nuwe Generasie, 2009).	SA4
	29. J Earle and A Briggs, <i>Social Sciences Today, Grade 8. Learner's book</i> (Pinelands, Cape Town, Maskew Miller Longman, 2008).	SA5
	30. J Bottaro <i>et al</i> , <i>Oxford successful social sciences. Grade 8, learner's book</i> (Goodwood, Cape Town, Oxford Univ. Press Southern Africa, 2010).	SA6
	31. J Bottaro <i>et al</i> , <i>Oxford – Op soek na sosiale wetenskappe. Graad 8, leerdersboek</i> (Goodwood, Kaapstad, Oxford Univ. Press Southern Africa, 2008).	SA7
Tanzania	32. E Nyema & A Ngwilizi, <i>History for Primary Schools, Standard 6</i> (Dar es Salaam, Readit Books, 2009).	TZ1
	33. S James, <i>African History from 19th c.-21st c. A.D. for Secondary Schools, Forms III and IV</i> (Dar es Salaam, The General Publishing House, 2008).	TZ2

Informed by international scholarship on textbook research,¹¹ the analysis of the sample presented in the next sections scrutinises textbook content related to WW1 with the purpose of identifying general trends and patterns in the various ways this historical topic is approached across Sub-Saharan Africa. A first level of analysis examines textbook content in relation to the

11 See, among others: J Mikk, *Textbook: Research and writing* (Frankfurt am Main, 2000); J Nicholls, "Methods in school textbook research", *International Journal of Historical Learning, Teaching and Research*, 3(2), 2003, pp. 1-17; F Pingel, *UNESCO guidebook on textbook research and textbook revision* (Paris/Braunschweig, UNESCO/GEI, 2010); F Pingel, *The European home: Representations of 20th century Europe in history textbooks* (Strasbourg, Council of Europe, 2000).

contextualisation and coverage of the war, prominent overarching questions and issues raised, and didactic approaches adopted to teach this subject matter. A deeper content analysis subsequently delves into the specific knowledge conveyed and emphasised in providing answers to the core questions around which lessons on WW1 are designed and does this through an analysis of textbook representations of two main themes in relation to WW1: “The world at war” and “Africa at war”. More specifically, the study investigates how textbooks engage with historical debates and controversies surrounding the war, including its origins and causes, the issue of responsibility for its outbreak and escalation as well as its consequences, and how they position Africa and the individual nations within the history of this war. It thereby seeks to distil the facts, dates, personalities and sites that carry particular resonance in African textbook narratives and the conceptual categories and interpretative frameworks they adopt. While it does not claim to be comprehensive, the sample undoubtedly provides telling insights into such questions.

General trends in textbook content and pedagogy

The analysis of the textbooks that were sampled for this study exposed several general trends in relation to the teaching of WW1 in present-day African classrooms. Broadly, the study found the Great War, variously treated as a theme in national, African or world history, to hold a marginal place in the analysed textbooks. Most of the textbooks dedicate one or two pages to WW1 and some only a few sentences.¹² A review of the predominantly cursory coverage of this theme in African textbooks further revealed a certain agreement on the main topics and significant questions that should be addressed in African classrooms with regard to the First World War. Pupils across Africa are expected to understand the causes, course and consequences of the war, specifically in relation to their own country, and to distil the main achievements and weaknesses of the peace settlement that ended the war. Similarities and differences in these respects will be analysed in more detailed in the following sections.

From a pedagogical perspective, the analysis of the topics dealt with in African textbooks exposed the predominance of a chronological and event-based approach in teaching the history of WW1, and a focus on political

¹² The negligible coverage of African involvement in WW1 in scholarly work on African history is manifest in Joseph Ki-Zerbo's *Histoire de l'Afrique Noire*, a popular reference work used in schools across the African continent, which dedicates only a single line to the topic. J Ki-Zerbo, *Histoire de l'Afrique noire: D'hier à demain*. (Paris, Hatier, 1972).

and military aspects of the war. It is largely a conventional “history from above” that is taught across Africa – a history of great men and great battles. Conversely, human aspects of the war and the experiences of common soldiers and civilians are largely neglected, while attention to social, economic, and cultural aspects of WW1, typical of a “history from below”, is mainly shown in relation to the consequences of the war, notably in Africa. Additionally, congruent with a traditional approach to teaching history, which seems to be widely embraced across the continent, the sample of African textbooks used for this study shows the predominance of authored text when dealing with the Great War, with the textbook narrative being accompanied at most by one or two visual aids, such as timelines of main events and maps, and with teaching and learning activities centred primarily on assessing factual knowledge as presented in the narrative provided by the textbook authors.

The most notable exceptions to this general trend in history pedagogy across Sub-Saharan Africa were found in South African textbooks, which appear by far the most modern both in their presentation and their didactic approach to the subject. Contrary to most other textbooks analysed, the South African textbooks are singularly dominated by a methodology centered on the presentation of primary and secondary sources as evidence to be questioned in order to address topics of historical debate from different perspectives. The approach adopted in the South African textbooks is geared towards nurturing critical thinking and developing historical skills and understanding of disciplinary concepts, such as chronology and time, cause and effect, continuity and change, links between past and present, and historical empathy, e.g. with soldiers who fought in WW1 and “with people who were colonised and who were victims of imperialism”.¹³ The South African textbooks are also characterised by a largely thematic approach and by particular attention being paid to social and cultural history and a “history from below”, with its emphasis on human experiences and emotions and on a study of the war from the perspective of ordinary people as well as on post-war commemorative cultures. Besides drawing attention to political leaders and their choices, they expose students to the combatant and the civilian experience of the conflict and their suffering during the war, by abundantly using such powerful sources as diaries and poems as well as visual representations of the war such as photos, drawings and paintings.

13 SA1:24 (See code Table 1)

Textbook representations of “the world at war”

A deeper analysis of specific textbook content points to further trends and patterns in teaching the First World War across Sub-Saharan Africa. This section presents an overview of how African textbooks describe and explain the Great War in relation to three fundamental questions, namely: Why and how did the war break out? How was it conducted? And what were its consequences?

The causes of the war

In relation to the causes of the First World War, multiple factors – military, political, economic – are typically mentioned in the African textbooks analysed. The textbooks trace the fundamental cause of the war back to increasing European rivalry for power. They commonly list factors such as the alliance system, imperialism and colonial rivalry, economic competition, growing militarism and the arms race, and nationalism. In particular, they highlight national rivalries between Germany, France and Great Britain, as well as in the Balkan region. Quite singularly, the textbooks from Tanzania, Mozambique and Angola, all countries with a post-colonial history marked by the embracing of a socialist ideology, are characterised by attributing the main causes of WW1 to capitalism and the rise of competition for new markets among industrial capitalist and imperialist countries in Europe, while also showing particular attention to the labour movement and the Second International and its fight against colonialism and militarism at the time.¹⁴

In quite an unusual manner across Africa, South African history textbooks at senior level explicitly present the origins of WW1 as a matter of historiographical debate and controversy and provide various sources hinting at “some of the most important causes suggested by historians”, thereby encouraging pupils to reflect on the reasons of disagreement among scholars. As part of the exploration of the context and causes of WW1, South African textbooks at this educational level propose a case-study on “Kaiser Wilhelm II and German militarism”, directing pupils to different historical sources (British newspapers, French cartoons, and pictures) to address this major topic of debate and build arguments on the Kaiser’s imperialistic ambitions and his

¹⁴ The Tanzanian book defines WW1 as a “crisis in the capitalist system” and as “imperialistic fighting”, with imperialism being described in the Mozambican textbook as a later phase of capitalism. TZ2: 87, 93; MOZ1:33, 50 (See codes Table 1).

responsibility for the war.¹⁵ In addition to promoting historical knowledge and disciplinary skills, in South Africa the teaching of the causes of WW1 is explicitly expected to nurture critical thinking in combination with social and civic norms, values and attitudes among pupils, including recognition of the risks of interstate rivalry and competition, of the value of patriotism and the dangers of extreme nationalism, and of leaders' influence on society and the perils of "unsound leadership".¹⁶ In an exercise in critical thinking and problem solving, one South African textbook further invites pupils to reflect whether in 1914 "war was the only option" or could instead have been averted.¹⁷

The course of the war

The African textbooks analysed typically draw attention to the course of the war that broke out as a result of the existing alliance system. They outline the warring parties, the theatres of war, and the weapons and tactics used. They underscore the uniqueness of the First World War, described as "the biggest and most destructive war the world had ever seen"¹⁸ – a war which "reached almost all the peoples of the earth".¹⁹ One Namibian textbook explains that "these years were the years of empire and colonies" and that "any war in Europe meant a world war". For this reason, it concludes, "peace in Europe was of great importance to the rest of the world".²⁰

The Western Front is usually presented as the most decisive front and the scene of "senseless slaughter".²¹ One textbook widely used in Francophone Africa, and published by Hatier, one of the top French publishers of educational media, includes a few sources on the fighting conducted on this front, illustrating different dimensions of war experience by complementing images of enthusiastic and patriotic French war mobilisation with sources conveying the harsh reality of life in the trenches.²² Similarly exposing pupils to such complexities, the South African textbooks pay considerable attention to the power of propaganda during mobilisation in Britain, Germany and USA, showing countries on both sides of the conflict depicting their

15 SA1:38-39 (See code Table 1).

16 SA2:30 (See code Table 1).

17 SA5:165 (See code Table 1).

18 NM1:1(See code Table 1).

19 DRC1:129 (See code Table 1).

20 NM2:155 (See code Table 1).

21 SA6:152-153 (See code Table 1).

22 CI1:63-65 (See code Table 1).

respective involvement in the war as a necessary and patriotic defensive struggle against merciless aggressors. Their focus is on contextualising and carefully examining iconographic objects, such as posters urging citizens to enlist for WW1, in order to discern their political motives and bias and their persuasive techniques, while also expecting pupils to reflect on the use of propaganda today. At the same time, the South African textbooks familiarise pupils with soldiers' wartime experiences during WW1, encouraging them to empathise with the combatants through the use of testimonies and pictures giving impressions of life in the trenches. In line with the "cultural" turn of the historiography of WW1, they examine sensory and emotional aspects of wartime experiences, stimulating pupils to think and feel about a distant past, for instance by conveying vivid images of the sickening "smell of rotting bodies" and poison gas, the "unbearable" noise of shelling, and the "sights and sounds of soldiers dying on all sides". They also address the question of soldiers' consent or coercion to fight by highlighting the pressure to enlist, the severe discipline, and the punishment to which soldiers were subjected for not following orders.²³ Furthermore, the South African textbooks draw attention to artistic responses to WW1, quoting popular war literature, including war poets Wilfred Owen and Siegfried Sassoon, to show "the horror and sorrow of war"²⁴ and to demystify the belief spread by propaganda that "it was good and proper to die for your country".²⁵ Against this backdrop, pupils in South Africa are encouraged to reflect on their own views and attitudes towards war, and, more specifically, on such issues as conscription and conscientious objection.²⁶

Overall, in contrast to many other textbooks used across Sub-Saharan Africa, which simply present the course of the war predominantly as a list of military operations and victories and defeats, the Francophone and especially the South African textbooks mentioned above seek to bring complexity and multiperspectivity to the way the course of WW1 is taught. They present and question sources that offer different perspectives on the war and propose exercises in historical empathy, asking pupils to imagine how they would have felt about certain actions if they had been on one or the other side of the conflict.²⁷

23 SA5:167-170; SA6:152-154; S7:154 (See codes Table 1).

24 SA5:177 (See code Table 1).

25 SA5:170 (See code Table 1).

26 SA5:161 (See code Table 1).

27 SA5:171 (See codes Table 1).

The peace settlement and the consequences of the war

With regard to the peace settlement that followed Germany's surrender, the textbooks surveyed show pupils across Africa to be typically expected to know about the major participants at the negotiation table and their conflicting interests, the terms of the peace, and its achievements and weaknesses.

The textbooks usually offer a critical and mostly negative assessment of the peace process. They show a general understanding of the peace treaty as an important destabilising factor in the aftermath of the war, which ultimately sowed the seeds of a new global war. Textbooks from former German colonies in particular, i.e. Namibian, Rwandan and Cameroonian, highlight the imposed and therefore unfair nature of the treaty of Versailles, and underscore the harshness of this treaty, which greatly punished and humiliated Germany, causing great suffering to its people and consequent resentment.²⁸ In relation to the issue of war guilt, while several books hint at Germany's overwhelming share of the blame, the African textbooks analysed show a certain consensual view on shared responsibility among Western, and especially European, powers. They frequently address the controversial issue of responsibility for the war by extending the blame for the conflict indistinctly to "the great powers", or the "imperialist" or "capitalist" powers, and, more specifically, to "the two opposing camps" led by Britain and Germany, all equally condemned in these textbooks for threatening world peace. By leaving this controversial issue to discussion, South African textbooks once again show a distinct approach to teaching World War 1. At junior level, they explicitly encourage pupils to question the War Guilt Clause and discuss "whether it was fair to blame Germany for causing the war", and, more generally, whether it is "possible that only one party is guilty in any conflict".²⁹

The textbooks often conclude their discussion on WW1 by indicating some of the consequences of a war which, according to one textbook, "changed the world" fundamentally.³⁰ Among other things, the textbooks frequently draw attention to the devastation caused by the war, highlighting its massive human and material cost. Several books illustrate a number of social and cultural consequences of the war as well. They refer to a contestation of pre-war values after WW1 and elaborate on the change of norms resulting from a "profound traumatism" in European societies caused by the war.³¹ A few textbooks

28 NM1:9; NM2:148-149; RW4:23; CM1:286-288 (See codes Table 1).

29 SA6:149; and SA7:159, respectively (See codes Table 1).

30 NM1:2 (See code Table 1).

31 CI1:74 (See code Table 1).

mention a decline of such beliefs as the supremacy of western civilisation, with one Namibian book arguing that after WW1 “people now saw that Europe was not superior to the rest of the world”.³² They also point to a concomitant triumph of pacifist ideas across Europe in the face of the horrors of the war. The Francophone textbook by Hatier, for instance, presents an extract from a French anti-war document from 1917, which conveys a pacifist message to pupils by stressing that “if you were to tell soldiers that there will be another war, they will reply ‘It is not for this that we fought!’”.³³ Considerable notice is further taken of how WW1 challenged gender roles and norms in Europe, changing the role of women in society as a result of their vital contribution to the war effort.³⁴ In their attempts to link the past and the present while framing discussions in a human rights discourse, South African textbooks in particular encourage pupils to think about and discuss the rights and opportunities women have in the world today, especially in South Africa, a country where voting rights by non-white women were attained as late as 1994, and where high rates of violence against women exist.³⁵

In relation to the aftermath of WW1, again none but the South African textbooks deal with the issue of remembrance. Textbooks used in this country examine how WW1 has been remembered, and more generally encourage pupils to reflect on the relevance and importance of remembering and on effective ways of doing so.

Textbook representations of “Africa at war”

Beyond describing how WW1 played out in Europe in particular, the African textbooks analysed in this study often address, in varying degrees, the central questions of why and how the war affected people in Africa, and in respective countries more specifically.

Explaining Africa’s involvement in WW1

As hinted at earlier, the African textbooks sampled typically present WW1 as a European war, or at most as an international event, which had not spared

32 NM1:3 (See codes Table 1).

33 CI1:78 (See code Table 1).

34 For example NM1:3; CI1:74 (See codes Table 1).

35 SA2:157 (See code Table 1).

the colonies. Described in one book as a “purely European affair”,³⁶ WW1 is widely reported to have extended to Africa, turning the continent into one of the battlegrounds of a disastrous war.

One Cameroonian schoolbook elaborates on the causes of Africa’s involvement, highlighting the Allies’ wish to take over Germany’s colonies and exploit their resources, among other things “under the pretext of rescuing the indigenes from the harshness of German rule”.³⁷ It also mentions the Allies’ wish to use the conquered colonies as a “bargaining weapon” in case of occupation of European territories by the enemy, and to “attack and defeat the Germans wherever they were found in the world”.³⁸ The textbooks often explain the involvement of African people in a foreign war by stating the simple reason that, at the time, Africans were, for the most part, colonial subjects of European powers embroiled in conflict, who, on account of their subordinate status, were expected to join the fighting on the side of their colonial masters. The Cameroonian schoolbook mentioned above points out that, “the war broke out in Europe and did not concern the people of Cameroon in any direct way. Fighting started in Cameroon mainly because the territory was a colony of Germany, an enemy to Britain and France.”³⁹ Similarly, on the question of “why South Africa invaded Namibia to wage war against the Germans”,⁴⁰ a Namibian textbook explains that, “Namibia was a German colony and thus joined the war on the side of Germany. South Africa had been a British colony and therefore joined the war on the side of Britain. This meant that Namibia was at war with South Africa.”⁴¹

The textbooks underscore that Africa eventually became greatly involved in the war, having been both a battleground and a crucial reserve of human and material resources needed to support the European war effort.

Africa as a battleground

In the textbooks analysed in this study, Africa is presented, first of all, as a battleground, a “terre des combats”, during WW1. These books describe, with varying degrees of detail, how the war was fought on the African continent, outlining strategies and tactics, and main frontlines and battles.

36 CM1:176 (See code Table 1).

37 CM1:49 (See code Table 1).

38 CM1:176 (See code Table 1).

39 CM1:49 (See code Table 1).

40 NM3:47 (See code Table 1).

41 NM3:58 (See code Table 1).

Some of them, such as the Francophone textbook by Hatier, present maps of Africa, distinguishing neutral countries, the colonies of the Allies, and German territories, and showing troop movements and attacks. The same textbook presents an overview of battles fought in Africa, including a timeline of Germany's defeats in each of its former colonies.⁴²

The authors of this textbook dedicate a few lines to each of the war fronts in Western, Southern and Eastern Africa, respectively. They start by reporting the quick surrender of the "small and badly defended" Togo in West Africa, and speak of the tougher resistance presented by Cameroon until the retreat and surrender of German troops.⁴³ The Cameroonian textbooks themselves elaborate on the course of the war in this country, indicating that the "German resistance was very stiff" and that the Germans, although outnumbered, were "not easily defeated" in Cameroon.⁴⁴

The Francophone textbook goes on to report South Africa's conquest of German South West Africa on behalf of Britain.⁴⁵ A Namibian textbook itself recounts how, after an initial phase during which "the Germans and South Africans seemed to be equally courageous and skilled in war," "South Africans ... slowly began taking over every corner of the colony".⁴⁶ This same textbook mentions the fate of German prisoners of war in Namibia after the defeat of German troops by South African forces – of which no mention is however found in the South African textbooks themselves. The book explains that in Lüderitz, "the whole civilian German population was captured and sent to South Africa to be interned", condemning this as "an illegal act under international law since only soldiers can be interned in this way".⁴⁷

The Francophone textbook finally describes the long guerrilla campaign that was conducted by German East Africa (Tanganyika) when confronted with "the strength of its French, British, Belgian and South African opponents". The authors underscore the great military success of the guerrilla tactic by highlighting that, "at the time of the armistice of Rethondes [which officially ended the war], the colony remained undefeated".⁴⁸

The experience of war in Central Africa, an area that had not been spared by WW1, appears to be largely neglected in the overview presented in the

42 CI1:66-67 (See code Table 1).

43 CI1:66 (See code Table 1).

44 CM1:50-51 (See code Table 1).

45 CI1:66 (See code Table 1).

46 NM5:64-65 (See code Table 1).

47 NM5:64 (See code Table 1).

48 CI1:66 (See code Table 1).

textbooks from outside this region. In relation to this region's war involvement, a Rwandan textbook itself speaks of the "insignificant" German efforts against the offensive launched by the numerically superior Belgo-Congolese forces, explaining that "in no time the Congolese forces had reconquered the Lake Kivu" after Germany's invasion.⁴⁹ Similarly, a Congolese textbook reports the "crushing superiority" of the Allies in this part of the world.⁵⁰

Remarkably, in the description of the battles fought on African soil, it is, at times, the Europeans, notably "the Germans, the French, the British and the Belgians", who appear as the main agents in the fighting. At other times, it is the colonies themselves that are presented as the protagonists – who fought, resisted and surrendered.

Africa's war efforts: The participation of Africans in WWI

In describing Africa's involvement in World War 1, the African textbooks analysed typically highlight the indigenous population's direct and multifarious participation, willing or not, in a war that had reached Africa's soil.

Across the textbooks, different nuances are used to recount the entry of African colonies into the war. One textbook from Tanzania, for instance, states that people in the colonies had "joined" [emphasis added] the war to "support" and "protect" the colonial masters.⁵¹ This particular formulation, including the use of the active voice, to describe Africans' involvement in WWI on the side of their respective "métropoles" leaves room to infer the colonies' voluntary participation in the war efforts of colonial European powers. Hinting at a certain level of pressure to engage in the war, one South African textbook explains that people in territories that were part of colonial empires were "expected to help".⁵²

Elsewhere an emphasis is placed on the exploitative and opportunistic nature of the employment of Africans in a war that was not theirs. According to an Ethiopian textbook, "colonial powers 'used' Africa's resources and Africans to support 'their' war efforts" [emphasis added].⁵³ Similarly, a Namibian book explains that "the colonies... also suffered, as the colonisers used their raw

49 RW2:78 (See code Table 1).

50 DRC2:165 (See code Table 1).

51 TZ2:87, 91 (See code Table 1).

52 SA6:158 (See code Table 1).

53 ETH1:118 (See code Table 1).

materials and people for the war”.⁵⁴ The authors of the Francophone textbook by Hatier echo the argument on the exploitation of the colonies in a foreign war by suggesting that “to the African combatants, the war was a ‘matter of the whites’: it did not concern them directly; and many had a poor understanding of the stakes”.⁵⁵ One Rwandan textbook further underlines the forceful and involuntary nature of African participation in WW1, stating that “both sides ‘forced’ Africans to fight for them” emphasis added.⁵⁶ Several schoolbooks add that Africans were not only forced to fight “for” the European powers, but also forced to fight for them “against each other”, thus affecting relationships between neighbouring African countries at the time. A Tanzanian textbook explains that “the British, French and Belgian colonies were fighting against the German colonies”, and that Tanganyika, more specifically, “‘had to’ fight against Kenya and Uganda that were under the British rule” emphasis added.⁵⁷

In describing Africans’ involvement in WW1, the textbooks generally refer to the massive recruitment of hundreds of thousands of Africans who “fought alongside their colonial masters”, either on African soil or in Europe,⁵⁸ as soldiers, as “carriers of heavy war loads”,⁵⁹ or as “scouts, guides and interpreters”, “carrying out the sabotage of facilities” and “obstructing the enemy party from making use of their land or any available resource like water” – thus critically contributing to the destruction of their own or other peoples’ country.⁶⁰ Stressing the important, although subordinate, role of Africans in the war efforts, a Congolese textbook emphasises that “the so-called French, Belgian and British troops, put in lines, consisted of African recruits, except for the officers”.⁶¹ Similarly, a Cameroonian textbook explains that “in some areas like in Togoland, they did the fighting alone, though under European command”.⁶²

The Francophone textbook by Hatier draws particular attention to the methods of recruitment in Africa. It points especially to the frequent use of force for this purpose, explaining that “recruitment, in some regions, such as in Ivory Coast, took the form of real man-hunting”.⁶³ In a section on “Africa

54 NM1:4 (See code Table 1).

55 CI1:66 (See code Table 1).

56 RW1:51 (See code Table 1).

57 TZ2:92, 87 (See code Table 1).

58 CM1:177 (See code Table 1). Across the textbooks, different figures are provided as to the exact number of Africans who participated in the war effort.

59 RW2:74 (See code Table 1).

60 CM1:51 (See code Table 1).

61 DRC2:165-166 (See code Table 1).

62 CM1:177 (See code Table 1).

63 CI1:66 (See code Table 1).

in the war”, this textbook reports an extract from a colonialist novel published in the early 1920s, titled *La Randonnée de Samba Diouf*, telling the story of a young Senegalese who was forcibly mobilised to fight in the European trenches in support of France’s war efforts. The textbook reproduces a central scene in the novel, in which the colonial administrators demand that local chiefs provide a quota of men – a collaboration omitted in other African textbooks, – and motivate the villagers by presenting their participation in the war as a form of “gratitude” for the “bienfaits” of French colonisation, including freedom from war and slavery, and by promising advantages to the recruits.⁶⁴

The Francophone textbook also draws attention to the hardship suffered by the tens of thousands of African recruits that were sent to Europe to fight and die in the trenches, and highlights the bravery of these soldiers by suggesting that the hardship they experienced during the war was no reason for them to surrender. Its authors emphasise that “everywhere their courage and loyalty aroused the admiration of their officers”.⁶⁵ Similarly, one Cameroonian textbook stresses that “Europeans’ respect for Africans increased after watching the bravery with which the Africans fought in the war”.⁶⁶

Some textbooks further underscore the fact that, although recruitment became widespread in Africa, concerns existed in Europe about waging war in the colonies and employing African troops for fear of compromising the authority of the white people. A Rwandan teacher guide explains that such concerns were based on a wish “not ... to expose the faults and weaknesses of the white man to the Black people” because “the future of colonial Africa depended on the esteem of the Black people towards Europeans”. The authors suggest that “the white man would not in any case be seen to be defeated or confused” and that “at all costs the Black people ... should never be given an opportunity to defeat or kill white people”.⁶⁷

The role of local communities: A courageous war effort between loyal collaboration and patriotic resistance

Several textbooks, which address WW1 as part of national history, elaborate on the specific position and role of the country’s own people in

64 CI1:61 (See code Table 1).

65 CI1:66 (See code Table 1).

66 CM1:178 (See code Table 1).

67 RW2:74-75 (See code Table 1).

the war opposing European powers. Rwandan and Tanzanian textbooks, for example, refer to the collaboration of their respective country and people with Germany. Congolese and South African textbooks instead exalt the role of their respective soldiers in support of the Allies wherever they were needed, telling stories of bravery, heroic sacrifice, and great loss, and honouring the fallen. Namibian and Mozambican textbooks, for their part, focus on the local opposition and resistance against their respective colonial administration during WW1. Finally, Cameroonian textbooks mention internal divisions among the colony's peoples as they sided with different camps.

Loyal support to the métropole

The examination of textbooks from countries that had fought on either side of WW1 found a frequent emphasis on the loyal support given by the former colonies to their respective *métropoles* and their allies during the war.

With regard to cases of collaboration with Germany, Tanzanian textbooks mention that “Tanganyika fought on the side of the colonial masters, defending the Germans”,⁶⁸ and speak of the role of local soldiers, the *askari* – African troops whose role in WW1 is greatly present in Tanzanian public memory as manifested in the “Askari Monument”, a famous statue located at the very centre of downtown Dar es Salaam, former capital of German East Africa. Rwandan textbooks also provide details on the loyal collaborative role of Rwandans on Germany's side, maintaining that King “Musinga did all that was possible to help Germans” by supplying soldiers and foodstuffs.⁶⁹ When further recounting the surrender of Rwandan troops after the conquest of Kigali by the Belgians, a Rwandan teacher guide highlights a general sense of nostalgia for the time of German presence in the country, suggesting that, “when the Germans left the country, they were still well appreciated, as a whole, by the population” and that “King Musinga, in particular, still longed for his friends, the Germans, until his last days”.⁷⁰

A perhaps even stronger emphasis on the loyal support given to the former colonial masters during the war was found in textbooks from countries that had fought on the side of the Allies. In textbooks from the DR Congo, the Congolese vital contribution to military operations and successes in Africa occupies a prominent place in the narrative of the war – a contribution the

68 TZ1:2-3 (See code Table 1).

69 RW3:79 (See code Table 1).

70 RW3:80 (See code Table 1).

memory of which is ingrained in the names of the streets that run through Congo's capital Kinshasa, a town which also recently saw the establishment of a memorial at the round-about of *rue Force Publique* [the colonial army] to pay tribute to the Congolese war veterans. Congolese textbooks, perhaps more than any other, take pride in the role of the colonial army of a "thriving" Belgian Congo in defending the country's territory from enemy attacks through which German troops had violated Belgium's pledge for neutrality, as well as in assisting, in important ways, the Allies on the African Front. One of the textbooks celebrates Congolese achievements on the battlefield, recounting that, during WW1, "the Force Publique succeeds not only in opposing the invaders but also in helping the British in the East, where it gains the victory of Tabora in 1916 ... and in helping France in Cameroon ... where it participates in the taking of Yaoundé (1916)".⁷¹

A textbook from Sierra Leone also briefly mentions the loyal support of the country, and more specifically of its dominant community, the Krio, given to the British colonial rulers, through the recruitment of "the King's Own Creole Boys" who were called upon "to fight, and if possible die, for our 'Gracious King and good old England'".⁷² Across the border, a textbook from Liberia, which together with Ethiopia was the only free African country at that time, hints at Liberia's declaration of neutrality and its later participation in WW1 as a result of persuasion by the United States, Liberia's closest ally, upon its entry to the conflict in 1917. Conveying a sense of limited agency of Liberians in taking this decision, the author simply states that Liberia "was persuaded by America to enter the war and so she did".⁷³

The South African textbooks, for their part, stress the loyal and committed involvement of this former settler dominion in WW1 by highlighting the mass voluntary participation of over 160 000 South Africans in the war and their deployment in South West and East Africa and in the trenches on the Western Front on the side of Britain, and this despite the resistance of some Afrikaners to fighting on the British side due to having fought against them only a decade earlier in the South African War.⁷⁴ Stressing the contribution of non-white South Africans as well, one textbook emphasises that at the time "the government did not want to give weapons or military training to black

71 DRC1:129 A similar focus can be found in DRC2:165 (See codes Table 1).

72 SL1:168 (See code Table 1).

73 L1:71 (See code Table 1).

74 One Namibian textbook refers to the decision of South Africa's Boer leaders to support Britain as "surprising", and traces this support to the Afrikaners' "grateful[ness]" towards the "remarkably generous [British] victors" and to their loyalty, admiration and confidence towards "the mighty British Empire". NM5:63-64 (See code Table 1).

soldiers” and that, in spite of this, “more than 80 000 black South Africans volunteered for service in non-fighting roles” as recruits in the South African Native Labour Contingent (SANLC). The textbooks further report two iconic events that tragically marked South Africa’s heroic participation in WW1 and the supreme sacrifice and exceptional acts of bravery of both white and black South Africans fallen while serving overseas. They mention the valour and victory of (white) South Africans at the “fierce” and costly Battle of Delville Wood in 1916, “one of the great battles on the Western Front”, which was fought as part of the allied offensive on the Somme. They also mention the “tragic” sinking of the troopship *SS Mendi* by a British vessel in the English Channel in 1917 and the death of hundreds of (black) South Africans, highlighting that “the ship which caused the accident did not even stop to pick up survivors” and underscoring the troops’ “bravery as they faced death”. Once again showing their uniqueness across Sub-Saharan Africa, in relation to these and other tragedies of WW1 South African textbooks singularly address the issue of remembrance, indicating the existence of memorials, memorial services, exhibitions, as well as poems, songs and oral tradition to honour the soldiers and their heroic acts.

Betrayal and resistance

The above mentioned emphasis on African attitudes of loyalty towards the colonial masters during WW1 starkly contrasts with the picture depicted in textbooks from other countries, which instead focus on reporting cases of desertion and betrayal in the rival camp of the conflict. This is the case in one textbook analysed for Namibia, which refers to the role of this colony’s local population in a corner of Africa where, as the textbook by Hatier points out, “the white” had refused to “employ black soldiers because they feared treason”.⁷⁵ This Namibian textbook mentions the notable position of the Herero, a community which a few years earlier had been victim of what is today widely considered to have been the first genocide of the twentieth century. The authors recount that the Herero “deserted their German employers” while chief “Samuel Maharero sent his best Herero soldiers to help the South Africans”. In a rather emotive tone, the authors then imagine how “it must have been a special moment for the Herero to see their enemies defeated”

75 CI1:66 (See code Table 1).

when they “saw the German flag come down over Windhoek” following their defeat.⁷⁶

Similarly, a textbook from Mozambique, a country whose peoples and resources were mobilised to support Portugal’s war effort, focuses on two iconic instances of anti-colonial resistance that took place in 1917 and which were sparked by Portugal’s involvement in WW1. Its author describes the unprecedented rebellion triggered by Portugal’s victimisation of the Barue peoples in 1917 – a revolt caused by the introduction of compulsory, non-remunerated and abusive labour to build a roadway in Barue territory for the purpose of recruiting thousands of African soldiers and carriers to fight in German East Africa. Against the backdrop of increased exploitation, oppression and abuse, and of a loss of the active population that led to grave famines, the textbook recounts how, as “a great example of patriotism”, local internal divisions at that time were put aside to fight and “liberate the homeland, expelling the Portuguese and those who helped perpetuate the colonial system in the area”. It underscores the “prowess” of the Barue rebellion, emphasising that its defeat was only possible following Portugal’s alliance with “angoni mercenaries”, who “impos[ed] much terror to the orders of the colonial governor”. Besides this most prominent case of anti-colonial resistance in the country, the textbook refers to the strike in Lourenço Marques, unprecedented in the history of the labour movement, that took place in the same year within the context of war-related famine and inflation and which was violently suppressed.⁷⁷

A nation divided: Between loyalty and resistance

While the Namibian and Mozambican textbooks mentioned above emphasise the unity of local populations in their struggle against colonial rulers during WW1, one textbook in Cameroon indicates a difference in the position held by various local communities at the time, explaining that “the various tribal groups in Cameroon that were either allies or enemies of the Germans before 1914 found themselves fighting either for the Germans or for the Allies”. The author emphasises that this difference of position among Cameroonians meant that “during battles, indigenes were killing indigenes on the enemy side”, thus adding to the tragedy of this war for the local population.⁷⁸

⁷⁶ NM5:66 (See code Table 1).

⁷⁷ MOZ1:20-23 (See code Table 1). The textbook also refers to miners’ strikes in South Africa that took place against the backdrop of WW1.

⁷⁸ CM1:51(See code Table 1).

The war aftermath: The effects of WW1 on Africa

Having outlined the causes and course of WW1, the textbooks finally draw attention to the far-reaching consequences of this war on Africa and its people, both socio-economic and political.

Socio-economic consequences

The textbooks highlight, first of all, the cost of a war that was imposed on the continent. They stress the massive loss of life of native people, both soldiers and civilians, although few estimates are provided of African victims of fighting, famine, and disease. A passage in a Congolese textbook is particularly telling of the human cost of the war. After mentioning the victory of the Allies over Germany, the authors affirm that “this victory was won at the price of enormous suffering endured by the African people. ... Many were killed, the survivors returned injured, mutilated”.⁷⁹

As part of their depiction of the human costs of the war, several textbooks mention the displacement, and the consequent separation of families, caused by WW1. The Rwandan teacher guide, for instance, explains that many had left their villages “for fear of missiles and to run away from the obligation and burden of carrying war materials”.⁸⁰ A Kenyan textbook briefly refers to people’s flight from imposed conscription in a section on the biography of Kenya’s first president, Jomo Kenyatta, who, in his early life, had “escaped from the forced recruitment” imposed by the British on his community, the Agikuyu, by taking refuge among the Maasai.⁸¹

Various textbooks further draw attention to the material costs of the war and the consequent beginning of a period of “crisis for African economies”.⁸² They mention the widespread destruction of property and facilities, including homes, schools, hospitals, farms, and roads,⁸³ as well as the decrease of production suffered in the colonies due to the burning of farms, plantations, and mines, and to the recruitment of Africa’s most active population, which

79 DRC2:165-166 (See code Table 1).

80 RW2:75 (See code Table 1).

81 KN1:146 (See code Table 1). One Cameroonian textbook refers to a special case of displacement during the war in the country, where thousands among the “strong German supporters such as Charles Atangana alongside many Beti Chiefs, escaped with the Germans to Fernando Po” just before the colony surrendered. CM1:52 (See code Table 1).

82 CI1:66 (See code Table 1).

83 One Namibian textbook, for instance, indicates the destruction inflicted by retreating German troops in Namibia, stressing that “as the German troops fell back, they poisoned the water points and blew up the railway lines” in order to prevent the enemy from using this crucial infrastructure. NM1:105 (See code Table 1).

was sent to the war front, in combination with reduced volumes of African export to Europe due to the latter's decline.⁸⁴ A few textbooks mention serious food shortages as one of the gravest consequences that derived from the destruction and decrease of production, and which had caused many deaths across Africa. Rwandan textbooks refer to the "terrible" *Rumanura* famine, which had been provoked by the destruction and the suspension of cultivation "by the order of the German command in order to deny cover to [the] enemy".⁸⁵ The Sierra Leonean textbook, for its part, mentions the great frustration among the colony's population due to the food shortage and the consequently increased price of basic necessities following the massive conscription of young farmers.⁸⁶ According to a Tanzanian textbook, WWI had also resulted in a more "intensive exploitation of the African people ... to overcome war losses" in Europe. African people had been reportedly subjected to "more forceful taxation and forced labour" and increased "land alienation". The book explains that "many people lost land which was given to the whitemen in order to grow cash crops needed highly in Europe to build their economies". The author mentions the example of the so-called soldier settler scheme in Kenya, "which encouraged the white soldiers to occupy land and set up farms".⁸⁷

While elaborating on the substantial material costs of the war suffered by African colonies, some textbooks recognise the economic benefits deriving from the war. The author of a Cameroonian textbook mentions the development of local industries during the war (such as the coal industry), and the increased circulation of money in society after the return of African recruits from Europe, who, according to the textbook, "were paid highly".⁸⁸

Political consequences

The African textbooks analysed often outline some of the political consequences of WWI for the continent. Among them is the new scramble for Africa which took place at the end of the war and which affected Germany's former colonies in particular as it was ratified in the Treaty of Versailles of 1919. The textbooks typically present a list, an overview or a map of the

84 See for example: TZ2:93; CM1:52, 177-178 (See codes Table 1).

85 RW2:75 (See code Table 1).

86 SL1:168 (See code Table 1).

87 TZ2:93 (See code Table 1).

88 CM1:177. On the positive impact of WWI, see also ANG1:43 (See code Table 1).

division of the territories among the victors of the war on the African Front.⁸⁹ In recounting the redistribution and reorganisation of African territories, several schoolbooks, such as one from Namibia, underscore the undemocratic nature of this action, highlighting that “the indigenous African people of these colonies were never asked their opinion”.⁹⁰ A Cameroonian textbook adds that the map of Africa was redrawn in an arbitrary manner, whereby the partition of certain African territories among European powers had separated certain communities, such as the Ewe of Togo.⁹¹ In the case of Cameroon and Rwanda, the textbooks also mention the territorial losses imposed on the respective country as a result of this new repartition, a seizure portrayed in Rwandan textbooks as an outrageous attack on Rwanda’s territorial integrity.

While the war had resulted in the “expulsion of the Germans” from Africa, according to most textbooks the subsequent change in terms of governance did not emerge as hoped for by the African people. The textbooks typically emphasise that, according to the principles of the League of Nations,⁹² the victors, acting as mandatory powers of people who were considered “not capable of governing themselves”,⁹³ “should not”, as pointed out in a primary school textbook from Cameroon, “treat the territories as colonies”, but “contribute to the[ir] development ... and lead them to independence”.⁹⁴ In an indignant tone, one Namibian textbook comments on the Europeans’ paternalistic and patronising attitude towards colonised people, arguing that “it was insulting to say that they were not ready for independence” and exclaiming that “the various chiefdoms such as the Herero had been independent chiefdoms for centuries!”⁹⁵

The textbooks usually suggest that the League of Nations’ principles, however condescending, had not been respected as expected by the colonies. Textbook descriptions of the nature of governance in the aftermath of WW1 commonly underscore a general dissatisfaction in the colonies with a continuation or even a worsening of the previous state of affairs under German rule. This criticism is found in textbooks from all former German colonies.

89 The fate of Ruanda-Burundi after the war is often forgotten in textbook narratives across Africa.

90 NM5:67 (See code Table 1).

91 CM1:177 (See code Table 1).

92 With regard to the League of Nations, reported views vary, from its establishment being understood as “the most positive achievement” of the peace settlement, as suggested in a Cameroonian textbook (CM1:289), to this institution being described as a mere “instrument for the defense of the interests of the victorious powers”, as found in a Mozambican textbook (MOZ1:41) (See codes Table 1).

93 RW2:85 (See code Table 1).

94 CM3:75 (See code Table 1).

95 NM5:67 (See code Table 1).

A Cameroonian textbook, for instance, stresses the lack of fundamental change after Germany's departure by suggesting that, under the smokescreen of international altruism, the "colonies of the defeated nations ... were seized and administered like colonies by the victorious powers under the cover of the mandate of the League of Nations".⁹⁶ According to the author, what was different, and thereby greatly disrupted the life of Cameroonians, was the establishment of two new systems of administration and education, the introduction of two new dominant languages, the establishment of barriers to trade and freedom of movement, and the division of ethnic groups as a result of the partition of the territory by France and Britain after the war.⁹⁷ Similarly, a Tanzanian textbook, after having explained that during the war the Germans had been "forced out and replaced by the British", affirms, without providing much detail, that "the British colonial government did not differ very much from that of the German colonial government".⁹⁸

In Rwanda, the tone in relation to the *de facto* substitution of colonial masters in the country appears particularly virulent. One textbook explains that, following the country's military "conquest" and "occupation" by Belgium, during which Rwanda was subjected to a military regime which enforced food requisition and the recruitment of people as carriers, colonial domination had continued under the Mandate period, during which Belgium had officially become Rwanda's "Trustee".⁹⁹ A Rwandan primary school textbook comments that, "Trustees were supposed to rule their territories for the benefit of the local people. They were also supposed to be preparing the territory for independence. The Belgians did neither of these two things."¹⁰⁰

Another Rwandan textbook refers to the introduction of "cruel" forced labour by the new rulers, unequivocally adding that, "during Belgian colonial rule, the White man was the absolute master and the Black man was the slave and the servant".¹⁰¹ It also points to a "very bad" relationship between the "occupying authorities" and the Rwandan royal court, arguing that the Belgians, who had engaged in a "progressive tearing apart of the monarchy", "had never liked [King] Musinga", among other things because "he had fought alongside the Germans against them" during WW1.¹⁰²

96 CM1:288 (See code Table 1).

97 CM1:54-55 (See code Table 1).

98 TZ1:4 (See code Table 1).

99 RW3:81, 84 (See code Table 1).

100 RW1:46 (See code Table 1).

101 RW3: 87 (See code Table 1).

102 RW3:82, 87 (See code Table 1).

In Namibia as well, the dominant narrative found in the textbooks negatively assesses the post-war political transformations experienced in the colony. Namibian textbooks describe in detail the conditions under which South Africa administered the country after having fought and defeated German troops there on behalf of Britain. They thereby emphasise, in a typically emotive tone, South Africa's failure to fulfil its obligation towards the Mandate and point to the worsened situation of Namibians as a result of this political change brought about by WW1. One textbook underscores that "the League of Nations expected South Africa to govern South West Africa for the benefit of all of the inhabitants", but that "the reality ... turned out to be very different".¹⁰³ The authors of another Namibian textbook indicate among such expectations a commitment on the part of the mandatory power to "improve the economy and living standards of everyone living in Namibia", "not to dominate or exploit Namibia", and to "prepare the country for independence".¹⁰⁴ Assessing South Africa's performance in fulfilling such obligations, yet another Namibian textbook argues that "South Africa's mandate over South West Africa did not significantly improve matters for the indigenous people overall, and in many respects it actually made matters considerably worse".¹⁰⁵ One book explains that, in its report to the League of Nations ("the Blue Book"), "South Africa described how badly the Germans had treated the local people. The Blue Book on Namibia created the impression that things would be different under South African rule. People would get back their land... Instead, South Africa ruled Namibia as if it was part of South Africa. Rather than giving people land, the South Africans took more land from Namibian community".¹⁰⁶

Along similar lines, yet another textbook bitterly affirms that, "The South African government never intended to free the Namibian people from colonial rule. From the very beginning its aim was simply to replace German colonial rule with its own. It never made any attempt to right the wrongs done by the Germans ... it continued the oppression and exploitation that the Germans had introduced and added new exploitative measures."¹⁰⁷

This textbook speaks of South Africa's "absolute", "oppressive", "unfair", "harsh", and "cruel" rule.¹⁰⁸ The Namibian textbooks all draw considerable

103 NM1:105 (See code Table 1).

104 NM3:59 (See code Table 1).

105 NM5: 69-70 (See code Table 1).

106 NM3:59-60 (See code Table 1).

107 NM4:47 (See code Table 1).

108 NM4:44, 52, 53, 55 (See code Table 1).

attention to the increased land expropriation and the forced removal of Namibians in favour of white settlers, the establishment of racial segregation through an expanded reserve system and a strict control of movement of the indigenous population, which was confined to underdeveloped areas, and the encouragement of a system of migrant contract labour.¹⁰⁹ They explain that any resistance was violently quashed. One textbook takes again the example of rebellious Herero, whose “dwellings were set on fire, their cattle confiscated and their crops burnt”.¹¹⁰ Having provided such information, one of the activities foreseen in the various textbooks with the objective of developing empathy asks pupils to imagine how they would feel about the Mandate and about South African rule in their country if they were living in Namibia in that era.¹¹¹ They also encourage pupils to understand the legacy of racial segregation in the area where they live today, and to reflect on how Namibia would have looked nowadays if it had not experienced German and South African rule.¹¹²

Not dissimilarly from former German colonies, textbooks from countries that had fought on the side of the Allies, such as Francophone West Africa, DR Congo and Sierra Leone, highlight the deep disappointment of the colonial subjects with the lack of improvement in their life in the colony despite their “meritorious”¹¹³ effort in the war and the great sacrifice they had made to support the colonial masters in their darkest hours. The textbook by Hatier describes the loyalty demonstrated by “black soldiers” as a testimony of their confidence in a prospect of “softened” colonial regime which they would gain in return.¹¹⁴ It highlights that this hope, however, was soon trampled when these soldiers failed to receive the expected benefits in the wake of the war.¹¹⁵ A Tanzanian textbook stresses that colonial recruits were in fact “oppressed and disregarded when they got home”.¹¹⁶ Similarly, the Sierra Leonean history book underscores that colonial subjects had been left disillusioned and embittered after the war. Its author explains that Sierra Leoneans had supported the European war effort “in the hope that they would be given a greater say in the management of their own affairs after the end of the war” – a hope “heightened by the principles of liberal democracy and self-

109 NM1:105-106; NM3:61-68; NM4:52-65; NM5:69-72 (See codes Table 1).

110 NM5:71 (See code Table 1).

111 NM3:59 (See code Table 1).

112 NM4:64 (See code Table 1).

113 ANG1:50 (See code Table 1).

114 CI1:66 (See code Table 1).

115 CI1:68. See also ANG1:40 (See codes Table 1).

116 TZ1:13 (See code Table 1).

determination propounded by President Woodrow Wilson of the USA and Prime Minister David Lloyd George of Britain”.¹¹⁷ The author comments that, “after the war, however, the British Government put political questions aside and instead concentrated on the economic exploitation of the African colonies”. The Congolese textbooks, for their part, suggest that, although life had improved to some extent after WW1, particularly in the domains of education and health, colonial policies had continued to “ignore the freedom of the individual”, persisting in subjecting Congolese people to strict control of movement to support a project of racial segregation, the disrespect of which was severely punished with forced labour.¹¹⁸

In relation to political issues, the textbooks also widely highlight the deep impact of the war experience on the growth of African nationalism and the struggle against colonial rule. They portray WW1 as having shaken colonialism worldwide, and specifically across Africa, by laying bare the fallible and “the inhuman character of the so-called civilized”,¹¹⁹ as well as by favouring an awakening among colonised people as a result of the suffering imposed by the war and a consequent revival of local anti-colonial resistance movements and revolts – uprisings which, according to a Congolese textbook, were repressed “to the uttermost”.¹²⁰ According to a Cameroonian textbook, this “spirit of self-realisation” among Africans had resulted in attempts “to bring back the dignity and the pride of Africans after several centuries of abuse”.¹²¹ The textbook by Hatier points out that “the war had made the white men lose their prestige and the myth of their invincibility”, concluding that, “in this sense, WW1 was a major turning point in the history of Black Africa”.¹²² Similarly, a Namibian textbook argues that “people now saw that Europe was not superior to the rest of the world” and not therefore entitled “to force European culture and rule on the colonies”.¹²³ A new era had dawned in Africa.

117 An Angolan textbook emphasises the general disappointment felt across Sub-Saharan Africa with the contradictions and inconsistent application of this principle worldwide as manifested in the gaining of independence by a group of Arab countries in Northern Africa. ANG1:41 (See code Table 1).

118 DRC1:130-131; DRC2:168 (See codes Table 1).

119 ANG1:41 (See code Table 1).

120 DRC2:166 (See code Table 1).

121 CM1:179 (See code Table 1).

122 C11:68 (See code Table 1).

123 NM1:3 (See code Table 1).

Discussion

The analysis of African textbooks and their dealing with WW1 presented in this article offers a window on the place of WW1 in African public memory and on the specific knowledge, skills, values, and attitudes considered important in contemporary African societies when teaching younger generations about this watershed in history. Above all, the analysis showcases efforts, found across African textbooks, to re-claim and re-centre local historical agency, experiences, and views, while also pointing to the possibility to better valorise and preserve this part of national, African and world heritage – too often neglected and marginalised.

The analysis provided illustrations of efforts made within African education systems to assert Africa's integral place in history and to advance an understanding of the world among pupils which involves an appreciation of this continent's past and its contributions to world history and civilisation. It showed examples proving a determination shared by African societies to thus transmit knowledge that challenges the inadequacy of a predominantly Western-centred historiography, which postcolonial theories have long brought attention to in their criticising of a traditional treating of Africa, and the non-Western world in general, as peripheral or outside mainstream historical analysis. In their challenging of traditional paradigms, textbook narrations of WW1 appear to simultaneously fulfil an important political and social function as they were discovered to widely celebrate African nationalism. The analysis found the narratives of World War I reported in African textbooks, though meagre, to be generally framed within a nationalist and anti-colonial discourse inscribed in a nation-building project to which schools across the young post-colonial African states tend to subscribe.¹²⁴ The textbook narratives of WW1 exhibited a common vocabulary of bravery, sacrifice, and enormous suffering and loss, at times showing nationalist and Africanist overtones and evoking strong emotions, including a sense of victimhood at the hands of former colonial rulers combined with feelings of national and African pride and anti-colonial sentiments, factors which appear central in promoting collective identities.

In identifying these trends, the analysis also calls attention to the limits of teaching such grand-narratives, arguing that the necessary re-claiming of African experiences and views of WW1 in contemporary textbooks, though

¹²⁴ D Bentrovato, "Narrating and teaching the nation: The politics of history, identity and education in the Great Lakes Region of Africa", Ph.D, Utrecht, University of Utrecht, 2013.

empowering in its distancing from Eurocentric perspectives, appears, however, to continue disempowering young Africans by predominantly aligning to what the father of critical pedagogy, Paulo Freire, refers to as “banking education”, namely a type of education based on the top-down transmission of dogmatic knowledge – widely observed in this study and which Freire considers an oppressive instrument of manipulation and domination used to reinforce hegemonic structures and people’s feelings of dependence and passivity.¹²⁵ The study points to a prevalent reality whereby current approaches to teaching history have largely come at the expense of a critical methodology able to encourage pupils’ reflection on the past and its legacy in the present, and to broaden perspectives and challenge single and Manichean narratives of glorification and victimisation, the downsides of which are notoriously known in history.¹²⁶ In this respect, as this study illustrated, South Africa, especially, represents an exception. Its textbooks were found to offer a critical appraisal of WW1 through an analysis of sources, evidence, multiple perspectives, and histories from below, and through exercises in historical thinking, prompting pupils to gain a deeper understanding of the past and of current realities to help younger generations shape the future. Of particular notice are the efforts made in South African textbooks to ensure the significance of history for young people’s lives, notably through their use of the study of WW1 as an entry point for discussions on conflict and human rights, two topics which are of great relevance for Africa and for the world today. Ostensibly, it is such practices which promise to teach important and meaningful lessons for posterity in a world which continues to be threatened by perpetual wars and large-scale injustice and abuse.

Conclusion

This article, written as we commemorate World War I, offers an opportunity to reconsider current trends in the ways in which we teach about one of the most tragic events of human history, and to reflect on promising orientations and directions for the future. Above all, the analysis pointed to a widespread asserting of local historical experiences and perspectives in African textbooks as integral part of an apparent generalised wish to provide younger generations with a “usable past” which could nourish a sense of collective identity and memory, and of ownership over history. At the same

125 P Freire, *Pedagogy of the oppressed* (New York, Herder and Herder, 1970).

126 On the worldwide perilous politicisation of history and of its teaching, see among others, M Ferro, *The use and abuse of history, or how the past is taught to children* (London, Routledge, 2003).

time, the analysis pointed to lost opportunities to use the study of WW1 to teach deeply meaningful lessons that could foster historical understanding, critical thinking and multiperspectivity. Such lessons have a critical potential of effectively empowering young people to become active participants in their own learning while also preparing them to constructively respond to contemporary societal challenges. In this respect, more concerted efforts could be made to allow for possibilities of using the study of WW1 to promote much-needed understanding and questioning of war and war-making, and their causes and impact. Similarly, the study of WW1 could provide more opportunities to foster intercultural dialogue and understanding, for instance by strengthening pupils' ability to discern links and parallels between wartime experiences in Africa and other regions of the world, as well as among African regions themselves, making explicit connection and comparison that elucidate commonalities, distinctions, linkages and interactions at the local, regional and global level. Undoubtedly, such and other lessons are opportunities that we, as educators, should nurture and cherish at a time where the need for dialogue and peace remains ever-great.

AN ANALYSIS OF THE VISUAL PORTRAYAL OF WOMEN IN JUNIOR SECONDARY MALAWIAN SCHOOL HISTORY TEXTBOOKS

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Abstract

Visual images are important in textbooks because they are a vital part of the symbiotic relationship with the written text. Most importantly, visual images are essential in history textbooks because they render human experiences less abstract. This article analyses the visual images of women contained in three junior secondary school history textbooks used in Malawi. The purpose being to explore how women are portrayed visually and why they are portrayed the way they are. The article is based on empirical research and employed feminist theory which is premised on the oppression and subordination of women in society. The visual images were analysed quantitatively through visual content analysis and qualitatively using visual semiotic analysis. We argue in this article that women are generally oppressed, under-represented and subordinated in their portrayal in the visual images in the textbooks analysed. As textbooks are authoritative in nature this kind of portrayal can send a certain message about women as historical characters to textbook users. We furthermore argue that our research findings in an African context speak to similar findings in other parts of the world and can for the most part be attributed to similar reasons - the powerful influences of patriarchy on both history and history textbooks.

Keywords: Visual images; History textbooks; Women; Feminism; Content analysis; Semiotic analysis.

Introduction

An old adage has it that a picture is worth a thousand words. Another has it that seeing is believing. What can be gleaned from these two sayings is that visual images – for the purpose of this article we regard paintings, drawings, photos, cartoons, posters, pictures and any other visual depiction as a visual image – are powerful means of communication. This is also the case with history textbooks as visual images are important in its symbiotic interaction

with the written text while simultaneously rendering the abstract nature of the subject more concrete.

Visual images have over the recent decades gained more prominence as the world has in many ways taken a visual turn and many people, including teachers and learners, are no longer experiencing written text as having supremacy over visual images (Harrison, 2003:46-60). Rather, they absorb and process all the visual images they see within a text to create meanings for themselves. In the process visual images tend to articulate more forcefully social and cultural meanings than the written text (Berger, 1989:1-23). In this regard it is a truism that visual images are no longer included in history textbooks merely for decorative purposes but they serve an important educational purpose (Zeegen, 2009:10-16).

The rationale for this article lies in the context of the lived experiences of the first author who had experienced the reality of being a woman, in both education and in society in general, in Malawi. These experiences stretched from Banda to Banda – Hastings Kamuzu Banda who reigned in a dictatorial manner over the country and women from 1964 to 1994 even forbidding them from wearing pants – and Joyce Banda who ruled as the democratically elected president from 2012-2014. Her experience resulted in two questions: How are women portrayed in Malawian Junior Secondary school History textbooks and why are they portrayed the way they are? The article is based on empirical research and employed feminist theory as the theoretical framework. All the visual images in the selected history textbooks were analysed quantitatively through visual content analysis and qualitatively using visual semiotic analysis.

Textbook production in Malawi is controlled by the government through the Ministry of Education. The latter controls the content, production, quality and availability of textbooks in schools. In terms of the production of textbooks, the Ministry of Education is responsible for publishing primary school textbooks by utilising its own employees in collaboration with the Ministry. However, the responsibility for publishing secondary school textbooks is left in the hands of private sector publishers who are guided by the curriculum provided by the government. These publishers commission individuals or teams of writers (preferably local) to write the books and the commissioning publishers concerned simply edit the drafts or manuscripts (Ministry of Education Science and Technology, 2006). The history textbooks we used in this article were published by Longman Malawi and Christian

Literature Association in Malawi.

With regard to authorship of the textbooks, government policy as overseen by the Ministry of Education Science and Technology stipulates that any commercial publisher who develops manuscripts and provides publishing services is the author of the secondary school textbook. However, other publishers include names of individual writers as authors. This explains why two of the books we used in this article have Longman as both publisher and author while one indicated the name of the individual writer as author alongside the publisher. When the books have been produced by the publishers, they go through an evaluation procedure conducted by the Ministry of Education before they are approved for use in the schools. The textbooks that we analysed in this article were all approved by the Ministry of Education. The approved textbooks are announced to the schools and made available in various bookshops. Unlike in primary school secondary schools are provided with several options of approved textbooks from different publishers from which to choose. This means that several textbook titles for each subject can be approved for use in secondary schools and individual schools have the liberty to purchase and use any title from the list of approved texts. Currently there are three history textbooks for the junior level that have been approved for use in the schools.

The article is organised into five broad sections. In the first we introduce and outline the study. In the second we present the literature review and the theoretical framework for the study. This is followed by the research methodology and the presentation and discussion of the findings. In the conclusion we draw the article together.

Literature review

Textbooks are contentious in nature as they are a, "... representation of political, cultural, economic and political battles and compromises" and they are therefore extremely complex (Crawford, 2004:2). As such textbooks are symbolic representations of the world as well as the society in which we live (Sleeter & Grant, 1991:78-109). Issues relating to gender and its depiction in textbooks is part of the complex symbolic representation of the world. Consequently much has been written over the past several decades about the visual portrayal of women in textbooks in general and in history textbooks specifically (O'Kelly, 1983:136-148; Sleeter & Grant, 1991:78-

109; Osler, 1994:219-235; Fournier & Wineburg, 1997:160-185; Clark, Ayton, Frechette & Keller, 2005:41-45; Chick, 2006:284-290; Schocker & Woysner, 2013:23-31).

In a study conducted in 1994, Osler analysed 36 history textbooks used in England by pupils aged 11-14. In her analysis she divided visual images into two groups, photographs and modern sketches and reconstructions. Osler concluded that women were under-represented in both categories. For instance, in every textbook, the number of photographs in which women appeared was less than those containing men. She concluded that the best balanced history textbook had almost twice as many photographs of men as of women and the least equitable texts contained a ratio of 26:1 of men to women respectively (Osler, 1994:219-235). Similarly, in the modern sketches and reconstructions, two textbooks had a ratio of 6:1 of men to women and in one textbook the proportion was 40:1. Even more telling was the fact that over half of the history textbooks analysed did not include any sketches and reconstructions of women. In her explanation of the under-representation and invisibility of women as historical characters Osler (1994:219-235) attributed it to early historians who did not consider topics involving women in their selection of subject matter. Consequently, the roles of women were downplayed visually and in written format. However, what Osler does deny is the argument that a lack of available sources is to blame for the under-representation of women in the visual images used in history textbooks. She rather attributes it to negligence on the part of writers and publishers due to the influence of the male dominated society in which they function. As evidence she points to the modern sketches and reconstructions which publishers use in which they have the liberty to produce reconstructions of the past that could include more women. Despite this opportunity, women are still under-represented in the history textbooks she studied.

Comparable conclusions to those of Osler were drawn by O'Kelly (1983:136-148), in a content analysis of gender role images as depicted in fine art works related to the Gothic, Renaissance, Baroque and Modern periods. She noted that women represented 30% of the subjects in the works of art while men constituted 70%. Furthermore, males made up 60 % of portraits studied.

In a different geographical context, the United States of America (USA), similar findings were found to those of Osler and O'Kelly in terms of the under-representation of women in the visual images in textbooks. In a study of social studies textbooks used in USA schools from grade one to eight,

Sleeter and Grant (1991:78-109) reported that women were represented in fewer visual images than men. More specifically women were depicted in 512 pictures while 855 featured men. Under-representation of women in visual images in USA history textbooks was also illustrated in studies by Clark, Ayton, Frechette and Keller (2005:41-45), Chick (2006:284-290), and Schocker and Woyshner (2013:23-31). In their study of 18 world history textbooks for high school students from the 1960s, 1980s and 1990s in the USA, Clark *et al* (2005:41-45) noted that only 368 pictures of women were named in the captions in contrast to 2167 images of men captioned with names. Similarly, Chick (2006:284-290), who analysed the K – 12 American history textbooks for gender balance, noted that all the three textbooks she studied contained significantly more males than females in the visual images. She reported that in the grade two textbook, there were 31 images of women in contrast to 89 of men, while in a grade 7-9 textbook women comprised 53 visual images and men 185 and a grade 9-12 textbook contained 46 pictures of females and 185 of men (Chick, 2006:284-290). Additionally, Schocker and Woyshner (2013:23-31) who studied one African American history textbook and two mainstream USA history textbooks for their representation of African American women revealed that African-American women were represented in lower percentages than men in the visual images in both sets of textbooks. Specifically, women were represented in only 14.4 % of the images in the African-American themed history textbook. Similarly, the two mainstream American history textbooks comprised women in percentages of 44.6% and 34.1% only.

Although operating in different contexts Su (2007:205-237) in Taiwan, Schoeman (2009:541-556), Fardon and Schoeman (2010:307-323), Nene (2014:100-120) in South Africa and Muravyeva (2006:51-62) in Russia, reported similar results to those found in the USA and Europe about the under-representation of women in the visual and written texts. Schoeman (2009:541-556), for instance, reported that the content in the textbooks she studied under-represented women. This is evidenced by the fact that in the three textbooks she analysed, the ratios of male to female subjects were 22:3, 11:3 and 23:3 respectively (Schoeman, 2009:541-556). Furthermore, Fardon and Schoeman (2010:307-323) observed a similar pattern regarding the under representation of women in the exemplar South African school history textbook they analysed. In this book women were generally absent within the discursive presentation of the text and no reference to female characters was made in the content.

A deeper reading of the literature was also necessary to understand how women were portrayed in terms of roles, activities and characteristics in the visual images in which they actually appeared. The literature reviewed indicated that women were visually portrayed in a variety of roles and activities but the majority of these were stereotypically feminine in nature (O’Kelly, 1983:136-148; Sleeter & Grant, 1991:78-109; Osler, 1994:219-235; Schrader & Wotipka, 2011:68-88; Schocker & Woyshner, 2013:23-31). Only on rare occasions were women portrayed in what can be regarded as stereotypically masculine roles and activities (O’Kelly, 1983:136-148; Sleeter & Grant, 1991:78-109; Osler, 1994:219-235; Schocker & Woyshner, 2013:23-31).

The traditional feminine roles and activities in which women are portrayed in history textbooks were evident in O’Kelly’s (1983:136-148) study covering the Gothic, Renaissance, Baroque and Modern eras. Across these eras women were portrayed as mothers, wives, servants, peasants, seductresses, participants in orgies, victims of rape, singers, dancers, slaves, prostitutes, harem girls and models – all general stereotypical traditional female roles related to domestic work, motherhood and sex objects. Only on a few occasions were women shown in stereotypically masculine roles such as leading soldiers to victory, farming and bartending (O’Kelly, 1983:136-148). Similarly, Osler (1994:219-235), in her study revealed that photographs of women showed them predominantly engaged in domestic roles. For instance, women were portrayed in activities such as child minding and nursing babies, in family portraits with their husbands and children, spinning, working in the kitchen, being punished as scolds and as witches, dancing and as observers of scientific experiments. These activities are more stereotypically associated with women. Osler’s (1994:219-235) study revealed only one woman, Queen Elizabeth I, was shown as a leader. However, a study by Schrader and Wotipka (2011:68-88) in the USA revealed that the photographs in the textbooks they studied portrayed women in a slightly more nuanced manner – not only as victims of war, but also as active community members, factory workers and leaders. There thus seems to be a consensus among the various studies in the way roles and activities of women are reflected in history textbooks. Women are mainly presented in the stereotypically traditional and domestic roles except for in a few exceptional cases where they are portrayed in engaging in activities outside of what is deemed the norm.

At this stage of the review it is necessary to point out that all the studies reviewed, bar the ones by Schoeman (2009:541-556), Fardon and Schoeman (2010:307-323) and Nene (2014), do not deal with the visual portrayal of women in history textbooks in an African context. In addition no study could be located that dealt with the visual portrayal of women in history textbooks in an African context outside of South Africa. This is the niche in knowledge to which this article hopes to contribute.

Based on the literature reviewed, it can thus be concluded that women as portrayed in the visual images in history textbooks are marginalised, and sometimes even excluded all together, as historical characters, under-represented when compared to men, portrayed largely in stereotypical female roles and activities and mostly portrayed with stereotypically female character traits. A common explanation for the particular portrayal of women is the patriarchal view of women in society and hence in history and history textbooks (O'Kelly, 1983:136-148; Osler, 1994:219-235). Tetreault (1982:40-44; 1986:211-262) takes this argument even further and contends that this under-representation can be attributed to the fact that the conceptualisation of history itself excludes women. However, we argue that under-representation of women in the visual images in history textbooks, and how they are portrayed, is a complex problem which could not be explained by one single factor. Consequently our study drew on feminist theory as the theoretical lens through which to conceptually understand the visual portrayal of women in junior secondary Malawian history textbooks.

We drew on feminist theory because the study is concerned with women as the phenomenon of inquiry. This theory was deemed relevant because of its potential to explain the positions of women in society. Although the study does not per se inquire on issues of women in a societal context, but analyses their portrayal in the visual images in textbooks, the way women are viewed in society gets reflected in textbooks because the latter by nature are manifestations of the society they serve. They signify particular constructions of reality and reflect the values and aspirations of the society (Apple, 1991:22-39; Apple & Christian-Smith, 1991:1-21; Foster & Crawford, 2006:1-23).

Feminism is based on a strong belief that women in society are subordinated, oppressed, disadvantaged and treated unequally in comparison to men and that their oppression is not legitimate, natural or justified in any way. The aim of feminism is to change this situation by ensuring equality between men and women (Bryson, 1992:163-241; Kenway & Modra, 1992:138-166;

Code, 1995:13-44; Brooks & Hesse-Biber, 2007:1-24; Hannam, 2007:8-15). However, feminism does not only address issues of justice and equality, but also “offers a critique of male-dominated institutions, values and social practices that are oppressive and destructive” by using gender as a category of analysis (Mannathoko, 1992:71). Despite this general conclusion, some feminists argue that feminism does not only recognise sex or gender as the single source of power that subordinates and oppresses women (Beasley, 1999:62-64; Bryson, 1999:10-27; Hannam, 2007:8-15). As Hannam (2007:12) argues, “some feminists prioritised gender issues throughout their lives, while others shifted their focus on their political interests over time, in some periods prioritising the fight against racism or class exploitation rather than women’s subordination to men”. Therefore, oppression and subordination of women is an intersection of gender, race and class (Bryson, 1999:10-27). Consequently, based on this argument, our analysis of the portrayal of women in the visual images in textbooks will not only be limited to gender but will be extended to issues of race and class. Thus the use of feminist theory provided us with tools for analysing and understanding the portrayal of women in the visual images in the three textbooks studied.

Feminism, however, does not only halt at explaining the subordination and oppression of women but extends further to question and challenge the origins of these social injustices and unequal power relations. As such, feminists hold the conviction that the condition of women is socially constructed, and therefore, it can be changed (Hannam, 2007:8-15). The goal of feminism therefore is to end the subordination and oppression of women and bring social justice and change in their conditions. In this regard, feminism will not only provide reasons why women are portrayed in particular ways in the visual images but will also offer solutions to change the portrayal of women in the visual images in textbooks by ensuring equality. Hence, as Weedon (1987:5-25) argues, feminism is both theory and politics. She asserts that it is a theory because it has a set of beliefs or understandings concerning the cause of the subordination and oppression of women and offers suggestions on how change to bring equality and social justice can be achieved, and, it is political because it is aimed at changing existing oppressive power relations in society in order to achieve equality and justice for women. We will return to this in the discussion section of the article.

Research methodology

The sample for our study consisted of all visual images containing people from three history textbooks which at face value might look dated but which are currently the only books used at junior secondary school level, the final compulsory schooling phase, in Malawi. The textbooks are:

- G Chiunguzeni, *New junior history course 1 & 2* (CLAIM, Longman Malawi, Lilongwe, 2006).
- Author/s unknown, *Strides in history 1* (Longman Malawi, Lilongwe, 2003).
- Author/s unknown, *Strides in history 2* (Longman Malawi, Lilongwe, 2003).

In this study, we refer to the *New junior secondary history course 1 & 2* as Textbook A, *Strides in history 1* as Textbook B and *Strides in history 2* as Textbook C. This was done because it is more succinct for us to refer to the textbooks in this way while blunting any possible bias from us related to specific titles. These approved textbooks, in use across Malawi, were selected based on purposive and convenience sampling because of their relevance and availability for the study.

The data for our study was both generated and collected. It was generated by the publishers who produced the textbooks and collected by the researchers who bought the textbooks from bookshops. In agreement with Nicholls (2003:1-17), we wish to emphasise that attempting research in textbooks is not an easy undertaking because methodologies for analysis are not always well described. Consequently we tried to create workable instruments for analysing the visual images premised on our understanding of content and visual semiotic analysis.

We analysed all the visual images of each textbook separately starting with Textbook A and ending with Textbook C. The content analysis of the visual images was employed quantitatively with pre-set categories that were derived from the literature and the theoretical framework. This was done because with quantitative content analysis, categories for coding data are created depending on the key concepts of the phenomenon under study (Ary *et al.*, 2002; Wilkinson & Birmingham, 2003:67-78; Leavy, 2007:223-248). The instrument had two major categories with criteria under each category to guide us in the coding exercise. These categories were: 1. representation of women in the visual images and 2, the manner in which women are portrayed in the visual images. We began our analysis with the category of the representation of women in visual images. This involved first counting all the visual images

containing people in each textbook and then the visual images that portrayed women. Totals were recorded and the percentages of visual images portraying women were calculated. Additionally, for the visual images featuring women, we counted those that portrayed women only as well those that showed both men and women. Totals were again taken and percentages of visual images that portrayed women only and those that depicted both men and women calculated. The next step was to analyse the number of people in the visual images as well as those of women and men portrayed in each textbook. Totals were again recorded and percentages of women and men portrayed in the visual images calculated for each textbook.

After we completed the analysis of data for the first category, we moved to the second which was concerned with the type of visual images in which women were portrayed. We classified the visual images into single visual images showing one person, pairs and group visual images consisting of three or more people. We also categorised the visuals into those showing women only and those showing both men and women. We first counted the single visual images showing one person as well as those showing women only and men only. Totals were taken and percentages of single visual images of women only and of men only were calculated. Secondly we counted pair visual images depicting two people, then those portraying women only as well as both men and women. Totals were recorded and percentages of pair visual images of women only and both men and women were calculated. Thirdly we counted the total number of group visual images as well as those portraying women only as well as those portraying both men and women together. Finally percentages of group visual images portraying women only and men and women together were calculated.

After the content analysis of the visual images, which was undertaken quantitatively by means of descriptive statistics as explained above, we analysed the visual images qualitatively using visual semiotics. Semiotics is the study of signs in order to derive meaning from them (Hopkins, 1998:139-156; MacCannell, 1999:17-34; Harrison, 2003:46-40; Nelson, 2005:131-143; Rose, 2007:74-106; Parsa, 2012: 844-853). A sign is anything that stands for or represents something and it could be verbal or non-verbal such as written text and sound or visuals such as photographs and images (MacCannell, 1999:17-34; Bulut & Yurdaisik, 2005:46-54; Rose, 2007:74-106; Parsa, 2012: 844-853). Semiotics is able to reveal meaning because signs by nature are made up of two components, the signifier and the signified (Kress &

Van Leeuwen, 1996:1-14; Rose, 2007:74-106; Parsa, 2012:844-853). It is through the systematic study of the signifiers in signs that meanings (the signified) are revealed or disclosed. The signifier is literally an object or word while the signified refers to the meaning or concept the signifier represents (Rose, 2007:74-106; Parsa, 2012: 844-853). Furthermore, meaning in visual semiotics is arrived at through use of denotations and connotations inherent in the images. This is because “signs are also both denotative and connotative” by nature (Parsa, 2012:849). In semiotics, the terms denotation and connotation describe the relationship between the signifier and the signified. Thus a signifier can disclose denotative or connotative meaning, or both, depending on the way the image or sign is made. Denotations give literal meaning of the image while connotations reveal hidden meaning in the sign which may be cultural or ideological (Parsa, 2012: 844-853). Visual semiotics therefore is the systematic study of visual images in order to expose the meaning that the images communicate (Kress & Van Leeuwen, 1996:1-14; Rose, 2007:74-106; Parsa, 2012: 844-853). Using this method we analysed only those visual images which featured women whether as individuals, in pairs with men or women and in groups either with men or women only.

Against this background we could now proceed to explain in detail how we conducted the visual semiotic analysis of the images of women contained in the three textbooks studied. Prior to conducting the visual semiotic analysis we developed an analytical instrument. As Morton (2006:21-37) argues, interpreting images requires the use of a tool which is guided by the background and purpose of the investigation. Since images as signs consist of signifiers and the signified (Kress & Van Leeuwen, 1996:1-14; Rose, 2007:74-106; Parsa, 2012:844-853), we developed an instrument which would enable us to decode the signifiers and signified from the images in order to reveal the meaning implied in them. The instrument had three columns indicating sign (image), signifiers and the signified. The number of rows in the instrument varied depending on the number of visual images in each textbook. For instance, the analytical tool for Textbook A had only two rows because there were only two visual images showing women in this textbook, Textbook B included 23 rows while Textbook C had 11. Therefore three analytical instruments were developed for the three textbooks. During the analysis we looked for signifiers from the visual images guided by the following aspects contained in the table below.

Image 1: Guidelines for visual semiotic analysis of the selected history textbooks

Guidelines for visual semiotic analysis
Roles and activities
Locus where the activities are performed
Positions of power and authority or status of women
Political, social and economic activities
Environment where women are portrayed
Race of women portrayed
Nationality and origin
Character traits

As with the content analysis explained above, the visual semiotic analysis of the images also progressed from Textbook A through B to C. The findings arrived at from this analysis were further analysed thematically and conclusions were drawn about the visual portrayal of women.

Data presentation and findings

As per our methodology as outlined above we started by counting the number of images in each textbook that featured women and men. This was done to determine the visual representation of women in visual images in the Malawian junior secondary history textbooks. The results were then presented in table format and expressed as percentages for the sake of readability. Thereafter the number of people in the visual images was counted and the totals for women and men were compared and contrasted.

The representation of women and men in the visual images

Textbook A (See Image 2) contained a total of 18 visual images of people. Of these only two featured women while 17 showed men. One group visual image was counted twice in the analysis. It was counted under visual images depicting women as well as under those showing men because it was a group visual image which contained both men and women. Statistically therefore, women are included in 11.1% of the visual images contained in this textbook. In contrast men appeared in a significant greater percentage 88.9% of the visual images.

Image 2: Number of visual images featuring women

Total number of visual images of people	Number of visual images showing women	Percentage of visual images showing women	Number of visual images showing men	Percentage of visual images showing men
18	2	11.1%	17	88.9%

Source: Textbook A.

The 18 visual images in Textbook A contained a total of 33 people. Only three of these were women while 30 were men. In terms of percentages, this means that only 9% of the people depicted in the visual images in this textbook are women while an overriding 91% are men (See Image 3). The conclusion to be drawn is simply women as historical characters are practically invisible in Textbook A.

Image 3: Number of women portrayed in visual images

Total number of visual images	Total number of people portrayed	Number of women portrayed	Percentage of women portrayed	Number of men portrayed	Percentage of men portrayed
18	33	3	9%	30	91%

Source: Textbook A.

Textbook B contained 48 visual images of which 23 featured women while 41 showed men (See Image 4). As with the group visual image in Textbook A, group and pair visual images which portrayed both women and men were counted twice. They were counted under the category of visual images depicting women as well as under those showing men. This explains why the numbers of visual images showing women, and those featuring men, contradict the total number of visual images. Statistically, women were portrayed in 36% of the visual images analysed in this textbook and men in 64%.

Image 4: Number of visual images featuring women

Total number of visual images of people	Number of visual images showing women	Percentage of visual images showing women	Number of visual images showing men	Percentage of visual images showing men
48	23	36%	41	64%

Source: Textbook B.

The 48 visual images in Textbook B analysed contained a total of 251 historical characters (See Image 5). Out of this, 63 were women and 188 were men. Statistically women comprise only 25% of the people represented in

the visual images while men comprised 75%. This means that in comparison two-thirds more male historical characters than female ones appeared in Textbook B.

Image 5: Number of women depicted in visual images

Total number of visual images	Total number of people portrayed	Number of women portrayed	Percentage of women portrayed	Number of men portrayed	Percentage of men portrayed
48	251	63	25%	188	75%

Source: Textbook B.

In Textbook C, of the 46 visual images analysed, 11 featured women while 45 showed men (See Image 6). Visual images which showed both men and women in groups and pairs were again counted twice - under those featuring women as well as those showing men. This explains why the total number of visual images analysed (46) does not tally with the sum total of visuals featuring women and men. The figures indicate that women featured in only 20% of the visual images in this History textbook while men featured in four times more in 80% of the images.

Image 6: Number of visual images featuring women

Total number of visual images of people	Number of visual images showing women	Percentage of visual images showing women	Number of visual images showing men	Percentage of visual images showing men
46	11	20%	45	80%

Source: Textbook C.

The 46 visual images analysed comprised a total of 172 people (See Image 7). However, only 29 were women and 143 were men. Women thus made up only 17% of the historical characters visually represented in in this publication while men comprised 83%. This meant that in Textbook C women were totally underrepresented in comparison to men.

Image 7: Number of women portrayed in visual images

Total number of visual images analysed	Total number of people portrayed	Number of women portrayed	Percentage of women portrayed	Number of men portrayed	Percentage of men portrayed
46	172	29	17%	143	83%

Source: Textbook C.

From the above it is thus clear that women are seriously under-represented as historical role players in the visual images in all the three textbooks studied. Of the 160 visual images across the three junior secondary history textbooks only 36 contained women. This is equal to only 22% of the visual images containing women in some shape or other. The under representation of women in visual images becomes even more stark when it is considered that out of the total of 456 people portrayed in the visual images only 95 or 20% are women. This under-representation renders women almost invisible in the visual images and portrays them as marginal to history which implies little contribution to history by women. The male dominance of the visual images paints a strong picture of women being subordinated, oppressed, disadvantaged and treated unequally as historical characters.

The manner in which women are portrayed in visual images

The next step in our analysis was to reach an understanding of the manner in which the 95 women that do appear in the visual images in the history textbooks analysed were portrayed. This was done based on three categories – the portrayal of women in pairs, as a group or as individuals. The purpose of this section of the analysis was to develop a deeper understanding of, not only the relational portrayal of women in visual images in the analysed textbooks, but also to what this would reveal in terms of historical standing.

In Textbook A women were not portrayed in any visual images in pairs, be it of women only or of a woman and a man together. Women were only portrayed in one visual image in a group context - two women alongside eight men. Women only featured in one individual image as an individual (See Image 8).

Image 8: Manner in which women are portrayed in visual images

Manner portraying women	Number of visual images showing women per manner	Number of visual images showing women only per manner	Number of visual images showing women and men together per manner
Pair	0	0	0
Group	1	0	1
Single	1	1	N/A

Source: Textbook A.

An analysis of all the visual images in Textbook B indicated that there were two pair visual images which featured women. However, both these visual

images portrayed a woman together with a man. Of the 19 visual images portraying women in groups, 18 depicted women together with men. Only one visual image of women only in a group featured in Textbook B. In terms of portraying women as self-standing individuals, only two such images were identified (See Image 9).

Image 9: Manner in which women are portrayed in visual images

Manner portraying women	Number of visual images showing women per manner	Number of visual images showing women only per manner	Number of visual images showing women and men together per manner
Pair	2	0	2
Group	19	1	18
Single	2	2	N/A

Source: Textbook B.

Analysing the visual images in Textbook C as per the identified categories revealed that women appeared paired with a man on two occasions, and in ten group visual images. Out of these nine showed women together with men. Not a single woman was deemed worthy for portrayal as an individual self-standing historical character in Textbook C (See Image 10).

Image 10: Manner in which women are portrayed in visual images

Manner portraying women	Number of visual images showing women per manner	Number of visual images showing women only per manner	Number of visual images showing women and men together per manner
Pair	1	0	1
Group	10	1	9
Single	0	0	N/A

Source: Textbook C.

Several conclusions can be gleaned from the manner in which the 95 women that do appear in visual images in the three Malawian junior secondary history textbooks are portrayed. First of these is that it is rare for women to appear in visual images without men being present. The fact that women are portrayed in the presence of men in almost every visual image across all three textbooks reduces them to historical actors generally only worthy of appearing alongside men as subordinates as if reliant on the agency of the latter. This means that only in exceptional cases were women deemed historically worthy enough by the textbook producers to be portrayed as individuals or alongside other women. The manner in which women were portrayed not only spoke to underrepresentation but also to a marginalisation and oppression of them as historical characters.

The identity of women portrayed in the visual images

The third stage of our analysis entailed a visual semiotic analysis of the visual images containing women. The purpose of this was to obtain a deeper understanding, beyond the numbers, of the manner in which the 95 identified women were portrayed in the analysed textbooks. In the first level of analysis emphasis was placed on the identity attributed to the women.

In Textbook A women were only portrayed in two images: as the Greek goddess Athena and as part of a slave caravan. Athena is European and of high social status in Greek religion (See Image 11) while the female slaves are black African women who are portrayed as being powerless people and victims (See Image 12).

Image 11: The Greek goddess Athena



Source: Textbook A (p. 53).

Image 12: A slave caravan

Captives being taken to a slave market. Notice the captive about to be hacked to death by a slave raider



Source: Textbook A (p. 110).

Textbook B proved to be the richest of all three analysed textbooks in terms of visual images' depiction of women. The 23 images featuring 63 women portrayed women in an array of identities. Some were portrayed as queens, angels, and as officials at a court meeting. Others were shown as school girls; an elderly local woman; mothers; wives; subsistent farmers; a tourist; hunter-gatherers (See Image 13); business women (See Image 14); and slaves. The vast majority of the women portrayed as historical characters in the visual images in Textbook B were ordinary women who held a lower socio-political status in society. The exception being the handful portrayed as queens, angels and officials at a political court meeting. At least in terms of the queens they were for the most part significant because of their betrothal to a king. Race was clearly an issue in the identity of the women portrayed with black women being reduced to more subservient roles such as slaves and an old woman for example. In contrast white women filled roles such as being a businesswoman (See Image 14). What also emerged from the semiotic analysis was that of the black women depicted in the visual images very few were clearly recognisable of Malawian origin – sharp commentary on how women of the country which the book was aimed at were viewed as historical characters.

Image 13: Women portrayed as wives and mothers in a Khoisan hunter-gatherer context



Source: Figure 9.3, Textbook B (p. 106).

Image 14: A woman portrayed in a business activity
A scene of daily city life in ancient Rome



Source: Figure 11.6, Textbook B (p. 138).

The 11 images in Textbook C that portrayed women contained 29 in total. In these images women were portrayed as having multifarious identities. Some were portrayed as country representatives at the Pan-African Conference, wage labourers picking cotton in a plantation and school girls celebrating the attainment of freedom and justice. Other women portrayed in the visual images were the Virgin Mary (See Image 15); women in a mob celebrating the opening of the railway; spinners in a textile industry (See Image 16); women as slaves and mothers taking care of their children. The women portrayed in the visual images in Textbook C, are except for the Virgin Mary and the women depicted attending the Pan-African Conference, ordinary women who populate the lower rungs of the socio-political ladder. Race also seems to be a factor in the identities attributed to women via the visual images as black women were seldom portrayed as being powerful historical actors.

Image 15: Women as mothers and holy figures
The Virgin of the Rocks by Leonardo da Vinci

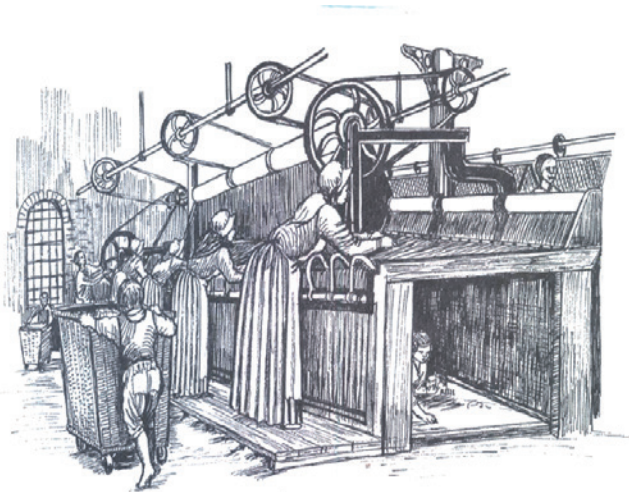


The Pietà by Michelangelo



Source: Figure 3.3-3.4, Textbook C (p. 25).

Image 16: Women in an economic activity as spinners
The interior of a 19th century textile mill



Source: Figure 5.8, Textbook C (p. 47).

Already in the earlier analysis it was established that women portrayed in the visual images in the three Malawian junior secondary history textbooks are under-represented, relegated to the margins of history, suppressed, subordinate to men and disadvantaged as historical characters. The analysis in this section provided a deeper and more nuanced understanding of how the women were portrayed by focussing on the identities attributed to women as historical

characters via the visual images. What stood out were the multifarious identities attributed to women. Apart from identities as mothers and wives they were also occasionally portrayed as religious and celestial figures, and associated with royal households. In terms of economic identities women were portrayed as weavers, businesswomen and subsistence farmers – for the most part labouring away in positions of little economic power. Politically, the pattern is generally the same with some having power by dint of their relationships with male figures such as the Virgin Mary and her relationship with Jesus. Socially, both race and class were important identity forming factors. Although less of the portrayed women are white they were invariably portrayed as having more agency by dint of being tourists, goddesses and businesswomen. What was particularly noticeable is the marginalisation of Malawian women as historical characters, both numerically and in terms of identity associated, in the visual images in all the three textbooks. This happened despite the fact that the books were produced for consumption in Malawian schools.

The roles and activities in which women are portrayed

In the final analysis section we will engage, based on our visual semiotic analysis, with the roles and activities in which women are portrayed in the three textbooks. In Textbook A there were only two visual images that included women. The visual image of Athena positioned her in a leadership role and as a divine leader in Ancient Greek religion. Besides the divine role, Athena was also portrayed in activities associated with domestic life. This was evidenced by the fact that she was portrayed carrying a pot in her right hand which signifies cooking, fetching water and being responsible for food. This portrays her in domestic roles which are stereotypical roles for women in society and serve to undermine her celestial leadership role (See Image 11). The second visual image in this book, of slaves being led to the market, revealed that in their role of being slaves, the women were also portrayed as mothers responsible for looking after children and as the custodians of food. In that visual image one slave woman was depicted carrying a baby. Another woman was portrayed carrying a load on her head which looked like a basket of food (See Image 12). This portrayed the women, in spite of being enslaved, in both reproductive and domestic roles and activities.

The analysis of the visual images in Textbook B revealed the portrayal of women in a variety of roles and activities. For instance, in some visual

images black women were portrayed as wives and mothers and in a variety of domestic roles such as taking care of the home, processing grain, being custodians of food and narrating oral tradition. All the women portrayed in these roles were exclusively black (See Image 13). The exception was a single image in which two women were portrayed in the economic activity of selling goods at a market. In contrast women portrayed in productive activities outside the house were invariably white women (See Image 14). Thus white women, despite their limited representation in the visual images in Textbook B, are portrayed in a more economically engaging position than their black counterparts. Additionally, religious roles such as being angels or going to the mosque for prayers were also attributed to women. A minority of the the visual images also portrayed women in leadership roles and positions of authority such as queens and participants in a political court meeting. However, in most cases these roles could not be separate from their being related to men as mothers or wives which served to emphasise the domestic and reproductive roles they need to fulfil.

In the third book, Textbook C, some women were likewise portrayed in stereotypical roles as mothers and wives (See Image 15). Women were, however, also economically portrayed as labourers picking cotton, spinning in a textile mill (See Image 16) and working as slaves on a sugar cane plantation. Besides the manual labour economic activities, women were also portrayed in political activities as participants in a Pan-African Conference held in Manchester in 1945, celebrating the opening of the Stockton-Darlington railway in Britain during the period of the Industrial Revolution and celebrating the attainment of freedom and justice in an African state. On the whole, in terms of the roles and activities attributed to women in Textbooks C, they were portrayed in a diversity of roles when compared to Textbooks A and B.

Across the three analysed history textbooks women were visually portrayed in domestic and reproductive roles as mothers and wives taking care of children and food. Even powerful figures could not escape such roles being attributed to them. Economically women were, for the most part, portrayed as being active as industrial and agricultural workers and homemakers. Spiritual and religious roles were also, by means of the visual images, attributed to women. However, across all three books an undercurrent did exist which served to challenge the stereotypical roles and activities attributed to women by portraying them as participants in the political process, celebrators and protestors. But these roles were underdeveloped and did not stray far from stereotypical thinking which

attributes especially celebrating and protesting to women. What also became clear was that the roles and activities in which women were portrayed had a certain racial bias with white women, for the most part, shown to engage in less stereotypical activities such as being tourists and businesswomen.

Discussion

Having engaged with how women are portrayed in the visual images in Malawian junior secondary history textbooks we now turn to why they were portrayed the way they were. The visual content and visual semiotic analysis employed have produced firm findings and these will be engaged with by discussing the two key concepts of marginalisation and stereotyping.

The representation of women and also the manner in which they were portrayed pointed to the marginalisation of women as historical characters. One such form of marginalisation was through under-representation. Numerically remarkably fewer women than men appeared in the visual images rendering them almost invisible at times. However, this marginalisation through under-representation is not unique to this Malawian-based study and resonates with a range of other studies conducted in countries across the globe. Research conducted by Osler (1994:219-235) in England, Schoeman (2009:541-556) in South Africa and Schoker and Woyshner (2013:23-31) in the USA, to mention just a few, bears out this unequal treatment. Numerical under-representation of women in the visual images is directly linked to the manner in which they were portrayed in the three history textbooks. Women were rarely portrayed on their own as individuals, in groups or in pairs. They for the most part appeared in visual images alongside men. The worst in this regard was Textbook C which did not contain a single visual image of a woman on her own while textbook A had a single visual image of an individual woman. The fact that women were not portrayed visually on their own marginalises them because it firstly denies their agency as historical actors who were capable of initiating events and secondly associates their appearance in visual images being dependent on men.

Singularly the most subordinated, oppressed and disadvantaged women in the textbooks were Malawians – the populace at whom the books were aimed. They hardly featured and when they did it was generally as historical characters operating on the very margins of history. They were thus portrayed as people who had contributed little to the history of their society. The situation in the

Malawian history textbooks studied raises a question as to why Malawian women as historical characters are marginalised in history textbooks of their own country. We would argue that the marginalisation of Malawian women reflects the patriarchal nature of Malawian society and the textbooks analysed are mirrors of the society they serve (Apple & Christian-Smith, 1991:1-21; Foster & Crawford, 2006:1-23). This finding, when viewed in the broader context of how other black women were visually portrayed in the textbooks, is supported by the study by Schocker and Woysner (2013:23-31) as well as propositions by black feminists who argue that black women are not only oppressed by their gender but also because of their race (Hooks, 2001:33-44).

The marginalisation of women in the visual images analysed could be understood in the light of feminism arguments that traditions and customs that exist in society create barriers for women to participate equally with men in the public world beyond the home and family (Beasley, 1999:62-64; Bryson, 1999:10-27). Subsequently we would argue that women in the past have been barred by deep-rooted customs and traditions from participating fully in the public domain, not only in Malawi but across the globe, with the result that they were omitted from much of history and hence would not appear in most visual images in history textbooks. In addition, the marginalisation of women in the visual images reflects patriarchal beliefs about women in the past as well as present societies.

Like marginalisation, stereotyping of women in the visual images also manifested itself in various ways. One of the clearest indicators of stereotyping was the persistent portrayal of women as wives and mothers surrounded by men and children. This resonates with results of history textbook studies conducted in other parts of the world by, amongst others, Osler (1994:219-235) and O'Kelly (1983:136-148). O'Kelly in her research on fine art history textbooks found that women were predominantly portrayed as wives and mothers. Similarly Osler found that women in the visual images in the history textbooks she analysed were portrayed with their husbands and children which implies motherhood, being wives and fulfilling reproductive roles. The stereotypical portrayal of women as wives and mothers is a reflection of the patriarchal expectation of the role of women in society, not only in Malawi, but also in other countries. As Lerner (1993:1-74), argues, in a patriarchal society, women are expected to marry and bear children as they are the nurturers and this is regarded as the primary role of all women regardless of race, class, nationality or continent. These are the roles in which women

as a class have primarily and mainly participated most historically and still continue to do so in the present. In the Malawian textbooks analysed these roles were overemphasised to the extreme and women were not, unlike in the study by O’Kelly (1983:136-148), portrayed as sexually deviant in any manner.

The stereotyping of women and their roles and activities also manifested itself in their portrayal in domestic roles and activities and as performers of menial manual labour. However, this finding is not unique to our study and echoes the results of studies by O’Kelly (1983:136-148), Osler (1994:219-235) and Nene (2013:100-120) where women were portrayed as amongst others farming, working in the kitchen and engaged in other housework. Therefore, this study confirms the stereotypical portrayal of women in domestic roles as found in international studies. As with reproductive roles, domestic roles are regarded as the primary responsibility of women in a patriarchal society because of the division of gender roles it perpetuates. Feminist theorists attribute the portrayal of women in domestic roles as a reflection of patriarchal stereotypes about the roles of women in society, regardless of differences in race, nationality or continent (Beasley, 1999:62-64; Bryson, 1999:10-27). Lerner (1993:1-74) argues that patriarchy believes that because of their nurturing role, women are meant for sustenance of daily life. This explains why women in patriarchal societies such as Malawi are cast into domestic roles as it is these activities which maintain society through provision of food, care and support in families.

Some women were, however, visually portrayed as exceptional historical characters. These are women who were portrayed beyond stereotypical female roles but as people with agency, capable of remarkable achievements and being powerful in their own right. An example is the female pharaoh Hatshepsut of Ancient Egypt. She was portrayed as a powerful ruler who governed for 20 years, thus an exceptional historical character. Although the portrayal of women as exceptions in for example political leadership seems to challenge patriarchal ideology which associates leadership with men and not women, we would argue that patriarchy still holds sway because the number of women portrayed in such positions is insignificant and unequal when compared to men and the majority of women portrayed in the textbooks. Furthermore, women were frequently portrayed as being exceptional however, women, like the Virgin Mary for example, achieved such positions by dint of their relationship to men. However, what the portrayal of women in leadership

positions does is to underpin feminist views that women are as capable as men and where they appear inferior, it is because of their upbringing and lack of education and not due to nature (Beasley, 1999:62-64; Bryson, 1999:10-27; Abbott *et al.*, 2005:16-56). Their oppression as historical characters is therefore not legitimate, natural or justified in any way. Despite this assertion, we would argue that the fact that only a few women are portrayed in exceptional roles in the visual images in the textbooks studied reflects a patriarchal view of the potential of women on the part of the customs and traditions of the society that produced these books.

Conclusion

At the outset of this article we highlighted the powerful status of visual images and that the act of seeing could be equated to believing. In conclusion we would argue that both these ideas hold true. The findings of this study highlighted the marginalisation and stereotyping of women as portrayed in the visual images in the three textbooks analysed. Considering the powerful nature of textbooks and visual images this constitutes a strong societal message to the end users of these publications and Malawian women respectively on what to believe in history. Simultaneously the findings point to the fact that women, as historical characters in junior secondary Malawian history textbooks are, and must be seen and believed to be subordinate, and not equal to men.

In terms of the broader research picture the portrayal of women in the visual images in the textbooks analysed resonates with similar studies conducted elsewhere. This leads us to conclude that women in visual images in history textbooks in different geographical and political context are generally treated in a similar manner. Emanating from an African context this article adds to the existing body of knowledge in this regard for no such study has been conducted in Africa outside of South Africa before. As such, this article contributes to the literature on the portrayal of women in history textbooks. More specifically it confirms the international literature on the visual portrayal of women in an African context and in so doing fills an existing niche.

What this study also confirmed is that the visual portrayal of women in history textbooks are afflicted broadly speaking, be it in Africa or elsewhere, by the same forces of patriarchy. In the case of Malawi, more specifically, this reflects a societal view of women, and women in history, deeply rooted in the

society that produced these books. Hopefully, this article can contribute to challenging the patriarchal status quo in terms of how women are portrayed in history textbooks and in so doing give meaning to the countless gender equality policies recently adopted in Malawi. This in itself is the firmest recommendation this article makes.

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HANDS-ON ARTICLES

Teachers' Voices

HISTORY TEACHERS AND THE USE OF HISTORY TEXTBOOKS IN AFRICA – FROM TEXTBOOK TO ‘DESA’: A PERSONAL NARRATIVE OF TEACHING HISTORY IN TANZANIA

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Background

When I was invited to write my own story about history teaching and how I have been interacting with history textbooks, many questions came to my mind. One of these questions is the long standing one: Am I really a history teacher? Although I love teaching and my family and friends thought that I could make a good teacher, I never grew to become a ‘professional’ ‘trained’ teacher. I have never been to a teacher’s college; nevertheless, I have entered into a teaching career on various occasions. The first was immediately after I finished an Advanced Certificate of Secondary Education in 2004 and was employed at Bondeni Secondary School as a History and English teacher for Form one students. The second time was after I finished a masters degree in archaeology and was employed at Stella Maris Mtwara University

College in the Department of History as a lecturer for education students majoring in history. I have therefore been a teacher, teaching history, using history textbooks in teaching, planning, preparation and in the classroom thus I definitely have a story to tell. The second question was about why my story matters. For the first time, I had to reflect on my own history, from my childhood history textbook, *madesa*, a pamphlet for standard seven known as *Jiandae Vyema Kumaliza Elimu ya Msingi*, a pamphlet for Form four and Form six famous as *Nyambari Nyangwine*, notes, exams and results which my father loved to keep. Although I had neither an idea of writing nor archiving this story in any form, for once in a life time, I thought of the significance of such a story of my own practices and experience of learning and teaching history and how my story exposes the challenges and opportunities for the discipline. This is a self-study rather than researching, reporting and generating a series of findings about 'other' teachers, students and schools which I would have loved to do. In presenting this story, some examples are drawn from my own learning experience.

Using history textbooks in teaching

While teaching at both secondary and university level, I have integrated textbooks on different occasions. In secondary schools, a few available textbooks were in the library, some were owned by the teacher and a few students had their own personal copies. The basic textbook here was *History for Secondary Schools: Book One*. The textbooks were freely available from all these three sources; however, this was a matter for students' personal effort and interest. As a teacher, the main task was to create notes which all the students would copy in the classroom while teaching. When teaching history in a Form one class, I also used my own Form one notes to compare and enrich the notes that I prepared for the students. The topics which are taught in Form one are: sources and importance of history (i.e. meaning and importance of history and sources of historical information); evolution of humankind and technological development (i.e. human evolution, early, middle and new stone age as well as iron age); development of economic activities in pre-colonial Africa (i.e. agriculture, handcraft, industries, mining and trade); development of social and political systems (i.e. kinship of clan organisation, age set system and state organisation). At the secondary level, the emphasis was placed on the meaning, factors, reasons, motives, success or failure, significance and lessons to learn from a particular historical event. The understanding and

narrating of historical events in English is very fundamental in this class. This is because history in primary school is taught in Swahili. In secondary schools and especially Form one, is the first place where the students learn the subject in English. In instances where the teacher was the same and thus used the same notes from previous classes and years, these notes become *madesa*. Students inherited the notes from previous classes and during history periods they would mark the points of emphasis, read the notes or ‘dodge’ the classes. As a student, I also benefitted from inheritance of notes from my brother and sister who went to the same secondary school as me. By the time I joined the school, almost seven years after my brother, and five years after my sister; their notes were still a prime resource. This was because all of my siblings made it to high school, meaning that their notes were good enough to enable them to pass the national examination. Secondly, the teachers have hardly changed; therefore, they were still using the same notes to teach. Thirdly, the school had only one history teacher teaching four history classes. Because my father was strict, aware of my time table and occasionally inspected my exercise books, it was very difficult for me not to write the teacher’s notes in the classroom. I therefore had to copy the notes during the class and only use my siblings’ notes to learn topics ahead and have knowledge by the time the teacher reaches such topics. Another reason why I had to copy the notes was the classroom assignments. Before the teacher would mark the assignment, he inspected the notes and marked them as seen. Because I loved participating in history class, I had to write my own notes and do all the assignments for the teacher to mark. Some students used to borrow my siblings’ notes for their personal reading as well. Throughout my secondary school learning I had never owned a history textbook; all I had were teacher’s notes which I used for both internal and national examination as my reading materials; this was also the case for most of my Form one students.

As part of assessment, the revision questions were provided at the end of the topic, and I marked students’ answers personally or used peer marking in the classroom. The limited number of textbooks necessitated that the questions be written on the blackboard for all the students to copy and answer either as a take home assignment or in a few cases as classroom exercises. For the final examination, what was expected from the student was to present the understanding of the question and topic that formulated the question. Teacher’s notes which students copied from the blackboard were memorised and reproduced in exams. Although it was not necessary for the students to reiterate what was presented in the textbooks or notes, teachers’ notes

remained the only reliable learning materials. As a teacher, I tried to encourage students to think about what they were learning, although I could never get anything back from them that was different from the notes, word for word. To my thinking, this was partly because they were not confident enough in English to depart from the wording, in case they got it wrong; but also because they shared a strong conviction that what they were taught was the right and only thing they should show that they had learned. My personal experience on using notes for writing exams is more or less the same. The disparities between rural and urban areas in terms of access to textbook and *madesa* was also obvious; while in urban areas the learning and teaching materials were accessible while in rural areas they were not. I remember one of my late cousins copied Nyambari Nyangwine *desa* on a textbook when he visited Dar es Salaam (the capital city) for the first time and saw the pamphlet. It was amazing to see all the national examination questions and their appropriate answers in the *desa*; thus what remained was cramming for the exams! Thus, *madesa* have equated history learning with studying for examinations, rather than seeking for knowledge.

At the university, I have taught different courses including History of Tanzania, History of East Africa and Economic History of Tanzania. Unlike in secondary schools, at the university level giving notes is optional and the teacher can choose to give them or not. In both situations, textbooks were then recommended for the students to read and where necessary extracts from the textbooks were made available for the students to make copies and use which then become *madesa*. The extracts might be from those books with a few copies or concerned with important areas for the covered topics. At the university, assessment was in three different forms: textbook-based take-home assignments where students were required to review, revise and discuss different topics either as a group or individuals. These could then be discussed in class as a seminar presentation or submitted for marking. Other forms involved individual tests and examinations. At the university level, assessment involved using books that students had read. The interaction with books in answering questions, giving examples and drawing cases from textbooks was important in assignments and answering questions which was what was expected of the university assignments. For instance, in teaching History of Tanzania (see the course outline in appendix I); the course is divided into five topics including: elucidating how and why present day societies evolved over the last three centuries, the course highlights the major transformations and continuities in the economic, political and social formations of the societies

constituting Tanzania today. It proceeds via a discussion on the origins and consequences of the various forces that have been shaping these societies since (1800), local social dynamics such as lineage and state formation, and external influences, such as cultural intercourse with neighbouring societies, long distance trading and European colonialism. The course also covers struggles for national independence, and the post-colonial situation with sub-topics on the nature of the early postcolonial state, decades of political and economic experimentation 1960s to mid-1980s, and Tanzania in the globalising world of the 1980s and after. The basic readings comprise ten scholarly books published between 1969 and 1999 by authors including Coulson, Iliffe, Kaniki, Kjekshus, Kimambo and Temu, Koponen, and Sheriff. The course is assessed by means of a timed test (20%), a seminar presentation (10%), a written paper (5%), seminar participation (5%), and an exam (60%).

At the university, I have also been involved in the comprehensive examination. This is an oral examination which intends to test the final year students on their different teaching subjects. On this occasion, students are required to come with their own books which they have been using throughout their studies. The reason for bringing their books is that they are provided with a loan each year for books and stationery. Most of the students however, will prefer to copy *madesa* rather than buy textbooks. Thus, asking final year students to bring their books during comprehensive exams requires the students to buy basic textbooks for the subjects they are prepared to teach. To show that they did not only buy the book for the exam but also read them, they are required to cite them while answering the questions. The students are also required to demonstrate their knowledge of topics which use the textbooks they own.

Selecting textbooks

For teachers in secondary schools, choosing textbooks to use is guided by the curriculum. In a few circumstances, a teacher's guide (*kiongozi cha mwalimu*) accompanies the student's textbook to aid in the teaching of the history subject. This is different from the university level where readings are chosen by the course instructors and they may range from textbooks, manuals and monographs to journal articles. The students are also responsible for reading and researching extensively to find books or materials relevant to the course of their study. Given the current widespread use of the internet, during teaching I have chosen to use the same system under which I was trained which is to

use the internet to understand the concepts but never to use sites such as Google and Wikipedia as references/sources. Journal articles available online, online books and other accredited internet materials are accepted. Thus, where internet access is available, teaching and obtaining teaching resources have been improved to overcome the problems of limited textbooks.

I should emphasise, however, that both English and Swahili are official languages in Tanzania. Swahili is used as a language of instruction in primary school and English is only a subject there. In secondary schools and university, English is the language of instruction and Swahili is only a subject. Given the difficulties that face both the teacher and the learner, I use both Swahili and English to explain points to aid comprehension. It is, however, mandatory to answer questions in English during examination, although a few students will tend to mix the two languages in the final exams. At the university level where there is no restriction on books to use, Swahili textbooks are also used by the students although they will write in English in their assignments and exams. One of the Swahili books is *Ufundi Chuma Asilia* written by Bertram Mapunda which is the reference book when teaching the topic of the Iron Age working in Tanzania. Throughout my teaching, especially at the university, I have tried to change my notes frequently. Although I had never provided my own notes to university students, while teaching, I tend to communicate slowly so as to involve students in writing their own notes according to their understanding. Using the blackboard was still necessary for writing words which students considered as new vocabulary or were not sure of the spellings.

Conclusion

The use of teachers' notes and *madesa* has narrowed the significance of textbooks in teaching and learning history. It has narrowed students' thinking and the notes or *madesa* have been regarded as the only important part of history to know. Students take little or no effort to supplement notes or *madesa* with a textbook even when books were available. With the abundance of internet use, both teachers and students are now able to delve into online resources using mobile phones, USB modems and internet cables most of which are available in both rural and urban areas. This is yet to be done substantially. It is, however, important to use technological advancement not only as a communication medium, but also as a tool for learning and teaching in the contemporary era.

USING HISTORY TEXTBOOKS TO TEACH IN RURAL KENYA

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Textbooks are crucial resources in the teaching and learning of History in Kenya. In Kenya, where I have taught History at Secondary School level for the past twenty years, textbooks are generally used by teachers for their own preparation as well as for the actual teaching or instruction in the class. Throughout my teaching career, I have found textbooks to be a vital tool in preparation of my lessons. As a matter of fact, I have used different textbooks to enrich my knowledge of the teaching content and to update myself on emerging issues in the teaching of History. Books that I have used in this regard include *Oral Tradition as History* by Jan Vansina, *UNESCO General History of Africa Volume VII* edited by A. Adu Boahen and *The History of Africa Volume 2 1840-1914* by Michael Tidy with Donald Leeming. In terms of History textbooks I use the following: *Milestones in History and Government Form 1*; *Gateway Secondary Revision History and Government Paper 2*; *The Evolving World Form 2* and *History and Government Form 1*.

In the classroom textbooks are useful to supplement notes and worksheets that I usually prepare from a wide range of textbooks. Typically, learners in my class usually have two or more different titles of prescribed textbooks that are shared between learners at the ratio of one book for every two learners.

More often than not, I refer learners to a section of a textbook to enhance their understanding of a given concept. I also refer them to a study or draw a

map, diagram or picture found in a certain textbook. Besides textbooks I also use diagrams, tables and maps drawn on the chalkboard to enrich my lessons. From time to time I prepare such diagrams and maps on flipcharts and use them during the lesson. In recent times I have embraced the use of audio visual materials such as radio lessons and video clips in classroom teaching.

Textbooks are also very useful in the assessment of learners, either during each individual lesson, during continuous assessment or summative examinations at the end of every term or year. In almost every lesson, I use the activities and questions in textbooks to evaluate the achievement of my lesson objectives. In the setting of questions for continuous and terminal assessment, I always refer to prescribed History text books to ensure the assessment conforms to the recommended syllabus and is relevant to what learners have learnt.

My choice of textbooks is to a large extent determined by their availability in the school and their suitability to the topic I am teaching. I try as much as possible to use the recommended textbooks when teaching in the classroom. However, during my preparation I use a wide range of textbooks, some of which are not prescribed but which I find useful nonetheless.

The use of textbooks in the teaching of History presents numerous challenges which I have struggled to circumvent throughout my teaching career. Some of the authors who have authored history books used in Kenyan schools are neither teachers nor historians but just businessmen out to cash in on the high demand for textbooks. The result is that such books are usually full of errors, inconsistencies and inaccuracies and are of little or no use to teachers and learners alike. Some of the textbooks available in book stores are also outdated and great care must be taken when using them with learners. Notwithstanding the aforementioned challenges the pivotal role played by textbooks in the teaching and learning of History cannot be overemphasized.

USING HISTORY TEXTBOOKS TO TEACH IN PERI-URBAN KENYA

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I have been teaching for 26 years and hold the following qualifications: a BSc in Leadership and Management, a Higher Diploma in Guidance and Counselling and a Diploma in Education. I teach History to Forms 1, 2 3 and 4.

In my preparation and planning of History I mainly use the *Evolving World series* by Oxford University Press. I supplement the notes with other books like *History and Government* by the Kenya Literature Bureau. I like the *Evolving World* because it is detailed and an excellent source for use by the teacher.

The textbooks I use are useful especially when the learners are doing group work and discussions. Sometimes I assign them to do work in groups and then do presentations to the class. Not every learner has a textbook so I make notes and dictate these where necessary. I instruct the students to note down important points in their exercise books during the lesson. When teaching topics like Nationalism in Kenya and Africa, the First and Second World Wars and the lives and contributions of Kenyan leaders, I also use video and DVDs so that the learners can watch and internalise the content. This is normally done in the hall because our classes do not have screens. After each viewing we have a recap of the happenings and allow the students to express their views.

After every topic there are revision questions and class activities that need

to be done. These are found in the textbooks and I have set aside one lesson every week for the students to use in class to answer the questions and do the activities which include debates. I sometimes get topical questions from the textbooks in the library and have them copied for every student for individual studies.

The prescribed books for use in the teaching of History and Government are: *The Evolving World History*; *Government Course* and *History and Government* by the Kenya Literature Bureau. I mainly use these books because they follow the syllabus and the learning objectives are well arranged. My students perform well in their final KCSE exams when taken through the course with the prescribed books. The Examination Council mainly uses the mentioned books to examine the students in the final secondary examination.

I avoid using books that are not prescribed because they give unnecessary though important information. The use of such books can end up confusing the learners and the objectives may not be achieved.

I use the following books for setting mid-term and end of term examinations, continuous assessment tasks and random assessment tests:

- Top Mark Series KCSE revision Books 1 and 2
- How to Pass KCSE History and Government Form 1, 2, 3 and 4
- Quick Reading, History and Government Form 1, 2, 3, and 4
- The Mirror
- Test It Fix It
- KCSE past papers
- Milestones in History and Government Form 1
- The Evolving World – a History and Government Course Form 1
- History and Government – Form 2 Students' Book
- Test it & Fix It – KCSE Revision History

USING HISTORY TEXTBOOKS IN RWANDA AT SCHOOL AND IN TEACHER EDUCATION

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My name is Jean Pierre Tuyisenge and I have a Bachelor degree in Education and History from the Kigali Institute of Education (KIE) currently University of Rwanda-College of Education. I have been teaching for 4 years. As a professionally trained teacher, I have been exposed to a range of History textbooks written in either English or French and I was eager to exploit them all because I use both English and French.

When I finished my studies in 2011, I started teaching History in Standards 3 and 4. The following year (2012), I was employed by the Kigali Institute of Education (KIE) as History Subject Tutor in its Distance Training Programme. From this time (2013) I have experience of 'two faces of educational practices'. At the Kigali Institute of Education, there are abundant resources and learners are conversant with them (2007-2011 at the university) but then in school, History textbooks are scarce in comparison to the number of learners who also have difficulty using them.

While planning my lessons, I take two or three books and compare how much the writer has extended the length of each topic to be part of my course to teach (History). The analysis is made to assess whether or not it will be of use to the learners.

While preparing a lesson (to be taught on a certain day), I take the arranged topics (from their different sources) and start making notes by adapting text length and language. In the classroom, History textbooks are also used. We do need our students to be conversant with various resources for a range of reasons, some of which I mention below:

1. Some students will become History teachers. So, they need to be exposed to various resources including History textbooks.
2. For some classes (for instance Standard 1-3) in Rwanda, History is a compulsory and examinable course during national examinations. Thus, all students need to access History resources to be able to pass it in National Examination in standard 3.
3. To appease students curiosity and sustain understanding of certain facts.

Not every learner has the prescribed textbook as very few prescribed textbooks are available. I am obliged to make my own notes and worksheets from a variety of History textbooks and online sources. In a typical lesson, I expect learners to use textbooks to analyse facts and provide ideas about what they have understood in essay form. In the classroom, I also use videos to illustrate some topics such as World War I or World War II documentary movies and movies about the Slave Trade etc. In assessment, textbooks are very helpful because at the end of various topics in certain textbooks are questions for topic summary or section assessment. I often do them to familiarise learners with reading and increase their researching capacity.

There are many reasons which influence me in selecting textbooks and I have outlined these below:

1. Legal frame work: I do select textbooks approved by the Rwanda Education Board (REB) because they are likely to be available on the market. Again I select textbooks which are not in conflict with the History of Rwanda (mainly textbooks not challenging current facts about 1994 Tutsi genocide).
2. Academic richness: A certain number of textbooks are detailed to provide rich content to be taught or learnt for example when using textbooks from a famous writer, publisher or from famous learning institutions like Oxford, Cambridge, McGraw Hill, Jomo Kenyatta Foundation Publication, UNESCO, Presence Africaine, etc.
3. Illustrative suitability: some textbooks are printed in black and white, others in colour. Textbooks printed in colour are more likely to be more effective in terms of picture analysis and display.

4. Accessibility: I know suitable textbooks but lack means of accessing them. For instance the books I used at university when I was a student may not be available for the school to purchase.
5. Date of publication: An updated book is likely to provide more detail than its earlier version though as a History teacher I am obliged to confront both sources.

As History subject tutor at University, there are other elements I want to mention. Due to the maturity of students at University, I bring some textbooks which students share in groups or individually because I train future History teachers for ordinary level (13-16 years) in secondary schools. History text books are not sufficient for learners and even in some schools teachers do not have a variety of History textbooks. The following are some of the textbooks that I use in my teaching:

- General History of Africa Volume 1-8 by UNESCO / PRESENCE AFRICAINE
- A History of Africa Volume 1 – 1800-1914
- A History of Rwanda – Teachers’ Guide for Secondary Schools
- New Junior Secondary History Book 1
- Basic Themes in African History – 1855-1914
- Peoples et rois de L’Afrique des Lacs

HISTORY TEXTBOOKS AND ACTIVE LEARNING HISTORY IN RWANDA

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I hold a Bachelor's degree in Arts with Education and have been teaching History since 2007 to Ordinary Level learners' (Levels 1, 2 and 3). In my view the Rwanda Education Board, the government institution in charge of education is encouraging what we call active learning – which is learner centred learning. Textbooks and teachers' guides are therefore written to support the History curriculum and to help and encourage teachers to provide opportunities for active learning in their classrooms. Some of the History textbooks I use in this regard are:

- New Junior Secondary History Book 1
- New Junior Secondary History Book 2
- New Junior Secondary History Book 3

These books are all written by Dorothy Ntege and Emmanuel Bamusananire.

This is a significant change from the traditional forms of classroom teaching used in Rwanda in the past and requires commitment on the part of the teacher and a supportive environment provided by the school management. Thus, textbooks and teachers' guides and other supplementary learning and teaching materials provided by Rwanda Education Board to our schools are crucially important components in achieving successful learner centred learning. History teachers, therefore, need to shift from the traditional method of instruction so as to rather play the role of a facilitator in order

to value learners' individual needs and expectations. Therefore, as a history teacher, I use textbooks in order to meet the educational policies of active learning as follows:

Annual scheme of work

At the beginning of the academic year, the annual scheme of work is established by me and handed over to the academic leader. I retain a copy on which I mark, on a weekly basis, the progress I make in my teaching. I also make and add some additional comments where necessary. The presentation of all activities to be done is recorded and the reference for each activity is mentioned. The History textbooks are very important in preparing this annual scheme of work: I consult the textbooks for each level in order to divide the content to be taught into topics and sub topics as well as giving the exact reference to be used during the teaching and learning process for each topic and sub-topic. The learners are also given a list of activities to accomplish and various textbooks are given to them as references.

Lesson planning

The scheme of work is underpinned by lesson plans for which I mostly use textbooks. They provide strong support for lesson planning and provide learning experiences with a balance of the different skills, attitudes, values and competencies over time while ensuring progression in terms of the knowledge and understanding, as set out in the syllabuses. Apart from the History textbooks that I use as outlined earlier I also use other History books in my lesson preparation. These include:

- A History of Africa Volume 2 – 1915-1995
- A History of Rwanda – Teachers' Guide for Secondary Schools
- MK European History – The Revolutionary Era 1789-1970

The textbooks (the school textbooks I use as well as the additional books) help me to set objectives at the beginning of each unit. But these textbooks also help me in the following manner in my History class:

Notes elaboration

Textbooks are important sources of content knowledge and are also useful with the elaboration on notes. I use knowledge from the textbooks to edit the lecture notes to be handed to students. At the end of the lesson, notes are given to students as a summary of the lesson. They are written on the chalkboard and students write them down in their notebooks. The textbooks are needed in order to make the summary to be given to the students. I have to choose important content for each topic in the textbooks to be given to the students as notes. Simply put the History textbooks portrayed above help me to summarise the notes.

Group discussions

Group discussions are encouraged in the classroom for some topics to facilitate the process of active learning. I give time to students to read different books in the school library thereafter we have discussions in groups. Each group stands in front of the other learners and tells us what they have discovered during their research. Other students ask them some questions and I give some observations, comments and even more explanations after the presentation of each group. For example, while studying sources of History, learners research how historical information is collected (they can use textbooks). I help them to form discussion groups and how to do a presentation of group discussions results.

Homework

The History textbooks are also useful for homework that is given to students. They use some textbooks as reference works to do their homework. However, they are also directed to the school library and read books from various authors that are similar to the books I use in my lesson preparation. This is very important for learners because while reading, they learn a lot and acquire new knowledge.

Locating some historical sites

Apart from the maps which are found at school, the textbooks are also used while locating some historical sites of importance. For example, I can ask

learners to locate some historical sites. Then, the learners are requested to consult the History textbooks in order to know where those sites are to be found. Sometimes, they are also asked to draw maps in their notebooks based on what is found in different textbooks. This helps the students to know where different historical sites are located.

Revision

At the end of each chapter in the History textbooks I use there are “study activities” that stimulate thinking and learning on the part of students. They also contain several exercises to guide the learner on how to answer questions. Some review questions are also found at the end of each chapter. I mostly use these activities for revision in the classroom for the examinations as outlined in my scheme of work.

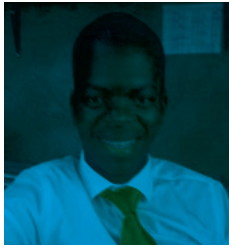
Assessment and evaluation

History textbooks also help me in the continuous assessment and evaluation of the learners. At the end of each unit, oral questions are asked to learners before going to the next unit. I do set my own questions from the content of textbooks or use review questions that are set at the end of each chapter in a textbook. This is also done at the end of the lesson where I even use written questions that are answered by students on a piece of paper. This helps them to prepare for exercises, tests and exams.

To me, in the Rwandan context in which I teach, I use History textbooks extensively in the teaching and learning process. Not every child in my classes has a prescribed textbook. I therefore supplement the History textbooks I have with Internet sources, films and videos, visits to historical sites, museum and field studies, photographs, maps, stories and testimonies of survivors of the Genocide in my country.

TEACHING HISTORY IN SWAZILAND

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Textbooks are very important or useful in the teaching of history. Besides being a student companion, a textbook is utilised by the teacher starting with the teacher preparation to assessing the learners' attainment of learning objectives and goals of a certain topic in history. Beginning from planning for the lesson, textbooks play a pivotal role since they contain important aids for some lessons. For example, they contain sketches of very important specific historical areas that cannot be clearly found on a simple map. This is where I utilise the textbook as a teaching aid in the planning stage. Sketches are clearly drawn in the textbook and such have been designed to extend learner understanding, so they make the teacher's job easier in explaining specific historical facts since he keeps on making reference to his map in the textbooks.

I am a teacher who is very fortunate to have the necessary textbooks required for my learners as many schools in the country do not have textbooks, which makes the teaching of history very difficult. In as much as the textbooks are important, I also utilise other reading material like the newspaper for source analysis. I ensure that I have them in the planning and preparation stage.

All the learners have textbooks since they all utilise the prescribed textbooks which they receive from the school at the beginning of every school year. Since they all have textbooks in their possession it becomes easy for my learners to make their notes during and after the lesson. As the learners make their own notes they get to understand the content better. These textbooks have been carefully chosen since they cover most of the content in the syllabus.

To achieve the above it becomes very important to conduct a thorough research on my class which helps me to know my learners very well. This is because learners' understanding comes in different shapes and sizes, for example some learners get along very well with historical facts presented in a pictorial form, so such teaching aids provide clarity to most learners who could have found the topic in question difficult. So a teacher who has conducted research on his learners is going to have minimal problems with his history class since he knows how to present his subject matter to his different learners.

I use the history textbooks to promote learner involvement during lessons. Learners who do not have textbooks cannot participate effectively in class, so I make sure that all learners have textbooks in their possession. I promote participation by assigning the learners exercises that require them to read on the next topic. I do this because learners have a tendency to not read on their own, so such exercises compel them to read at home. If the learners have read at home, they become fully involved in the lesson which makes the lesson very lively, enjoyable and more learner-centred. So the textbook is used as a means to promote learner involvement and also raise interest and curiosity among history learners. As the learners read before coming to class they encounter problems and they cannot wait for the history period to come so that they can raise such problems and see how their colleagues and teacher are going to tackle such problems. The strategy of letting the learners read ahead acts as a motivating factor amongst the history learners, however this approach works well when all learners have the prescribed textbook so that they might not be left behind or else be demotivated.

Furthermore, I use a text book to inculcate critical thinking in my learners. For example, through reading aloud in class, though it is not frequently used, I make some pauses for thought provoking commentaries and questions that challenge the learner to test the elasticity of his or her thinking skills. This is one of the best ways to involve the learners during the lessons and to instil sympathy and empathy among the history learners as it is very fundamental for history teachers to teach content at the same time equip their learners with these abilities. These skills make history distinct from other subjects and make a history learner different from other learners in the school in the way he thinks and does things. During the reading from the textbook process therefore, when we encounter an interesting situation faced by a historical character, I ask my learners questions that would require them to put themselves in the shoes of the particular character. An example of these questions is: *If it were*

you how would you feel, what would you do? I have seen these questions are very helpful in inculcating empathy in the history learners. This therefore makes the textbook very important in the effective teaching of history.

I also use my history textbooks to inculcate tolerance amongst my learners. Tolerance is one of the very fundamental skills needed not only by the history learners but it is also needed in the community where these learners live. So I use the textbook therefore to prepare my learners for community living. The textbooks have many group work activities which require working together and listening to other people's point of view. They require working together and a lot of cooperation which also encourages good human relations. The activities bring the learners together to discuss important historical issues while covering the syllabus at the same time. It is very important to note that working in groups does not guarantee good relations. This makes it very important for me to take the initiative to ensure that all my groups are positively working together to ensure progress. It is also essential for me to ensure that each group has enough relevant textbooks. As a history teacher I find it very important to know the learners very well because that helps me in ensuring that I have formed groups that are capable of working together.

I also use the textbook to prepare for my daily lessons. The textbooks are very helpful because they have been prepared for the current syllabus, and cover most of the content that is found in the syllabus. However, that does not mean that textbooks are the only tools used for reference purposes. They are supplemented by a variety of other books since history is a subject which demands extensive reading from both the teacher and his learners. It is for such reasons therefore that the teacher has to show that he has read extensively on a particular subject. The teacher can show this by displaying mastery of his subject matter. This is achieved with the efficient use of the textbook supplemented with other historical sources. Before going to class I go through the textbook on my own and carefully utilise the content to prepare or plan how I can effectively involve my learners on that topic. I also prepare thought-provoking questions during that time. Such questions aim to develop learners' historical knowledge without being told by the teacher in black and white. It is very important for the learners to create their own knowledge, which is what is being encouraged by the current history syllabus.

Reading in class is also one of the methods I utilise however it is not frequently used. On rare occasions, I assign one of the learners to lead the class in reading on a certain historical topic. This is mostly done if I realise that my class have

not done enough reading on the assigned reading. In such cases therefore it becomes the easiest way to go through the prepared lesson. Mostly in the lower grades like Form one and two, the learners have a tendency of not paying attention to assigned work. It is during such lessons that I pause to make important emphases and clarifications. Such clarifications are usually accompanied by assessing questions to check if learners are following. This is very important to do rather than waiting for summative evaluation at the end of the lesson when much damage has already been done.

On another note, I use the textbook for evaluating purposes. The textbooks contain a lot of exercises that help me check if my objectives for the lesson have been met. This is made possible by the fact that most of the textbooks cover the objectives of the syllabus. This makes it simpler for me to build on those activities to see if my objectives for the day have been met. However it is very important as a teacher that I do not rely on those activities because sometimes they do not contain other aspects of the lesson which I want to test. This is where it becomes very important to prepare my own questions to check for understanding and test if my objectives have been met. This demands that I pay attention to the textbook exercises during the planning phase so that I ensure that they cover or meet the lesson objectives or I prepare other questions if they do not.

The most important textbooks I use to teach History are:

- Swaziland in Focus
- History Awake 1 and 2
- South Africa 1948-2000

USING HISTORY TEXTBOOKS IN SECONDARY SCHOOLS IN MAURITIUS

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I have been teaching history for five years and I teach Form 1 – 3 (lower secondary school).

History provides an essential input into the entire system of education, bringing out the link between human beings and various areas of knowledge and their significance for individuals in society as they progress and interact. History teaching in schools also helps students to develop a sense of values and to resolve ethical and moral problems since it focuses primarily on cultivating humanism. In Mauritius, history is taught both at primary and secondary level. However, the curriculum limits itself to the Dutch, French and British period. Modern history is taught on a much smaller scale. At present, history is being taught as one of the three components of Social Studies in lower secondary as prescribed by the New National Curriculum Framework for Secondary. Social Studies is taught as a compulsory subject in Form 1 to 3 and comprises three distinct learning areas: History, Geography and Sociology.

Since 2010, I have been teaching history where both local and world elements are introduced at lower secondary level. The main topics featuring under history that I teach are: Ancient Civilization, Discovery / Voyages, Pre-Colonial Indian Ocean, The European, Portuguese, Dutch, French and British in the Indian Ocean.

The content of history as an academic discipline forms the focal point and core of arts. Therefore, teaching history with a sociological background is quite challenging and this result in a heavy reliance on the textbook. So, the prescribed textbooks at school have proved to be an excellent teaching aid in my situation. Nevertheless, I do not use the textbook as the only resource but as a guide and not as a mandate for instruction. I normally, modify, change, eliminate or add to the material in the textbook and my lessons are supplemented with outside readings and information from other sources, especially before introducing new lessons/topics. I usually use other textbooks available on the local market since they are all based on the National Framework of the Ministry though there are different publishing houses and authors. For instance, at Form 1 level, the second chapter deals with Ancient Civilizations which is new for beginners at secondary level. Hence, I normally supplement information from books available in the school library before introducing the lesson.

Yet, the organised units of work with a balanced, chronological presentation of information in the prescribed textbook provide me with an excellent guideline to prepare my plan of work and lessons. Moreover, it is important to note that resources and information in our textbooks are carefully spelled out in detail. Questions are set to assess understanding and the lessons provide all the answers. However, to avoid students seeing learning as an accumulation of correct answers or simply a collection of facts and figures, I regularly set higher level and problem solving activities that require creative thinking as homework or research work.

I also advise students to learn the difficult and important concepts which are defined at the end of each chapter to ensure good understanding. I often organise small quiz sessions to encourage students to participate actively in class lessons. On the other hand, students are also expected to supplement their understanding from books at the library and the internet.

History as a subject can become very dry and boring when taught only from a textbook. Consequently, I find it important to mould the curriculum around active, engaging, hands-on lessons that create an environment facilitating learning. New lessons are not just formally introduced using information from a textbook as I use a variety of techniques such as storytelling, simple questioning and brainstorming activities to check pre-requisite knowledge. To ensure full participation, volunteers are requested to mind map all the answers on the board. Following class discussion, I then use text, visual and

graphic information from the textbook to supplement explanation. Most of the time, a student-centered approach and cooperative learning are preferred to traditional classroom instruction because I have observed that students who engage in cooperative learning learn significantly more, remember longer and develop better critical skills. So, I regularly adopt methods such as group work and working in pairs. To ensure a sound learning environment, I give short and simple instructions followed by a check for understanding to ensure that all students identify themselves with the task at hand and that lesson objectives are clear. However, there is often flexibility and in case students do not understand I reinforce explanation and instructions.

I constantly act as a facilitator so as to provide students with opportunities to learn and use related content and skills in other subjects. For example, I use history vocabulary and reading material in language lessons and incorporate instruction in how to read non-fiction materials into history lessons. Similarly, in their art class, students can make use of past events from history to create tableau. Through integrated learning, I provide students with multiple opportunities to reinforce and demonstrate their knowledge and skills in a range of settings. For example, research and communication skills encourage connections among many subject areas. Students are often required to communicate their research findings through written projects and oral presentations which help them develop skills required for language subject.

Information and Communication Technology (ICT) also provide a wide range of tools with a unique capacity to extend and enrich students' learning in history as well as teachers' instructional strategies. Therefore, I encourage students to use ICT to support their learning through internet websites to gain access to archives around the world.

To further create an interesting opening which sparks students' interest, visits to local museums, archaeological digs and other historical places are organised with the help of my colleagues from the department of Social Sciences. This helps students to develop a better understanding of various aspects of history when they can see and experience realistic depictions and actual historical facts they are studying.

For evaluation purposes, I normally use role play, class presentation, feedback from students, summary of main facts/features and written assessment as the main tools to assess students. It is noteworthy that the activities and summary at the end of each unit in the textbook helps me greatly in assessing students'

performance and understanding.

Teaching history involves teaching students to analyse historical evidence, to consider perspective and context and to go beyond the written word. Therefore, teachers themselves must understand the “know how” of history and possess a deep understanding of what history is. This involves the fostering of a deep knowledge of the discipline. But it is to be noted with great concern that very few teachers in Mauritius have a specialisation in history. Hence, this poses challenges for teachers as most teachers responsible for teaching history are either specialised in Social Studies or Sociology. As a result there is a heavy reliance on textbooks as resources available to teachers are very limited. Most lessons are conducted within the four walls of the classroom, as arrangements for a film show require a rigid hierarchical process to be planned because not all secondary schools are equipped with an audio-visual room.

Moreover, an average of 35 minutes per week is allocated for history class which is very limited to successfully meet the lesson objectives. In addition, despite being on the plan of the Ministry to teach history at School Certificate (SC) which is Form 5 or O level, history is still being taught only from Form 1 to Form 3 except for some private secondary schools such as Mahatma Gandhi Institute where history is being taught at School Certificate (SC) and Higher School Certificate (HSC) level (A levels) but with very few students. Therefore, students show a lack of interest in history as it is not a career oriented subject.

Role play which I normally use as a teaching strategy is limited to the classroom setting which allows limited space for performance. We also have many on-line resources but computer and internet facilities at school are inadequate. Consequently, students have to rely on the affordability of their family to access such facilities. Besides, field visits too, have become less frequent as permission is not easily granted.

Though teaching history has proved to be quite challenging for me, I must say that the five years of experience and support from the department of Social Sciences have proved to be valuable in my teaching career. I also look forward to continue with on the job training whenever I get the opportunity so as to build my capacities to serve my students.

USING HISTORY TEXTBOOKS IN A WELL-RESOURCED SOUTH AFRICAN SCHOOL

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I teach History from Grade eight to twelve thus I am privileged to see the whole high school syllabus (Curriculum and Assessment Policy - CAPS) played out in my classroom. I have an Honours degree in History and I have been teaching for nine years. I have a data projector in my classroom with a computer and internet access. I am able to not only utilise textbooks as a pedagogical tool but the internet and YouTube. This is really amazing when we have to show learners cartoons and teach visual literacy skills. You tube clips such as History with “Hip Hughes” and others like him make History interesting and fun for learners.

I would like to ask publishers to produce digital versions of their textbooks so that learners can see the pages on the screen and then have the book itself as a hard copy to take home and study from. This will increase the textbook's value for the publisher and the learner. As not all learners are auditory learners seeing the text or the image can benefit them tremendously.

The primary teaching textbook I use is Oxford *In Search of History* Grade 10, 11, 12. For grade eight and nine I use Oxford *Successful Social Sciences*. I am passionate about History and History teaching and I personally love the Oxford History books but utilise as many textbooks as I can to afford to buy on my limited budget to provide me with a broad analysis of the curriculum.

The learners have a History textbook and I explain the words in the text and we analyse the cartoons and any other images in the textbook to increase visual

literacy skills. Then the relevant activities are done and then we go through the answers that are in the teachers' guide and we have a discussion about any learner answers that may be different but not incorrect to the textbook's teachers guide answers. The questions and the answers are explained to learners so that they can learn to recognise the different types of questions that are asked about the sources.

Textbooks can be very helpful to give teachers an overview of the curriculum. Each section can be read from various textbooks to get an overview of the theme or the content. Educators have a vast quantity of knowledge to ingest and by reading through the various textbooks I gain insight into the CAPS curriculum. Learners can then receive worksheets that use the best questions from all the textbooks.

Ultimately I would like to have my own set of composite notes for each section of the syllabus, made up from many textbooks and many different other resources, such as academic books or websites. These notes could be placed on the school intranet and contain hyperlinks that then let learners access the History notes and other web pages and websites to enhance their learning experience.

The learners are allocated a textbook and it becomes their responsibility for the year. This gives them a sense of ownership and helps them to take care of something that is not their property as subsequent learners must use it. It can also help them to feel secure knowing that they can read ahead or go over things that have been done already or even complete the exemplar papers as revision for exams at the back of the textbooks. Textbooks must be handled by the learners physically and they need to bring them to school every day which can be quite onerous for a learner who has many subjects and walks to school. The general layout can be explained to learners. Contents page, various chapters and sections can be highlighted for them to familiarise themselves with the book and that term's curriculum requirements. This might seem pedantic or an exercise in futility however it will be helpful to learners who are not used to handling books. It is a similar exercise to teach English learners dictionary skills. I call this "textbook skills" especially for the screen generation who are used to handling nano electronic devices and not paper books the size of an A4 page.

Hand-outs of extra notes can be given to learners which, is also helpful so that they do not write in the textbooks or highlight words and write in the text books that have to be used for at least six or seven financial years due to

the financial constraints placed upon schools.

In a typical lesson the textbook will be used as the primary resource and the educator will explain the concepts in the textbook and make a summary of the contents of the page for learners to see, either in the form of a mind map or set of notes on the whiteboard.

The activities that are in the textbook are based on historical skills learners need so then they will do the activities and the educator will emphasise the skills required and teach those skills before they do the activity in the textbook. Thus textbooks serve two functions as they contain the information required for learners in the form of the actual text, photos, graphs, cartoons, drawings, paintings, posters and other visual images and they also have activities to keep learners busy and working on their historical skills. History is simply practising these historical skills and the textbook needs to have many different types of questions so they can practise these skills and interpret, critically analyse and engage with the textbooks and the content that is in them.

Other sources that are used in a classroom are worksheets and movies. Worksheets and films go together as film studies are always great for learners to visualise the scenery and historical places. Excursions can also be used to enhance the teaching of History and the Holocaust museum in Durban is an excellent place for Grade 11 learners to critically engage with the past.

Textbooks can be very helpful to educators for assessments. The sources can be provided by the textbooks which must then be referenced correctly and then utilised as actual assessment questions or examination questions. Sometimes the rewording of some of the questions can be made or new questions created. The teacher can use similar questions to the textbook or think of new ones that are at the correct level. Bloom's taxonomy can be a useful tool for this purpose. Some textbooks are better than others and no one textbook has it all, so for History teachers to be able to do their jobs well, they must have a variety of textbooks so learners can be learning from a variety of sources (that they can then interrogate and analyse critically) using their historical skills.

Different textbooks can be used for different sections of the curriculum.

I use the textbook that has the most variety of sources and questions for learners to be able to think critically and so that there is enough content in the text itself to be able to write an essay on that particular topic.

History textbooks can never be a "one size fits all category" and so each teacher must make the best use of the resources that their school can afford,

however not all schools can afford books so this is an issue that many schools have. Perhaps textbook publishers can donate one free copy of their textbooks to all the municipal libraries, providing that municipalities and schools have libraries that are utilised by the public and learners.

Every learner has a textbook in my school. I love books, so in my classroom textbooks are a wonderful option and I use them regularly and follow the CAPS curriculum. I try my very best to provide the learners of History with critical historical skills (I am very passionate about visual literacy) so that they can become informed citizens ready to take their place in a democratic South Africa.

THE VARIED NATURE OF HISTORY TEXTBOOKS IN THE TEACHING OF HISTORY IN CAMEROONIAN SCHOOLS

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Like most countries in Africa, Cameroon is a colonial construct. It has its specificities and paradoxes, which are quite mesmerising. Cameroon is one of only a few countries in Africa to have had three colonial masters, Germany, France and Britain and has serpented through Anglo-French Trusteeship, Federalism and the unitary state, to what is today just the state. Geographically, even Cameroon's location is ambiguous with an English-speaking sector located in West Africa and the French-speaking sector in Central-Africa¹ It is based on this standpoint that the Anglophones and the Francophones who graduated from the two colonial legacies and from two colonial educational systems reunited in 1961. It is vital to understand the path covered by the former German colony to achieve unification. After the defeat of the Germans in Cameroon in 1916, Britain and France were left to arrange the administration of this former German colony. Based on fundamental differences after the war as to the type of administration to be introduced to be styled on whose mood – Britain or France separated

¹ W Gam, Nkwi, *Voicing the voiceless: Contributions to closing gaps in Cameroon History, 1958-2009* (Bamenda, Langaa Research and Publishing CIG, 2010), p. 137.

the imperialist. This disagreement was enough for them to settle on the partition of the territory. With the partition effected in 1916 and endorsed by the League of Nations in 1922, each colonial power administered its own section differently. British Cameroon was administered as part of Nigeria and developed along the Anglo-Saxon line and France did not administer its own portion as an appendix to any French territory, but even so French Cameroon developed along a De Gaullist path and the Francophone culture. For close to three decades the peoples of the former German colony were separated. France granted independence to its own sector 1st January, 1960 and the independence of British Cameroon came through a United Nations organised plebiscite on the 11th of February 1961 and reunification and independence of the two Cameroons on the 1st October 1961.² It was from this juncture that all attempts to reunite the two educational systems to produce a national system responsive to Cameroon's political, economic, social and cultural aspirations to present have failed.

There was excitement and enthusiasm in the political scene for both systems to be united so as to create a single national educational system adaptable to Cameroonian needs. Apart from the political measures the legislative and administrative procedures for the harmonisation of the educational systems were high. A National Council for education was created as the forum for harmonisation. The council initiated reforms that resulted in the first federal law on education No .63/COR/5 of 1963. This was achieved through the initiative of a National Council for Education charged with the harmonisation of the educational systems of Cameroon. In June of the same year Law No 63/COE/13 of 19th June 1963 restructured the secondary school and a senior or high school cycle. Unfortunately, while the Anglophone side was implementing these laws on the harmonisation of education in the country the Francophones were not implementing these laws, but rather they maintained the French educational system and were attempting to wipe out the British system of education. Realising that the Francophones were adamant not to change, the Anglophones became intolerant and resistant to further changes proposed by the Francophones for the harmonisation of the two educational systems.

The Anglophones' resistance to changes in the educational system was reinforced by the introduction of the London General Certificate of Education

2 For more on the political process in Cameroon see; VJ Ngoh, *Cameroon 1884-1985: A hundred years of History* (Yaoundé, Navi-Group Publication, 1987); VJ Ngoh, "Dismantling the federal system", VJ Ngoh (ed.), *Cameroon: From federal to a unitary state, 1961-1972: A critical Study* (Limbe, Design House, 2004).

(GCE) examination curriculum in 1963 to replace the West African School Certificate Examination. This was followed with the return to the London GCE curriculum and the presence of the British volunteers in the Cameroon educational system. The West Cameroon Educational Reform of 1963, which was based on the Nigerian educational system, further perpetuated the desire for the British system of education from being assimilated by the Francophone system was the top priority of the Anglophone minority in Cameroon who fought³ for the creation of an independent examination board for the Anglophone educational sub-system – the Cameroon General Certificate of Education Board (CGCEB) which was granted in 1993. This Board is charged with the responsibility of designing the curriculum and decides on the kind of textbooks to be used in schools and colleges in Anglophone Cameroon in consultation with the Ministry of Secondary Education. It has the sole responsibility of organising the complete process of examinations in this part of the country. On the other hand another examination board was created for the Francophone sub-system. The Baccalaurean Board oversees the examination processes of *Probatoir* and *Baccalauria* examinations respectively – the equivalent of the ordinary and advanced levels for the Anglophone sub-system.

This article therefore examines the use of textbooks in Cameroon in the teaching of history in the secondary and high school⁴ levels in Cameroon schools. In it I argue that the use of textbooks varies from public to denominational or private (mission schools) to lay private (sole proprietorship or limited liability) institutions. While the state publishes and makes official the textbooks to be used in schools in the country, the private and lay private institutions decide on what kind of textbooks to be used by their schools. While the use of these books are made more compulsory in mission schools to both the teachers and the learners, the public or Government and lay private school may decide to use them or not. In as much as there are variations in terms of publication and authorship, the content remains the same, which is tied to the curriculum. These differences in the use of textbooks in Cameroon schools have prompted some teachers to create a summary of the original text on the official booklist to produce pamphlets with hints on how to interpret

3 NB Francis and AR Fonteh, *The Cameroon GCE Crisis: A test of Anglophone Solidarity* (Bamenda, Langaa Research and publishing, 2008, CIG).

4 The secondary school level or first cycle is the junior level after primary school which last for six years and the junior secondary has a five year duration. In the fifth year the candidates are expected to write a national examination which is a transition to the senior or high school level or second cycle, with at least a pass in four of more subjects. At the end of the second year another national examination is written with a pass in two or more subjects a candidate can secure admission in to a university or any higher institution or professional schools

examination questions. Learners pay less than the cost of the official textbook for these creations. In the mission schools these “teacher made books” are not accepted for use by learners.

It is important to note that most of the textbooks accepted by the government for official use are written by government school teachers. The mission schools encourage their teachers to write for use by their schools. The lay private schools oscillate between the official books, and those from mission schools. Of relevance is that they make frequent use of pamphlets. Pamphlets are made by teachers to supplement the absence of the textbook by students caused either by scarcity, cost and are more simplified or focused towards examination and are less costly. Interesting is the fact that they are made by the teachers on the spot who at times force it on the students most probably because they are not in possession of the original. Again, teachers produce these books to make up for their poor pay or salary while the students themselves who find these pamphlets easy to read go in for them. These differences in authorship and publications has been conditioned by the fact the government has not encouraged teachers who are not on the official payroll to write. To increase the pay of the mission teachers their employers encourage them to write and make use of the compulsory books. Secondly, the educational system in Cameroon is examination oriented, this gives room for teachers to write based on that.

Whether there are books on the official booklist or private or lay private, they do not meet the requirements of international norms of textbooks. A textbook should consist of a registration number, a publishing and or printing house, editor(s), and the content and to an extent the quality of the paper. The books used in the school system in Cameroon do not meet these criteria more so, because publishing houses are scarce, editors are scarce and expensive to hire, and above all books that are specialised in the reconstruction of Cameroon, Africa and World histories are expensive. It would be preferable to say the books used in the secondary and high school levels in the teaching of history in Cameroon are co-supplementary textbooks.

Since the Cameroonisation of the GCE in 1977 and the advent of the GCEB in 1993, both the structure and the course content of Ordinary Level and Advanced level history has evolved significantly. Forms 1 and 2 treat the history of the Great Empires in Africa, civilisations, Islam, Christianity, inventions and inventors and the advent of the Industrial Revolution in Britain. Therefore, in these forms the focus is on the early history of Africa

and part of British history. Given that these are topics that no single textbooks has included, teachers then make use of specialised textbooks authored by African and European historians on these subjects to compose a volume for Cameroon schools that will answer the questions posed by the curriculum. It is important to understand that in the French section of Cameroon, especially in the denominational and lay private schools reserved for Anglophone learners, they prefer books coming from the Anglophone section of the country rather than those authored by Anglophones who have taken up residence in the French zone. The contention here is that the textbooks coming from the Anglophone zone have met the conditions for official examinations controlled by the GCEB. Some principals of public schools in the Francophone zone sometimes do the exception by not respecting the official books and make use of books from mission schools. The reasons advanced is that they are co-authored and better edited, supervised, focused and in better language which explains why these mission schools perform better in official and public examinations.

In the Catholic missions as a whole and Our Lady of Lourdes College Mankon, Bamenda, the history textbook used is the *New Companion History for Secondary Schools and Colleges, book one and two*. This book is co-authored by four teachers of the Catholic Education Agency of the Archdioceses of Bamenda among whom are Nyinchia Godwin Gham and Nfor Augustine Fanka. It is used only by schools in Bamenda and some lay private schools at which the authors give part-time teaching. What is of relevance here is that a textbook can be used by other mission schools, both within the same denomination for example the diocese of Buea or Mamfe if one of the authors is from there, or just by simply lobbying with colleagues and or the education secretaries of sister dioceses. While on the other hand it can be used by other denominations for example the Presbyterians and or Baptists for similar reason. The exception to this rule may come from conservative Pentecostal Missions who demand that the authors should be members of their community.

At the end of each chapter, revision questions are provided for class revision and for the learners' private studies. Teachers recommend that learners should use the questions at the end of each chapter to practice for the examinations. This is common for all textbooks used in all the schools. But seldom do the teachers repeat the same phrasing of the question in a class test or annual examinations. This textbook is accompanied by a work book for learners'

practice of the lesson taught. The method of testing the learners at the junior level is based on the Multiple Choice Question and structural systems. The first method is in line with the official examination conditions while the second method is aimed at developing the writing skills of the learner. Every learner is in possession of this textbook in class. The teacher constantly makes reference to the book for illustrations, equally instructions are given for a learner to read some portion from the book in the hearing of the class. Assignments are given and the learners are asked to draw maps from the text book into their note books.

The lay private schools like Saint Frederick Comprehensive High School (SFHS), Saint Michael Academy of Science and Arts (SMASA) and Progressive Comprehensive High School Mankon (PCHS), use these textbooks but their use by both teachers and learners is not compulsory. Very few learners are in possession of history textbooks in particular. The reasons are three-fold: the first is that most of the learners in these schools come from low income homes and non-salary earners, secondly the parents of the learners see no reason to buy textbooks after they have paid school fees and the third is that the schools themselves do not lay emphasis on the learners to have them. They are interested in the collection of school fees since the motive of most private venture is the maximisation of profit. They ensure that the teachers give the learners all the notes in class and thus the learners like their parents and school management do not see the need for text book, but endorse the workbooks.

In public or government schools, the situation is not very different. The teachers emphasize history textbook use but do not make it mandatory. They occasionally give assignments on the prescribed textbooks and encouraged student to do group work. Like their colleagues in lay private schools they hardly make use of the textbooks in class or use them in classroom teaching. The history textbook used for forms one and two is *History For Beginners Book one* and *Ordinary Level History for Cameroon Schools*. Form 3 or mid secondary school level has a different history textbook from the first two levels. The curriculum for the GCE examination begins at this level and the focus is on the history of Cameroon only. The topics which are treated in this class are from the arrival of the imperialist along the coast of Cameroon to the end of the German rule in 1916 and beyond. The curriculum emphasises that the history of Cameroon is treated completely here. But given that it is almost impossible, it is spread for three years more so to keep the student current with events right to the end of their examination. Secondly, because

out of the 50 MCQ for the examination, 25 are from Cameroon and of the 4 questions in the second section essay two should be answered from Cameroon with a compulsory stimulus or extract question from the two. Most of the specialised textbooks on the early history of Cameroon were reconstructed by Eurocentric historians, Anthropologists and Sociologists *inter alia* Ardener Shirley, Delancy Mark, Rudin Harry, Chilver and Kaberry and some Cameroonian Historians like V.G. Fanzo and Ngoh Victor Julius. It is with these specialised textbooks that teachers of history used to write textbooks to be used by their learners. In the Catholic Mission School, the text book used is *Certificate Approach to Ordinary Level History 3-5: Cameroon, Africa and World*, authored by two teachers of the agency Nfor Augustine Fanka and Nzelenmuyuy Ernest. This text is accompanied by a workbook and other question and answer pamphlets to guide learners towards the end of course examinations. In government schools the recommended textbook is *Ordinary Level History for Cameroon Schools*, by Anucam books

The last two years of the secondary school level maintain the same books. At this level, there is the introduction of African and world history. In government schools the world history book used is *The World Since 1914* by Jeo Scott. However, the lay private school make use of a teachers' hand out which is oriented towards the examinations. Past GCE questions are answered for the learners who sometimes resort to cramming rather than studying for knowledge but for examinations reasons.

At the high school or second cycle level the three sections of history are maintained but with emphasis on details. The approach, method and style of writing the textbooks are very different. It has to meet the required standard of the Advanced Level syllabus. In the mission schools mentioned above the books used are *Standard African History, Cameroon History Since 1800* by Ebanek John and *World History for Secondary Schools* by Tefu Emmanuel. In government schools they use *Elaborate African History for Advanced Level GCE* and *Essential Modern World History*, by Bate George Enow.

In order to prepare to teach history in all the forms, the use of specialised text is necessary. The books are listed in the table below:

For Cameroonian History

Authors	Titles
S Ardener	<i>Eye-Witness to the Annexation of Cameroon, 1884-1887</i>
Elango Z Lovett	<i>The Anglo-French Condominium in Cameroon, 1914-1916: A History of Misunderstanding</i>
Eyongetah Tambi and Robert Brain	<i>A History of the Cameroon</i>
VG Fanso	<i>Cameroon History for secondary school and colleges Vol 1</i>
VG Fanso	<i>Cameroon History for secondary school and colleges Vol 2</i>
Le Vine Victor	<i>The Cameroon Mandate to Independence</i>
Ngoh Victor Julius	<i>Cameroon 1884-1985</i>
Ngoh Victor Julius	<i>Constitutional Development in Southern Cameroons, 1946-1961</i>
Ngoh Victor Julius	<i>History of Cameroon Since 1800</i>
R Harry	<i>The Germans in the Cameroons, 1884-1914</i>

For African History

Authors	Titles
Ki-Zerbo Joseph	<i>General History of Africa</i>
Onwubiko KBC	<i>History of West Africa</i>
R Oliver and A Atmore	<i>Africa since 1800</i>
J Vansina	<i>Oral Tradition as History</i>

For World History

Authors	Titles
RD Cornwall	<i>World History in the Twentieth Century</i>
D Richard	<i>An Illustrated History of Modern Europe</i>
N Lowe	<i>Mastering Modern World History</i>
M John	<i>Twentieth Century World History</i>
HL Peacock	<i>Modern European History</i>

Given that the books in the table above are scarce and expensive most learners of history cannot afford them. This has resulted in making teachers resort to pamphlets and other make-shift and supplementary documents discussed above. Consequently the teachers resort to producing alternatives to help the learners and facilitate their teaching. These are mostly question and answer guides with past examination questions with ready-made answers to them. Prominent history teachers who have made their name in this domain include; Batey George Eno with his famous *Path Finder*, used by both teachers

and learners in Cameroon, Atu Robert and Ndifon Walters Gham and their *Success in Cameroon, Africa and World History* and others. Some of the titles of these reads thus; *The cure to World History, History Made Simple, Ease Revision Guide History for learners* and so forth. The titles are attractive and the content is appealing to the learners who rush for them, for use instead of a history textbook; they made references in them to support any historical argument. These alternatives are absent at the junior levels, and therefore most learners at this level do complete this level without ever seeing a history textbook or its supplementary one. The reason is simple the market is not there because the learners are not preparing to write any public examinations, the teachers do not waste resources producing what is not needed.

In the teaching of history in the secondary and high school levels in Cameroon apart from the use of textbooks there are other teaching aids needed in class to facilitate the teaching and learning processes. These include; maps, charts, tables, statistics, photographs, power point and computers. Like the text books these are completely absent in all the schools in Cameroon.

The Cameroon educational system and educational planners have failed to make use of textbooks in the teaching of history mandatory to both teachers and learners. This is explained by the fact the educational system is examination oriented that the need for further research and reading as far as the discipline history is concern has been relegated to the background. This problem further inhibits the effective mastery of the facts and events in history generally. To rescue history from banalised mire, it must transcend and move out of the examination system to academic and knowledge base system. This is the only way to move towards meaningful qualitative and quantitative development of the teaching and learning of history.

BOOK REVIEWS

New Generation History: Grade 11 learner's book

(New Generation Publishers, 2015, 358 pp. ISBN 13: 978-1-920321-96-3)

Fiona Frank, Lindiwe Sikhakhane, Reggie Subramony, Carol-Anne Stephenson, Thembi Mbansini, Roshnie Pillay

Byron Bunt

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Vaal Triangle Campus

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New Generation History for Grade 11 was compiled by a team of highly qualified and experienced History teaching practitioners. The book is quite impressive, learner-friendly, as well as highly attractive with a memorable front cover, riddled with photographs of some of the most important figures in modern history.

The authors of this textbook set out to address the demands of the Curriculum and Assessment Policy Statement (CAPS) for History in Grade 11. Regarding the format of the textbook, the contents page (p. vi) is accurate, as is the index and the bibliography on p. 348. The introduction “Note to the 21st century history learner” is sufficiently descriptive. A section on “History in the South African Context” is given on p. ii and another on “History and the world of work” on pp. iii. There is also a page dedicated to historical concepts, such as cause and effect and time and chronology on p. v.

New Generation History is laid out in a well-organized fashion as it progresses through all the content specified in the official curriculum. It is abundantly equipped with descriptions, definitions and concept summaries. There are many other constructive features within this textbook, for example that a good range of media from both primary and secondary sources have been used. The sources which have been selected, which include maps, photographs, maps, cartoons and diagrams, are of the highest applicability and are also very commendable. The learner activities are appropriate and of the highest

quality and to achieve the purpose of learning History. Unfortunately, no model answers have been included at the end of the book.

New Generation History is also envisioned for inclusive education purposes, and there is no overt evidence of prejudice in terms of race, gender or religion. The examples used are very relevant in terms of teaching for non-racialism and equality. The writing style and language usage is appropriate for this grade, although there are some errors in grammar and style. These, however, are not enough to detract from the overall quality of the textbook.

In conclusion, *New Generation History's* content is reasonable, and as such, it will be a valuable resource for high school teachers of Grade 11 History. The authors approach the topics in a thought-provoking and original way, and there are ample amounts of highly enjoyable assessment activities for learners to complete. With the addition of improved editing and careful proof-reading, plus the inclusion of model answers for the exam exemplars, the textbook would have received a much more favourable review.

The shouting in the dark

(Jacana Media [Pty] Ltd, 2015, 247 pp. ISBN 978-1-4314-2233-3)

Elleke Boehmer

Ramon Mark Fynn

University of KwaZulu-Natal: Edgewood Campus

ramonmarkfynn@gmail.com

The shouting in the dark is an excellent historical fiction book reflecting what life appeared to be like in colonial and apartheid South Africa, but particularly during the 1970s. It constructs a representation of the family life of a “white” (immigrant) family seeing South Africa through the eyes of a young “white” girl. Most historical novels that deal with the difficulties in colonial and apartheid South Africa tend to be about “Black”, “Indian” or “Coloured people. However, the author’s aim in this book is to show that South Africa was a land that was divided not only across the race boundaries, but also within families.

This book consists of sixteen sections whereby the author wishes to keep the focus on Ella, the main character's perspective. This is done so that the different stages of her story of survival are revealed to the reader as one gets to know her. Emphasis is placed on seeing life through the eyes of a "white" child growing up in colonial and apartheid South Africa. This is all carefully written to show that "white" children also felt the anguishes of apartheid, one of them being the constraint of not being able to explore the world around them and interact with all individuals living in South Africa.

The novel reveals Ella, a young girl who is from a dysfunctional home, and her struggle for recognition. Ella's father (Har) married his first wife's sister (Irene) not long after the first wife, who Ella is named after died. The sudden marriage leads to Ella's untimely birth and disability, resulting in her lack of acceptance. Ella has a poor sense of identity as she is not given the chance for self-exploration. The author captures how Ella has blossomed as a young lady, despite her challenges, and her love for the "black" teenage gardener (Phineas). This novel symbolises Ella as a young country wanting to embrace its differences and come together as one for the benefit of peace, love and happiness.

Upon reading this novel it becomes evident that the author conducted efficient research to contextualise the novel historically. Reading this novel makes one eager to inquire more about the real experiences of "white" families under a failing colonial system, and under the apartheid regime. Such a novel allows one to imagine and step into a different world of understanding historical experiences, something which school textbooks still struggle to do. It is through such a novel that learners of history can empathise with the characters of the past and in some way relate to them even though things have since changed in South Africa.

The novel narrates the experience of a child growing up in an abusive home, torn between loving outside of her race grouping and finding herself. South Africa was then divided across the social, cultural and aesthetic aspects in the 1970. However, even today the apartheid prejudices are entrenched into society and many learners are dealing with the issues that Ella experiences in the novel. Therefore a sense of empathy can be developed through this novel.

The focus of *The shouting in the dark* is on the experiences of Ella and how she wants to establish herself. Many a time parents want to enforce their ideologies and their views on life on their children, as in Ella's case. This novel shows how the young girl, through her experiences and challenges, wants to

create her own understanding of the world around her and not be repressed by her parents' ideology. Likewise, in the teaching and learning of History, learners come to class having to deal with the perceptions of History brought down on them by their elders, parents or educators. This novel can aid in the learning process for learners to challenge their thinking of what they see as "truth" according to their elders parents take.

The shouting in the dark is well written; the historical aspects, besides being thoroughly researched, are presented in an engaging manner. There is a sense of engagement or oneness with the characters and the author. The author has succeeded in offering a looking glass for readers to see the effects of colonisation and apartheid through the eyes of a child. Therefore, *The shouting in the dark* enhances the deeply rooted historical challenges placed on a young girl (Ella) in South Africa similar to what many young South Africans are still. Ella can be viewed as a symbol of South Africa who fights for equality and justice in what can be described as a dark and disturbing yet a positive outlook portrayed through this novel.



PROGRAMME
29TH ANNUAL SASHT CONFERENCE
(9-10 October 2015)

hosted by

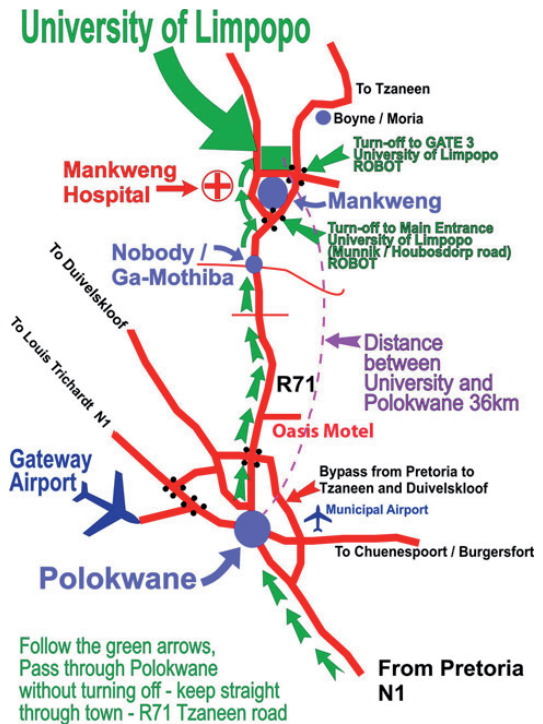
**The University of Limpopo School of Social Sciences and
 Department of Cultural and Political Studies**

VENUE:

The University of Limpopo,
 University Street, Turfloop,
 Sovenga, Polokwane (Pietersburg),
 Limpopo Province (23.8860° S,
 29.7380° E)

(30 km out of Polokwane on the
 R71 to Tzaneen/Phalaborwa)

http://www.ul.ac.za/application/images/get_here_map.jpg



SASHT EXECUTIVE AND REGIONAL REPRESENTATIVES

Term: Oct 2014-Oct 2017

Core Executive

- **Chairperson:** Elize S van Eeden Elize.vanEeden@nwu.ac.za
- **Vice Chairperson:** Henriette Lubbe lubbehj@unisa.ac.za
- **Secretariat:** Susan Bester sjbdok@telkomsa.net

Additional members:

- Patrick McMahon (Website-Facebook portfolio & core meetings) mcmahons@netactive.co.za
- Jakes Manenzhe (General SASHT Marketing-DoE & other podiums) ManenzheJ@edu.limpopo.gov.za
- Siobhan Glanville-Miller (G- Province – FET marketing & reporting) Siobhan.glanvill@wits.ac.za
- Rob Siebörger (DoE; DBE and DHET-communication and GET-marketing//reporting) rob.sieborger@uct.ac.za
- Pieter Warnich (NW- Province rep. and *Yesterday&Today* editor) pieter.warnich@nwu.ac.za
- Barry Firth (WC- Province rep. and History Textbooks developments) barryfirth29@gmail.com
- Marshall Maposa (Popular SASHT-Teaching Journal exploring and Book Review reporting *Yesterday&Today*) maposamz@ukzn.ac.za

Co-opted members (for regional representative and/or particular sub- committee positions):

- Matthew Marwick (KwaZulu-Natal province regional representative) marwickm@mc.pmb.school.za
- Sunet Swanepoel (Northern Cape Province) sunet@museumsnc.co.za
- Keneilwe Mosala (Mpumalanga Province) kmosala@mpg.gov.za
- Wilfred Chauke (Limpopo Province) chaukew@gmail.com
- MG (Gladstone) Nhlapo (Free State) mgnhlapo@gmail.com
- Rika Odendaal-Krone (History Olympiad developments and Web-quiz) rikaod@gmail.com
- Eastern Cape representative -Vacant

Thursday 8 October

15:30 – 16:30	Meeting: <i>Yesterday&Today</i> Editorial members	Pieter Warnich (Editor)	Venue: Rustic Rest B&B
16:30 – 17:00	Tea/Coffee		
17:00 – 18:00	Meeting: SASHT Regional Representatives	Henriette Lubbe (Vice Chair SASHT)	Venue: Rustic Rest B&B
18:00 – 19:30	SASHT Executive Committee meeting	Elize van Eeden (Chair SASHT)	Venue: Rustic Rest B&B
19:30 -	Dinner for SASHT Executive and regional representatives & spouses		Venue: Rustic Rest B&B

Friday 9 October

07:30 – 08:55	Registration all delegates & SASHT membership applications & renewals			
FACILITATOR:	SESSION ONE			
	Jake Manenzhe (Curriculum advisor – Limpopo & chief conference organiser)			
09:00 – 09:30	Welcome			
	General arrangements			
09:30 – 10:30	SASHT Presidential address <i>Are history educators (also) “dangerous people”?</i> Elize S van Eeden (NWU-Vaal Triangle Campus) Elize.vanEeden@nwu.ac.za			
10:30 – 10:45	TEA			
FACILITATORS:	SESSION TWO			
	Gengs Pillay		Siobhan Glanvill-Miller	
	VENUE A		VENUE B	
10:45-11:45	Land and history teaching		Textbooks and assessment	
10:45 – 11:05	Marj Brown (Roedeans Senior School, Johannesburg) MABrown@roedeanschool.co.za	<i>The forced removal of Bakwena Ba Mogopa, the choices people made and subsequent splintering of a community</i>	Rob F Siebörger (Emeritus Assoc. Professor – UCT) rob.sieborger@uct.ac.za	<i>DBE screening of Gr 12 textbooks – Lessons for History Education</i>
11:05 – 11:25	Sebola, Mokoko (University of Limpopo) Mokoko.Sebola@ul.ac.za	<i>The Mapungubwe story and land claims in South Africa: The battle for the soul of the dead, greed and deception</i>	Barry Firth (Crestway High School – Cape Town) barryfirth29@gmail.com	<i>Developing historical thinking? Think again!</i>
11:25 – 11:45	Discussion		Discussion	
FACILITATORS:	SESSION THREE			
	Marj Brown		Keneilwe Mosala	
	VENUE A			
11:50 – 13:20	Sharing assessment experiences and ideas			

11:50 – 12:10	Paul Maluleka (University of the Witwatersrand- student) Malulekapaul@gmail.com	<i>How Social Sciences II initial teacher-training students understand the 'role' of King Shaka played, before and after exposure to historical accounts</i>		<i>Self-directed Learning based assessment by means of creative tasks (projects) for History students</i>
12:10 – 12:30	Monnapule J Mosifane (Social Science teacher – Beisang Mabewana Primary School – Free State) mjmosifane@gmail.com	<i>Enhancement of parental involvement in teaching of Social Sciences (History part): A transformative approach</i>		<i>Developing quality assessment items in FET History</i>
12:30 – 12:50	Lesley W Cushman (Holocaust Centre, Cape Town) lesley@holocaust.org.za	<i>Teaching and assessing the Holocaust with sensitivity</i>		<i>Developing visual literacy skills in the History classroom using picture-books</i>
12:50 – 13:20	Discussion			
13:20 – 14:10	LUNCH			
	SESSION FOUR			
FACILITATORS:	Barry Firth	Fred Netshikhophani		
	VENUE A	VENUE B		
14:10-15:10	Debating History teaching from other angles		Sharing assessment techniques (2)	
14:10 – 14:30	Johan Wassermann (University of KwaZulu-Natal) Wassermannj@ukzn.ac.za	Pieter Warnich (NWU- Potchefstroom Campus) pieter.warnich@nwu.ac.za	<i>Designing and implementing role play as a performance assessment strategy in a history class</i>	
14:30 – 14:50	Francois J Cleophas (University of Stellenbosch – Cape Town) fcleophas@sun.ac.za	Philip Modisakeng (NWU- Potchefstroom Campus) 13279378@nwu.ac.za	<i>Assessment practices and challenges for History students in an Open Distance Learning (ODL) context</i>	
14:50 – 15:10	Discussion		Discussion	
15:10 – 15:30	TEA			

FACILITATOR:	SESSION FIVE Henriette Lubbe
WORKSHOP SESSION 1 15:30 – 16:45	Infusing (broad organising) concepts for the study of History into assessment
15:30 – 16:30	Michelle Friedman (University of the Witwatersrand School of Education) <i>Causation and Alphonse the camel</i> michelle2.friedman@wits.ac.za
16:30 – 16:45	Discussion
17:00 – 18:00	SASHT ANNUAL GENERAL MEETING
19:00	CONFERENCE DINNER

Saturday 10 October

08:30 – 08:55	Registration delegates & SASHT membership applications & renewals			
FACILITATOR:	Sekgothe Mokgoatsana			
09:00 – 10:00	<i>UNDERSTANDING AND INTERPRETING HISTORY:</i> <i>What and how the learners can learn from the past?</i> Keynote speaker: Prof N Barney Pityana			
10:00 – 10:30	TEA			
FACILITATORS:	Wilfred Chauke		Joyce Monakhisi	
10:30-11:30	Debating the relevance of assessment		Revisiting taxonomies (skills) in the assessment of History	
	VENUE A		VENUE B	
10:30 – 10:50	Gillian Sutton (Educator – Kenwyn, Cape Town) gilsut63@gmail.com	<i>Identity and assessment</i>	Kate Angier (School of Education – UCT) kate.angier@uct.ac.za	<i>So what's your alternative? An investigation into the current trends in assessing historical thinking skills</i>
10:50 – 11:10	Jake Manenzhe (Curriculum advisor – Limpopo) Manenzhej@edu.limpopo.gov.za	<i>Assessment - end product or a means to an end?</i>	Aneshree Nayager (University of the Witwatersrand- student) Aneshree.Nayager@Wits.ac.za	<i>CAPS and Assessment in History: Understanding how it's done – A case study</i>
11:10 – 11:30	Discussion		Discussion	
FACILITATOR:	SESSION SEVEN Rob Siebörger			

WORKSHOP SESSION 2 11:30 – 12:45	Successful ways to study History for days of assessments	
11:30 – 12:30	Henriëtte Lubbe (University of South Africa – Department of History) <i>Having fun with assessment: Practical tools for self- and learner assessment</i> lubbehj@unisa.ac.za	
12:30 – 12:45	Discussion	
12:45 – 13:15	SASHT Executive and other members	Review & Closing the Conference Henriëtte & Elize Lucky Vuma Gill Sutton Pieter Warnich
13:45 – 16:30	Brownbag lunch	After Conference Heritage Tour

GENERAL IMPRESSIONS ON THE 29TH ANNUAL SASHT CONFERENCE OF 9 AND 10 OCTOBER 2015

Elize S van Eeden
Chairperson SASHT
Elize.vanEeden@nwu.ac.za

The SASHT conference of 2015 in Limpopo at the University of Limpopo, and efficiently hosted by Mr Jakes Manenzhe and his team, will in many ways be remembered as a historical milestone conference. Not only was the SASHT honoured to have Professor Barney Pityana around to deliver the keynote in such an amicable and captivated fashion, but was this conference also a first for the SASHT in the Limpopo Province. Educators as potentially new SASHT members were met and it was with great adoration that one of the SASHT remarked that the Society has with this conference for the very first time achieved its goal to be well presented, and equally presented, among all groups of the South African Society. The accolades and initiatives should go to Mr Manenzhe and the University of Limpopo School of Social Sciences as well as the Department of Cultural and Political Studies and the Department of History for their inputs. A special word of thanks is to be extended to Professor Sekgothe Mokgoatsana also who pulled several strings to ensure that the SASHT members feel welcome. Indeed we did!

As for the rest of the conference itself the Limpopo Conference delivered another milestone as the first SASHT presidential speech was delivered after 29 years of SASHT-existence. It is hoped that this tradition will be continued in the years to come. In one and a half day seventeen papers and two workshops were delivered, apart from the presidential speech and the keynote address. The emphasis of discussion for this year mainly was on the different shades of thinking and applying assessment in the classroom.

In reviewing the papers at the conference from a broader angle it was noted that Kadriye Erickan and the ever green Peter Seixas (Eds) have just published on aspects of assessments that provide direction in the trends of assessment currently. The work is titled: *New directions in assessing historical thinking* (New York & London, Routledge, 2015). Educators of History can care to read for some valuable update on recent trends regards assessment. Some bits from this publication is accentuated below for their value:

There are ever more assessments, ever easier to access, worth less and less. Mere memorization can no longer be the name of the game. This creates opportunities – indeed, it demands that history education broaden its goals and that history assessments focus on more complex processes (p. X).

New technologies have radically transformed our relationship to information in general and to little bits of factual information in particular. The assessment of history learning, which for a century has valued those little bits as center-piece of its practice, now faces

an unprecedented glut surplus...oversupply] interplay (the editor's quote from Osborne 2003; Wineburg 2014).

It was pointed out that Erickson and Seixas (eds.) have thematically organised the content. The following can serve as a teaser guideline to those wanting to read the book and benefit from the ideas in assessment practises:

◇ ***Goals of History Education:***

Models of Historical Cognition and Learning

- » Historical consciousness
- » The difficulty of assessing disciplinary historical reading
- » Heritage as a source for enhancing and assessing historical thinking
- » Relating historical consciousness to historical thinking

◇ ***Issues in designing assessments of Historical Thinking***

- » Assessing for learning in the History classroom
- » Historical thinking competencies and their measurement
- » A design process for historical thinking.

◇ ***Large-scale assessment of historical thinking***

- » Large-scale assessment of historical knowledge and reasoning
- » Assessing historical thinking...
- » Historical consciousness and historical thinking reflected in large-scale assessment...

◇ ***Validity of score interpretations***

- » The importance of construct validity evidence in History
- » Cognitive validity evidence for validating assessments of historical thinking
- » Measuring up? Multiple-choice questions
- » History assessments of thinking: An investigation of cognitive validity
- » Material-based and open-ended writing tasks for assessing narrative competence among students.

In what ways the conference papers as delivered by educators from tertiary and secondary environments, and representing several provinces, have lived up to this publisher guideline and other important national needs, can be structured as contributions in the following categories:

◇ The practical side of formative and summative assessment:

- Gengs Pillay: *Developing quality assessment items in the FET-phase*
- Pieter Warnich: *Role play and assessment*

- Susan Bester: *Self-directed Learning Based Assessment by means of creative tasks*
- Henriëtte Lubbe: *Having fun with assessment: Practical tools for learners & educators*
- ◇ Skill development from different forms of assessment:
- Siobhan Glanvill- Miller: *Visual literacy skills with picture-book as medium*
- ◇ Assessing sensitive themes:
- Lesley Cushman: *A view on the Holocaust*
- ◇ National and logistical assessment challenges:
- Rob F Siebörger: *DBE screening of Gr 12 textbooks*
- Philip Modisakeng: *Assessment practices and challenges in Open Distance Learning (ODL) contexts*
- Aneshree Nayager: *CAPS and Assessment ...How it's done*
- ◇ Papers reflecting diversity and multidisciplinary facets in History:
- Paul Maluleka: *Exposure to historical accounts – Understanding the role of King Shaka*
- Francois J Cleophas: *Teaching stones in sport History*
- ◇ Value of History and parent involvement:
- Monnapule J Mosifane : *Transforming ideas on parental involvement in teaching of Social Sciences*
- Johan Wassermann: *Why do learners choose History in Gr 10?*
- ◇ Land claims and forced removals as themes for assessment in the classroom:
- Sebola, Mokoko: *The Mapungubwe story and land claims...*
- Marj Brown: *The forced removal of Bakwena Ba Mogopa*

It seems evident that historical thinking skills and designing assessments skills, as in the *New directions in assessing historical thinking* also received the attention of several presenters at the SASHT conference.. The two workshop sessions with gurus Henriette Lubbe and Michelle Friedman lived up to expectations. A warm thanks to each presenter who has prepared well, and presented their papers with so much dedication. There is no doubt that we all have learned from what was presented.

The after conference tour at the Makapan's caves was unforgettable and the 20 or more members of the SASHT that could attend, will remember the extensive but valuable session by an amicable guide until late after sunset, and to us (in the words of our guide) all eventually has made perfect historical sense.

Another first for the SASHT will be the 2016 the SASHT conference to be hosted in the Eastern Cape and probably in Port Elizabeth (in the Nelson Mandela Metropole City). Members will be updated. In 2017 the SASHT also hopes to welcome all interested at a combined conference of the SASHT with the International Society for History Didactics (ISHD) at the NWU in the Vanderbijlpark area. Both conference will take place in either late September or early October. It is hoped that all members and others interested will make effort to attend these initiatives.

UNDERSTANDING AND INTERPRETING HISTORY: WHAT AND HOW THE LEARNERS CAN LEARN FROM THE PAST?

The keynote address delivered by
Prof N Barney Pityana GCOB at the SASHT Conference

Abstract

The study of History will forever be a contested space. That is because the tools of unlocking historical material and the influences touching on that activity are always evolving and gathering new meanings. And yet, history can also become a harbinger for a variety of contesting ideologies.

In South Africa there is something of a revival of interest in history. That, I find, is at the back of the movement in higher education for transformation. A critique of the use and abuse of history in these circumstances will be presented. Alongside that, the paper will examine defensible ways in which history throws light on the present and shapes the future.

Then paper will draw on the work of literary figures like Chinua Achebe and Ngugi wa Thiong'o, as well as some modern writing on Africa. Tools of engagement with historical material will be examined as well as ways in which assessment can be deepened.

Who controls the past controls the future; who controls the present controls the past. – George Orwell, 1984

On 10 September 2015, Wits University's Paleo-anthropology Unit that has been engaged in research into the origins and evolution of the human species, unveiled their latest discovery at a star-studded unveiling at the Cradle of Humankind, Maropeng Visitors' Centre, at Sterkfontein, north-west of Johannesburg. Prof Lee Burger and his team of researchers announced that they had discovered a distinct species, they called *homo naledi*, in an almost inaccessible cave some 100 yards from the opening of the cave nine metres deep.

Prof Lee Burger, research professor in the Evolutionary Studies Institute at Wits, announced the find, reputed to be the largest of the fossils, and called it "practically the best known fossil member of our lineage." Researchers noticed that there was evidence of ritualized behavior by the community that suggested that that was a burial site, conduct previously associated with humans.

This sparked a furious reaction from, among others, Dr Mathole Motshekga, as it did in the social media and in other platforms. The essence of the objection appeared to me to be more religious than scientific. It was stated that the find

could not possibly show evidence that human beings had apes as descendants. It was feared that to do so would lend credence to the science of racism, and undermined the accepted biblical traditions that human being were created by God “just as we are today.”

This debate got me thinking. It said to me that typical of our country, race and race consciousness was always lurking just below the surface and views about religion are always the substance of our disagreements. More substantially, it confirmed for me what I had always known – that in South Africa we tend to use history in a very selective manner, only to the extent that historical material become “facts” that stand alone, or that are self-validating, without any critical, contextual assessment being brought into service. In other words it seems to be the case that some tend to believe that once something is stated as “history” then it brings all argument and contestation to an end. If there is to be any contestation therefore it rather should be about the meaning of history.

A similar development can be detected in the prevailing student activism at our university campuses. Much has been made of the statues and monuments from the history of the European colonial settlements and imperial occupation of South Africa. The ostensible reason given for attacking the statues and monuments is that they are reminders of a painful past that must be obliterated, as if that past will thereby cease to exist. To achieve this task a one-dimensional view of history must be purveyed. It is one that simply sees black people and the indigenous peoples of Africa as mere victims. Very little is made of the history of collusion by Africans in the slave trade for example, in the years of resistance to colonial occupation, or in the acts of heroism and resistance, and in cultural and scientific ingenuity that informed Africa, or in recognizing that the history of Africa cannot be confined merely to the advent of Europeans on the soil of Africa. In other words, there is a deliberate denigration of the African personality in the name of anti-coloniality. It was out of listening to so many of these historical distortions that I came to believe that the teaching of history in our country has become an imperative. It means that we ought as a nation to reverse our previous notions that history was no longer an essential, and basic to educational attainment.

I came across a petition to the Nigerian Ministry of Education recently (www.change.org) *Keep the Study of History in Nigerian Schools* by Omei Bongos Ikwue. The petition makes a compelling case for making the study of History a compulsory subject in schools. Ikwue states “History completes our existence.” In other words our human existence is defined by our history. We confirm, resist or seek to change our past, or of those who affect us today. It tells of the exploits and struggles of the past, makes us understand heroes and villains of the past whose memory hovers over our present. It shapes our value systems, and helps us to understand how our values evolves or were shapes or influenced. He quotes an editorial in a Nigerian newspaper *Vanguard* that

says that “when we obliterate history, we should also destroy artefacts, burn museums, monuments and heritage sites.” While we are at it, says Ikwue, we may as well destroy our grandparents, burn all the biographies and old photographs – because they embody the history that we cannot physically experience – the sacrifices, the labours, the hours of thought and study, or even hours of plotting and scheming, that went to shaping our present lives.”

In his magisterial work, *Why the West Rules – for now* (2010) Ian Morris takes the view that to understand and interpret history is to understand and to trace the shape of history. That “shape” does not arise from isolated and singular events. It takes time and human agency for historical events to find their meaning. That meaning is equally subject to interpretation and social sifting through the lens of human imagination. In other words, he says, “The question requires us to look at the whole sweep of human history as a single story, establishing its overall shape, before discussing why it takes that shape” (2010:22). For that reason, observes Morris, a broad approach was needed “combining the historian’s focus on context, the archeologist’s awareness of the deep past, and the social scientist’s comparative methods” (2010:24). On this understanding therefore history is a multi-disciplinary and inter-disciplinary activity.

I am always wary of the triumphalism that is often attendant to political history. A history that is put out to bring out the best, or to or to present a sanitized view of human nature. Alternatively, one has to be guarded against views of history that are linear and simplistic. The truth as we all know all human activity is complex, and dubious and inscrutable. History is no different. It is not easy always to understand from hindsight what may have motivated certain kinds of human actions. It then becomes legitimate to interpret and to speculate out of limited factual knowledge at times. For example – who are the first peoples of South Africa? The first thing to say is that a geo-political construct named as such never existed until 1910. Second, we do well to remember that the idea of nation-states with the boundaries that shape the 55 countries in Africa never existed as such. The reality is that for all time indigenous people roamed around this Continent in search of food, pastures and water, gathering and hunting, trading among themselves, at war and conquering, forming strategic alliances, inter-marrying, forming and reforming themselves. All this means is that it is no longer easy surely to trace a neat line of development from one point to the other. Ideas, and meanings and interpretation are constantly changing, words derive new meanings all the time, and new philosophies are being discovered afresh constantly. It has become very complicated to speak about “development” any longer, or about morality or values. Progress is a complicated expression, and its meaning depends both on the context as well as on the speaker and listener.

I came to think about this recently when I was trying to understand how it was that Africa appears to have been so easily colonized, her wealth looted

by imperialists, her land occupied by colonialists, and the best of her sons seized and transported as slaves, and whatever religion Africans professed was supplanted by Christianity and by Islam, and her languages ceased to carry any influence in science and knowledge development. Somehow, the same cannot be said of the Asian nations, China, India. It interests me that even today it is so easily for foreigners to bribe the political elite, peddle influence and enrich themselves. Just as in the pre-colonial times the African elite were complicit in the designs of the conquerors, and the tribal formations we now boast of were merely instruments of colonial rule.

Why then is history so fundamental for education? Chinua Achebe in his little memoir *Home and Exile* (2000) says that education in his Igbo upbringing in Nigeria was never a word ascribed to Igbo things. Education was about faraway things and places and people. What it was meant to do was to ascribe human consciousness on those faraway people and places: they were more human, more clever and worthy of emulation. Ngugi wa Thiong'o reminds us that it is the duty of African intellectuals to take responsibility as custodians of their memory and to interpret it. In other words, the coloniser's way of defining the world and of comprehending human relations had to be scrutinized and challenged. The danger, warns Achebe, is that we may be tempted to view history as "mindful and purposeful; and to see the design behind this particular summons and rendezvous as the signal at long last to end Europe's imposition of a derogatory narrative upon Africa, a narrative to call African humanity into question" (2000:46). Looking back on time does not make it history. The past becomes history only to the extent that it bears significance on the present. The wrongdoing of the past does not for that reason alone become history. The past does not valorise the present. As Achebe says, the past that is not owned by the present must remain susceptible to challenge and question, no matter how long it takes (2000:48).

What then, does this have to say about teaching history, and how historical knowledge may be assessed? The understanding and teaching of history, in the first instance, takes a great amount of intellectual courage. It means that historical material must be approached with openness, and readiness to be surprised by what one discovers. It also means that we should be wary of imposing either literalism, or linear and simplistic versions of the truth, but to recognise that all truth has many sides. One hopes that the teacher would have confronted her/his own story and journey, interpreted it and derived meaning from it. Must recognize its limitations and the extent to which it intersects with and is affected by the stories of others. The historian is not only a scientist unravelling the truth-claims of a story, but that she/he also tests that story against others and human experience as well. To that extent the historian is an interpreter.

Embedded in the study of history are forms and languages of interpretation, the emerging identities and the changes that they undergo through the

wide sweep of history. History, on this understanding, is both local and contemporary. It means that one's historical consciousness must begin with what is familiar, or ordinary and taken-for-granted. It is to undergo what may be an uncomfortable task of dissecting that which one has always assumed that one knew, and it spoke to one's culture or norms, and then to recognize that it is without meaning, may have been distorted over time and serves a purpose for which one no longer wishes to associate. It may also bring about a discovery of the darker and unpleasant side of one's history. The present must confront the past. Historical consciousness compels us to ask the question "Why?" all the time, because nothing provides a total and complete story by itself. The cultivation of a critical and perceptive mind is the task of a historian. The end product may be what late Oxford philosopher Sir Isaiah Berlin states so beautifully:

Yet, if presuppositions are not examined, and left to lie fallow, societies may become ossified; beliefs harden into dogma, the imagination warped, the intellect becomes sterile. Societies can decay as a result of going to sleep on some comfortable bed of unquestioned dogma. If the imagination is to be stirred, if the intellect is to work, if mental life is not to sink to a low ebb, and the pursuit of truth (or justice or self-fulfilment) is not to cease, assumptions must be questioned, presuppositions must be challenged – sufficiently, at any rate, to keep society moving (1978:17).

A historian then, on this understanding, is a radical transformative agent.

If that is what should be expected of a teacher of History, what is the knowledge that is being assessed of the learner? I believe that any history student must begin with a readiness to tell her/his own story, understand it and interpret it. All of us are brought up on a rich and colourful tapestry of stories. We take pride in these stories, we take our identity from these stories, we have fond memories of the tellers of the stories, and we get to identify with the stories. They get to speak to our inner being. Learn to tell your story.

Second, the learner must understand the environment where he/she is, understand the evolution of communities and peoples, the histories of migration, connect to the environment and to be inquisitive and curious as to the reasons that things are as they are, language, names and places and the natural environment are rich stores of historical knowledge.

Third, I believe that a student must learn to approach historical material critically, perceptively and with an open mind. In other words one should be open to seeing things differently and to be surprised by what one discovers. One must challenge and interrogate received wisdom.

Fourth, a learner must trace the evolution and the shape of historical knowledge. In other words what we have today was not always the way it is. What contributed to the change and what purpose does it serve?

What then does it all mean? In other words a learner must place himself/herself at the centre of the historical events in real time. They should avoid the temptation of judging the past by the lens of their day. Nonetheless, they must still confront or challenge that history on the basis of the knowledge and experience of their day. What Political Scientist Hannah Arendt had to say is so true is so true that the most radical revolutionary will become a conservative the day after the revolution. Human nature is subject to change. Power changes the way we see the world. However important it is (and it is important) we want to avoid training learners to memorise dates and events by rote.

Why then do we study History? It is to challenge and confront the present with the tools of the past, lay firm foundations for the present and to shape the future. If we understand and are comfortable with the past, as that which we cannot change, but which must not imprison our minds, then we shall not be afraid of the present that is in our hands to make or to break.

ARE HISTORY EDUCATORS (ALSO) DANGEROUS PEOPLE?

The presidential speech of
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SASHT 29th Annual Conference Polokwane, University of Limpopo, 10-11 Oct 2015

Dumela, re ja le amogela mo SASHT conference!

Hello and welcome at the SASHT conference – a first time ever in the Limpopo Province. On this historical occasion its necessary to say that it was high time. After all the history educators of this province are responsible for the third most Grade 12's in History in the country. We as Society hope to be more visible in this Province through its members and activities in future.

Introduction

In many ways, you are witnessing a very special occasion on the eve of the Society's 30th conference birthday next year (2016). As far as I can recall – ever since the start of my membership of the Society in 1992 and when I was invited to attend the founding conference in 1986 – there has never been a presidential speech. After all, educators are busy people! For the past two years I have, with interest, taken note of the presidential speeches by the chairs of two other major historical societies in South Africa, namely the South African Historical Society (SAHS) and the South African Historical Association (SAHA). As they discussed a contentious issue or two that they felt necessary to “RELEASE” on such an occasion, I realised that the SASHT also experiences issues and deals with issues that should be “RELEASED”. We are, after all, the educational side of the discipline/subject, and we may sometimes perhaps sense the concomitant tension and contentious attachments much more than those in the purely historical field of research and writing.

So what will then be the proverbial pebble in the shoe that I have for this very first SASHT presidential address? In this regard I had to borrow at least my point of departure from Prof. Sandra Swart of the University of Stellenbosch. In a recent presidential address in early July 2015 at the South African Historical Society Conference, she titled her address as follows: “Are historians dangerous people?” She pondered on this particular question for quite a while

in the course of her address. She remarked that the question actually evolved from an observation made by a well-known Russian statesman of yesteryear – not that we as historians and history educators expect to ever receive accolades from politicians for our research and teaching assessments...

This well-known statesman was none other than the post Second World War Russian leader Nikita Krushchev.¹ In a little bit of additional research that I conducted, I picked up that he had apparently actually said that: “Historians are dangerous people, they are capable of upsetting everything.”² Though one of my network colleagues in Russia is currently following this up to identify the exact speech in which Krushchev is said to have made this observation decades ago, the statement can be traced and attributed on Google to an educator, Christina Barnes, in 2012, when she apparently exposed her students to it. Barnes wanted to know from students what it meant to study History. Eventually one of several students responded by stating that: “... if a historian interprets something incorrectly, that could be dangerous.”³

I strongly feel that we could also associate this student’s opinion with the history educator’s profession where we are daily battling or struggling towards a representative and truthful historical account of a past – one that can be assessed in the light of whether it is based on “fact” and/or fiction, is accurate, reliable, authentic, representative and legitimate or as valid as time and source access permits. We may even nurture or endorse a particular thought, ideology or paradigm engraved on our minds, as if the historical profession in History education and in History proper lacks principles and methods in what actually should be best practice research and teaching. It’s as if we then use a revised “GAME PLAN” like the Springboks did when they recently lost to Japan in the World Cup. ☺ Surely Krushchev was then perfectly correct by asserting that there can be a dangerous element in History. May history hopefully always be dangerous because of a principle such as aspiring for truthfulness and not because of hasty, ill-considerate, unethical, unprofessional practices that can lead to wrong interpretations and loads of perceptions creating life-long misconceptions that in turn nurture dangerous battles among peoples of different races, classes, genders and communities.

Undeniably, historians and educators of History involved in research, the writing of History and the teaching of History all probably know that the historical battle (to use the words of historian Arthur Marwick) towards an absolute and perfect way of researching, writing, assessing and teaching will probably never be won. However, there are ways to ensure that progress is actually made towards best practice. Consider achieving this by means of developing a sensitivity; by searching for and using a diversity of knowledge; by ensuring inclusivity regarding past voices on issues and equally by cultivating habitual critical source reading while also ensuring that learners and students on senior levels are exposed to critical reading (I regard this skill as an essential

element of assessment in History). Critical reading implies that the student or learner does not rely merely on a meagre source excerpt (and sometimes not even in proper context!), but that learners do adequate research on a theme from wide variety of applicable articles. In this regard I am not ignorant of the time limitations in schools and at universities that may lead to a practice of a reliance on a single source, hoping that it will serve the purpose and be reliable at the same time. Yet this is not always the case and every so often teachers are engaged in their own historical battles in the classroom: battles with regard to own identities; their own origins and histories; often the lack of appropriate resources of which they are supposed to avail themselves, and to whom they ought to “apply”. Teachers may have life histories sometimes punctuated with emotions and a particular sense of what is “right” or “wrong”. The dear “truthfulness” that we as educators then want to “RELEASE” can sometimes turn out to be another battle. We can therefore quite rightly ask whether we should open the door to the possibility that history educators are (also) dangerous people. It surely can be the case if our aims are emotional, political and ideological – which in turn impacts on the impossibility of aspiring for any “truthfulness”.

Currently, the status of “truthfulness” in history education is a debate that entails much more than this presidential address. At the International Congress for Historical Science in Jinan (the biggest conference of Historians worldwide) in August 2015, the International Society of History Didactics, representing educators of History, also participated. One of the themes they covered in a session was that of “The importance of the concept of veracity/truthfulness in history education”.⁴

Features of VERACITY from a South African’s point of view are defined as: wanting to know what actually happened (a sense of “truth”), being “truthful” in the way sources are utilised or knowledge is disseminated; a tendency towards being accurate in articulating research at all times; being open-minded, reliable, legitimate, exact, sincere and aspiring to truthfulness as part of a professional “honourability”. Vocabulary that comes into action as complementary to veracity will be to appreciate “prismatic” thinking, acknowledge multi-diversity, multi-disciplinary inclusiveness and to be sensitised towards all knowledge offered as relics from the past. One can also only exercise “historical veracity” in so far as access to sources, knowledge and availability permits. Consequently reinterpretations, no matter what paradigm or information may come to light, will always (and should always) remain part of the openness in historical research and debate.⁵

Judging by the number of articles found in some scientific journals in Africa on concept-related words to veracity or its alter ego truth and fiction, it is possible to assume that debate and a quest for truthfulness in History and history writing in South Africa has not gone unnoticed:

Journal	Articles on veracity-related discourses	Comments
Journal of Southern African Studies	249	Only one historian considered the possibility of veracity in research done. Truth or truthfulness visible in fiction contributions only (e.g. art, cinema and literary contributions).
South African Historical Journal	171	More references to notions of veracity, but with the emphasis rather on using words connected to assessing or endorsing veracity – words like “interpretation”; “reinterpretation”; “misinterpretation”. Earlier published articles linger on the use and sometimes irresponsible use of “truth” in discussing research done.
New Contree	176	The same notion as in the SAHJ is pursued, except that a very focused publication on fact and fiction was done by Kobus du Pisani in the early 21 st century. There was also some authors’ encouragement to follow a postmodern approach to research in History.
Journal of African Studies	114	A feature in some articles is that critical contesting of truth and “truer” versions are necessarily possible in counter-memories. A theoretical discussion on the possibility or impossibility of historical veracity appears to be a less contentious debate in the JAC. ⁶
Historia	77	Examples of discussions on “fact and fiction” are evident in articles identified on contesting “truth” in history. ⁷
African Historical Review	36	Journal articles identified expose limited discussion on “truth” as a theoretical debate, and in particular the historian’s “ability” or “inability” to be “truthful”. Subaltern voices in postcolonial times are part of some discussions, implicating the acceptance of diverse voices of history. An exposure of criticism on fantasies in history (like writings on the Zulus) is said to have a limited standing in the popular market whose perceptions remain statically embedded in past images of history. ⁸
South African Journal of Cultural History	25	It is mostly the use of films as media to create images of “truth” that seems to be targeted, as well as the value of imagining in cultural history, and also critical discussions on the postmodern paradigm and claim it imposes on “truthfulness” in History as discipline.
Yesterday&Today (since 2006) ⁹	9	Theoretical contemplations on “historical truthfulness” of histories displayed in textbooks for various grades in schools and those used in undergraduate studies fall short, ¹⁰ or are rather mechanically and artificially assessed for the limitations or efficiency in which the standard curriculum is represented. More voice should be added to how a “truthfulness” should be encouraged in master narratives of South African history.

By the way, it should be noted that several articles hosted in issues of the SAHJ are contributions from international scholars on research and debates related to South(ern) Africa. Though this reality is not at all discouraged, it certainly is not conducive for spurring on local and continental minds to be abundantly creative and thoughtful enough about their own soil as platform for research, contestation and theoretical contemplation (and yes, also to be articulated in a language with which the researcher and educator may be more familiar).¹¹ Yet, complexities in “doing history” will remain a transnational issue, and how to deal with sources and to assess or interpret sources in order to arrive at an ultimate interpretation of their being “historically truthful” remains a challenge.¹²

In what sense it will be possible to follow this very historically minded route in a perceived ahistorical environment such as South Africa – one encumbered with political attachments, legacies and, sadly, a limited number of educated learners in History – will present a challenge that will require more discussion than just a paper debate.

I want to share with you three “battles” coming from a past and currently still ongoing in history education. Its impact on History as discipline can be beneficial or negative, depending on the way a “truthfulness” are inclusive of the progressing towards the most feasible outcome.

◇ Curriculum onslaughts in South Africa’s past as a battle¹³

By the late 19th and early 20th centuries, the visibility and handling of History at school level differed from province to province, and the training of teachers in History was still in its formative period. Prof FA van Jaarsveld fills us in on some factual relics that certainly need some thorough research and critical thought. About teaching History in South Africa some 100 years ago, Van Jaarsveld observed that:¹⁴

... There has never been satisfaction with history teaching at school. During the nineteenth century, the nationalist-minded Afrikaners complained about the biasedness of the British and Cape History that England as mother country commanded, and demanded a fatherland [South African-centred] history. [EvE translation from Afrkaans]

Cases do exist where History teaching at school level was actually abolished in an attempt at pacification. For example, after the Boer defeat in 1902, Lord Milner provisionally prohibited fatherland history in white schools and apparently only allowed British imperialist history.¹⁵

During the outbreak of this war in 1899, an English academic, HES Fremantle (later known as the first professor of History in South Africa at UCT) made some observations that relates to “truthfulness”. Apart from

having said that communities should be confronted with unbiased historical content,¹⁶ he also stated that:¹⁷

The absence of accurate and unbiased historical knowledge ... had allowed political myths to flourish among all the inhabitants of South Africa, and these had to be removed if a new country was to be built on a sound basis. Its bureaucrats too would need such knowledge, while a "scientific" study of the past would be vital for any serious study of "native questions" ... as "a work of incomparable importance" for the future ...

Now, as we all are aware of, this advice was certainly noted but not practically noticed in post-war history syllabi. Consequently, the "political attitude"¹⁸ remained that of the colonial conqueror as supervisor and overseer, and it paved the way for only Europeans to dictate and authorise in all fields that mattered. Education in South Africa in the meantime further expanded and several histories are available on how black, coloured and Indian teachers gradually added their voices of discontent to those of English-speaking teachers who criticised the dominant Afrikaner nationalist-centred approach to the content of the History curriculum in particular.¹⁹

In the politically unequal and unstable times of the 1960s, historians at tertiary institutions pondered on the necessity and possibility of transforming History in Schools as a compulsory subject. In the 1971 HSRC report, it was explicitly recommended that History ought to be a compulsory subject up to Grade 12. We all are living evidence that this recommendation fizzled out in subsequent years. Instead, we witnessed in our country the growth of more divisions and more "truths". The establishment of People's History²⁰ during the 1980s in reaction to the Christian National Education²¹ as well as out of frustration against the segregation policy, will also be remembered.²² After several transformational shifts in education, ones in which the teaching of History was merely left as a punching bag as if representing only the "not so memorable" past,²³ tides gladly changed in the first decade of the 21st century. In this regard Peter Kallaway responded by saying:²⁴

The rejection of the apartheid education curriculum was confused with the abandonment of a curriculum that was based on historically constructed knowledge...

Several revised curricula later, we find ourselves in 2015 and again it is heard from levels higher than FET and HET education that some considerations should be given to transforming History into a compulsory subject. In some way, the same motivation as in the past surfaced, namely to teach learners a past they should not forget. In addition to this, the teaching of History, amongst others, is heavily relied on to assist – with the required knowledge – to curb recent outbreaks of violence and intolerance as an apparent lack

of understanding and a skew effort of “truthing” because of not being “well-informed”.²⁵ That brings me again to the topic of encouraging a sense of “truthfulness”. How did SASHT-members recently respond to the possibility of History becoming a compulsory subject?

◇ **Compulsory History in schools? Some views of SASHT members and some other dangerous signs**

In April 2015, some South African newspapers buzzed at the idea of the possibility of History becoming a compulsory subject in future as proposed by the Department of Basic Education.²⁶ After some solo responses by SASHT-members to newspapers, the SASHT executive also invited its members to comment and express their opinions. About 20 (23%) of the SASHT members responded – a percentage unfortunately too low to be regarded as representative of all the Society. Perhaps the timing for asking an input was a factor. Be as it may the responses received provided opinions, ideas and considerations which I only refer to today by accentuating their thoughts on the possibility of building a national history on “truthfulness”. If working towards openness, honesty and reliability, it means that it must be a history that has as building stones features of diversity of memories and an inclusivity of identifiable cultures. I doubt whether all respondents at the time thought of it in these ways when they provided their opinions. Without analysing the outcome too academically, I can say that the feedback from our members was very much 50% for and 50% against the possibility of compulsory History (A repeat of this activity will be done again soon to ensure a more representative view of SASHT-opinion).

Among those responses for History as a compulsory subject, I picked up notions among the members of expressing positiveness towards the idea because of:

- A new South Africa and a changed curriculum and all should be informed to “complement democracy”;
- More history learners, students and more educators (which implies that quantity is an exciting option for some);
- Informing learners with the intention of their being informed, “tolerant citizens”.

With reference to the first two responses, one can argue that thoughts about the subject were not necessarily academically inspired, but perhaps more emotionally, politically and economically motivated. Not that these contexts are avoidable, yet they should, to my mind as historian, not be the core priorities when reasoning about History as discipline. The last opinion in this group, namely “informing learners with the intention of being informed, “tolerant

citizens” brings us somewhat closer to the idea of “truthfulness” by exposing learners to a diversity of views in the curriculum selected themes and time-frames.

Those SASHT members opposed to the idea of compulsory history (especially FET educators but also some university academics) accentuated a logistical concern and expressed misgivings regarding the possibility of tampering with intentions in pursuing “truthfulness”.

- Logistical concern: Current limitations in the training of history educators, so much so that an “anybody” may sometimes be recruited to teach History in school – which will nurture poor teaching. If History becomes compulsory, the aspect of bursaries and the training of more History teachers should be seriously considered.
- Concerns about possible tampering with “truthfulness”: that the DBE//DoE may interfere with what should be taught once History is transformed into a compulsory subject.

To continue this discussion and also to touch on other burning issues pertaining to History, the SASHT executive, in conjunction with the South African Book Fair held in Johannesburg, has organised a critical debate on, amongst others, whether History should be compulsory or not. Prof Noor Nieftagodien, Luli Callinicos, Barry Firth, Patrick McMahon, Michelle Friedman and I participated with Sarah Godsell (jr) as facilitator. My impressions were that some academics and teachers felt that the compulsory opportunity must be embraced while again, at the very least, half of the group preferred to follow the conservative route. In both opinions an “informedness” among learners and some logistics became the focus rather than whether compulsory history will allow for “truthful” approach to history.

Another additionally debated, but very seriously perceived, concern was the rumours about the possibility that the DoE may allow only one textbook per grade (see the Draft National Policy for the Provision and Management of Learning and Teaching Support Material (LTSM) of 4 September 2014).²⁷ Such a step, if ever so, will impact heavily on any notions of veracity or “truthfulness” in History teaching. SASHT-executive member Barry Firth articulated this well at the time:²⁸

The sources provided are the “glue” that ultimately determines whether or not learners are ably inducted into a historical mode of thinking. The sources allow the learners the opportunity to practise their “gaze”: activities developed around good sources provide ample opportunity for learners to identify all aspects of historical thinking (Canadian Benchmarks). And it is here that the textbooks show their greatest weaknesses: too many sources are poor examples of evidence and serve only as illustrations of the text. The text cannot be interrogated using the sources. The learner is then required to use his/her everyday knowledge to interrogate the sources.

In the absence of a strong second register, learners are not able to do so and when that happens, it is not HISTORY.

So far nothing in particular has resulted from the outspoken responses against such a possibility by the SASHT and academic institutions in general.²⁹ As representative for the SASHT on textbooks and as communicator to the DoE, prof. Rob Siebörger, also present today, communicated in the media with regard to the “one-textbook” rumour that, in this regard:³⁰

The greatest loss is (a) that a generation of learners will be led to believe that there is one superior version of history to be studied at school and, (b) that learners will be led to think of school history as being contained and limited (“this is all you need to know to do well in history”), in complete contradiction to the discipline of history and to the multiplicity of sources of information available elsewhere.

May I add that inadequate content and research in textbooks with regard to the histories of most races in South Africa have left a void in History education in the past³¹ but also in the present, which represent dangerous “voids” if aspiring truthfulness is part of the broader vision.³²

◇ **Quality training and qualified educators (teaching)?**

Though one could discuss the issue of “truthfulness” in more depth, I think the last aspect I want to briefly touch on in this regard today is the utmost importance of the availability of quality training for both current and prospective history teachers. (By the way, the training of educators as theme will also be covered at the International Society for History Didactics at their late August 2016 conference in Trabzon, Turkey).

- Past research on history education in South Africa – HSRC reports³³
- No fewer than four reports on the status of the teaching of History in schools were published from the 1960s to the 1990s, two of which were done by the Human Sciences Research Council (HSRC) of South Africa. In respectively 1971 and 1992, many facets of the status of History as school subject were brought to the table. Some of the findings in the 1971-report relating to truthfulness are:
 - That no less than 82,3% of the respondents were of the opinion that students’ reading ability as well as retention was very limited;
 - That unacceptable objectives and ill-prepared teachers created problems;³⁴
 - That “...the employment of inefficient, irresponsible and pedagogically unsound methods in order to attain good examination results” also created a problem;
 - The ill-considered use of the prescribed textbook in class, namely overemphasising it at the expense of other relevant history publications are a

concern. It was said of History teachers that they were the victims of spiritual isolation, and should the situation prevail, they would smother the subject History.

In the 1971 HSRC Report, it was recommended:

- That more precedence or priority should be given to insight and interpretation.

We must take note of Prof. Albert Grundlingh's observation made in 1973 regarding understanding the decline of the History intake at tertiary level. It was based on what happened in schools that he noted as a negative trend also observable in the United States of America of the day. Amongst others, he listed the textbook system and inadequately qualified and incompetent teachers as part of the "problem".

In some way this concern can be interpreted as a lack of knowledge that breeds distorted "truths". Informed educators (considering extended studies) may overcome this constraint in particularly South Africa.

In the 1992 HSRC report³⁵ one would appreciate some of the most prominent observations³⁶ made and which certainly could severely impact on the level of history-related skills and ethics in the discipline, namely that:

- Teachers are not adequately trained. Some teach history classes without ever having received any training whatsoever in the subject. The concern was that precisely this shortcoming gives rise to the situation where teachers are unable to adequately deal with complex matters in the History syllabus, and are even less able to deal with new approaches in the teaching of History (for example explaining the logic behind a diversity of perspectives regarding certain events);
- Opportunities available to teachers with regard to in-service training on a regular basis are absolutely necessary. It has apparently been found that 31,25% of black teachers teaching History received no training whatsoever in that subject; nonetheless they indicated on the questionnaire that they deemed themselves to be sufficiently competent to teach History;
- All the teachers that were subjected to the questionnaire indicated that learners should be made aware of the diverse perspectives regarding historical themes. (Whether educators "truthfully" championed this need in the class is another debate).
- The principle of pursuing diverse perspectives and prolific historical contexts as also endorsed in the 2012-CAPS will enable multiperspectivity as a means towards truthfulness:³⁷

Multiperspectivity means that there are many ways of looking at the same thing in the past. They may involve the different points of view of people in the past according to their position in society, the different ways in which historians have written about them, and the different ways in which people today see the actions and behaviour of people in the past.

This vision for History in CAPS, together with a sufficient training of educators in this regard, can be accentuated habitually and in a clearer way in classrooms.³⁸ Dealing with purging perceptions in their various guises (stereotypes; gender discrimination; exaggeration and propaganda) helps to eradicate error. A preparedness, passionate presentations, infinitely professional attitudes and an exclusive ethic protocol are all building blocks towards accomplishing “truthfulness”. Also practically show parents the power of History. It does not help to just vocalise it without concomitant action.³⁹

Recapping and assessing

That a search for the complete “truth” will always imply partiality seems to be a *fait accompli*, one that is never contestable. In History no historical discussion is definite or final for Marwick. The debate can always be qualified or corrected and political bias will vigorously be pointed out. Marwick also points out that historians (and for that matter history educators) are not propagandists. Their “job” is to understand the past (or parts of it), to inform and not “to change the future”. As is known among historians Marwick’s view is in turn contested by post modernists like Alun Munslow who prefers to deconstruct History...and so this particular “battle” continues.

If in the possible absence or lack of a more inclusive utilisation of past recounts in their variety (multi-disciplines) and diversity (several voices) – the question will be if it will not bring about more remoteness and distance?

The hope is that historians will aspire to produce all-inclusive reflections on a past with which each engages and which may differ in certain time frames as more or additional information on the past is exposed, discovered or reinterpreted with the support of additional sources that provide even more detail and additional insight. This process must be done with integrity.

An escape involving fiction or a lack of truthfulness in everyday life with its spontaneously growing paradigms and ideologies is hardly imaginable. It can, however, be manageable in the education process by dealing with the past in a more inclusive and reflective way. A critical reading and assessment of scientific articles in some themes of history curricula to my mind contributes towards the educator’s, learner’s and student’s ability to understand the challenges and values of “truthfulness” in dealing with History. This perhaps is not done enough and constructively in both the FET and HET-phases of History teaching.

Though it may require another decade or so in South Africa to critically review the performances of textbook publications in the post-1994 years, the reality of time and the way it steers historical decisions, selections and representations of the day seems an inescapable obstruction to a deliberated history. Other obstructions are the historian's and the history educator's fallible nature; the influence and impact of the space of origin and way of living on the persona, as well as an enforced directive in education. It also seems as if some history educators find it difficult to deliberate History as a science from the dream of nation building and specifically the history educator's so-called "task" in this regard. The wish to see nation building is not contested here, but it's the impression among some that it's the task of the history educator to fulfil it. In order to do so the focus to be "truthful" with the past maybe compromised because nation building as a politically inspired wish can lead to a process of selectively utilising the past, and that also is not HISTORY. This dream by all means can be and should be dreamed, but will always remain worlds apart from what History as a discipline represents. Let's build with care and sensitivity on what we have.

Thank you to each and every history educator for their passion and dedication in the classroom and lecture hall! The fact that you attended this conference (and I know some of you have paid your own expenses because you wanted to be here) and for sharing your needs and knowledge with the next two days. May the rest of the conference proceedings on assessment be stimulating to one and all.

Ke a leboga! //Thank you!

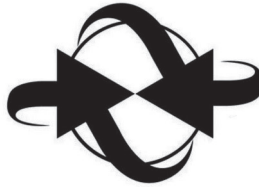
Endnotes

1. With acknowledgement to a Christina Barnes, 2012.
2. See Anon., "What does it mean to study history?" (Available at <http://www.dpcdsb.org/NR/rdonlyres/EA81D42F-53AD-4B4E-B061-D086615EF2FD/32808/WhatdoesitmeantostudyHistory.pdf>, as accessed in July 2015).
3. Anon., "What does it mean to study history?" (Available at <http://www.dpcdsb.org/NR/rdonlyres/EA81D42F-53AD-4B4E-B061-D086615EF2FD/32808/WhatdoesitmeantostudyHistory.pdf>, as accessed in July 2015).
4. International Congress for Historical Science, ISCH/CISH, XXIIInd Congress, Session: ISHD-Prof Terry Haydn on The importance of the concept of veracity/truthfulness in history education, 28 August 2015.
5. Elize S van Eeden, Paper on "Assessing the historiography of fact and fiction in understanding and teaching History in South Africa", CISH XXIInd Congress, ISHD-Session, Jinan, China, 23-29 August 2015. Also compare with Webster's New Collegiate Dictionary (London, 1975).
6. In particular is pointed out Michael Wessels' article on "The /Xam narratives: Whose myths?", *African Studies*, 67(3), pp. 339-364.
7. See for example Maria Hugo and KW de Pauw, "Feite of fiksie – Freudiaanse fantasie en 'n feministiese beeld van Susanna Smit", *Historia*, pp. 8-13; Robert A Laing, "Our South African (Afrikaner) heraldic heritage – A mythical creation?", *Historia*, 49(1), May 2004, pp. 110-134.

8. Compare with Stephen Leech's "New histories for a new millennium", *Kleio* [African Studies], 2001, 33(1), pp. 144-155.
9. Though in existence since 1981 a thorough Google Scholar research is only possible as from 2006.
10. One recent critical view on past narratives is that of Noor Nieftagodien, "Youth in history, youth making history: Challenging dominant historical narratives for alternative futures", *Yesterday&Today*, 6, December 2011, pp. 1-11. Elize van Eeden also produced some articles that could be considered.
11. Compare Marijke du Toit, "Telling tales: The politics of language in oral historiography", *South African Historical Journal*, 42(1), 2000, pp. 89-120.
12. Luise White, "The most telling: Lies, secrets, and history", *South African Historical Journal*, 42(1), 2000, pp. 11-25 (esp. p. 13).
13. See also Elize S van Eeden, "Studying History in South Africa; Reflections of yesterday to face, map and bridging diversity today and tomorrow W Hasberg & E Erdman (Eds.), *History Teacher Education. Global Interrelations* (Germany, Wochenschau-Geschichte, 2015). Chapter contribution by ES van Eeden, "Studying History in South Africa: Reflections of yesterday to face, map and bridging diversity today and tomorrow", pp. 225-258.
14. FA van Jaarsveld, "Skoolgeskiedenis in die nuwe Suid-Afrika", *Gister en Vandag/Yesterday and Today*, 20 September 1990, pp. 1-2.
15. FA van Jaarsveld, "Weereens 'n skoongeveegde lei? – Afrekening met, en nuwe singewing aan die Suid-Afrikaanse Geskiedenis?", *Historia*, 39(1), May 1994, pp. 95-96, 98.
16. See RB Mulholland, "The evolution of History teaching in South Africa" (MEd thesis, University of the Witwatersrand, 1981), p. 127 as cited by H Phillips, "The South African College and the emergence of History as a University Discipline in South Africa", *Historia*, 49(1), May 2004, pp. 1-11.
17. See RB Mulholland, "The evolution of History teaching in South Africa" (MEd thesis, University of the Witwatersrand, 1981), p. 127 as cited by H Phillips, "The South African College and the emergence of History as a University Discipline in South Africa", *Historia*, 49(1), May 2004, pp. 1-11.
18. See RB Mulholland, "The evolution of History teaching in South Africa" (MEd thesis, University of the Witwatersrand, 1981), p. 127 as cited by H Phillips, "The South African College and the emergence of History as a University Discipline in South Africa", *Historia*, 49(1), May 2004, pp. 1-11.
19. Compare RE Chernis, "The study of South African school history syllabuses and textbooks, 1839-1990", *Yesterday and Today*, 21 April 1991, pp. 12-23; EG Pells, *300 Years of education in South Africa* (New Haven:Greenwood Press, 1970).
20. WP Visser, "People's History en geskiedenisonderrig op skool: 'n Alternatiewe geskiedenis vir die nuwe Suid-Afrika", *Yesterday and Today/Gister en Vandag*, 25 Mei 1993, pp. 32-39; ES van Eeden & T Vermeulen, "Christian National Education and People's Education: Historical perspectives on some common grounds", *New Contree*, 50, November 2005, pp. 177-206.
21. Compare ES van Eeden & T Vermeulen, "Christian National Education and People's Education: Historical perspectives on some common grounds", *New Contree*, 50, 2005, pp. 177-208.
22. Compare K Hartshorne, *Crisis and challenge. Black education, 1910-1990* (Oxford University Press, Cape Town, 1992), pp. 218-254; M Cross, *Imagery of identity in South African education, 1880-1990*, pp. 73-81; 213-216.

23. Compare Peter Kallaway, History in senior and secondary school CAPS 2012 and beyond: A comment”, *Yesterday&Today*, 7, July 2012, pp. 1-40.
24. Compare Peter Kallaway, History in senior and secondary school CAPS 2012 and beyond: A comment”, *Yesterday&Today*, 7, July 2012, pp. 1-40.
25. Republic of South Africa, “Minister announces major changes in education sector”, *SANews*, 6 May 2015. The words used by the Minister of Education, Minister Angie Motshekga.
26. Republic of South Africa, “Minister announces major changes in education sector”, *SANews*, 6 May 2015; Poppy Louw, “History is in our future”, *The Times*, 23 April 2015, p. 4.
27. See Republic of South Africa, Government Gazette, 591(37976), 4 September 2014; RSA, Draft LTSM for public comments, ca Sept 2014, pp. 3-4.
28. B Firth, Report on the *SA-Bookfair* debate/ES van Eeden, 12 August 2015.
29. See letters by the SASHT and UCT in the archival records of the SASHT, of which some parts are also available in www.sashtw.org.za.
30. See Siebörger’s comments (Available at <http://www.litnet.co.za/the-south-african-society-for-history-teachings-representative-on-the-proposed-one-textbook/>, as accessed on 18 November 2014, when talking to Carine Janse van Rensburg).
31. CG Coetzee, “The Bantu and the study of History”, *Historia*, 11(2), 1966, pp. 96-105.
32. See for example AM Grundlingh, “Herhistorisering en herposisionering: Perspektiewe op aspekte van geskiedsbeoefening in hedendaagse Suid-Afrika”, *Historia*, 46(2), November 2001, pp. 312-314.
33. See for this discussion the English version of ES van Eeden, “Die jeug en Geskiedenis – vandag en gister, met verwysing na die Hertzog-era” (The youth and History – today and yesterday, with reference to the Hertzog era), *Suid-Afrikaanse Akademie vir Wetenskap en Kuns/South African Academy for Science and Art*, 21 September 2011, pp. 1-43.
34. Human Sciences Research Council, “Die onderrig van geskiedenis aan Suid-Afrikaanse sekondêre skole; ’n verkorte weergawe van ’n opname in die jaar 1966”, Compiled by CR Liebenberg, Report 0-11, HSRC, Pretoria, 1971, pp. 1-36.
35. MH Trümpelmann, “The HRSC-investigation on history teaching – a response”, *Yesterday and Today/Gister en Vandag*, 23, May 1992, pp. 46-49; Anon., “What our pupils think”, *Yesterday and Today/Gister en Vandag*, 24, October 1992, pp. 45-60.
36. Another report on the status of History in historical white Afrikaans and English Schools, commissioned by the Committee of University Principals was also released in 1992, with nothing extraordinary that previous reports did not report on. See Breytenbach, HJ & S Leo Barnard, “Die huidige stand van die vak Geskiedenis op skoolvlak in blanke hoërskole in die RSA”, *Yesterday and Today/Gister en Vandag*, 23, May 1992, pp. 28-32.
37. P Kallaway, “History in senior and secondary school CAPS 2012 and beyond: A comment”, *Yesterday&Today*, 7, July 2012, pp. 1-40.
38. Compare P Kallaway, “History in Senior Secondary School CAPS 2012 and beyond: A comment”, *Yesterday&Today*, 7, July 2012, pp. 23-62.
39. A Ecker, “Process-oriented methods in the teaching of history. New avenues in the initial training of history teachers at the University of Vienna” (Available at http://univie.academia.edu/AloisEcker/Papers/1428329/Process-oriented_methods_in_the_teaching_of_history/), ca 2000, 1-23. Also compare ES van Eeden, *Didactical guidelines ...*, Chapters 2- 3.

Occasionally the SASHT Executive requests that the SASHT constitution is displayed in an Yesterday&Today edition to inform and/or update their members. Members are invited to request a review of any section of the SASHT constitution at an SASHT General Meeting. Prior consent of a section review must be received in written form by the Secretariat of the SASHT or the Chairperson/vice Chairperson of the SASHT (see communication details in the SASHT AGM-minute)



SASHT CONSTITUTION

THE SOUTH AFRICAN SOCIETY FOR HISTORY TEACHING (SASHT)

(An Association of History Educators, Organisations, Publishers and People interested in History Teaching as well as the educational dissemination of historical research and knowledge)

1. CONSTITUTION

1.1 There shall be constituted a body known as the SOUTH AFRICAN SOCIETY FOR HISTORY TEACHING (SASHT). The provisions herein contained shall be known as the Constitution of the Society, which provisions may be altered by a majority of those members present at a general meeting of members, considering that:

1.2 the precise terms of any proposed alteration shall be set out in the notice convening the meeting;

1.3 the purpose and objects of the Society shall not be altered without the consent of 66% of all the members.

2. OBJECTIVES

The objectives of the Society (since date of founding in 1986) shall be to assist its members in every possible way and in particular:

2.1 To improve the contact between educators of History training at tertiary level and teachers in the broad educational field.

2.2 To renew a training in the didactics of history education.

2.3 To utilise the expertise of educators teaching History to assist with the training of future history teachers.

2.4 To continuously debate the content of basic and advanced educational programmes in the training of history educators with the intention to continue to improve quality.

2.5 To make history educators and student teachers aware of the relationship between History as an academic discipline and the didactics and teaching of History at school level in order to keep abreast with development and academic debates.

2.6. To encourage educators of History to strive towards achieving and sustaining high academic standards in the teaching methodology and in the general knowledge of History as a discipline.

2.7 To make educators of History and student teachers in History aware of the relevance or “value” of History for the community and nation at large.

2.8 To explore, if the SASHT grows in membership, the idea of identifying and organising committees that can explore and develop certain fields in History to benefit all the educators of History in South Africa.

3. MEMBERSHIP

3.1 Membership shall consist of three types:

3.1.1 Individual membership (History educators or other academic-focused members from institutions) who are fully paid up members of the association (Annual fees will be determined by the Executive each year and communicated timely to members and potential members). The individual members representing an educational institution; will be eligible to vote or serve on the SASHT Executive and any committees//portfolios, and will receive electronic correspondence as well as a copy (twice annually) of the peer reviewed SASHT- connected Journal, *Yesterday&Today*.

3.1.2 Group membership (private organisations & publishers) that will pay an annual membership fee determined by the Executive Committee on a yearly basis which will include a membership provision of more than one individual. These members will be eligible to vote but not eligible to serve on the committees and only receive electronic correspondence as well as a copy (twice annually) of the SASHT-connected Journal *Yesterday&Today*.

3.1.3 Individual membership outside the borders of South Africa that will pay the annual fee as determined by the Executive Committee in Rand or in another currency as indicated on the SASHT membership form.

The individual members will not be eligible to vote or serve on the Executive Committee (but could serve on other committees as occasionally identified, as well as on the *Yesterday&Today* editorial board) and will receive electronic correspondence as well as a copy (twice annually) of the SASHT-connected Journal, *Yesterday&Today*.

3.2 The following persons are eligible as members of the Society:

3.2.1 any History educator/organisation/publisher who subscribes to the objectives of the Society; and

3.2.2 is approved by the Executive Committee as a member.

3.3 Any member may resign by notice to the chairperson, the vice chairperson or the secretariat//treasurer. Such member remains liable for membership dues up to the date of receipt by the chairperson of the letter of resignation.

3.4 Membership will be held confidential, and it is up to individual members to disclose his or her membership to the general public.

4. MANAGEMENT

4.1 The interests of the Society shall be managed by at least a *ten*-member committee consisting of a chairperson, a vice-chairperson (when required), a secretariat and a treasurer (this position can also be combined into a secretary-treasurer position) and *six* to *seven* additional members as portfolio members and/or regional representatives. These members in the leading position of the SASHT shall hold the respective positions for a maximum of three years, after which they may be re-elected at an annual general meeting (usually to be held in September-October). Two additional members (the guest hosting a conference during the following year and a history educator abroad) may be nominated.

The temporary Executive member hosting the next conference may be nominated fully on the Executive as well, but if not he/she only has a temporary executive position to smooth the conference organization process with efficient communication.

4.2 An election of new Executive Committee members for the SASHT Executive during an Annual General SASHT meeting should be conducted by one of the SASHT members or an executive member who has been nominated to undertake the task (and not the current chairperson or vice chairperson). From the ten nominees fully accepted, the positions of chairperson and vice chairperson should be voted for by the elected SASHT Executive Committee that represents the vote of all the members.

4.3 A process of nomination and election becomes necessary if Executive Committee members have served a three-year term. Both new nominees and retiring committee members are eligible for re-election via e-mail one week prior to the annual SASHT conference. The secretariat manages the term of office of the SASHT Executive and sends out notifications to retiring/re-election status members (and invites new nominations, to be done formally and on the standard SASHT nomination form) a week prior to the SASHT conference.

The list of new nominations//re-electable Executive Committee members will be formally dealt with during an annual AGM meeting.

4.4 Only fully paid-up members of the SASHT (and preferably only one member per institution in the Society) are eligible for election as Executive Committee members.

4.5 The SASHT Executive Committee may co-opt a member to the Committee in the event of a vacancy occurring for the remaining period of the term of office of the person who vacated the position OR the opening of a vacancy due to any other reason and with the consent of the rest of the SASHT Executive.

4.6 The Executive Committee of the Society may appoint sub-committees as it deems fit.

4.7 Each sub-committee or portfolio of the Executive Committee shall be chaired by a committee member and may consist of so many members as the committee may decide from time to time.

4.8 A sub-committee may co-opt any member to such sub-committee or portfolio.

5. MEETINGS

5.1 Committee Meetings

5.1.1 Committee meetings shall be convened by the secretariat/secretary-treasurer on the instructions of the chairperson or vice-chairperson or when four committee members jointly and in writing apply for such a meeting to be convened. Three committee members shall form a quorum. Most of the correspondence will be done via e-mail.

5.1.2 Meetings by the SASHT Executive Committee will take place BEFORE an annual SASHT conference and AFTER the conference has ended when new executive members have been elected.

5.1.3 Committee decisions shall take place by voting. In the event of the voting being equal the chairperson shall have a casting vote.

5.1.4 Should a committee member absent himself from two successive committee meetings without valid reason and/or not replying twice on e-mail requests in decision making, he/she shall forfeit his/her committee membership.

5.2 General Meetings

5.2.1 The Annual General Meeting (AGM) of the Society shall take place during the annual SASHT Conference.

5.2.2 A special general meeting may be convened by the Executive Committee upon the receipt of a signed, written request of at least ten registered members of the Society which request must be accompanied by a full motivation for requesting such a meeting.

5.3 The Executive Committee may call a general meeting as it deems fit.

5.4 The following procedures shall apply to all general meetings:

5.4.1 A minimum of *ten* members will form a quorum. In the absence of such a quorum, the members present may adjourn the meeting for a period of seven days where the members present at the adjourned date will automatically constitute a quorum.

5.4.2 Decisions shall be taken by a majority vote.

5.5 Finances

5.5.1 All the income of the Society shall be deposited in an account at a bank and/or other approved financial institution. One to two members, consisting of either the chairperson and/or the vice-chairperson and/or the secretary-treasurer if so arranged, shall be empowered to withdraw and deposit funds for the use of/on behalf of the Society.

5.5.2 Any amount that must be withdrawn, and exceeds the amount of R3 000 should beforehand be properly communicated among the two to three empowered Executive members (namely the chairperson, the vice chairperson and, if a position of treasurer exist, the treasurer). All these aforesaid empowered executive members should be able to exercise their signing right (to withdraw and deposit funds) on behalf of the SASHT in the absence of a/ the treasurer, but with the consent and approval of the core SASHT Executive.

5.5.3 Proper accounts shall be kept of all finances of the Society as set out in the regulations published in terms of the Fundraising Act, 1978.

5.5.4 A financial report shall be produced by the Executive or Secretary-treasurer (the latter if appointed as such) at the annual general meeting or upon request from the SASHT Executive Committee. Otherwise a full general account at least should be provided in the Chairperson's report.

5.5.5 Financial contributions will be collected from all persons and/or organisations, worldwide, which support the objectives of the Society.

5.5.6 A guest SASHT conference organiser(s)/Society member involved, is shall be accountable for transferring the remaining income obtained from organising an annual conference into the SASHT bank account, as part of the effort of the SASHT to strengthen its financial capacity. Any contributions, towards the covering of conference expenses by the Society are on a strictly voluntary basis.

6. Right to vote

Each individual subscribed member (and one member of a subscribed institution) has one vote at any meeting.

7. CONSTITUTIONAL AMENDMENTS

Any amendment to this Constitution shall only be effected by a two thirds majority decision at a general meeting

or special general meeting and further provided that seven days' prior notice was given of the proposed amendment.

Notice is to be given in the same manner as a notice for a general meeting.

8. DISSOLUTION

8.1 The Society may dissolve, or merge, with any other association with similar purposes and objectives in each case only:

8.1.1 On a resolution passed by the majority of members present at a duly constituted general or special general meeting of members; or

8.1.2 On an application to a court of law by any member on the ground that the Society has become dormant or is unable to fulfil its purpose and objectives,

8.1.3 On a merger, the assets of the Society shall accrue to the Society/Association with which the merger is affected.

8.1.4 On dissolution, the assets of the Society shall be realised by a liquidator appointed by the general meeting or the court, as the case may be, and the proceeds shall be distributed equally amongst such Societies/Associations with similar objects as may be nominated by the last Executive Committee of the Society.

9. MISCELLANEOUS

9.1 Every Executive member/ordinary member of the Society shall be entitled at all reasonable times to inspect all books of account and other documents of the Society which the custodian thereof shall accordingly be obliged to produce.

The Yesterday & Today (Y&T) Journal for History Teaching in South Africa and abroad

Editorial policy

1. Y&T is a scholarly, peer-reviewed journal (accredited since the beginning of 2012).
2. The Y&T journal is a journal for research in especially the fields of history teaching and History discipline research to improve not only the teaching, but also the knowledge dissemination of History. The Journal is currently editorially managed by the North-West University and published under the auspices of the South African Society for History Teaching (SASHT).
3. Contributions may be either in the humanities (historically based theoretical discourses), or from education (best practice workshops, or focused content research with a fundamental theoretical basis reflecting History or other histories). Articles, in which interdisciplinary collaborations between the humanities and education are explored, are also welcome.
4. Regional content mostly considers quantitative and qualitative research in Southern Africa, but international contributions, that may apply to History teaching and research in general, are equally welcome.
5. Authors may submit individual contributions or contributions created in teams.
6. Contributions are subject to peer reviewing by two or more expert reviewers in the disciplines used in the research and writing of the research report – the article.
7. The language of the journal is English. However, abstracts may be in any of the 11 official languages of South Africa.
8. Contributions must be accompanied by an abstract of not more than 250 words.
9. The titles of articles should preferably not exceed 20 words.
10. The names of authors and their institutional affiliations must accompany all

contributions. Authors also have to enclose their telephone and fax numbers and E-mail and postal addresses.

11. The Harvard or the Footnote methods of reference may be used (see the last pages of the journal for the reference guidelines for more detail on the Harvard and Footnote reference methods). The authors' choice of which reference method will be respected by the editorial management. References must be clear, lucid and comprehensible for a general academic audience of readers. Once an author has made a choice of reference method, the *Y&T* guidelines for either the Harvard reference method or the Footnote reference method must be scrupulously followed. The guidelines for referencing according to the Harvard method are provided on the last pages of the journal. The most recent *Yesterday&Today* journal articles could also serve as guideline.
12. Editorial material with images (illustrations, photographs, tables and graphs) is permissible. The images should, however, be of a high-density quality (high resolution, minimum of 200dpi). The source references should also be included. Large files should be posted in separate E-mail attachments, and appropriately numbered in sequence.
13. Articles should be submitted to the editor electronically at: pieter.warnich@nwu.ac.za and also to his administrative assistant, Ronelle van Staden at: 20505957@nwu.ac.za. Notification of the receipt of the documents will be done within 48 hours.
14. The text format must be in 12pt font, and in single spacing. The text should preferably be in Microsoft Word format.
15. The length of articles should preferably not exceed 8 000 to 10 000 words, or 15 to journal pages.
16. Articles which have been published previously, or which are under consideration for publication elsewhere, may not be submitted to the *Yesterday&Today* journal. Copies of the Journal is also electronically available on the SASHT website at www.sashtw.org.za.

Yesterday & Today

Template guidelines for writing an article

1. **Font type:** Adobe Garamond Pro (throughout document)/Arial (if the first font type is unavailable).
2. **Font size in body text:** 12pt.
3. **Author's details: ONLY provide the following:** Title, Campus & University and E-mail address

Title: 10pt, regular font; Campus & University: 10pt, italics; and E-mail address: 10pt, regular font. (Consult previous articles published in the Y&T journal as an example or as a practical guideline).

Example: Pieter van Rensburg, *Vaal Triangle Campus, North-West University*, p.vanrensburg@gmail.com.

4. **Abstract:** The abstract should be placed on the first page (where the title heading and author's particulars appear). The prescribed length is between a half and three quarters of a page.

The abstract body: Regular font, 10pt.

The heading of the *Abstract*: Bold, italics, 12pt.

5. **Keywords:** The keywords should be placed on the first page below the abstract.

The word '**Keywords**': 10pt, bold, underline.

Each keyword must start with a capital letter and end with a semi-colon (;).
Example: Meters; People; etc. (A minimum of six key words is required).

6. **Heading of article:** 14pt, bold.
7. **Main headings in article:** '**Introduction**' – 12pt, bold.
8. **Sub-headings in article:** '*History research*' – 12pt, bold, italics.
9. **Third level sub-headings:** '**History research**' – 11pt, bold, underline.
10. **Footnotes:** 8pt, regular font; **BUT** note that the footnote numbers in the article text should be 12pt.

The initials in a person's name (in footnote text) should be without any full stops. Example: LC du Plessis and **NOT** L.C. du Plessis.

11. **Body text:** Names without punctuation in the text. Example: “HL le Roux said” and **NOT** “H.L. le Roux said”.
12. **Page numbering:** Page numbering in the footnote reference text should be indicated as follows:
Example: p.space23 – p. 23. / pp. 23-29.
13. **Any lists** in the body text should be 11pt, and in bullet format.
14. **Quotes from sources in the body text** must be used sparingly. If used, it must be indented and in italics (10pt). Quotes less than one line in a paragraph can be incorporated as part of a paragraph, but within inverted commas; and **NOT** in italics. Example: An owner close to the town stated that: “the pollution history of the river is a muddy business”.
15. Quotes (**as part of the body text**) must be in double inverted commas: “...and she” and **NOT** ‘...and she’.
16. **Images: Illustrations, pictures, photographs and figures:** Submit all pictures for an article in jpeg, tiff or pdf format in a separate folder, and indicate where the pictures should be placed in the manuscript’s body text. All visuals are referred to as Images.
Example: **Image 1: ‘Image title’** (regular font, 10pt) in the body text.
Sources of all images should also be included after the ‘Image title’.
Example: **Source: ‘The source’** (regular font, 9 pt). Remember to save and name pictures in the separate folder accordingly.
Important note: All the images should be of good quality (a minimum resolution of 200dpi is required; if the image is not scanned).
17. Punctuation marks should be placed in front of the **footnote numbers** in the text. Example: the end.¹ **NOT** ...the end¹.
18. **Single and left spacing** between the sentences in the footnote.
19. **Dates:** All dates in footnotes should be written out in full. Example: **23 December 2010; NOT 23/12/2010 [For additional guidelines see the Yesterday & Today Reference guidelines].**
20. Language setting in Microsoft Word as **English (South Africa); do this before starting with the word processing of the article.** Go to ‘Review’, ‘Set Language’ and select ‘English (South Africa)’.

The footnote or Harvard reference methods – some guidelines

Both the footnote reference method and the Harvard reference method are accepted for articles in *Yesterday & Today*. See some guidelines below:

The footnote reference method

Footnote references should be placed at the bottom of each page. Footnotes should be numbered sequentially throughout the article and starting with 1. Archival sources/published works/authors referred to in the text should be cited in full in the first footnote of each new reference. Thereafter it can be reduced to a shorter footnote reference. Do not refer to the exact same source and page numbers in footnotes that follow each other.

The use of the Latin word “Ibid” is **not** allowed. Rather refer to the actual reference again (or in its shortened version) on the rest of a page(s) in the footnote section.

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Examples of an article in a journal

R Siebörger, Incorporating human rights into the teaching of History: Teaching materials, *Yesterday&Today*, 2, October 2008, pp. 1-14.

S Marks, “Khoisan resistance to the Dutch in the seventeenth and eighteen centuries”, *Journal of African History*, 3(1), 1972, p. 76.

Example of a shortened version of an article in a journal

From:

P Erasmus, “The ‘lost’ South African tribe – rebirth of the Koranna in the Free State”, *New Contree*, 50, November 2005, p. 77.

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Examples of a reference from a book

WF Lye & C Murray, *Transformations on the Highveld: The Tswana and the Southern Sotho* (Cape Town, David Phillip, 1980), pp. 7, 10.

JJ Buys, *Die oorsprong en migrasiebewegings van die Koranna en hulle rol in die Transgariëp tot 1870* (Universiteit van die Vrystaat, Bloemfontein, 1989), pp. 33-34.

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Example of a shortened version of a reference from a book

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JA Conforti, *Samuel Hopkins and the New Divinity Movement: Calvinism, the Congregational Ministry, and reform in New England between the Great Awakenings* (Washington, Christian University Press, 1981), p. 23.

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JA Conforti, *Samuel Hopkins and the New Divinity Movement...*, p. 23.

Example of a reference from a chapter in a book

S Brown, “Diplomacy by other means: SWAPO’s liberation war”, C Leys, JS Saul et.al, *Namibia’s liberation struggle: The two-edged sword* (London, Oxford University Press, 1995), pp. 19-39.

Shortened version:

S Brown, “Diplomacy by other means...”, C Leys, JS Saul et.al, *Namibia’s liberation struggle...*, pp. 19-39.

Example of a reference from an unpublished dissertation/thesis

MJ Dhlamini, "The relationship between the African National Congress and the Pan Africanist Congress, 1959-1990" (Ph.D, NWU, 2006), pp. 4, 8, 11.

Examples of a reference from a newspaper

P Coetzee, "Voëlvlugblik ATKV 75 op ons blink geskiedenis", *Die Transvaler*, 6 Januarie 2006, p. 8.

or

Zululand Times, 19 July 1923.

Archival references:

• Interview(s)

Provide at least key details such as: Name of interviewee and profession; the interviewer and profession and date of interview

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K Rasool (Personal Collection), interview, K Kotzé (CEO, Goldfields, Johannesburg Head Office)/E Schutte (Researcher, NWU, School of Basic Science), 12 March 2006.

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K Rasool (Personal Collection), interview, K. Kotzé/E Schutte , 12 March 2006.

• Example of an Electronic Mail - document or letter

E-mail: W Pepler (Bigenafrica, Pretoria)/E van Eeden (Researcher), 22 October 2006.

• National archives (or any other archive)

National Archive (NA), Pretoria, Department of Education (DoE), Vol.10, Reference 8/1/3/452: Letter, K Lewis (Director General) / P Dlamini (Teacher, Springs College), 12 June 1960.

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A source accessed on the Internet

A Dissel, "Tracking transformation in South African prisons", Track Two, 11(2), April 2002 (available at <http://ccrweb.ccr.uct.ac.za/two/11-2transformation.html>, as accessed on 14 Jan. 2003), pp. 1-3.

A source from conference proceedings

First reference to the source:

D Dollar, "Asian century or multi-polar century?" (Paper, Global Development Network Annual Conference, Beijing, January 2007), p. 7.

B Sautmann, "The forest for the trees: Trade investment and the China-in-Africa discourse" (Paper, Public Seminar: China in Africa: Race, relations and reflections, Centre for Sociological Research, University of Johannesburg, 28 July 2007), p. 7.

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• **Unpublished theses or dissertations**

Fardon, JVV 2007. Gender in history teaching resources in South African public school. Unpublished DEd thesis. Pretoria: Unisa.

• **Anonymous newspaper references**

Daily Mail 2006. World Teachers' Day, 24 April.

• **Electronic references**

Published under author's name:

Marshall, J 2003. Why Johnny can't teach. *Reason*, December. Available at <http://www.reason.com/news/show/29399.html>. Accessed on 10 August 2010.

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