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Two double-blind peer-reviewed issues are annually published. *Yesterday & Today* focus and envision research articles in the following fields of research:

- History teaching/education
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The above covers 75% of the journal

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Contributors need to note the following:

- Manuscripts must be in British English and should not exceed 8000 words
- Times New Roman 12 pt font and 1.5 spacing should be used
- Manuscripts in Microsoft Word should be submitted electronically to the editor
- Images (such as photographs, graphics, figures and diagrams) are welcome but the author(s) should secure the copyright of using images not developed by the author
- Six to ten keywords should be included in the manuscript
- Opinions expressed or conclusions drawn in *Yesterday & Today* are in the first place those of the authors and should under no circumstances be considered the opinions of the SASHT or the editorial board.

The editorial board accommodate peer reviewed articles and practical hands-on articles. However, it's only the peer- reviewed articles that are acknowledged by the South African Department of Higher Education and Training for being accredited and valid for subsidy purposes. Please note that authors are expected to provide written proof that the language and style of both the abstract and the manuscript were professionally edited before submitting the manuscript to *Yesterday & Today* for consideration. For more information, see the "Template guidelines for writing an article" and "The footnote or Harvard reference methods – some guidelines" on the last pages of the journal. Also refer to the last pages of this publication and the most recent issue of the journal available on the SASHT's website: http//www.sashtw.org.za for more information. The use of the correct citation methods and the acknowledgement of all consulted sources is a prerequisite.

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EDITORIAL

History Education greetings,

Welcome to the December 2024 edition of *Yesterday & Today*. This will be the final edition using the current t editorial policy. The July 2025 edition must adhere to the new editorial policy pioneered by Scielo and ASSAF, which went through numerous scholarly engagements. The editorial board of *Yesterday & Today* itself discussed the suggested editorial policy on various platforms and is embracing it, especially in aspects related to the submission regarding the use of AI and good governance. The editorial board of *Yesterday & Today* would like to thank Scielo and ASSAF for their work.

A different debate that raged within certain South African universities was on "what makes a journal an international journal". This debate was framed, in my view, by neoliberal ideas related to targets, impact, and so forth. Consequently, South African-based journals were, in a reductionist manner, seen as "not being international" and not considered an ideal outlet for scholarly work. The reality is that such thinking is colonial in nature and often based on ignorance. *Yesterday & Today*, as an independent journal belonging to SASHT, has an Afrocentric focus as it relates to History Education and is affiliated with two international bodies—Scielo and AJOL. Additionally, our journal is a fully open-access publication. Hopefully, this will quell any such future debates.

In terms of contributions, the December 2024 edition of *Yesterday & Today* carries eight articles.

- In his article, Martin Gustafsson engages with issues related to the school history curriculum and pressing inter-related social issues such as poverty and rising inequalities against a backdrop of democracy. This is framed by using statistics and the need to reduce poverty and confront climate change.
- Hellemann and Heshu, in a creative and vibrant contribution, engage with historical revisitation. More specifically, they go beyond reenactment when exploring the Battle at Egazini with grade 10 history learners using applied theatre.
- In their article, Mashayamombee and van den Berg contribute to the continuing debate about the Zimbabwean History curriculum by focusing on implementing Curriculum Reforms in Heritage Studies and History in Mutare

District Secondary Schools.

- The contribution of Bharath and Human centres around bringing two forms of official history, textbooks and artefacts, into conversation. In so doing, they argue for the Re-Writing His-Story.

- Lance and Byron Bunt bring the world of Game-Based Learning in History Education to life by unpacking the educational possibilities of using Dogs of War to teach and learn the subject.

- In my view, the articles by Chimunde and Moreeng and Sithole and Fru should be read together. These authors, in a timely manner, consider the *PROGRESS REPORT ON THE IMPLEMENTATION OF HISTORY AS A COMPULSORY SUBJECT (GR 4-12)* which took place on 19 November 2024, engaged intellectually with the idea of making the subject compulsory. The first two authors took a big-picture view, and the latter drilled down deeply into a single district.

- The final contribution is by Jongikhaya Mvenene, who brings a true Afrocentric perspective to the December edition by focusing on Iingoma (Traditional Songs) and Izibongo (Traditional Poems) and the implications for History teaching and learning in South African schools.

The December edition has, as per usual, a vibrant book review section in which five different publications are reviewed. Getting reviewers is not always easy. Therefore, I want to thank our review editor, Bafana Mpanza, for his work and all the reviewers who contributed to this essential aspect of our journal.

In the "hands-on" section, Gordon Brookbanks and Lethukukhanya Mbambo engaged with the idea of how to strengthen the history curriculum by reimagining what we teach in the classroom and how this can be scaffolded through using the work of historians from a decolonised perspective.

Finally, a big thank you to Dominque Wnuczek-Lobaczewski and her team, who have expertly put the December 2024 edition together in good time.

Happy reading.
Johan Wassermann
Editor-in-Chief

Poverty, inequality, and atmospheric colonisation: Pointers for the school history curriculum

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Abstract

There is an interest in having the school history curriculum cover pressing and inter-related social issues: rising inequalities, even where there is a democracy, and the need to reduce poverty and confront climate change. These focus areas align with another interest among many history teachers: using statistics and data better to understand the past. Since around 1980 income inequalities have worsened after a couple of centuries of decline. This is a key reason why the Sustainable Development Goals of the United Nations prioritise greater equality. While measures of inequality warrant attention, quantitative and qualitative knowledge about the more normative concept of poverty is arguably easier for secondary school history students to grasp. Remarkable declines in poverty since the Industrial Revolution should be understood against the enormous environmental cost of industrialisation. Moreover, in terms of the increasingly used concept of "atmospheric colonisation", colonising countries have been inordinately large contributors to changes in the earth's atmosphere, changes that drive climate change and are likely to worsen poverty. Students need to understand these complexities, in part so they can form opinions around a fair sharing of the burdens of emissions reduction and adaptation to a changing climate. Such matters will become increasingly important when voters must choose between parties in national elections. There are clear implications for history curricula, which are only beginning to receive attention. While the article should be of interest to history teachers anywhere, specific content recommendations are made in terms of the South African

secondary school curriculum.

Keywords: Economic history; Secondary schools; Voter education; Inequality; Numeracy across the curriculum; Climate change education.

Introduction[1]

In the current context of rising inequalities, even where democracy thrives, and of climate change, there is a need for evidence-based explanations of daunting social and environmental complexities. The role of history in this regard is vital.

This article rests on the premise, reflected in the United Nations' Sustainable Development Goals (SDGs), that past, present, and future social inequalities and poverty are central human concerns. South Africa's 2018 Ministerial Task Team report on history in schools essentially shares this premise. Yet there is surprisingly little work mapping out an approach for this within South Africa and even beyond. The article attempts to address this gap. This is possible in part because of new research providing a better sense of the history of poverty, useful data initiatives such as those behind the World Inequality Report (WIR), and new ways of understanding the inequality of historical greenhouse gas emissions.

Given the serious impact of climate change on poverty trends expected in the near future but to some extent observable in our recent past, the history of climate change warrants attention. There are two strands to this. First, the history of anthropogenic emissions, what some have called "atmospheric colonisation",[2] should be understood in part because of its importance in current policy debates around the equitable sharing of responsibilities to address climate change. Second, the emergence, since the 1992 Rio Conference, of institutions and protocols to address climate change should be understood.

History in schools has served many purposes. It has been employed to build a sense of nationhood, to laud colonial projects, and to celebrate anti-colonial liberation movements. Much of the post-1945 emphasis has been on empathy towards other nations, with a view to reduce the risk of international conflict. This article argues that one emphasis should be the one espoused by Bailly (1998) and others in a 1998 issue of UNESCO's academic journal *Prospects*: an understanding of history that improves insights into sustainable development and humanity's relationship with the natural environment.

The article is organised into five key sections. First, history in South African secondary schools is introduced as well as the 2018 Task Team report. The WIR, a recently established initiative led by the economist Thomas Piketty and others and considered important in the Task Team report, is discussed. Second, recent advances in understanding the history

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2   See for instance Borràs (2019).

of poverty, particularly in the field of economics, are summarised. Third, how school history could draw from these advances is examined. Fourth, the concept of atmospheric colonisation and how this could be included in the history curriculum is explained. Fifth, specific proposals are put forward for Grades 8 to 12 on how to incorporate the themes of inequality, poverty, and climate change into existing curriculum topics.

The article is intended to inform curriculum development in South Africa and beyond, and to assist teachers wishing to cover new and relevant themes. However, it is also intended to inform data analysts on what new work could assist history teachers seeking materials to use in the classroom.

School history issues in South Africa and beyond

History is optional in Grades 10 to 12 in South Africa, and flows from the history half of the compulsory subject social sciences, offered up to Grade 9 (the other half being geography). Grade 8, the start of secondary schooling, covers the period from around 1800 to the end of World War I. Grade 9 focuses on the twentieth century, from 1919. In Grade 10, the focus shifts backwards to 1600 and developments over three centuries to around 1900. Grades 11 and 12 revisit the first and second halves of the twentieth century respectively. In each grade both South African and world history are covered.

In 2022, a third of Grade 12 learners took history; this figure has risen continuously from 19% in 2013. Some of history's popularity relates to history being seen as relatively easy: since 2013 history has enjoyed the highest pass rate of all the major non-language subjects, with the examination pass rate being 88% in 2022.[3]

The 2018 Task Team report endorses elements of the existing system: history should remain a distinct discipline in schools, and history teachers should have majored in history at university. However, it also recommended changes: history should be compulsory up to Grade 12; there should be more emphasis on historical enquiry skills relative to learning content; potentially divisive topics in South Africa should be confronted rather than avoided. On this last point, the review refers to the WIR and its accompanying data as a useful tool for understanding South Africa's extreme inequalities (Ndlovu *et al.*, 2018: 56, 68, 130-133). The value of quantitative approaches to understanding history is alluded to in passing in the 2018 report. But the matter receives no substantive focus. This article in part aims to convince the reader that such a focus would have been compatible with, and

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3   From official examination reports of the Department of Basic Education.

indeed furthered, the report's aims.

The 2018 report argues for going beyond the predominant focus on political history, by including more social and economic history. How to do this is a contested matter, with tensions between, for instance, proponents of learners' interpretations of primary sources and proponents of more theoretical approaches (Ford, 2015). Moreover, as argued by Kallaway (2012), it is important to consider the level of complexity with which secondary learners can engage.

The WIR series, started in 2018, was prompted by concerns that income and wealth inequality within countries had worsened since around 1980, despite a decline in inequality between 1900 and 1980.[4] It was also prompted by insufficient use of available data to monitor long-range inequality trends. Two WIRs have been released so far, for 2018 and 2022, with the second extending the historical focus back to around 1820. South Africa receives special attention in both WIRs.

Inequality trends in the rest of the world are essentially mirrored in South Africa, with several South African inequality indicators worsening since around 1990, despite the advent of democracy, even if inter-racial inequality has declined (Alvaredo *et al.*, 2017: 145). South Africa exemplifies that political and economic history do not necessarily move in ways one may expect: under certain conditions democracy can be associated with greater inequality. Globally too greater democratisation has been accompanied by greater income inequality.[5]

A worldwide trend, beginning around 2010, towards more quantitative historical research, has been observed. According to Ruggles (2021), this trend represents a third wave of quantitative emphasis in the study of history, with the two earlier waves found at the beginning of the twentieth century and the 1960s to 1980s respectively. Judging from past trends, quantitative approaches in history will continue to attract adherents, in part because of multidisciplinary work where, for instance, demographers and economics delve into history, and consequently influence the work of historians. At the same time, more traditional historians are likely to resist what could be seen as an excess of quantitative analysis. Non-quantitative textual sources may appear pre-eminent for proponents of

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4 See Alvaredo *et al*. (2017: 9). The conclusion that within-country inequality has worsened in recent decades is shared by the World Bank (2016: 10). Prominent economists have disagreed with this conclusion, in particular as far as one country, the United States, is concerned. Yet the consensus among economists agrees with the notion of rising within-country inequalities – for instance Gale, Sabelhaus, and Thorpe (2023).

5 This becomes clear if one compares, for the 1970 to 2000 period, global democracy trends in V-Dem Institute (2023: 10) to trends for income inequality, including within-country inequality, in Chancel *et al*. (2022: 13).

local history, given that quantitative data lend themselves most to national or international historical narratives.

A separate impetus for more quantitative approaches in the history class is the "numeracy across the curriculum" movement. This assumes that numeracy skills are too important to be confined to mathematics only. Phillips (2002) argues that history teachers should learn how to select statistics that can deepen an understanding of topics that are already being taught. The South African history curriculum is typical insofar as it reflects no explicit interest in quantitative approaches: none of the eight skills referred to in the curriculum documentation relate to quantitative enquiry, though such enquiry could easily enrich some of the eight skills areas.

While the Task Team report does not discuss climate change specifically, in the last decade UNESCO and other organisations have begun to place a strong emphasis on climate change education. Education International (2021), the world federation of teacher unions, has called for universal climate literacy among youth.

Recent advances in understanding the history of poverty and inequality

The WIR argues that a key reason why rising inequality since around 1980 is concerning is that this makes it more difficult to reduce poverty. In a seminal history of global poverty, the economist Ravallion (2016) explains that poverty reduction has been a growing concern of much economics scholarship during the past approximately three centuries. During the First Poverty Enlightenment, lasting from about 1800 to 1950, new knowledge and policy proposals relating to poverty emerged and poverty rates declined, though not as rapidly as after 1950: between 1800 and 1950 the percentage of the world's population considered poor dropped from around 85% to 55%, or 0.2 percentage points per year. This trend was not evenly distributed across the globe, as will be explained below. In the Second Poverty Enlightenment, from around 1950, political factors such as decolonisation and a stronger push for gender equality, as well as technological changes in agriculture, invigorated and reshaped the focus on reducing poverty. Between 1950 and 2010 the global poverty rate dropped from 55% to around 15%, a decline of 0.7 percentage points per year.

This decline in the poverty rate over two centuries co-existed with a *worsening* of inequality, especially before 1900, as industrialisation, colonisation, and slavery generated new types of inequality. The world is considerably less equal today than it was around 1800 (Chancel *et al.*, 2021: 13). That poverty rates can decline while inequalities are rising is a

phenomenon that can easily appear counter-intuitive. It seems important for school history students to understand this complexity.

Producing comparable poverty rates over a longer historical period, characterised by great technological and socio-cultural change, is an immensely complex task which is sensitive to, among other things, philosophical underpinnings. The basic ideas and debates, however, are relatively straightforward. In presenting historical poverty rates, Ravallion elaborates on earlier analysis, using time series data on three things by country, or group of countries: gross domestic product (GDP) per capita; the share of income received by each decile (tenth) of the population, with the top decile being split into two twentieths; and total population.

Ravallion employs, among other measures, one 1985 United States dollar a day of income per household member as a threshold for escaping extreme poverty. This threshold has been widely used. What this means in actual human experience is of obvious importance. The threshold itself is based on estimates endorsed by governments around the world, particularly in poorer countries, of what a basic basket of food, plus some basic non-food items, would cost in monetary terms if the goods were bought (Chen and Ravallion, 2010).

For more recent decades, poverty rates per country or region have been calculated using information on household size and consumption as reflected in sample-based household surveys. The introduction of these surveys can be considered a historical milestone in its own right, one that greatly facilitated the understanding of social history. To illustrate, the establishment of India's National Sample Survey in 1950 was an integral part of the country's decolonisation and democratisation process: it assisted planners in the newly independent state to understand the needs of not just elites but society as a whole.

However, for most of the past 200 years, two vital sources, household surveys and national accounts monitoring GDP, have been virtually non-existent, especially outside Europe and North America. Concerning average GDP per capita, there is an important body of literature estimating this for the past millennium, much of it initiated by Maddison (2001). Given the absence of money in the modern sense in many societies, historical sources, for instance, on food production and consumption levels have been used to produce comparable monetary values. Concerning inequality of income distribution, analysis of historical phenomena with large impacts on inequality, in particular the Industrial Revolution and colonisation, is used to build assumptions on how income distributions are likely to have changed.

Figure 1 below draws from a dataset accompanying Bourguignon and Morrisson

(2002: 788) that breaks the world up into 33 countries or groups of countries, each with statistics for 11 years in the range 1820 to 1992. South Africa is one of the 33 countries. History students could conceivably use this simple dataset to study the history of poverty and develop quantitative skills. For this graph, the threshold for "extreme poverty" is the consumption possible in the United States in 1993 using 1.08 dollars per day and per person.[6] The WIR draws from this data, though the data published with the WIR, known as the World Inequality Database (WID), covers fewer past years, for instance only from 1913 in the case of South Africa.

Figure 1: Extreme poverty in South Africa and elsewhere 1820 to 1992
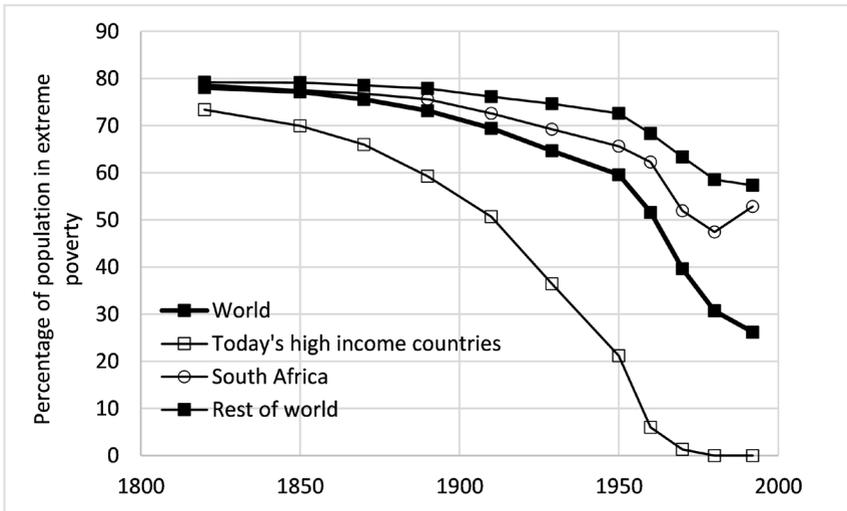
Source: Own analysis of Bourguignon and Morrisson (2002) dataset found at https://web. archive.org/web/20120217010359/http://www.delta.ens.fr/XIX (in April 2023).

A South Africa-specific analysis by Van der Berg and Louw (2004), using a different approach, arrives at lower poverty rates for South Africa than those seen in Figure 1. This is due to the use of a lower per capita income threshold. This analysis also arrives at an *increase* in poverty towards the end of the twentieth century for South Africa, as in the above graph, though in Van der Berg and Louw (2004) this increase commences around 1990 (in the

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6   See also World Bank (2001: 23).

graph it commences in 1980).

A vital distinction for an economic historian would be the relative importance of economic growth, or the increase in the size of the "cake", and declining inequality in the distribution of the "cake" of total income. Either of these two factors can reduce poverty. However, as will be discussed below, in South Africa and the world it was economic growth rather than reductions in income inequality that accounted for almost all poverty reduction in the last 200 years.

Strikingly, school history curricula appear to ignore one of the most significant trends in human history: population growth.[7] The fact that the world population increased five-fold between 1820 and 1992 means that the absolute number of people living in poverty almost doubled over this period, even if poverty rates fell. In South Africa, the number of poor people increased seven-fold between 1820 and 1992. The contrast between rates and raw numbers raises important philosophical questions. In particular, can improvements in rates combined with a deterioration in the number of people in poverty be considered progress?

Ravallion (2016: 17) speculates that colonisation largely explains worsening poverty in certain periods and world regions while arguing that data limitations make it difficult to quantify the phenomenon. Moreover, the monetary poverty lens has some clear drawbacks. In particular, it fails to take into account the psychological trauma of colonisation. This is better captured in Walter Rodney's *How Europe underdeveloped Africa*, first published in 1972 (discussed below), and Iliffe's *The African poor*, of 1987. Measures of holistic well-being that are comparable over time have begun to emerge, for instance in the *World happiness report*,[8] but these measures have a very limited historical span.

Why and how to study poverty in the history class

Focussing on poverty rates is perhaps the simplest way of introducing a stronger quantitative focus on inequality in the history class, and easier than considering a more sophisticated indicator, such as the Gini coefficient. Poverty rates feature strongly in the SDGs, and the South African political discourse (discussed below).

Poverty should be dealt with sensitively in the South African context, where between

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7   Curriculum documents from South Africa, Brazil, India and England were found to display no focus on this topic.

8   https://wellbeingintl.org.

21% and 56% of the population have been classified as poor by Statistics South Africa (2017: 14). How poverty statistics vary, depending on definitions, should be underlined to reduce the risk of labelling specific learners in the class. In schools serving exclusively middle-class communities, a deeper examination of the historical causes behind social disadvantage has been demonstrated to reduce common prejudices, such as that people are poor due to their lack of interest in escaping poverty (Mistry *et al.*, 2012).

There is value in examining measures of what has come to be known as multidimensional poverty. Statistics South Africa (2020: 48), in employing an internationally used methodology for this, identifies seven non-monetary factors reflecting levels of child poverty in South Africa, the most influential one being sub-standard physical facilities at school.

Indeed, education's role in perpetuating or breaking cycles of poverty in the last two hundred years lends itself well to study in history class. Extracts from international learner test data help explain how international and within-country income inequalities are underpinned by inequalities in what children learn at school. However, these data only span the last twenty years for a substantial number of countries, including South Africa. The historical factors behind South Africa's low point of departure regarding learning levels but also its relatively rapid improvement, achieved through reduced inequalities since around 2002, are important but largely under-studied (Gustafsson and Taylor, 2022). In contrast, statistics on participation in school go back to the creation of South Africa as a country in 1910, thus offering easier integration with periods specified in the curriculum (Fedderke Kadt and Luiz, 2000).

One benefit of a more quantitative focus in the history classroom, be it in terms of poverty or other themes, is opportunities to examine data-generating processes and the uncertainties typically associated with statistics. How to discern differing levels of reliability among statistics is increasingly important for young people in a context where statistics are easily manipulated in the political discourse. A useful discussion of the reliability and comparability of poverty statistics in Africa is provided by Jerven (2019). A sufficient awareness of these uncertainties can prevent reading too much into the available statistics while appreciating that statistics illuminate important historical trends which would be lost in their absence. The latter is important in the context where even sufficiently reliable statistics may be rejected for political purposes, for instance in the pursuit of climate change denialism (discussed further below).

An important resource available to teachers, including history teachers, to raise awareness of uncertainties associated with self-reporting in surveys, and sample-based

statistics, is Statistics South Africa's (2013) "Census @ school" materials, which facilitate simple school-based simulations of household surveys.

Poverty and atmospheric colonisation

The term "atmospheric colonisation", coined recently and used in academic circles (Borràs, 2019) as well as the United Nations (2022), refers to the effect of the Industrial Revolution, in combination with colonisation, on the global climate. The basic concept is that the atmosphere, like land, is a finite resource that has been unjustly utilised since the onset of the Industrial Revolution, especially through the burning of fossil fuels. Since the Industrial Revolution, above all European societies and their offshoots across the globe have significantly raised carbon dioxide levels in the atmosphere beyond what could be considered a fair share of their "carbon budget", with negative repercussions for the welfare of generations of humanity.

Estimates of national carbon budgets are debatable, yet the evidence points strongly to developed nations having used up their budgets: the United States has already used up around twice its budget (Thompson and Montañez, 2023). Developing nations have often not used all of their budget: South Africa had used around 60% of its budget by 1999 (BASIC experts, 2011: 43).[9]

Recent decades have seen evidence of the welfare implications of climate change. As early as 2002, the World Health Organization (2002: 72) published statistics on additional mortality attributed to climate change. Mazo (2010) and others have argued that the post-2003 conflict in the Darfur region of Sudan, partly over scarce natural resources and costing up to half a million lives, can be considered the first conflict of the modern age attributable to climate change.

This type of evidence will unfortunately mount. Jafino *et al.* (2020) estimate that by 2030 some additional 32 million to 132 million people, mostly in Sub-Saharan Africa and South Asia, will be poor due to climate change.

The historian Amanda Power (2020; 2022), in speaking about the school history curriculum to the Royal Historical Society in Britain, underlined two key focus areas. First, students should understand that climate change adds an additional layer to the inequalities resulting from industrialisation and colonisation, a layer which is particularly difficult to undo because it alters the chemistry of the atmosphere. Climate change further

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9 In Table 3, 10.55 over 17.80 is around 60%.

problematises the notion of human progress due to questions of ecological sustainability.

Second, students should understand how knowledge about climate change has evolved. Unlike visible inequalities such as income inequality, unequal utilisation of national carbon budgets is largely invisible. The evidence needed to partition responsibilities across countries to reduce emissions, commonly referred to as mitigation, and to pay for adaptation to a different climate, has emerged fairly recently. Moreover, the responsibility of key emitters to take action increased enormously when the science around climate change matured in the 1980s.

The first of Power's (2020) focus areas involves examining which societies have most exceeded their carbon budgets. The 2022 WIR deals comprehensively with climate change and presents a history of emissions which lends itself to use in the classroom. Europe and North America went from producing by far the most emissions between 1850 to 1950, to around half in the 1970s, and around a third in 2020.[10] The historical legacy is strong, as emissions from two centuries ago continue to influence the climate today.

The WIR 2022 analysis draws from PRIMAP-hist data, a relatively simple dataset used to generate Figure 2 below. The relationship between population growth, increases in average welfare represented here by income, and emissions is vital. Both average income and population increased around tenfold between 1820 and 2021 and thus each contributed more or less equally to increases in total income, which in turn is strongly correlated with emissions. The latter is due to the extent to which consumption, be it of food, housing or leisure, has depended heavily on the burning of fossil fuels since the Industrial Revolution.

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10 See Chancel *et al* (2021: 116).

Figure 2: Global income, population and emissions since the Industrial Revolution
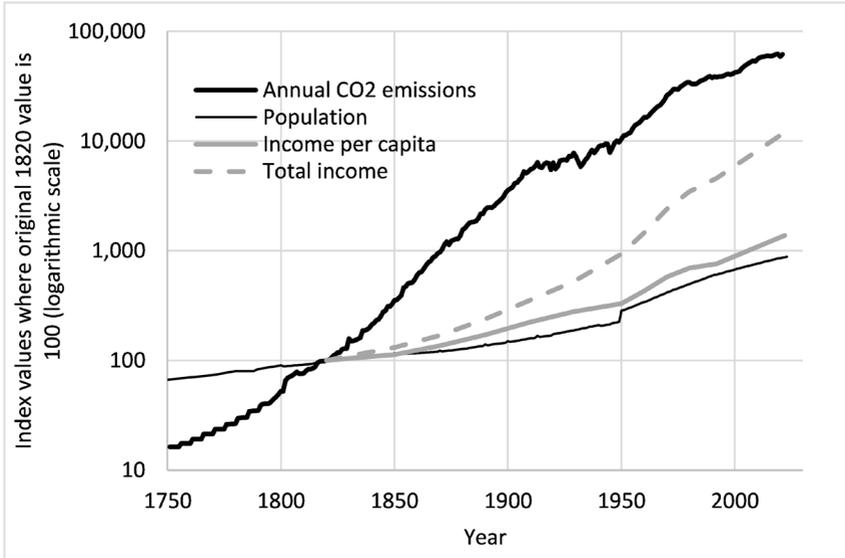
Sources: Annual CO2 emissions from analysis of the PRIMAP-hist dataset published by the Potsdam Institute for Climate Impact Research. Global population from ourworldindata.org. Income data from the abovementioned Bourguignon and Morrisson (2002).

The PRIMAP-hist dataset helps situate the historical emissions of South Africa within the Sub-Saharan Africa region. Though South Africa's population has never exceeded 10% of the region's population since 1820, South Africa's contribution to the region's emissions peaked at 36% in 1987, declining after that to 23% today. These trends reflect South Africa's relatively early industrialisation in the region and to an extent the apartheid regime's attempts to evade sanctions through the emissions-intensive Sasol parastatal (discussed below).

South Africa finds itself being part of a developing world calling for rich countries to assume their due responsibility when it comes to climate change, while also a relatively high emitter in per capita terms. These factors, in part paradoxical, are beginning to shape South Africa's foreign policy. Understanding the historical background to this will become increasingly important for South African voters.

The 2022 WIR presents groundbreaking work focussing not just on inequalities in

emissions across countries but across social classes. This allows for a far more informed historical analysis. While in 1990 most of the emissions inequality was *between* countries, by 2019 most of this inequality resided *within* countries when half of all emissions were accounted for by the 10% of the global population emitting most.[11] Within South Africa, the post-1980 worsening of income inequality discussed previously is mirrored by worsening inequality with respect to emissions: the top 10% of emitters in the population contributed to 30% of national emissions in 1990, but 40% in 2020.[12]

Turning to the history of the science and politics of climate change, it is important for students to appreciate that while the climate change challenges for humanity are immense, since the 1980s the foundations have been laid for the necessary political, technological, and social change. Political milestones in this recent history include the 1992 Rio Declaration, the 1997 Kyoto Protocol, the 2009 Copenhagen Accord, and the 2015 Paris Agreement (Skidmore and Farrell, 2022; Clemençon, 2023; Maslin, Lang and Harvey, 2023). The use of moral persuasion and diplomacy to get "atmospheric colonisers" to reach a zero emissions state, while ensuring that countries which had not used up their carbon budgets remained within budget (Bacchetta, 2023), is not dissimilar to processes aimed at ending the Vietnam War and preventing a nuclear catastrophe during the Cold War. Economic isolation of countries not complying with international commitments has not occurred yet, but is considered a possibility (Cirone and Urpelainen, 2013). However, there are also key differences. Climate change is likely to affect societies more gradually than war, even if the ultimate harm is comparable. This reduces public interest in, for instance, mitigation. Arguably, the leverage of less powerful countries in the climate negotiations is even weaker than it would be in a military conflict.

Specific curriculum suggestions

Below, ten of the 25 topics found in the history curriculum for Grades 8 to 12 are identified as presenting opportunities to explore the questions discussed so far. Suggested focus areas within these ten and important academic sources are discussed as are possible uses of statistics. To bring together the quantitative side of the discussion, key statistics relevant to all five grades are presented in one table.

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11 See Chancel *et al* (2021: 122, 126).
12 Own analysis of the 2022 World Inequality Database data.

Grade 8: Industrialisation, global inequality, and carbon extraction

The Grade 8 topic "Industrial Revolution in Britain and Southern Africa from 1860" offers opportunities to examine the impact of industrially-driven economic growth on emissions and poverty reduction in Britain, and on inequality and new forms of poverty in what was to become South Africa.

Table 1 is derived in part from the World Inequality Database. The Industrial Revolution saw Britain's per capita emissions increase from 3 to 13 tonnes between 1820 and 1900. The doubling of the population, from 21 to 41 million, implies an eight-fold increase in total emissions. This reflects the rise of non-renewable fossil fuels, largely coal, for heating and mechanical work. In 1600 around 80% of Britain's energy needs came from three traditional sources: food permitting human labour; feed for working domestic animals; and firewood. Coal accounted for some 10% of energy consumption. The share of coal increased to 50% in 1700, 75% in 1800, and 95% by 1900 (Warde, 2007: 74). Coal's rise thus predated the onset of the Industrial Revolution proper.

Table 1: Historical statistics on average income, inequality and emissions

		Population (millions)*	Average adult income (2022 Euros PPP)*	% of total income in top 10%*	% poor*	Literacy rate among adults (%)	Per capita emissions (tonnes CO_2-equivalent)
United	1820	21	3,329	50	78	53	3
Kingdom	1900	41	9,590	56	24	85	13
France	1820	32	2,875	60	86	38	1
	1900	39	6,952	50	38	75	6
Russia	1900	70	2,276	47	83	34	3
	1985	143	19,374	23	8	98	22
	2021	146	24,587	51	10	100	19
USA	1900	76	7,430	40	33	97	12
	1985	239	53,281	37	5	100	24
	2021	330	57,734	46	6	100	18
China	1900	402	1,146	50	92	30	1
	1985	1,059	2,969	30	63	65	3
	2021	1,406	18,692	43	16	97	10

		Population (millions)*	Average adult income (2022 Euros PPP)*	% of total income in top 10%*	% poor*	Literacy rate among adults (%)	Per capita emissions (tonnes CO2-equivalent)
South Africa	1820	2	1,327	58	91	10	1
	1900	5	3,141	63	82	26	2
	1985	32	11,376	64	53	76	14
	2021	59	15,182	65	40	95	10
Sub-Saharan Africa	1900	87	2,509			3	1
	1985	447	4,686	58	65	49	3
	2021	1,182	5,795	56	55	67	2

Sources: The four variables marked with * are calculated using the WID dataset. The percentage poor statistic used the WID income distribution values, and set the poverty line to produce 40% poor in South Africa in 2021 (the WID does not select a specific poverty line). An adjustment to the three WID income-related statistics for South Africa in 1985 was applied, using Van der Berg and Louw (2004) and the World Bank's World Development Indicators, given obvious problems with the WID-based statistics. Where possible, literacy rates for 1985 and 2021 are from the World Bank's World Development Indicators, with Van Leeuwen and Van Leeuwen-Li (2014: 94) being the second option for 1900 and beyond. For 1820 (United Kingdom and France) values are those compiled by Roser and Ortiz-Espina for Our World in Data at ourworldindata.org (2018 revision). South Africa's 1820 and 1900 literacy values are drawn from Christopher (2015). Per capita emissions is from the aforementioned PRIMAP-hist dataset.

Between 1820 and 1900 Britain's poverty rate declined dramatically, from 78% to 24%, though inequality worsened insofar as the share of total income of the richest 10% rose from 50% to 56%. The figures in Table 1 illustrate the fact that poverty declined not because inequality declined, but because average per capita income roughly tripled over the period. The "cake" grew.

Descriptive histories of Britain, and even the South African curriculum, emphasise the misery experienced by Britons in crowded cities. Yet, apart from declining poverty, there is evidence that Britons experienced improvements in their diet and health, were able to afford better quality accommodation, and lived longer.[13] A holistic picture clearly requires different sources, including nationally representative statistics. Britain's economic growth

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13 This appears to be the recent consensus, though data issues continue to provoke lively debate – see Harris (2004).

relied in part on control over distant colonies and involvement in the slave trade (Wardley-Kershaw and Schenk-Hoppé, 2022). More broadly, the Industrial Revolution facilitated an unprecedented rise in inequality *between* countries.[14]

Political forces within Britain assisted in reducing poverty. Pressure from trade unions, but also elite fears of social revolt, led to better wages and the introduction of compulsory primary schooling in 1880.[15] The history of compulsory schooling should be a topic of interest to learners. While this can deprive poor households of income from child labour, common in nineteenth-century Britain, adult workers are more likely to demand better wages, and literate adults are more productive than illiterate adults, especially in an industrial economy.

In South Africa, the period 1860 to 1900 saw the well-being of a few, particularly whites, improve. Poverty remained high, declining slightly between 1820 and 1900, from 91% to 82%. The share of income of the richest 10% increased from 58% to 63%. How is a poverty rate of, say, 82% in South Africa for 1900 calculated, and how should it be interpreted? This 82%, calculated from the WID, considers the consumption of non-traded goods by households, in particular the household's own agricultural production.[16] But given the methods, there are important uncertainties around such figures. Alternative measures of welfare are more difficult to obtain for South Africa than for Britain, but some exist. Wylie (1989) provides a valuable account of changes in patterns of hunger in the nineteenth century: while income from migrant labour and technological innovations such as the metal plough provided better protection against the problem of drought, worsening land scarcity aggravated hunger.

Grade 9: Economic growth with inequality in twentieth-century South Africa

Here two curriculum topics focus on five turning points in South Africa during the latter half of the twentieth century. In broad terms, in South Africa, the trend seen elsewhere of poverty declines, but with persistent inequalities, prevailed. But South Africa's apartheid system closed many opportunities for escaping poverty which existed elsewhere while

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14 See Chancel *et al.* (2021: 66).

15 See Ravallion (2016: 497).

16 Alvaredo and Atkinson (2022) explain that official national accounts data are projected backwards in producing South Africa's WID values and such accounts have included 'vegetables and livestock produced for the market or for own final consumption' (Statistics South Africa, 2002: 10). Importantly, methodological explanations of relevance here are often less detailed than one would want, which compounds the interpretation problem.

contributing to exceptionally high emissions.

The agency of oppressed South Africans is recognised in the curriculum in terms of their political resistance to apartheid. What should arguably also be covered is how some used the few available opportunities to improve their economic situation, even as others saw their lot worsened by apartheid. There could be an early introduction to the South African middle class – the curriculum formally only introduces this in Grade 10. Defining the middle class is even more contentious than defining the poor, yet middle-class growth is closely linked to poverty reduction. Statistics South Africa (2009: 8, 11) argues the middle class was 23% of society in 1998, with just over half of it comprising white South Africans. The historical question is how, despite racial discrimination, a small black middle class was able to emerge. While apartheid's land policies severely curtailed the opportunities of black farmers, largely restricted to the "Bantustans", other avenues offered some opportunities to black South Africans (Lewis, 1984). The realisation of the apartheid government that employers needed a more skilled workforce to sustain economic growth, necessary for sustaining the tax revenue of the state, led to an expansion of state-run segregated schooling for black children, clearly of a much lower quality than that provided to whites. New teaching posts contributed to some growth in the black middle class, even if black teachers were paid considerably less than white teachers. The number of black African teachers rose from 20,000 to 140,000 between 1950 and 1990 (Fedderke, Kadt and Luiz, 2000: 265). Nursing provided another small, yet expanding conduit into the middle class (Southall, 2014). The "Bantustans" provided limited opportunities for publicly employed administrators and black businesspeople (Mabandla, 2012).

As seen in Table 1, in 2021 South Africa displayed per capita emissions on a par with China's, despite being a much poorer country. Two driving forces behind this were the apartheid government's advancement of white Afrikaners and fear of a total oil embargo by the outside world. Coal mines and coal-driven electricity generation were seen as key for advancing Afrikaner capitalist interests, relative to the dominant white English-speaking capitalist class. To maximise this opportunity, state control of investments in coal-related industries and electricity prices was considered important. In 1948, the state-run Escom electricity generation company achieved control over the entire industry with the purchase of the large private Victoria Falls and Transvaal Power Company. The state promoted low electricity prices and high industrial consumption. High consumption was partly driven by restrictions on the movement of labour to cities. This encouraged capital-intensive production modalities and suppressed employment. Though the apartheid plan largely worked, weaknesses in state capacity resulted in electricity demand outstripping supply,

and load shedding, throughout the 1950s (Van Doesburgh, 2022; Sparks, 2012).

Sasol, which focussed on converting coal to liquid petroleum, was established by the state in 1950 in part as a safeguard against an oil embargo. The conversion process was emissions-intensive, with emissions associated with a litre of Sasol's oil being twice that of imported oil (Marano and Ciferno, 2001). Sasol's output accelerated rapidly when the end of the Shah's rule in Iran in 1980 seemed to spell the end of South Africa's only remaining foreign oil supplier. Yet even after 1980, South Africa remained highly reliant on mostly secret supplies from abroad. Sasol's production was at most able to meet just 20% of the country's demand (Kaempfer and Lowenberg, 1988: 23).

Grade 10: Inequalities in 1600 and questioning the French Revolution

The Grade 10 topic "The world around 1600" provides an opportunity to discuss a period characterised by the co-existence of *high* levels of poverty but *low* levels of inequality by today's standards. The vulnerability of a largely agricultural, and largely illiterate, world to climate anomalies warrants attention. The topic "The French Revolution" provides an opportunity to examine how historical patterns of inequality easily persist, even under governments with a rhetoric focussing strongly on change.

Only 5% of humanity was urban in 1600, compared to 54% in 2016.[17] Agricultural technology was rudimentary as were the means to transport agricultural produce to markets. Innovation was made difficult by low levels of literacy. The literacy rate of 3% for Sub-Saharan Africa in 1900, seen in Table 1, would have been the norm worldwide in 1600, including in European countries such as Spain, Ireland, and Sweden, though in England and France, somewhat higher literacy rates of around 16% were achieved at the time (Buringh and Van Zanden, 2009).

Poverty tended to be the result of poor harvests brought about by climate anomalies, mostly local but occasionally with a global reach. The 1600 eruption of the Huaynaputina volcano in Peru has been linked to unusual climate patterns across the world, and widespread famine particularly in Russia (Verosub and Lippman, 2008). Koch *et al.* (2019) find evidence of what is perhaps the only instance of a global disruption of climate patterns by humans in the pre-industrial era. European colonisation of the Americas involved widespread deaths largely due to the introduction of previously unknown pathogens in the local population, which in turn resulted in farmland being abandoned. The effect of this,

17 From 'Urbanization over the past 500 years, 1500 to 2016' in Our World in Data.

the data suggest, was lower carbon dioxide levels in the atmosphere, and hence also slightly lower global temperatures, during the 200 years preceding the Industrial Revolution.

Though no rigorous pre-1820 global poverty rates exist, the evidence suggests that in 1600 global rates were a little above the 80% seen for 1820 in Figure 1 above.[18] Yet levels of inequality were low compared to today. Archaeologists such as Fochesato, Bogaard and Bowles (2019: 866) have estimated the Gini inequality coefficients for wealth in societies with limited written records, using evidence of wealth seen in graves. It is estimated that a thousand years ago societies tended to display a wealth Gini coefficient of 0.40, while today the statistics at the national level range between 0.70 and 0.90 (a higher Gini coefficient points to more inequality).[19]

Turning to the French Revolution, Table 1 provides confirmation that revolutionary rhetoric and the introduction of democracy do not necessarily bring about the kinds of reductions in inequality one may expect. Comparing France and the United Kingdom is instructive. Even though universal male suffrage became entrenched 70 years earlier in France – 1848 compared to 1918 – the trajectory for poverty, inequality, and literacy was similar across the two countries.

Grade 11: Capitalism, communism, brain drains and the environment

The two topics "Communism in Russia 1900 to 1940" and "Capitalism in the USA 1900 to 1940" provide opportunities to compare the effects of very different government systems on poverty, inequality, and the environment.

Poverty and inequality are discussed first. The period 1900 to 1985 of Table 1 is twice the 1900 to 1940 period of the curriculum, yet a longer timespan permits a deeper understanding of the impacts of foundations laid in the early twentieth century. Calculating annual rates of poverty reduction from Table 1 reveals that the fastest downward trends among trends permitted by the table occurred under communist governments. The second-fastest was that of Russia between 1900 and 1985, where poverty declined from 83% to 8%, or by 0.9 percentage points a year. The fastest decline was China's, from 1985 to 2021. Further analysis of Table 1 would reveal that Russia's poverty reduction from 1900 to 1985 appears somewhat more driven by reductions in inequality, while that of the capitalist

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18 Ravallion (2016: 16) refers to the period around 1820 as a critical period when poverty rates abruptly began declining.

19 Credit Suisse Research Institute (2022) appears to be the most authoritative source for current measures of wealth inequality.

United States depended more on economic growth.

Also noteworthy is that the fastest annual gain in the literacy rate seen in Table 1 is that of Russia between 1900 to 1985. There is ample evidence pointing to communist systems being particularly effective at achieving high levels of test scores in international tests administered to samples of learners. Cuba's learners display the highest literacy and mathematics scores in Latin America, and Vietnam's remarkably high scores in global testing programmes are commonly cited (McEwan and Marshall, 2004; Dang *et al.*, 2020).

Why have communist systems tended to reduce poverty and improve education so successfully? A key factor was a strong centralised focus on reducing inequalities and public control over industries that in capitalist societies would facilitate the concentration of wealth among an elite. However, as discussed above, poverty reduction is largely driven by economic growth, and this applies to communist societies too. The annual increase in Russia's per capita income between 1900 and 1985 was relatively rapid, more rapid than in industrialising Britain in the nineteenth century. The curriculum points to Lenin's New Economic Policy and Stalin's focus on industrialisation as important causal factors. What also warrants attention is the role of curbs on emigration, as this highlights a phenomenon of importance to Africa and South Africa, namely the risk of a brain drain. After years of rapid expansion of its education system, the USSR acquired a vast pool of skilled engineers and other specialists. In 1960, a larger proportion of young people in the country were at university than in capitalist countries such as West Germany and the United Kingdom, though the United States displayed an even higher proportion (World Bank, 1978: 111). The risk of a brain drain in a context where more unequal capitalist countries paid professionals more contributed to the USSR and other communist countries effectively prohibiting emigration.[20]

Both the free-market capitalism of the United States and the communist system of the USSR led to especially high per capita emissions, for rather different reasons.

In 1985, the per capita emissions of the United States, at 24 CO_2-equivalent tonnes, were, together with those of Australia, the highest in the world.[21] Factors behind this include a relatively small role for the state in areas such as public transport, resulting in the widespread use of emissions-intensive private transport. Developments in the more climate-aware post-1985 era reflect a strong tendency, going back decades, to protect the

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20 Apart from the risk of a brain drain, there were additional national security concerns – see Light (2012).
21 This ignores a few oil-exporting nations with exceptionally high emissions associated with the oil industry.

more immediate interests of businesses, at the cost of long-term social interests. Since 1985, political groups within the United States, often funded by business, became highly successful in convincing large segments of the public that the science of climate change was not reliable and that the crisis was exaggerated (McCright and Dunlap, 2003). The United States has easily been the largest obstacle to progress in international efforts to reduce emissions: the country refused to ratify the Kyoto Protocol and withdrew from the Paris Agreement in 2020 (though it subsequently returned).

In 1985 the average per capita income in the USSR was less than half that of the USA in the same year and roughly equal to that in China in 2021. Yet emissions per capita were about equal to those of the USA in 1985 and twice those of China in 2021. Emissions in Russia were thus high relative to the standard of living. There is a rich literature on how approaches to the environment have differed across capitalist and communist systems (Ziegler, 1980). In theory, a communist system should be better placed to avoid negative environmental effects as economic decisions can be taken in the interests of society as a whole. However, two characteristics of the communist USSR undermined the protection of the environment. First, production targets in state-controlled companies, essentially the communist equivalent of the capital profit motive, focussed on production but seldom on environmental effects. Second, and perhaps more importantly, limits on political opposition meant there was little pressure on the state at the local and national levels to take environmental risks seriously. The USSR experienced environmental crises that were particularly onerous for affected communities. The Chernobyl nuclear disaster of 1986 and the emptying of the Aral Sea, beginning in the 1960s, lend themselves to a cross-curricular study spanning history, geography, and physical sciences.

Grade 12: Worsening inequalities and the geopolitics of the climate

Here the topic "The end of the Cold War and a new global world order 1989 to present" should encompass geopolitical questions related to climate change. For South Africa, the following is relevant: "The coming of democracy in South Africa and coming to terms with the past". How democracy impacted poverty and inequality warrants attention. This is in a context of global trends towards greater inequality, facilitated by changes in tax rules that favoured the wealthy,[22] but also new business opportunities, linked to the internet, which made a few individuals extremely wealthy. Finally, the topic "Independent Africa" provides

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22 See Chancel *et al.* (2021: 93).

an opportunity to explore why poverty reduction in the continent has lagged behind that in other world regions.

The geopolitical questions relating to climate change have been briefly discussed above. The international climate agreements are part of a wider phenomenon whereby countries, through the United Nations, have agreed to improve the human condition. Central to this are the 2000 Millennium Development Goals (MDGs) and the 2015 Sustainable Development Goals (SDGs) which called for more action on climate change and poverty reduction.

In considering South Africa's share of the global emissions reduction responsibility, it is important to note that South Africa's emissions are among the most export-driven in the world. This means that much of the country's emissions are associated not with consumption by South Africans, but by people in the rest of the world consuming South African exports, especially raw materials from the mining industry. A consumption-based calculation of South Africa's emissions would result in a considerably lower emissions figure than the 10 tonnes per capita seen in Table 1, which is a production-based statistic. It is often argued that international negotiations would be fairer if consumption-based, as opposed to production-based, statistics were used. The barrier to the wider use of consumption-based statistics is largely the difficulty of calculating them reliably (Chancel *et al.*, 2021: 120; Gustafsson, 2021).

In focussing on South Africa's high levels of poverty, the 1994 election manifesto of the African National Congress paid special attention to ending rural poverty but dealt with the broader society through reference to "better incomes" and more jobs. Statistics South Africa (2017) produced three poverty rates for each of 2006, 2009, 2011, and 2015, the three values differing by how strictly poverty was defined. Whichever criteria are chosen, poverty declined slightly over the 2006 to 2015 period if a trendline is used, though the trend is not monotonic because of an increase between 2011 and 2015. For 2015, the three rates are 56%, 40%, and 25% (it was 55% in 2021 in Table 1, which also points to a decline in recent decades). The highest values, for instance, 56% in 2015, are used for the indicator "Poverty headcount ratio at national poverty lines (% of population)" reported by the World Bank, which is responsible for tracking global SDG indicators of poverty. South Africa's monitoring of poverty is relatively effective: among 133 developing countries, 32 have produced national poverty rates more frequently than South Africa in the 2005 to 2020 period.[23]

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23 According to the World Development Indicators of the World Bank.

What factors have contributed towards South Africa's poverty decline? Unfortunately, less unemployment is not one of them. Since around 1980 unemployment rates began rising and have remained between 25% and 35% since 1994. Unemployment has remained high while the country has suffered a skills shortfall, meaning that the education system has not succeeded in keeping up with the demand for skills (Terreblanche, 2002: 14; Schoeman and Blaauw, 2009: 94; Kuluvhe *et al.*, 2022: 19, 32). Thus, despite some improvements in education, these have not been large enough to alter the unemployment situation substantially. Employment was also negatively affected by the structural legacy of apartheid, including the capital-intensive nature of industry. An important factor that alleviated poverty was the expansion of South Africa's social grant system. Between 1998 and 2017, the number of social grant recipients increased from two million to 17 million (Mtshali, 2018: 22). By around 2013, South Africa had one of the most extensive social protection systems among developing countries (World Bank, 2018: 19-20).

Turning to the African continent, the point is made in the 2018 WIR[24] that income per capita grew especially slowly in Africa – this roughly doubled between 1900 in 2021. In contrast, in China, income per capita increased by a factor of 16 over this period (see Table 1). This severely limited Africa's ability to reduce poverty. Explanations for Africa's relatively weak economic performance and high poverty levels differ in emphasis, often depending on which academic discipline is doing the explaining.

One explanation is captured in the Marxist historian Rodney's 1972 *How Europe underdeveloped Africa*, perhaps the most cited work on Africa's weak economic performance.[25] The book argues that European colonisation removed economic resources from Africa through the extraction of human beings as part of the slave trade and then natural resources such as minerals and timber. Even after independence, foreign ownership of, for instance, mines permitted the impoverishment of Africa to continue. Though places such as India and China also experienced colonialism, this was more severe in Africa. While former colonial powers were key promoters of the exploitative arrangements, elites within Africa who benefitted from the system have helped to perpetuate it. A seminal accounting exercise by Boyce and Ndikumana (2001) concluded that over the 1970 to 1996 period the amount of money relocated abroad, or "capital flight", from 25 poor African countries was remarkably high, and higher than what these countries borrowed during the period. Much of this capital flight was done by local elites.

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24 See Alvaredo *et al* (2017: 65).
25 Established through Google Scholar.

A second prominent explanation is reflected in the work of Daron Acemoglu, a widely-cited Turkish-American economist. Acemoglu, like Rodney, has argued that the legacy of colonisation has hindered economic development in post-independent Africa. Guns, often received as payment for slaves, proliferated in much of Africa during the transatlantic slave trade, generating a lasting legacy of conflict and violence. However, where Rodney's emphasis has been on the perpetuation of exploitative international relations, Acemoglu emphasises the way colonialism left Africa with public institutions more oriented towards benefitting a small elite than providing services and promoting the rule of law. A few countries, notably Botswana, escaped the worst effects and thus developed relatively well. In arriving at these conclusions, Acemoglu has drawn extensively from quantitative economic research (Acemoglu and Robinson, 2010).

Conclusion

In a context where the United Nations has been concerned about rising inequalities as a threat to world stability, and has raised the alarm about insufficient action to deal with climate change, it seems difficult for history teachers to ignore these topics. This is especially so given the fundamentally historical nature of inequality and climate change. Globally, income inequality declined somewhat between 1800 and 1980. Why was that trend reversed in the last 45 or so years? This is a question that history teachers and their students should grapple with.

Climate change may at first sight appear to be a matter for the geography or science classroom. Yet this phenomenon is rooted in the Industrial Revolution, a topic familiar to history teachers but often taught without reference to its environmental impacts and how these impacts are beginning to influence international politics and human welfare in profound ways.

Poverty reduction has continued even with worsening inequality since 1980. This has been possible largely because the "cake" of the global economy has grown. Students should understand the often counter-intuitive relationship between inequality, poverty, and democracy. In short, opportunities abound for the history teacher to influence how society understands and deals with these daunting challenges.

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Beyond Reenactment: exploring the Battle at Egazini with grade 10 history learners using applied theatre

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Abstract

The South African grade 10 history curriculum as outlined in the Curriculum and Assessment Policy Statement (CAPS) requires learners to develop historical thinking skills that promote interpretation, analysis, and critical thinking competencies. One way of developing these skills is through revisiting historical events through reenactments to explore untold stories and develop historical empathy. However, reenactments can become sensational, one-sided events that lack the transformative power to offer varied versions of the events such as the Battle at Egazini and its key historical figures. The paper proposes reenactment for learning as an interdisciplinary methodology that draws on art exhibitions, history literature, and applied theatre techniques. The paper shows how these teaching tools actively and creatively engaged the learner-audiences in the reenactment of the 1819 Battle at Egazini between the amaXhosa and the British in Makhanda, formerly Grahamstown.

The facilitators moved learner-audiences from four local schools beyond passive

reenactment modes of engagement using games, pantsula dancing, facilitator-in-role, enrolling participants, and reflection exercises in one-hour workshops. The activities helped learners explore the relevance of colonial expansion and conquest themes within the Battle at Egazini context. The art-based interpretation framework also helped address misconceptions and cultivated an interest in wanting to know more about Makhanda, the war hero that the town is now named after. The paper argues for a creative and engaging pedagogy that helps learners make sense of broad topics. It contributes to current literature advocating for creative historical interpretation and teaching approaches in and outside the classroom space.

Keywords: reenactment; history curriculum; applied theatre; Makhanda; Battle of Grahamstown; participation

Introduction and background

The South African Curriculum and Assessment Policy Statement (CAPS) outlines the mandated history curriculum. Accordingly, CAPS notes various topics and skills learners must learn throughout the year. Topics 2 and 5 under the grade 10 history subject guidelines require teachers to teach about expansion and conquest during the fifteenth – eighteenth centuries and colonial expansion after 1750 (Department of Basic Education [DBE], 2011:9, 16). In learning about these expansions and conquests, the learners must also acquire specific historical interpretation skills. Accordingly, learners must

> *Engage critically with heritage issues, public representations of the past, and conservation. Thus, thinking about how the past is remembered and what a person or, community or country chooses to remember about the past. Therefore, consider how past events are portrayed in museums, monuments, and traditions. It includes the issue of whose past is remembered and whose past has been left unrecognised or, for example, how a memorial or museum could be made more inclusive.* (DBE, 2011:9).

The abovementioned point alludes to the importance of teaching historical empathy as a historical thinking skill. According to Ramoroka and Engelbrecht (2018), historical empathy is a crucial historical thinking skill that teaches learners to consider other people's perspectives and experiences and helps in reconciliation and nation-building in countries like South Africa. However, as Thelen (2003) notes, history education in school is often riddled with what students perceive as unrelatable content and facts presented chronologically, leaving no room for varied interpretations and engagements. In South Africa particularly, the history curriculum has long been overpopulated with colonial and apartheid thinking and knowledge that disregarded African-centred knowledge forms (Maluleka, 2021). Ramoroka and Engelbrecht (2018:48) further add that these untransformed approaches to history education usually tend to embrace traditional history teaching pedagogies that "undermine the teaching of Historical empathy". According to Barteld Savenije and Van Boxtel (2020:529), teachers can teach historical empathy that explores multiple perspectives through historical figures and events to help "students learn to understand the experiences, decisions, and actions of people in the past. The education ministry in South Africa, therefore has now embraced the idea of fostering a history curriculum with a decolonial and inclusive pedagogical framework following the 2015 #RhodesMustFall anti-colonial education protest (Maluleka, 2021).

Recognising that there is often a disconnect between what the curriculum content asks and the default traditional pedagogical approach to history, the Isikhumbuzo Applied History Unit (IAHU) of Rhodes University made up a multidisciplinary team: a seasoned public historian, Julie Wells; applied theatre practitioners, Phemelo Hellemann and Masixole Heshu; and a professional dancer, Likhaya Jack came together to design a history teaching creative methodology that helped make room for more varied interpretations and engagements with the chosen topic of the Battle of Grahamstown.

The paper explores how applied theatre techniques became helpful teaching tools in studying the Battle of Grahamstown as one of the events that fall under the topic of expansion and conquest that happened in the 19th century but played a role in growing the British colonial expansion in the Cape as noted under topics 2 and 5 (BDE, 2011). The Battle was the Fifth Frontier War (also referred to as the Xhosa War), which was part of nine British attempts to hold on to Grahamstown as a British territory during the 19th century. The place Grahamstown, written as Graham's Town back then, was a British military headquarters that Colonel John Graham established to keep Chief Ndlambe's people away from the Zuurveld (Wells, 2012). The Battle of Grahamstown is one of the most interesting moments in South African history due to the complexities and mystery behind the legend of Makhanda, also known as Nxele, who led amaXhosa warriors to fight for their land in 1819. Grahamstown was renamed Makhanda in 2018 to recognise the warrior's heroic actions during the Battle of Grahamstown (Department of Arts and Culture, 2018).

Briefly, according to Chabalala (2018), minister of the Department of Arts and Culture Nathi Mthethwa announced the renaming of Grahamstown to Makhanda in June 2018 as part of the country's symbolic reparations as recommended by the Truth and Reconciliation Commission. Moreover, the name change was also motivated by what Mthethwa described as "a 20-year-old battle that has pushed people to recognise that Grahamstown carries the name of the most brutal and vicious" colonial British commander, Colonel John Graham (Chabalala, 2018). Not long after the announcement of the name change, a civic organisation called Keep Grahamstown Grahamstown (KGG), challenged the change noting 200 objections stating that the Minister did not follow "proper public consultation process in accordance with what has been laid down by the Supreme Court of Appeal" (Carlisle, 2018). However, their objection did not derail this change, although they remain committed to seeing it through.

Although the town is named after Makhanda, the complexities of the legend remain an area of interest as an attempt to bring local stories to the fore, thus challenging notions of "European observers . . . and . . . the vital question of who was paying tribute to whom" as

Pieres (1975:118) noted. Pieres' concern aligns with the DBE's as they both request that researchers and teachers look deeper into how the past is written and who benefits from such perspectives. These sentiments bring us closer to exploring Makhanda as literature (stories, books, and poems) by drawing on scholars ranging from early writers such as Thomas Pringle to contemporary historians such as Julie Wells who present him as a complex figure.

However, one cannot engage with the man without engaging in the Battle that made him a hero. Thus, through the outlined expectation of CAPS, the Battle of Grahamstown became a catalyst for engaging with Makhanda through a series of workshops. The Egazini Battle workshops, led by the IAHU, confronted the dominant European historical narratives that Pieres noted. The team fostered and centralised a conversation about the Battle with grade 10 history learners from local schools in Makhanda. We received ethical clearance from the history ethics committee, which granted us permission to work with four school groups of 15 to 20 Grade 10 learners from local high schools (Nombulelo; Nathanial Nyaluza; T.E.M. Mrwetyana; and Ntsika Secondary School) and a few Rhodes University history student-teachers studying towards their post-graduate certificate in education (PGCE) in four one-hour educational workshops. The participants were familiar with history as part of the grade 10 syllabus. We chose to work with this specific grade because the CAPS requirements on warfare and conquest topics aligned with the Battle at Egazini research interests of IAHU. The workshops took place at the Egazini Memorial Park, thus exposing learners to existing resources about local histories from creative outputs based on oral histories known to African people in Makhanda.

The article, therefore, provides a literature review, which offers the historiography of the battle as contextual framing for the paper. Moreover, the article reflects and analyses the historical empathy educational aims of the workshop for participants, researchers, and facilitators through reenactment for learning. Instead of approaching the Battle chronologically, we structured conversational interactive workshops in response to the expectation of "whose past is remembered and whose part has been left unrecognised" as noted in the DBE (2011:9). To re-vision the stories behind the Battle of Grahamstown, IAHU assessed learners' prior knowledge about the Battle's events and the Xhosa warrior Makhanda and provided opportunities for critical engagement through an art-based pedagogy.

Contextualising the Battle in review: the Battle at Egazini and Makhanda

Notably, when driving or walking through Makhanda, the divide between well-off areas and those lacking adequate housing and quality education facilities is evident. The scenery serves as a reminder of the outcome of the Battle in 1819. As noted by Fox (2019), Egazini lies on the edge of a valley with views of "Fort England, Fort Selwyn and the other colonial sites, but the site is abandoned and neglected".

Egazini, meaning the place of bloodshed, is the battle site where the amaXhosa warriors led by Makhanda fought the British soldiers. Although the battle is commonly known as the "Battle of Grahamstown" (Wells, 2012:83), we propose that for this article we adopt the Battle at Egazini to decentralise the colonial narrative attached to its current name. Shaw argues, based on a poem called *The Battle* by John Rae, who wrote a series of poems celebrating the battle, that authors have long written about the battle from a victor's point of view, thus positioning amaXhosa as a people "driven by hate" (Shaw, 2020:119). To echo Wells' sentiments during the creation of the sixth plinth mosaic art exhibition at the battle site, the battle forms part of the large white colonial conquest narrative, but if we want to move toward a decolonial mindset, then we need to challenge "old mindsets and discourses" (Wells, 2003:83). By calling it the Battle at Egazini, we are not only revisioning it to shift the narrative from a colonial conquest-centred discourse to a more inclusive story that centralises the adversities associated with the site but also broadens the engagement regarding Makhanda's war strategies and sacrifices as acts of love for his people.

Before this conquest, the British had tried over a 100-year-long period through nine territory wars to conquer the Xhosa territory of the Ngqika and Ndlambe compounds. Going as far back as 1779, the Xhosa chiefdoms in the Zuurveld butted heads as Ngqika (a paramount Xhosa chief) and his uncle, Chief Ndlambe, fought over territory and the control of the Zuurveld (Hodgson, 1985). As explained by Wells, all the frontier wars between 1718 and 1819 were about "asserting claims to the Zuurveld, the land between Port Elizabeth and Fish River" (Wells, 2012:75). Discussing the complexities of Xhosa chieftaincy politics is beyond the scope of this paper. However, we provide a brief discussion of what unfolded that led to the events of the Battle at Egazini.

The amaXhosa chieftaincy has a long history of sibling rivalry. The house of Phalo, a great Xhosa chief, was divided between the Rharhabe and Gcaleka sons. They had different rights and authority based on kinship and royal wives' house systems according to tradition and African culture (Pieres, 1975). Because of their rivalry, the brothers had divided

ownership of the Xhosa territory, with Gcaleka ruling over what later became known by their colonial names, the Transkei and the Ciskei, which became land for the Rharhabe (Pieres, 1975). The Transkei referred to all the Xhosa territory east of the Great Kei River, while Ciskei referred to land between the Great Fish and Great Kei Rivers (Pieres, 1975). From the Rharhabe lineage, Ngqika and Ndlambe are subjects of the events that led to the Battle at Egazini. Their conflict started when Ndlambe refused to give up the chieftaincy as a temporary regent appointed while Ngqika was still too young to be chief after his father, Rharhabe, died (Pieres, 1975). Their conflict solidified after cattle theft allegations and encounters when the Rharhabe group went to war with the Boer in 1778 to defend the Fish and Bushmen[1] Rivers boundaries as their territories in the first frontier or Cape-Xhosa war (Stapleton, 2010:4).

Ngqika and Ndlambe split up because they had opposing war strategies. But in 1793, when the Boers attacked the Zuurveld again, Ndlambe joined forces with the Boers to gain the upper hand over Ngqika's people from the Gqunukhwebe group, who lost 2,000 cattle to Ndlambe (Pieres, 1975). In 1795 the conflict between Ngqika and Ndlambe escalated when the British came into the picture as part of the commando by *landdrost* Christaan Maynier to join the territory fight for the Zuurveld by "seizing 8000 cattle and chasing Xhosa groups from the area" (Stapelton, 2010:4). The commando was an intentional action that progressed British colonisation into the Second Frontier war. Not long after Ndlambe attacked Ngqika's people, Ngqika retaliated and overthrew Ndlambe. This led to more disputes in 1807 and 1817, which saw Ndlambe revive his power in the Zuurveld through more cattle raids (Pieres, 1975). These interactions eventually led to the 1819 battle.

In the interim years, Ndlambe and Ngqika employed different spiritual and religious practices and war strategies. Ndlambe soon became acquainted with Makhanda, while Ngqika solicited Ntsikana's help (Stapleton, 2010). According to Chapman (2021:12), both Ntsikana and Makhanda "epitomise two strategies of survival within the colonial advance", with Ntsikana strongly rooted in Christian values of "peace and accommodation" and Makhanda on "ancient customs as a leader of the resistance". Makhanda gained rank and power after joining Ndlambe's forces. During this period of turmoil, Makhanda illuminated Ndlambe's strategies as more forceful than Ngqika. Chapman (2021:13) further explains how Ntsikana's approach was less powerful than Makhanda's; "Ntsikana

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1 A colonial term used to describe the indigenous hunter-gatherers of South Africa. The term is problematic because it also carries a derogatory meaning as expressed in the *Mail & Guardian* article by the staff reporter (2007).

advised his followers to discard their spears and arm themselves spiritually by singing his hymns, and he fled Ngqika's wrath after the latter had been defeated by Ndlambe."

Unlike Ntsikana, Makhanda did not solely rely on Christian views to guide his war strategies. According to Shaw (2020:14), he had a "hybrid religion, which combined Christianity, superstition and his own 'wild fancies' and styles as a prophet", and his strategy was driven by revenge and "emancipation from colonial domination". But as Hodgson (1985:15) explains, Makhanda's gift of prophecy and predictions made an impression on Ndlambe, who subsequently gave him his own place and two of his followers. Makhanda became good friends with Mduhsani, Ndlambe's son. Soon after, the British illegitamately accepted him as chief due to his influence and following in the Xhosa communities while others, like Chief Ngqika, rejected his regent status because he was not born into royalty (Wells, 2012). Amongst other political and personal activities, Makhanda arrived in Grahamstown shortly after its establishment in 1812 to pursue "information about Christianity" as part of his varied spiritual practices as an acclaimed prophet (Wells, 2012:33).

In 1819, Makhanda and Mdushani joined forces to lead the Battle at Egazini to reclaim and secure the town as former Ndlambe territory. Wells (2012) explains that the one-hour fight occurred on 22 April 1819 between the amaXhosa warriors and British soldiers. Although the amaXhosa outnumbered the British soldiers that day, the British won the battle because of Elizabeth Salt's intervention to supply British soldiers with new ammunition. According to Jooste (2016), Salt volunteered to bring the soldiers gunpowder from another barrack by disguising the gunpowder as a baby as she walked through the crowd of Xhosa warriors. She knew that they did not kill women and children during wars (Jooste, 2016). Wells states that this view of Salt's heroism is a widely accepted one, but back then her role did not have much recognition because it would have meant that the British soldiers had to "acknowledge that it was her act of heroism which turned the battle in the British favour" (Wells, 2012:89). At the time, it was unheard of for women to receive honour for their role in wars. Nonetheless, her actions made the British soldiers gain the upper hand in the battle.

The gunpowder advantage outweighed the amaXhosa warriors' weaponry; hence, losing ten thousand warriors was inevitable. The loss resulted in Makhanda surrendering and subsequently imprisoned on Robben Island, a well-known prison in Cape Town (Shaw, 2020). The British victory led to the arrival of five thousand 1820 British Settlers in the Cape, who then dispersed and infiltrated the Zuurveld (Wells, 2003). The long-standing historical narrative of the battle has been one of typical heroic terms of how a

small battalion of British soldiers and one brave Englishwoman conquered the amaXhosa warriors and their land. Sadly, the massive loss of amaXhosa lives is overshadowed by the stories and memories of the Battle, often infused with "heroic treatments of Makhanda" and British victory, which Wells notes should indeed be "accepted as highly subjective" (Wells, 2010:5).

This subjectivity is notable in the landmarks and engagements in the town, which have become commemoration sources. There are monuments, names, and statues that denote various stories and events that offer 'accurate' representations of history for the white settlers while they provide misrepresentations that highlight a painful past for the indigenous people. The 1820 British Settler family statue stands tall at the 1820 Settlers Monument on a hill in Makhanda. Unlike the Egazini battle site, which the local municipality is supposed to maintain, the 1820 Settlers Monument is well-maintained and cared for by the Grahamstown Foundation and National Art Festival officials who use it as their workspace. The monument and the statue were built in July 1974 as a preservation of English settler heritage during the apartheid rule, which was very Afrikaans-dominated (Warwick, 2020).

Image 1: Six plinths form the Egazini Outreach Project at the Egazini Memorial in 'A' Street, Rhini, Grahamstown. Source: Roddy Fox (Fox, 2019).

Fort England Mental Hospital, which used to be a military post, and the Elizabeth Salt statue in the centre of town are sites and reminders in Makhanda about what happened in the town in the colonial era. Yet, they do not account for the hidden histories of the painful, traumatic experiences of the amaXhosa under British dominance. Other than the visual representations and interpretations of the six mosaic plinths displayed at Egazini Memorial Park, there is little visual representation of the local people's version of the history. Wells (2012:5) adds that most "books acknowledge that it was a big event", yet the battle site continues to receive less attention and visitation.

Before the construction of the sixth plinths, as shown in Image 1 above, there were no visual landmarks to show where the battle had taken place. Today, the site is a memorial park commemorating the battle's events through a creative visual exhibition by local artists. Wells (2003) states that the 2000 Egazini Outreach Project came from the realisation that the local black African people's history needs visibility. Here, the local people engaged with the battle's history by questioning it and interpreting the event using art mediums such as printmaking and tile mosaic art as interpretation tools (Wells, 2003). The artists drew inspiration and information from "primary sources on the battle and unrecorded oral traditions on the battle" (Wells, 2003:81). These two sources were catalysts for artistic and historical interpretation of the battle that brought African versions out of the peripheries. Accordingly, Wells points out her engagement in that the Egazini Outreach Project revealed how the public sees the past as "elusive and subjective", especially regarding the story of Makhanda, a contested Xhosa historical figure (Wells, 2012:5).

Makhanda continues to be a fascination for historians, religious practitioners, poets, and novelists alike, as Damian Shaw notes in his review of Makhanda's appearances in English literary works such as Rae's poetry on Makhanda. According to Shaw (2020), Rae is among the writers who popularised the myth around Makhanda's belief that British bullets would turn into water during the Battle, and he also writes about him in another poem as the fool who swam from Robben Island to Cape Town on a suicide mission. The literature reveals that to some, he was a hero, while to others, he was a sell-out and a fool who adopted British Christian views (Shaw, 2020).

Arguably, the battle intrigues historians and researchers across various disciplines due to its many misconceptions and varying historical positions and narratives that polarise it. Wells (2012) notes the missing parts in reporting the event, especially regarding Makhanda's heroic actions. Often, books describe him with "negative connotations and embarrassing elements" that present him and his people as puppets of "religious fanaticism" (Wells, 2012:3). From these long-standing perceptions, the myths and misconceptions of

Makhanda and the battle arise. We explored some of these perceptions in the Egazini Battle site workshops with the school learners.

Because most of the literature around the battle is written from a British perspective, for the Egazini Outreach project, the organisers put more effort into getting as many Xhosa perspectives as possible through art. The artists and the historians in the team looked for local Xhosa-speaking elderly, who, according to Wells (2012:81), had "intimate knowledge of the local community and they contributed previously unrecorded oral traditions on the battle." The prominent artworks we draw here are the six mosaic plinths created by the Masakuhle art group, which are made of elderly African women who grew up on the surrounding farms (Wells, 2003). The women's interpretation of the sources and stories gathered on the battle at Egazini focused on the pain and loss experienced by the amaNdlambe people in the events leading up to the battle (Wells, 2003).

Unlike the colonial statues and the monument, the plinths do not receive much attention, highlighting how memory is curated and performed in the town. They are often overshadowed by the occasional battle reenactments, which are interpretations that usually perpetuate the dominant British Settler's perspective and commemorate the battle that led to the arrival of the settlers. One of the leading reenactors in Makhanda is Basil Mills, known for staging battle reenactments in the town (Grocotts' Mail, 2013). The reenactments occur at the 1820 Settlers' monument, where a replica cannon is staged and housed outside the building. There are no set schedules of when these take place; therefore, they happen as he sees it, whether as part of the local art festival or as commissioned by interested parties. From Mills' reenactments, we get the impetus to discuss the various types of reenactments and how we arrived at conducting the Egazini Battle site workshops using applied theatre methods as an alternative approach to Mills'.

Methodology

We employed a qualitative methodological approach that falls under the umbrella term applied theatre. Applied theatre is an unconventional theatre practice that takes theatre to the people no matter where they are, and the audience members become active participants (Landy and Montgomery, 2012). Accordingly, the audiences are encouraged to be both participants and viewers. In an educational context, applied theatre draws its methodological approaches from process drama, also often called drama-in-education (D-i-E). Briefly, process drama is a term pioneered by Gavin Bolton and Dorothy Heathcote in the early 1970s in the United Kingdom, and it continues to be a popular drama approach worldwide

(Schonmann, 2011). According to Norris (2016), D-i-E is qualitative educational research and experiential in guiding education practices using drama. As such, using drama techniques helps teach and learn in/out of the classroom (Andersen, 2004). Its uniqueness lies in unscripted performance or interactions that allow both the teacher and the learners to participate in the learning across various subjects.

D-i-E is also an interdisciplinary methodology. Interdisciplinarity promotes the mixture of two fields of study that create new knowledge, professional roles, and methods, drawing on dual theoretical frameworks (Repko, 2008). Our methodology was interdisciplinary, pulling from drama techniques and history interpretation approaches. As seen in both Mills' and Wells' works discussed earlier, the mixture of art as in visual art, performance as in reenactment roleplaying, and historical content is not a foreign concept in South Africa or internationally. But, as noted earlier, we are not satisfied with the one-dimensional approach Mills tends to use when combining the historical content on the Battle at Egazini and reenactment roleplaying techniques. From this view, we challenge the method and offer an interventionist approach to history education in South Africa. Speaking in an American context, Thelen (2003:157) argues for an interventionist education approach in history education, which fosters an open-ended experience that sees content as an unfinished product that requires ongoing inquiry. We share these sentiments, thus positioning our project as a project that advocates for history education and uses drama techniques to foster inquiry and open-ended engagement with the Battle at Egazini and Makhanda.

Revisiting Reenactment as an interpretation method: from presentation towards historical empathy learning

Reenactment refers to reconstructing histories that focus on a specific event or moment in the past (Cook, 2004). Performers recreate these moments to bring about life experiences during that time. The people who are often interested in this work are historians and military research enthusiasts. This type of historical interpretation is also known as living history performance. It is common in Western public history museums where staff members often take on a historical figure role to lead museum visitors through exhibitions (Jackson, 2000).

However, to assume this persona or historical character, one must do thorough research to represent historical facts well. Thus, reenactments have become popular cultural practices that seek to provide audiences with "authentic experiences of history" (Gapps, 2009:395). These experiences come from primary resources that offer first-hand encounters of the event, ranging from artefacts, personal testimonies and any finding that connects them

back to the past. As such, "photographs, diaries, letters and 'local newspapers of the times'" become useful material that helps reenactors understand the events (Gapps, 2009:395). In this way, they can capture as much information as possible about the historical narrative of the event they are exploring. Reenactors can enhance the experience by staging an event as close to the past as possible through relevant costumes, anticipated dialogue, and rehearsed actions and interactions.

Cook (2004) distinguishes between two types of reenactments: reenactment for presentation and reenactment for learning. Reenactment for presentation simulates the past as it is by presenting objects such as costumes, artefacts (used as props) and the narrative as historically accurate as possible. These types of re-staging serve as a "valid form of public commemoration" in most communities (Gapps, 2009:396). Light and Young (2015) state that commemorations include monuments, statues, street names, and other public buildings. Therefore, reenactments tend to happen in these spaces because they hold historical significance. In Makhanda, the Egazini battle site and the 1820 Settlers monument are commemorative sites, although the latter receives more attention than the former. It is at the 1820 Settlers monument that Mills occasionally reconstructs the battle of April 1819 to commemorate all amaXhosa and British soldiers who lost their lives (Grocotts' Mail, 2013). Mills' commemoration work also takes on a military history approach. In its traditional sense, military history focuses on "traditions of heroic epics" where warfare is glorified to enhance the victor's power (Morillo and Pavkovic, 2012:1-2). Mills achieves this by providing what he perceives as 'an authentic battle experience' through elaborate costumes, props, and cannon demonstrations.

Image 2: Re-enactors in Grahamstown getting ready to do the Battle of Grahamstown re-enchantment. Source: 8A Grahamstown.

As is notable in Image 2 above, the battle staging gives a polarised view of the battle, with Caucasian men in roles as British soldiers and African men as amaXhosa warriors. Here, Mills simulates the past using artefacts and historical narratives as they appear in the historical literature. Sue MacLennan notes Mills' preoccupation with getting replicas accurate as follows:

> When here in Makhanda (Grahamstown), Basil Mills was asked to make up replicas of survivor Pollux and the Long Tom that got its twin, he jumped at the challenge… Mills operates a traditional metalwork forge, where these extraordinary historical monuments were welded and moulded. The guns are definitely not operational. 'We used a combination of old photographs and some rather vague old imperial plans to get the proportions right,' Mills said. (MacLennan, 2018:1)

Arguably, the historical event's props, costumes, and location get more attention because they are what he perceives as "what authenticity refers to" (Gapps, 2009:403). He believes that roleplaying in these costumes and props brings the audience closer to the battle as a turning point in the town's history (Cook, 2004). By focusing on costumes and props for authenticity, Mills' reenactments favour British soldiers' narratives, and the audience misses

out on deep conversations about the devastatingly high number of amaXhosa fatalities. He associates military commemoration with fostering public remembrance that focuses on the significance of British soldiers' victory. Thus, this points to the subjectivity of the British victory narrative that Wells warned against earlier. At a surface level, the event serves the purpose of public memory and "collective understanding of the past", but it fails to achieve the facilitation of social cohesion because it focuses too much on the victor narrative (Light and Young, 2015:23). The problem here is that Mills' traditional military history approach presents "narrative without analysis" (Morillo and Pavkovic, 2017:4).

We note the transitional justice gap that reenactment for presentation fails to fill by drawing on Morillo and Pavovic (2017:4), who further contend that military history practitioners need to explore warfare beyond objects and names by exploring "ideas, beliefs (religious practices) and ideologies that shaped plans, decisions and actions of the individual and group". Accordingly, as Keynes (2019) states, transitional justice is a truth-telling process that seeks to redress and acknowledge the harms caused by settler colonial societies. They serve an anthropological purpose which places value on how researchers/performers ought to interact with past objects as Auslander (2013) noted. Hence, one of our primary concerns with limiting authenticity to objects is that it neglects to acknowledge that authenticity can extend to dialogue and emotion to understand further war strategies and beliefs, especially of the victims. With Mills' approach, the collective understanding of the past rests on the victor's narrative while neglecting or underplaying the oppressed's narrative. Accordingly, reenactment for presentation has little engagement with what social cohesion and "public memory as a fluid process of negotiation" can look like (Light and Young, 2015:235).

According to Peers (1999), who writes about live historical performances in the West, live interpretations usually offer one-sided history. A one-sided historical narrative does not allow for negotiation, which means reconfiguring the past to include expressions of "oppositions or contestations of the official public memory" (Light and Young, 2015:235). Thus, Peers' approach and Light and Young's notion of negotiation include creating inclusive interpretations that present native people's perspectives on the past. It is in these varied perspectives that minority stories have gained attention. The need for telling these stories has seen Peers work extensively to revise interpretation from "middle-class activities such as baking bread to telling stories of the roles native people played on-site" (Peers, 1999:42). The shift from staging stereotypical colonial roles to finding authentic material and information that presents alternative stories from the usual Eurocentric view is essential. As supported by Keynes (2019), who writes in an Australian context but

her work resonates within South Africa, the truth-telling of indigenous people's stories should not seek to neutralise history in the name of nation-building (or social cohesion) but instead honour stories that were hidden and untold during the colonial period. By moving from reenactment for presentation to reenactment for learning, we are arguing for a history education approach that embraces transitional justice through engaging learners in dialogue, interactions, and processes of reconciliation that deal with a complicated past as Makhandians.

Research design: the Battle at Egazini as a reenactment for a learning exercise

We draw on Peers' view to highlight the limitations embedded in Mills' one-sided reenactments and offer a methodological approach that embraces alternative historical perspectives and interpretations. IAHU embarked on a creative interpretation journey through four one-hour workshops using the reenactment for learning approach over four days. Thus, the activities of the Egazini Battle site workshops had an educational aim with six phases: enrolling participants, games, group meeting in-role, interaction with plinths, final battle station, and reflections out-of-role. Owing to Cook (2004), we created reenactment for learning that sought to expose their audience to new information. This reenactment played an essential role in illuminating historical facts through the imaginative process. Because of its nature as a reenactment for learning, as interpreters (and facilitators) we were responsible for making historical information accessible by engaging visitors (learners) in conversations, questions, and discussions that helped them understand the Battle at Egazini and Makhanda's role better (Jackson, 2000).

We used applied theatre tools such as games and the teacher-in-role as avenues that help ask questions and start difficult conversations. As O'Neill and Lambert (1982:17) reiterate, "[H]history is one of those subjects which seem an obvious choice for the inclusion of drama strategies". Applied theatre strategies became obvious choices in tackling the passivity of the reenactment process. The tools aided us "academic historians to communicate with a non-specialist audience" because they served as rich tools for content engagement (Cook, 2004:489). The facilitators used images, sounds, gestures, and scenarios to create meaning between the content, interpreter, and visitor (Norris, 2000). We used the six plinths (example on Image 3 below) as existing images to help us create content and improvised scenarios that encouraged dialogue about Makhanda and the battle.

Image 3: Pictures of the writing that accompanies the images on the six plinths erected at the Egazini Memorial park. Source: Phemelo Hellemann

Moreover, not only did the participants engage in making drama, but they were also involved in creating their own meaning about Makhanda, the warrior. Here, the focus of making drama in a process drama event was not to create a theatre piece but to use imagined roles to understand colonial expansion and conquest beyond the usual reading and writing practices in education. The role of drama strategies in this instance "was not to transmit historical facts but an attempt to illuminate those facts" (O'Neill and Lambert, 1982:17).

Ethical considerations

We conducted the study before the university introduced the new ethics application review system. We followed the History Department's ethical protocols and procedures accordingly, as all the participants gave written consent to participate in the study. The schools signed research consent forms, giving the team permission to record the learners' participation and use the schools' names but not the learners' names in the research. The departmental ethics committee, under the guidance of the Head of Department in 2018, granted us ethical clearance to conduct the research.

Actively participating in the Battle at Egazini: Teaching and learning through drama tools.

Enrolling the participants

The first phase involved establishing how the school learners and the teacher accompanying them would be enrolled as fellow characters to ensure that they use roleplaying as a framework to step into the past creatively. Wells, whose writing advocates for a deeper understanding of Makhanda, the warrior, welcomed the participants and facilitated a brief discussion on the history behind the Battle at Egazini. She asked questions and discussed points that familiarised the participants with the history of the place. The participants arrived, and Masixole Heshu, a Xhosa warrior, and Phemelo Hellemann, a British soldier, were already in the role, chanting war sounds and gestures in war costumes, as seen in Image 4 below. Teacher-in-role (T-i-R) is a teaching technique in D-i-E that allows teachers to take on a fictional role/character and use it to "teach complex concepts through interactive engagement" (Hellemann, 2022:5). The teacher can also use the approach to enrol learners, so they participate in the fictional context together. Because we were not their teachers, we called the technique facilitator-in-role (F-i-R) instead of T-i-R. We chose characters based on the traditional Egazini Battle narrative of British soldiers versus amaXhosa warriors. The characters, however, did not have names and remained as general as possible, so we referred to ourselves as commanding officers.

Image 4: Facilitators in-role as a Xhosa warrior (Masixole Heshu) and a British soldier (Phemelo Hellemann). Source: Nceba Mqolomba

Drawing on the reenactment-for-learning approach, we used Wells' book and the information on the six plinths (as shown in Image 3) as pretexts that shaped our semi-improvised dialogue. Our challenge was working on a restricted budget, which did not allow access to war costume replicas like Basil Mills did with his reenactors. We sourced costumes with a similar feel from the Rhodes University Drama Department costume room. Although we kept the costumes and props as minimal as possible, we could not fully achieve the costume authenticity as Mills did because we realised our limitation as we are not military, history-based researchers but more public history practitioners. War costume authenticity was not too essential for us as the focus was on cultivating dialogue and critical engagement.

However, we put more effort into finding historically accurate symbols (as seen in Images 5 and 6 presented below) that we used to enrol participants into their roles. The workshops started with F-i-R handpicking participants and then offering them symbols as badges to wear. We did not want participants to choose sides based on their bias towards

a specific narrative, so we hand-picked them individually. We had a mixture of African participants, such as British soldiers, and white participants stepping into roles as Xhosa warriors and participating in a reenactment that embraced an inclusive pedagogical and interpretation approach. For us, this is the alternative creative pedagogy that Maluleka (2023) argues for, which, according to him, teachers and learners can use to encourage a diversity of voices around sensitive and controversial topics.

Image 5: 1800 British military leather hat. Source: PicUK

Image 6: Vintage Nguni assegai spear and shield. Source: Digital Mayland

Additionally, Peers (1999) states that when performers/participants play races or identities different to their own, they often desire to know more about those cultures and develop empathy and deep meaning about identity, the past and its repercussions on the marginalised. By participating in activities that explore multiple perspectives, learners develop historical thinking skills by understanding the event's historical significance through swapping roles. According to Boadu (2020), historical significance as a historical thinking skill grows when learners understand how past events impact contemporary issues. Thus, the facilitators' choice positioned learners to understand the 'other' in-role, with the modern knowledge of the impact of the battle and colonisation in modern-day Makhanda.

There is a theatrical risk of stepping into someone else's shoes while suspending your preconceptions and allowing yourself to take on a narrative that gives you a glimpse and a brief experience of the 'other' side of the story. As noted by Jackson (2000:205), first-person interpretation while working in role with a real context or place can be a powerful tool for "inviting the audience to engage in the interpretation of the historical content presented to them". Boadu states that the power of this engagement lies in analysing the complex similarities and differences, which requires empathy that students can use to assess what has "changed or remained unchanged over time" in our humanity (Boadu, 2020:281). The swapping was challenging for some participants as they were understandably reluctant to participate. But, they did not get a chance to reflect on this immediately, as they had to step into the role by giving their group a name and engage in game strategies that they would use to win against the opposition.

Games as war strategy simulations

The second phase involved the F-i-R leading the two teams in battle-simulated theatre games. We chose three games: human rock paper scissors (Icebreakers, n.d.), Morabaraba (an indigenous South African game that requires strategic and premeditated playing) (Bead Game, n.d.), and a variation of Simon Says (a well-known children's game) (British Council LearnEnglish Kids, n.d.) to represent frontier wars before the Battle at Egazini. Likhaya Jack was a judge who served as a score facilitator and mediator between the two forces while guiding everyone through each workshop phase. His role represented the role of the media, observers, and commentators who wrote about the battle, often from a victor's perspective. Likhaya used these simple children's games to get participants comfortable working in the role. Instead of saying Simon Says, the 'judge' Likhaya instructed the whole group regarding what gestures to do. The games helped the learners to engage in critical

thinking and strategising, much like in battles. We did not predictably simulate combat; instead, we highlighted the importance of strategy in combat imaginatively.

Image 7: Phemelo Hellemann and learners from Nathaniel Nyaluza Secondary School engaging in a game at the beginning of the workshop. Source: Nceba Mqolomba

As seen in Image 7, the games gave the learners the confidence to participate in the Egazini Battle simulations in a creatively engaged way. Moreover, the theatre games maintained a power balance between the facilitator and the audience as they both participated in the games to establish a working relationship (Boal, 2002). According to the learners, the games were enjoyable because the winner differed every time, separate from the known historical outcome. The creativity did not distract them from discussing the essence of the Battle at Egazini and its consequences on the current Makhanda landscape. The games allowed the groups to strategise moves by working together to defeat the opposition. It was especially effective with the human rock-paper-scissors game, which imitated the British and amaXhosa encounters in other wars before the one on 22 April 1819.

The fictional battle context, through games, allowed the learners to develop historical perspectives that appreciate the value of strategies. As Boadu argues, historical perspective in the classroom can develop through "travelling across present-day culture and value systems and appreciating activities of historical agents of the past" and seeing how they lived and acted differently to present-day societies (Boadu, 2020:281). As present-day activities,

the three games allowed the learners to travel back through an imagined context and appreciate the evolution of warfare strategies during the British-Xhosa wars. As facilitators, we recognised that for such a heavy history topic like the Battle at Egazini, we needed to start with a light activity to build a working relationship with the participants. From thereon, we moved into a more critical thinking process that required more imagination and an in-depth look at how culture and value systems influence actions.

Make-believe world: groups working in-role and town planning

Image 8: Phemelo Hellemann led the town planning and discussion with learners and a teacher from Nombulelo Secondary School. Source: Nceba Mqolomba

In the third phase, as seen in Image 8, the British and Xhosa groups did town planning activities in-role separately. They strategised how they were going to use their land after the battle victory. As facilitators, we conceptualised predetermined but open-ended questions to guide the make-believe interaction of the battle in advance. The questions allowed for the flow of the dialogue between the facilitator and participants. For example, one question was why winning the war was essential to each group, while the other was about town planning strategies. The open-ended questions took the participants beyond the simple yes or no answers. Jackson (2000) notes that the questions asked during the make-believe stage are essential in cultivating conversations and the scenarios that develop during the in-role interactions. Here, we draw on Boadu's (2020) notion of cause as a historical thinking concept, which teaches learners to think about factors, circumstances, and beliefs

as conditions that directly or indirectly motivate people to act.

Although the participants started confidently in the games section, they were shy when they engaged in the town planning activity. We believe this is because they were grappling with how their in-role beliefs and actions and those of the actual British and Xhosa soldiers of the time influenced their decisions about what should happen in the town should either group win the battle. Therefore, as facilitators, we often dealt with awkward silences. However, we used the guiding questions to keep the difficult dialogue going. We wanted to "encourage learners to analyse the complexity of causes, counter-forces and unintended consequences" of warfare (Boadu, 2020:281).

From the British in-role side, there were plans to build schools, hospitals, and churches as an assimilation approach. As one of the participants-in-role said, "[W]e need to make sure that the Xhosas lose their culture and religion by learning the British ways of life". Upon reflection, the participants explained that this is the view of history their school curriculum has exposed them to and they wanted to challenge it. The Xhosa side added that they enjoyed coming up with different ideas of how they would have liked the town to look after winning the war against the British.

Interaction with plinths

Image 9: Masixole Heshu facilitates a discussion on Makhanda's role in the battle using the information noted in Image 3 earlier in the paper. Source: Nceba Mqolomba

Although the plinth exhibition has been on site since 2000, most learners and local people do not engage with it, as noted earlier. The learners expressed that they see it all the time but never take the time to read the information there. As established earlier, the exhibition offers alternative stories of Makhanda, the warrior, and artistic interpretations of the 1819 battle. Through this information, we could probe further to find out what the learners and teachers knew about the legend. As one student-teacher reflected, "I have been studying here (Rhodes University) for a while, and I did not know much about Makhanda the person, even after the town was named after him". This reflection confirms that the Egazini Outreach Project legacy continues to tell untold stories of the battle in a simple but effective way through the art. As Wells writes, the project gave the amaXhosa a version of a courageous Makhanda in a time where "passivity and defeatism were unknown" (Wells, 2003:92). Without the plinths, it would have been difficult to find accessible sources that gave a varied view of the warrior. The plinths served as evidence that the learners could cross-check with other sources (current curriculum content) to improve their understanding of the past (Boadu, 2020). The plinths paired with the in-role discussion served as a valuable pedagogical strategy that "combined content and engaging teaching strategy to avoid monotony in pedagogical content delivery" (Badu, 2020:2818).

Final battle: Morabaraba

Image 10: Likhaya Jack (in the middle), about to start the staged battle game of Morabaraba between the British soldiers with Phemelo Hellemann and the amaXhosa warriors with Masixole Heshu. Source: Nceba Mqolomba

For the final battle stage, Likhaya, as noted in Image 10 above, presented the information from the participants (learners from T.E.M. Mrwetyana Secondary School) in pantsula dance form as the last game. Briefly, pantsula is an African dance of "quick and complex rhythms of dancing feet" performed by skilled young men and women, but more than that, it is a culture and a way of life usually prominent in South African townships (Fowler, 2022). We chose the pantsula dance form because it's a prevalent dance form in Makhanda and Likhaya has used it before as an interpretation tool in another public history project in the town. Likhaya's dance interpretation followed a semi-improvised structure based on the content that the participants were sharing. Cheering and camaraderie were the exciting parts of the session, with each group singing made-up war cry songs. It highlighted how each team had invested in the narrative they built throughout the workshop. As Likhaya in Hellemann (2019:6) states, using dance to make sense of historical content is what applied drama/dance/history means to him, as he uses an art form to help the audience understand content through rhythm, emotion, and action. Dance as an alternative form of history presentation helped us further embrace an interdisciplinary approach to the Battle at Egazini, much like the outreach art project done by Wells in 2000. As Wells (2003:97) argues, "deepening awareness of the meanings embedded in the history in turn need to be freshly shared with the artists to maintain the ongoing 'conversation' which generates both products for the tourism market and the educational activities".

For us, the dance added that element of deep meaning-making, which was an integral educational activity in the Egazini Battle workshop series. The dance finale added to the ongoing conversation which the facilitators and participants explored in the reflection session of the workshop.

Out-of-role: reflections on learning and revelations

Image 11: Participants (Rhodes University student-teachers, learners and teacher from Ntsika Secondary School) reflecting on the process/workshops put of role. Sources: Nceba Mqolomba

For each workshop, facilitators and participants shared a packed lunch meal and reflected on the workshop experience out-of-role. In this session, they shared their revelations and feelings experienced during the workshop. We wanted to know which information was new to them, how much they already knew before the workshop, and what feelings came up for them. As Maluleka (2023) argues, learners already come with some knowledge in the class, which they learn from various sources ranging from parents to social media. The reflection exercise brought all this together, and we discuss the findings from this session in succeeding paragraphs.

Results and discussion: Alternative viewpoints of the battle

Learning history interpretation and analysis in-role

The idea of working in-role was new to all the participants, therefore it made the learning

experience tangible, but it required a lot of intellectual and creative investment. Bolton and Heathcote (1999) state that roleplaying requires investment because facilitators need to engage the group's perceptions and attitudes while considering their world experiences. Working in the role unearthed the participants' perceptions through a framework that allowed for investigative reenactment that stimulated fruitful reflection on land and conquest issues from the past and the present through sensitively conceived and conducted activities (Cook, 2004). One of the learners stated, "[I] it was so much fun to learn about amaXhosa people's history this way; we are not taught like this at school".

The group in-role activity notably allowed the learners to explore what colonial expansion meant. It was in this activity that the learners named their groups, and one of the names they gave themselves was 'Destroyers' because they said their mission was to destroy amaXhosa and their culture by teaching them the colonisers' way of life. When the British won the 1819 battle, they colonised the area by building schools, hospitals, and churches after the arrival of the 1820 British settlers. Through thinking about identity and nation-building, the learners were able to learn about how colonial assimilation added to the cultural erasure of the indigenous people. According to Maluleka, history teachers often do not engage with the effects of forced assimilation and how it impacted "new colonial identities that eroded social bonding, indigenous beliefs, values, and identities, and denying indigenous children knowledge of themselves" (Maluleka, 2023:33). The activity helped the learners develop a deeper understanding of the British invasion strategy, which involved populating the Zuurveld and claiming its complete land ownership to pursue economic and political uses (Wells, 2012).

Moreover, working in-role allowed the facilitators to explore historical content by linking it to the present by getting the learners to think about how the colonial narrative has impacted what they know or do not know about the amaXhosa's side of the story. Although it happened in a fictional context, the Battle at Egazini revisionist history exercise explored Xhosa perspectives, which, according to Keynes, would have otherwise been ignored but are necessary in "complicating a simplistic one-sided representation" (Keynes, 2019:121). This is not to say that this could change people's perceptions, but rather to ask them to "try to imagine the protagonists in the original historical situation sympathetically and to identify with their hardships and dilemma" (Cook, 2004:490). This is how the activity taught historical empathy.

Presenting the other side of the story helped the learners understand the consequences of writing one side only. Once they gained the confidence to speak and make decisions in-role, the Xhosa warriors challenged the British perspective of the battle by imagining

themselves in an alternative narrative, a crucial step in engaging with the Egazini Battle history. This was notable in the Morabaraba and the human rock-paper-scissors games, where learners had to implement war-like strategies. They often huddled in groups, discussing which gesture to choose or sending spies to look at the other team's gestures. They also sang war-cry songs in between the interactions. However, one of the most popular strategies involved them changing their gestures at the last minute after seeing the gesture the opposition chose. Their ideas were not far off from the Xhosa strategies that Wells (2012) discusses in her book, which she highlights as being strong enough to cause panic in the British camp. The real Xhosa strategies included sending spies to the British camp, creating 1.8-meter-long sharp spears, and sending warning messages to the enemy's camp, to name a few (Wells, 2012).

Based on Wells' observations of the terror the British felt during the various frontier wars, we posit that perhaps the battle games were not a farfetched idea from events and thoughts of historical figures at the time because even in this fictional context, the Xhosa warriors consistently won the games. Seeing the fictional representation of the Xhosa's victory on a site riddled with loss and pain was emotional. The outcomes of the battle games showed how we ought to find creative ways to challenge how teachers teach the Battle at Egazini. The experience demonstrated an alternative narrative that teachers could explore that does not pose Xhosa warriors as people who lacked agency and strategies during the territory wars. The activities emulated the narrative in Wells' book on Makhanda, arguing that the Xhosa warriors had agency and war strategy in the battle. Battle simulation, therefore, through games and roleplaying is a tool that can encourage learners to make connections and appreciate multiple perspectives when engaging in historical research and interpretation (Boadu, 2020).

The out-of-role reflection encouraged more dialogue, which the facilitators structured through out-of-role questioning. Jackson (2000) argues that asking questions out-of-role can address any unanswered questions asked in-role. For example, the out-of-role exploration helped the facilitators discover what the learners knew about Makhanda. They learned about the battle from the polarised colonial version, emphasising British victory over Xhosa perspectives. But they also knew what their parents told them, which is very similar to what Wells also discovered during the creation of the plinths, which is people hearing about the "battle of Grahamstown in a general sense from their parents, but without any detail or elaboration" (Wells, 2003:83). We needed to know what they knew so we could unpack views around the myths about Makhanda's role in the battle and his personality. The discussion revealed new knowledge of Makhanda as the same person as

Nxele to the learners, who they thought were different people. Here, we got a chance to address this inaccuracy which was based on their prior knowledge. As Maluleka (2023) argues, the benefit of teaching sensitive and controversial topics is that teachers address learners' inaccuracies and misconceptions. This revelation made us realise that there are still lingering issues regarding Makhanda's identity and personhood, which intrigued the learners.

The lingering versions of Makhanda

The interactive workshops at Egazini were not the first creative attempts to address misconceptions about Makhanda and his involvement in the Battle at Egazini. In 2001, Andrew Buckland, a well-known South African performer and writer, wrote a historical drama called Makana, performed across the Eastern Cape.[2] Buckland in Murry (2002:82) explained that the play was not about presenting "accurate facts of the past" but making sense of the stories and meaning derived from historical war records. The production unearthed misconceptions about Makhanda's beliefs and elements of his heroic positioning within the Xhosa community. It portrayed Makhanda as a man of many secrets and wonders through fallacies of superstitions, as many believed him to be a prophet.

As Wells (2012:178) elaborates, one of Makhanda's beliefs during the battle was that "supernatural forces would assist the amaXhosa" to conquer the British soldiers. As a result, one of the long-standing myths that still circulates across generations is that Makhanda told his warriors that the ancestors would help them turn British bullets into water to make them ineffective, thus, the warriors believed him. The learners had also heard this from parents, but they said they never understood what it meant. According to Sinclair-Thomson and Challis (2017), the belief that bullets could turn into water during the colonial war era was a common indigenous belief among African people (the San, Khoi, and Bantu speakers) as it was influenced by rituals conducted before a war. Thus, it is believed that Makhanda performed a war ritual with Chief Ndlambe and Mdushane, which involved slaughtering cows "accompanied by spells of singing and dancing" (Wells, 2012:178).

Given that Makhanda often drew his spiritual practices from other cultures, such as the Khoi and Christianity, it is not unfounded that he would have borrowed some war preparation rituals and beliefs such as the one noted above. As Sinclair-Thomson and Challis explain further, culture crossings and ritual borrowing were not unusual as seen

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2 Many historical records write Makana, but the correct spelling is Makhanda.

with the mix of click sounds between languages such as isiXhosa and San/Khoi languages (Sinclair-Thomson and Challis, 2017). We posit that perhaps Makhanda did say this phrase as encouragement, but the translation of the phrase was taken literally instead of metaphorically, as African languages tend to be. However, Wells does not acknowledge the 'bullets into water' phrase in her writing. Instead, she says it is relatively fair to recognise that "we shall never know exactly what Makhanda told his men the night before the battle, nor as they set out for Grahamstown" (Wells, 2012:170). What remains is that most people throughout generations know him as a man of many superstitions and varied spiritual practices. The learners did not express any views on this. Perhaps this is something we as facilitators could have explored more. However, from the two views, one can see how the mysteries behind Makhanda and his war strategies continue to fascinate historians.

Another tradition that remains is that Makhanda did not die on Robben Island; thus, he will one day return to his people and fight for their land again. As such, Wells (2012) notes how various generations have held on to the idea of Makhanda as their hero and even held on to his superstitions and messages. Indeed, the school learners were familiar with this version of Makhanda's story. They had heard it before from their elders, and they know it as 'ukuza ka Nxele', meaning the return of Makhanda. As Nokes (2011) argues, history is one subject that challenges adolescents to think critically. However, this often competes with their experiences and current conditions, which also tend to shape their thinking. Therefore, it was no surprise that the learners linked this narrative to that of Jesus Christ and Nelson Mandela, which for them is another 'false' promise their parents and community members talk about but never elaborate on. One of the reasons for the name change to Makhanda was that the name "fulfils the prophecy of 'Ukubuya kuka Nxele (the return of Nxele)'" (Masinga 2018:1).

Given that both Christianity and Mandela[3] remain contentious topics in South Africa, it made sense that learners applied the same scepticism to Makhanda based on the correlations they drew. Some learners believed he was not the hero he was made out to be because he surrendered himself to the British authorities instead of fighting to defeat them. Accordingly, the controversy around his surrender lies in that he did not inform his fellow warriors, thus some viewed it as a sell-out move (Wells, 2012). In reflecting on Makhanda's decision to surrender, Wells (2012) further posits that his surrender needs to be viewed as a

3 The discussion of these two figures is beyond the scope of this paper. But for further engagement, readers can refer to Bundy (2020) to understand the revisionist history of Mandela. Manala (2013) notes the complexities of Christianity in South Africa against the backdrop of missionary education and the erasure of African spirituality.

heroic instead of a cowardly retreat because it led to peace negotiations between amaXhosa and the British. The correlation between what some of the learners said and what Wells notes shows that oral tradition plays a part in sharing, if not preserving, elements of African people's history. As Wells (2003:83) notes elsewhere, oral tradition in Xhosa-speaking communities still finds its way as a form of "handing down their history orally from one generation to the next". We posit that this practice also needs to include conversations and be cross-checked and referenced with history textbooks that tend to offer the one-sided narrative of colonial expansion.

The workshops revealed a yearning to learn more about the local history and Makhanda. Although they ran for a limited time, the interactive workshops provided the space to give learners an introductory session on local history, focusing on a small yet significant event/story of expansion and conquest during the fifteenth to eighteenth centuries. In doing so, we confronted narratives about territorial wars, colonial expansion, and the consequences of war on indigenous people's culture and identity using theatre-based tools such as roleplaying and games to formulate interactive interpretations of Makhanda and the Battle at Egazini.

The impact of the workshops is captured succinctly by Jackson (2000:202), who affirms that theatrical techniques play a vital role in education approaches to history because they "generate a spirit of enquiry and engagement with a recognition of the differences and similarities between past and present". The workshops achieved this by asking the learners to critically engage with the battle information. They made sense of the differences and similarities between what they knew from school, parents/grandparents, the exhibition at Egazini Memorial Park, and what the facilitators presented on the Battle at Egazini. We see this dialogue between the past as a continuous exercise in the knowledge production journey.

Conclusion

Educators and historians interested in educational historical approaches can find solace in using reenactment for learning to teach historical empathy. However, as noted throughout the paper, one needs to intentionally use and structure the reenactment for learning activities. For the facilitators mentioned here, applied theatre games and techniques were a gateway to engaging interactions and participation, which took learning beyond the textbook interpretations of history. Thus, they became practical tools for learners to interpret the Battle at Egazini by questioning, planning, and responding to the day's events.

However, as Cook (2004:493) warns, reenactors should not fall into the trap of causing "disconnections between the response of participants and the attitudes of those in the original situation". We heed this caution by positing that the aim was not to rewrite the Battle of Egazini history based on fictional interactions but to try to imagine an alternative viewpoint as a critical engagement and thinking exercise. The facilitators were not trying to "simulate mentalities of the past", as Cooks further discourages, but rather to improve the learners' "understanding of a different world and the behaviour of its inhabitants" (Cooks, 2004:491).

We know that some might question the approach of using theatre techniques and history content, especially within the history discipline. For concerns such as this one, we draw on Jackson's observations, in which he states (Jackson, 2002:214) that "playfulness and historical accuracy may seem poles apart. But, as most historians themselves are quick to argue, the notion of historical accuracy is fraught with problems."

Therefore, we look at integrating history and theatre techniques to further understanding. The approach is not trying to romanticise or fix the past. As Cooks (2004:492) affirms, "the key to using these experiences constructively is to remember that no proper conclusions about history can ever be drawn". To this end, reenactment for learning is not about drawing conclusions but allowing new meanings and interpretations to develop. This paper provides a starting point for public historians and teachers interested in taking audience participation and history education further in the interpretation processes through active and engaged reenactments to encourage historical empathy as a historical thinking skill.

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Insights into the Implementation of Curriculum Reforms in Zimbabwe: Heritage Studies and History in Mutare District Secondary Schools

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Abstract

The study provides insights into the implementation of Zimbabwe's 2015-2022 curriculum, particularly to determine the successful implementation of the Heritage Studies and History curriculum reforms in line with official guidelines. Although Zimbabwe's Ministry of Primary and Secondary Education issued a circular in January 2017 mandating the implementation of curriculum changes for secondary schools between 2017 and 2022, the directive alone may not have guaranteed successful adoption and implementation. While curriculum reform implementation is meant to ensure national goals, global evidence suggests various factors hinder successful curriculum implementation. The study used a qualitative approach, employing a case of secondary schools in Zimbabwe's Mutare district to generate data. The conceptual framework adopted a five-step cyclical

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model for curriculum implementation review. Data was generated through interviews, complemented by document and website analysis. Ten teachers from ten secondary schools in the Mutare district participated in the study. It was established that the Ministry of Primary and Secondary Education has made important efforts to enhance the successful implementation of the new curriculum through teacher workshops and instructional materials. However, the dissemination of curriculum information and the training of teachers through workshops were rushed. The education ministry failed to monitor or evaluate the implementation process at the grassroots level. The study identified challenges, including overloading teachers with work, restricting learners' choice of subjects, a shortage of instructional resources, and a lack of qualified teachers for the newly introduced subject, Heritage Studies. Based on these findings, recommendations have been made.

Keywords: History; Heritage studies; Curriculum framework; Curriculum implementation; Curriculum implementation review; Secondary schools.

Introduction and Background[1]

Curriculum implementation is an important stage in the curriculum development process. It is the stage when the contrived activity is put into operation to realise the intended outcomes (Lestari and Widiastuty, 2023). In this regard, governments worldwide often take the initiative to reform their education systems so that their national visions are achieved (Madondo, 2022; Petherick, 2023). Given the above, the Zimbabwean government was no exception. In early 2017, Zimbabwe's primary and secondary schools had to implement a new and revised school curriculum (Ministry of Primary and Secondary Education, 2017). The Ministry of Primary and Secondary Education gave this directive after several consultative meetings with various education stakeholders. These consultative review meetings aligned with the recommendations of the Nziramasanga Commission of Enquiry into Education report of 1999, which calls for all stakeholders' participation in curriculum reformation processes (Nziramasanga, 1999). Additionally, the curriculum reforms were intended to align Zimbabwe's primary and secondary education with the country's 2013 Constitution, the 1999 Agrarian Reform and Globalisation in Information Technology and Communications (Ministry of Primary and Secondary Education, 2015a).

As a result of the consultative review meetings, the Ministry of Primary and Secondary Education produced a national document, the Curriculum Framework for Primary and Secondary Schools (Ministry of Primary and Secondary Education, 2015a). The Curriculum Framework introduced changes to Zimbabwe's school education system (Ministry of Primary and Secondary Education, 2017). The Curriculum Framework was designed and developed as a medium to long-term guiding policy for teaching and learning in Zimbabwe's primary and secondary schools for 2015 to 2022 (Ministry of Primary and Secondary Education, 2015b). The Framework consisted of many new and revised learning areas. In the case of the secondary school curriculum, some of the learning areas were sciences, mathematics, languages, humanities, commercials, technical vocational, and music and arts. Under humanities, the specific subjects were heritage studies (a new subject), history, sociology, economic history, and family and religious Studies.

Using a circular, the Ministry of Primary and Secondary Education directed the implementation of the Curriculum Framework 2015-2022 at the school level, beginning in January 2017 (Ministry of Primary and Secondary Education, 2017). Paradoxically,

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1 This article is based on the PhD study of the first author. The second author acted as the supervisor for the research.

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the directive was issued against heavy criticism and disgruntlement from education stakeholders such as teachers' unions, politicians, parents, and civil society, who felt the implementation stage was rushed (Ndlovu, 2017; Nkala, 2017). Despite this criticism and disgruntlement, the Ministry of Primary and Secondary Education insisted that there was no going back concerning the implementation of the new curriculum. Among other secondary school subjects, heritage studies was mandatory, while history was an elective (Bentrovato and Chakawa, 2022; Ministry of Primary and Secondary Education, 2017). However, the researchers agree with studies suggesting that implementing a curriculum reform is complex, and its adoption is unpredictable (Haque and David, 2022; Voogt, Pieters and Roblin, 2019).

Given the scenario that the Zimbabwean secondary schools were directed to implement the Curriculum Framework 2017-2022, Lestari and Widiastuty (2023:111) recommend that once instructors implement a new curriculum, administrators "… can begin evaluating it and making adjustments if necessary". Mohanasundaram (2018) and Supriani, Meliani, Supriyadi, Supiana and Zaqiahet (2022) agree that once the curriculum is made available to schools for implementation, it has to be monitored and evaluated occasionally to ensure that it remains relevant. The significance of curriculum implementation assessment as part of the curriculum development process is further revealed by Voogt et al. (2019), who confirm that curriculum developers at national levels are often challenged to have their curriculum adopted and implemented in schools. Fullan (1991:17) supports the same view by asserting that: "Educational change depends on what teachers do and think – it's as simple and complex as that." It was because of the referred limits and possibilities that exposed the gap that this study had to address. Given the above background, the research reviews the implementation of the new curriculum at the secondary school level from its inception in January 2017-2022, with a focus on heritage studies and history teaching and learning at Form 3 and Form 4 (O-level) in the Mutare district of the Manicaland Province, Zimbabwe.

Purpose and Contribution of the Study

The curriculum implementation review process is an important exercise in curriculum enterprise since it has the potential to influence the success of curriculum implementation (Lestari and Widiastuty, 2023). For Furneaux and Brooke (2019), curriculum implementation review enhances student learning, engagement, experience and outcomes. The study findings may encourage education stakeholders to take responsibility and work

together to address issues that could hinder the successful implementation of a secondary school curriculum in this and similar contexts. The findings provide possible solutions for Zimbabwe's education officials and others in similar contexts to implement a new curriculum effectively. The study also reflects on the challenges teachers and learners encounter and how these could be addressed. It further encourages the education ministry and/or academics to institute a fully-fledged curriculum implementation review of the entire curriculum framework, which may result in its revision and building of an improved and revised Zimbabwe's Curriculum Framework for the 21st century. Besides, insights from the study may have global implications for countries in similar situations. This research may also add value to curriculum theory and practice as a field of study, particularly on principles of curriculum implementation review.

Given the above, this study was guided by the following research question:

How did the Mutare district secondary schools implement the heritage studies and history curriculum reforms?

Literature Review

The concept of curriculum has been defined differently by different scholars. The idea originated from *currere*, a Latin word meaning a race course (Offorma, 2014). Based on this, the concept curriculum was classically taken to refer to a study course or a student's list of subjects under study (Supriani et al., 2022). According to Nevenglosky (2018), a curriculum is a complete programme for learners that includes their experiences and knowledge prospects. Mashayamombe (2024) regards it as a guide or prescription for teaching and learning purposes, which serves as the working definition for this paper. The Curriculum Framework, 2015-2022 or subject syllabus, is considered such a curriculum.

Throughout the world, a curriculum is used as an instrument to prepare learners for future life and also as a way of addressing problems that society faces (Offorma, 2014). Since society keeps changing, the curriculum is also constantly changing to meet societal demands (Nkyabonaki, 2013). Therefore, the issue of curriculum change is a concern for every nation since its vision and aspirations are expressed and advanced through the nature of its education system (Mashayamombe, 2024). This explains why scholars vehemently argue that no curriculum is apolitical (Madondo, 2021; Petherick, 2023). Given this argument, countries often finance processes of curriculum reforms so that they keep up with changes or challenges (Nkyabonaki, 2013). The introduction of Zimbabwe's

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Curriculum Framework, 2015-2022 can be understood within this context (Ministry of Primary and Secondary Education, 2017).

In most cases, curriculum change or reform is introduced following a process of curriculum implementation review (Tyler, 1949). Curriculum implementation review is a justified process in curriculum development practice. Some of the justifications are that it gives feedback on the effectiveness of curriculum implementation, helps in the understanding of the prevailing situation in school set-up in terms of resources such as textbooks and other curriculum documents, offers a means of understanding for education stakeholders to make a value judgment on the worthiness of the curriculum, and reduces risks on resource wastage (Haque and David, 2022; Mulawarman, 2021). Curriculum evaluation refers to the gathering of data that can be used to come up with an informed decision on whether the curriculum or programme is worth or effective enough to be retained as it is, altered, or dropped completely (Neumann, Robson and Sloan, 2018). For the purpose of this research, curriculum implementation review refers to the activity of reviewing, assessing, and evaluating the operationalisation of a curriculum to determine the extent of the latter's implementation. Because of this working definition, the study was motivated by the desire to review the implementation of heritage studies and history from 2017 up to 2022, based on the guidelines and the intended outcomes of the 2015-2022 Curriculum Framework.

Batton et al. (2015) advises that when it comes to curriculum implementation review, the first stage is to review the national curriculum framework with the syllabi, ascertaining whether there is cohesion between how the learning areas are presented vis-à-vis the intended outcomes. With this in mind, the researchers assessed the implementation of Zimbabwe's new curriculum, particularly history and heritage studies at the secondary school level. According to Bentrovato and Chakawa (2022), a top-down approach was used with regard to the introduction and elevation of the heritage studies subject over history. It has to be kept in mind that the political context of the country influenced these curriculum reforms. Following Zimbabwe's independence in 1980, the government was prompted to initiate a decolonised curriculum that addressed the inadequacies of the previous system, which had been criticised for failing to meet the educational needs of the Zimbabwean society (Chimbunde and Kgari-Masondo, 2021). In the context of this study, teachers were forced to teach heritage studies as a mandatory subject, while history was not (Bentrovato and Chakawa, 2022).

Conceptual framework of the study

The implementation of curriculum reforms in Zimbabwe, particularly in the context of heritage studies and history in secondary schools, necessitates a robust conceptual framework to guide the research process. Therefore, Furneaux and Brooke's (2019) five-step cyclical model for curriculum implementation review was found most suitable. A conceptual framework is defined as a structure that operationalises curriculum theory by systematically identifying and defining the components and elaborating on their relationships (Pohan, Azmi and Rafida, 2022). It offers a structure that guides research to reduce the chances of omissions regarding the study's focus (Salomao, 2023). Therefore, this model provides a structured approach to systematically evaluate curriculum implementation, guided by specific questions (Furneaux and Brooke, 2019).

Table 1: Key guiding questions of Furneaux and Brooke's five-step model with brief explanations

Step 1: Where are we now, and where do we need to be?
This aspect of the model provides a basic understanding of the current state of the curriculum and identifies desired outcomes for the reform.
Step 2: How are we going to get there?
The step identifies pathways to achieve intended outcomes, the development of a strategy, and key stakeholders.
Step 3: What do we need to make it happen?
This step focuses on the practical steps necessary to achieve the curriculum goals. It emphasises preparation, resources, and active involvement of all stakeholders in the implementation process.
Step 4: How do we make it happen?
This process involves the actual implementation of the curriculum changes. It includes workshops for teachers and creating awareness of the new curriculum.
Step 5: How can we sustain the positive impact on student learning, engagement, experience, and outcomes?
This step emphasises the long-term sustainability of curriculum reforms and ensures that the positive changes brought about by the new curriculum are maintained and enhanced over time.

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The questions of Furneaux and Brooke's cyclical model are instrumental in establishing a clear vision for the intended outcomes of a curriculum implementation review. The model further emphasises the importance of aligning the operationalisation of the curriculum with established benchmarks, thus ensuring structure and reliability in its implementation (Fauzi, 2019). The above conceptual framework suggests that in the curriculum implementation review process, the vision or intended outcomes for the curriculum must be established. Additionally, it needs to be established how the intended outcomes will be achieved. With this in mind, and when reviewing the implementation of the curriculum, the research had to establish whether the operationalisation of the curriculum was in line with the set benchmarks. Using this five-step model, the study aimed to critically assess the implementation of heritage studies and history in secondary schools in the Mutare province, thereby contributing to the broader discourse on curriculum reform in Zimbabwe.

Research design and methodology

A qualitative research approach was adopted for this study, with the case study being used as the research design. Qualitative research can be defined as the generation, analysis, and interpretation of data to gain some insights into a phenomenon of particular interest (Alnaim, 2023). Such a social phenomenon is understood in a natural setting (Hameed, 2020). As such, the researchers were interested in reviewing the implementation of a curriculum. For the study to be manageable, a case study was chosen as the research design (Alnaim, 2023). It emphasises the focus on a unit, which can be an institution, individual, class, or group of people (Mahlambi, Van den Berg and Mawela, 2022). In this regard, Zimbabwe's Mutare district of the Manicaland province was chosen as the geographical setting of the case study.

Population and sample

The Mutare district has seventy-five secondary schools. From these, ten teachers from ten secondary schools were chosen as study participants. Ten (seven male and three female) was regarded as manageable for the transcription, analysis, and interpretation of the data generated. The selection of the participants was based on potentially rich sources of data (Obilor, 2023). Each of the ten teachers taught history or heritage studies or both at the O-level between 2017 and 2022 (cf. Table 2). Thus, purposive sampling was used to identify the study participants. Given that the participants were practising heritage studies

and history teachers, the researchers considered them suitably qualified, rich data sources.

Data-generation tools

Interviews, document studies, and website analysis were used as the methods of data generation. The interview questions were semi-structured and open-ended, which promoted consistency regarding the focus of the study and ensured that the interviewer and interviewee were engaged in the topic (Barrett and Twycross, 2018; McGrath, Palmgren and Liljedahl, 2019). Additionally, interviews are an appropriate method used in curriculum implementation reviews (Hussain, Dogar, Azeem and Shakoor, 2011). Document analysis involved primary documents such as circulars from the education ministry and subject syllabi. Such documents were rich sources of primary evidence used for triangulation and to complement interview data (Morgan, 2022). Website analysis on information posted on the Ministry of Primary and Secondary Education's website was also used. For example, the education ministry posted updated and valuable information about the new curriculum, including the national policy and goals for the Curriculum Framework, 2015-2022, secondary school learning areas, and implementation modalities (http://www.mopse.gov.zw/index.php/updated-curriculum/curriculum-framework/). Permission to conduct this study was obtained from the Ministry of Primary and Secondary Education of Manicaland Province in Zimbabwe. The data generated was analysed and interpreted using the thematic analysis method.

Findings and discussion

This section presents the study findings through the major themes which emerged from the study as presented in Table 3. The conceptual framework of the study guided the emerging themes. Six of the ten participants taught heritage studies and history at the O-level at their respective schools. Three of the remaining four participants taught heritage studies, while the remaining one was a history teacher. The participants were from different schools and joined the teaching profession at the secondary school level before the implementation of the New Curriculum Framework in 2017. Their ages ranged from 35 to 58 years. The purpose of the study was to review the implementation of the Curriculum Framework, 2015-2022, in particular the implementation of heritage studies and history at O-level from 2017 to 2022. As part of ethical considerations, the names of the participants and their respective secondary schools were removed. Rather, pseudo names were used as indicated

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in Table 2.

Table 2: Participants in the study

Type of participant	Pseudo name	Sex	Subject taught
Interviewees	A to F	4 males and 2 females	Both heritage studies and history
Interviewees	G to I	3 males	Heritage studies
Interviewee	J	1 female	History

To initiate the review of the implementation of Zimbabwe's 2015-2022 curriculum, particularly heritage studies and history at O-level, national aims for the latter were established along with the methodology for achieving such aspirations. This was in line with the cyclical model for curriculum implementation review, which recommended identifying the intended outcomes and how they were to be achieved (Furneaux and Brooke, 2019). Having established those two important principles in the curriculum implementation review, support efforts by the Ministry of Primary and Secondary Education for the successful implementation of the new curriculum were evaluated. Besides, challenges faced by teachers during the implementation of the new curriculum were also established.

From the thematic analysis, four themes emerged and are presented in Table 3. Subsequently, they are discussed in detail.

Table 3: Themes emerging from the study

Theme 1	Intended outcomes for Zimbabwe's 2015-2022 curriculum: Heritage studies and history teaching and learning
Theme 2	Methodology to achieve the intended outcomes
Theme 3	Ministerial support rendered to heritage studies and history teachers to facilitate the successful implementation of the new curriculum
Theme 4	Challenges encountered by secondary school heritage studies and history teachers in the implementation of the new curriculum

Intended outcomes for Zimbabwe's 2015-2022 curriculum: Heritage studies (4006) and history (4044) teaching and learning

Theme 1 was guided by the conceptual framework question, *Where do we need to be?* Zimbabwe's curriculum, 2015-2022, has a number of intended outcomes. These outcomes are well presented in the Curriculum Framework and in the heritage studies and history syllabi. One of the central intended outcomes was the development of skills and empowerment of individuals (Ministry of Primary and Secondary Education, 2015b). Examples of skills to be developed through history teaching and learning are critical thinking, problem-solving, self-management, decision-making, communication, and conflict resolution. Similarly, the teaching and learning of heritage studies are intended to develop individuals who are responsible to the extent of valuing and protecting cultural, economic, and even liberation heritage (Ministry of Primary and Secondary Education, 2015a). Such an education system is meant to mould responsible and patriotic citizens (Ministry of Primary and Secondary Education, 2015a; Ministry of Primary and Secondary Education, 2015b). This can be appreciated if patriotism is considered as the love for and loyalty to one's country (Merry, 2020).

The successful moulding of patriotic citizens would be a natural expression by individuals who take pride in their nation. In this regard, a society that accepts human character would be moulded (*Ubuntu/Unhu*). *Ubuntu/unhu* is a Ndebele/Shona concept respectively, which implies a human being in totality and morally upright sense. Thus, the concept of *Ubuntu/unhu* is used as one of the justifications for crafting Zimbabwe's Curriculum Framework, 2015-2022. Hence, the youth needed to promote *Ubuntu/unhu* as recommended by the Presidential Commission of Inquiry into Education in 1999 (Nziramasanga, 1999; Ministry of Primary and Secondary Education, 2018.). The successful moulding of patriotic citizens, whose minds are fully soaked in *Ubuntu/unhu*, would then "… uphold our national unity, sovereignty, governance by embracing Zimbabwean constitution, national symbols, and events which foster patriotism, national identity, and a sense of pride and ownership of factors of production such as natural resources" (Ministry of Primary and Secondary Education, 2015a:1). Such a curriculum is aligned with Lawton's (2012) model of curriculum development. Lawton's position is that a curriculum should be developed based on a selection of aspects from society that are deemed relevant. In this regard, it is the political leadership, just like in the case of Zimbabwe, which decides which part of culture has to be included as part of the curriculum (Lawton, 2012).

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Methodology to achieve the intended outcomes

Theme 2 emerged when the researchers considered the second step in terms of how a curriculum implementation review should be conducted, guided by the question, *How are we going to get there?* This implied identifying how the intended outcomes were to be achieved. The aforementioned intended outcomes were to be achieved through teaching and learning. In this regard, teaching and learning Heritages studies and history at O-level call for learner-centred approaches. Prescribed teaching and learning approaches included discovery, research, educational tours (at least three times a year), e-learning, projects, and tasks (Ministry of Primary and Secondary Education, 2015a; Ministry of Primary and Secondary Education, 2015b). The project and task approaches were new to history teaching and learning at the secondary school level. While heritage studies was a new secondary school subject, using projects and tasks were also new teaching and learning approaches in this context.

In terms of projects, learners are expected to conduct research and write a report on a topic of their choice selected from either the O-level or Form 4 learning areas (Zimbabwe School Examination Council, 2017). The projects must be done within two years as part of the continuous assessment for a terminal result, seeking to promote investigation, application, problem-solving, and communication skills (Zimbabwe School Examination Council, 2017). The template for the project report was as follows: topic, background, objectives, sources, methods of data collection, findings, conclusion, and recommendations (Zimbabwe School Examination Council, 2017). Concerning the tasks, whose intended outcomes are similar to that of project writing, learners are given termly tasks (i.e, three at Form 3 and two at Form 4), for example, an investigative task and writing a short report, which also constitute part of the continuous assessment (Zimbabwe School Examination Council, 2017).

In terms of time allocation on the school timetable, thirty-five to forty minutes were prescribed for a lesson for both heritages studies and history, with four and five periods per week respectively (Ministry of Primary and Secondary Education, 2015a; Ministry of Primary and Secondary Education, 2015b). This suggests that the teachers had to draft a school timetable that allowed teacher-learner interaction for at least thirty-five minutes per lesson, and not more than forty minutes. Ideally, such allocated time is assumed adequate for individuals to be transformed through their learning experiences into responsible characters in line with the intended learning outcomes.

With the rationale, methodology, and time allocation for the teaching and learning of

heritage studies and history in mind, the teacher is then expected to interact with learners using specified themes or learning areas to produce societally acceptable individuals. Table 4 below shows the O-level learning areas in heritage studies and history.

Table 4: O-level learning areas in heritage studies and history

O-level heritage studies (Forms 3 and 4)	O-level history (Forms 3 and 4)
Socialisation	Sources of history
Family and the country	State formation in Zimbabwe and the region such as Great Zimbabwe, Mutapa, Ndebele, and Zulu
Ubuntu (norms and values), such as courtship practices, dance, and drama	Slave trade and the Portuguese activities in the Zambezi Valley
Colonisation of Zimbabwe and resistance to colonialism in Zimbabwe	Early missionaries and agents of colonisation and scramble for Africa
Independent Zimbabwe, sovereignty, and governance	Colonisation and resistance to colonisation in Zimbabwe
National heritage such as the national flag, heritage sites, and natural resources	Colonial rule and struggle for independence in Zimbabwe and post-independent Zimbabwe
Zimbabwean constitution	Land reform in Zimbabwe
Global issues such as pollution, human traffic, land degradation, and waste management	South Africa since 1884
	First and Second World War; the League of Nations
	Europe in the 20th Century, the United Nations, and the Cold War
	The rise of dictators in Europe; Chinese, Cuban, and Russian revolutions
	Democracy and human rights

Source: Ministry of Primary and Secondary Education, 2015a; Ministry of Primary and Secondary Education, 2015b.

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In view of the Ministry of Primary and Secondary Education, when teachers successfully implement the above-mentioned curriculum, the result would be the moulding of responsible, patriotic individuals. The importance of this statement cannot be overstated. In a context where political purposes had often manipulated historical narratives, the Ministry of this new curriculum was seen as a means to empower learners to understand their rights and responsibilities as citizens (Pinto, 2023). This empowerment was crucial for learners' individual development and for the broader goal of fostering a politically aware and active citizenry capable of handling national issues (Dzvimbo, 2019).

The next section is a review of the operationalisation of the O-level heritage studies and history curriculum at the O-level, with the view to establishing whether the implementation of the curriculum changes was a success.

Ministerial support rendered to history and heritage studies teachers to facilitate the successful implementation of the new curriculum

Theme 3 of this study was guided by the specific question that underpins the third step in terms of the principles of a curriculum implementation review, namely, *How do we make it happen?* (Furneaux and Brooke, 2019). Given the above guide for a curriculum implementation review, the researchers established what the education ministry did to enhance the successful implementation of the curriculum reforms. In light of the above conceptual framework, the study established that the Ministry of Primary and Secondary Education, through the district education officials, descended to school clusters towards the end of 2016, where a few selected teachers were trained. During the workshops, "… teachers were also taught how to draft a school-based syllabus from the national one, scheming and implementing the new curriculum using different approaches" (Interviewee F). This was confirmed by the other participants of the study. This exercise was held between late 2016 and early 2017 (Interviewees A, C, D, F, and H).

All participants testified that they participated in workshops that were coordinated either by district education officers or fellow teachers who district education officials trained. Interviewee J confirmed her participation in the works: "We were informed of the rationale for the Curriculum Framework, 2015-2020. We gained a lot of knowledge, especially an understanding of the overview of the new curriculum and how it was supposed to be implemented." Another interviewee added: "The November 2016 preparations [workshops] enabled me to understand the philosophy and vision behind the curriculum" (Interviewee D). Interviewee I, a heritage studies teacher, also reported:

"They (district education officers) trained us on how we were supposed to scheme our work." In this regard, one other interviewee said that she was even given templates of the scheme of work, whose headings and sub-headings were easy to follow when it came to scheming (Interviewee J). This was a positive way towards the intended goal(s) because key stakeholders in curriculum implementation needed to be involved to feel "ownership" and accustomed to the curriculum that they had to implement (Alsubaie, 2016; Alter and Gafney, 2020).

However, while the workshops were meant to familiarise the teachers with the new curriculum, some participants in this study argued that the workshops were rushed, as implied by the rhetorical question: "How did you expect us (teachers) to master the new style of planning and scheming, given the short notice. Remember, we (teachers) were rushed into the workshops in December 2016, and forced to start implementing the new curriculum on 10 January 2017." (Interviewee A) Rather, all ten participants complained that they were not given enough time to prepare for implementingg the new curriculum. It was, therefore, established that the education ministry rushed curriculum information dissemination. Curriculum experts such as Peskova et al. (2019) and Voogt et al. (2019) warn that curriculum reforms that are rushed into implementation without adequate involvement of teachers are often resisted by the latter.

All participants pointed out that the government trained teachers through workshops, although not often, up to 2021. However, they further indicated that there were no follow-ups to see if the curriculum reforms were successfully implemented. For instance, four out of the ten participants indicated that heritage studies was not offered as a mandatory subject at their respective schools, which contradicted the ministerial directive (Ministry of Primary and Secondary Education, 2017). Additionally, five participants noted that heritage studies and history were allocated 30 minutes per lesson instead of the prescribed 35 to 40 minutes. This suggests that, in some instances, the curriculum changes were not adequately implemented in the Mutare district as per the ministerial requirement, something that curriculum monitoring could have addressed (Mavhunga, 2006).

It can be concluded that the education ministry made significant efforts to assist the teachers to ensure the successful implementation of the new curriculum through workshops and the release of some instructional materials. To some extent, these workshops helped the teachers have a theoretical understanding of what was expected to implement the new curriculum successfully. However, curriculum information dissemination and conducting initial workshops to train teachers were rushed. Besides, the education ministry did not monitor the implementation process at the school level.

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Challenges encountered by secondary school heritage studies and history teachers in the implementation of the new curriculum

The fourth and last theme of the study focused on the challenges that heritage studies and history teachers faced while implementing the new curriculum. All participants reported that they faced challenges that inhibited them from successfully implementing the new curriculum. Generally, the challenges included confusion among teachers concerning the level at which the new curriculum was to be offered in January 2017, overburdening teachers and learners with workloads, limiting learners' choice of subjects, shortage of instructional resources, and shortage of qualified teachers to teach the newly introduced subject heritage studies.

The study established that from the onset of the implementation of the new curriculum in early January 2017, it was not clear at what level the new curriculum had to be introduced. Some participants said they introduced it only at Form 1 while others implemented it at Forms 1, 2, and 3 (Interviewees B, C, E, F, and H). Interviewee G put it as follows: "While we were not sure where to start, we later agreed as a school to offer the new curriculum to Forms 1, 2, and 3 learners." "At Gray High School (a pseudo name), we introduced it (new curriculum) to Form 1, and later on to 2 and 3", said Interviewee A. This confusion was clarified by Interviewee J, who said: "The mix-up was due to the fact that our ministry (Ministry of Primary and Secondary Education) had not clearly communicated until schools received a circular in February 2017." While the circular was received, it was date-stamped on 18 January 2017 (Interviewees D, H, and G; Ministry of Primary and Secondary Education, 2017). The circular clarified that the implementation had to start at Forms 1, 3, and 5. This implies that the Ministry of Primary and Secondary Education used a fragmented approach when it came to curriculum information dissemination. While Alter and Gafney (2020) define curriculum dissemination as a process that includes taking the curriculum to the instructors, the education ministry's approach was defective because it was not communicated in time. Alter and Gafney (2020) further advise that curriculum dissemination must be completed before implementation. Therefore, the fact that the Ministry of Primary and Secondary Education disseminated only part of the curriculum information before implementation was not aligned with the principles of curriculum information dissemination. This negligence made the curriculum implementers unsure of the learner level/form to start receiving the new curriculum (Interviewees D, H, and G).

Another challenge was that both teachers and learners felt overburdened with their workloads. Seven participants argued that more work was added, hindering their

effectiveness. The issue of tasks as part of continuous assessment was identified as the major cause of overburdened workloads. In the words of one history teacher: "How can you expect me to be an effective teacher when I am supposed to supervise 54 tasks of my students in a term, for five school terms?" (Interviewee F) In support of this view, another teacher complained that besides introducing tasks requiring supervision, the education ministry never reviewed the minimum work the teacher should give, mark, and record. Thus, regarding work coverage, secondary school history teachers are expected to give, mark, and record at least one objective type of test per week, one essay per fortnight, and one test per month (Ministry of Education, Sport and Culture, 2006). Regarding burdening students, it was reported that tasks were burdensome to learners who are supposed to study the seven compulsory subjects in addition to the electives (Ministry of Primary and Secondary Education, 2017). Since each subject has five tasks, it implied that, for example, "… if a learner is taking ten subjects, it means the learner is expected to do ten tasks per term, translating to fifty tasks in two years [duration for an O-level study]" (Interviewee H). It was further pointed out that although tasks are meant to develop investigative and critical thinking skills in individual learners, the intention was likely to be doomed because they complained of too much work (Interviewee A). This scenario falls far short of Learner (2022), who argues that when it comes to curriculum development and implementation, the interests of learners have to take centre stage. In this regard, the heritage studies and history curriculum reforms suffer from the deficiency of being learner-centred (Ornstein and Hunkins, 2009).

The study further established that, as a result of the seven compulsory subjects, which included agriculture, English language, heritage studies, general science, indigenous language, mathematics, physical education, sport, and mass displays (Ministry of Primary and Secondary Education, 2017:4), the secondary school curriculum became too wide. Resultantly, subjects such as family and religious studies, history, and geography were offered to a few classes or dropped from the school curriculum (Interviewees B, F, and H). One participant revealed that it was a painful experience at her school for both history teachers and learners that history was dropped at both Forms 3 and 1 levels to accommodate heritage studies (Interviewee C). In the same vein, one other history teacher said: "For the love of the history subject not to 'die', as a school, we agreed that two classes dropped history as an elective subject, while the other two classes continued with the subject at Forms 1 and 3." (Interviewee F) From this revelation, it can be argued the implementation of the new curriculum was marred by challenges.

At one school, it was reported that although history was an elective, the members of

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the History Department and the O-level learners rejected phasing out the subject from the school timetable despite the fact that the curriculum had become too wide due to the inclusion of the seven compulsory subjects. Rather, instead of sticking to at least thirty-five minutes per lesson, five periods per week, it was reduced to thirty minutes per lesson, four periods a week to include history (Interviewee G). While the mandatory subject, heritage studies, was officially allocated at least thirty-five minutes per period and four times a week, it was reduced to thirty minutes per period and three periods per week (Interviewee G). This confession made it clear that the classroom teacher has veto power to or not to implement a curriculum change. Thus, this validates the statements of Peskova et al. (2019) and Voogt et al. (2019) that teachers are critical agents in the successful implementation of any curriculum innovation.

While some participants appreciated the introduction of the new subject heritage studies, it was not without implementation challenges. The introduction of heritage studies as a new secondary school subject was associated with a lack of instructional resources, especially in the first two years of the implementation stage. According to all ten participants, by January 2017 there were no instructional resources approved by the Ministry of Primary and Secondary Education besides the syllabus. To this end, implementation of the new reforms was a struggle. Elaborating on this view, a heritage studies teacher said: "In the first six months of my experience in teaching heritage studies, I solely used my syllabus to make notes for my students. I only managed to get a heritage studies textbook towards the end of May 2017. Funny enough, the textbook is awash with errors, not exhaustive, and lacks chronology in the presentation of study topics." (Interviewee F) Examples of errors noted are that the stone buildings at Great Zimbabwe were built with stones and dagga; Matebeleland is sometimes written as Matabeleland on the same page.

The problem of shortage of resources was also confirmed by other heritage studies teachers who said they had to search for information on the internet, although they were not sure of the quality (Interviewees A, D, and J). Some who did not have access to the internet said they purchased prepared notes from vendors in the city of Mutare. Commenting on the quality of the teaching notes, one teacher said some notes were good and usable, while others were too brief, shallow, and questionable (Interviewee H). Such a challenge was worsened by the fact there were no Zimbabwe Schools Examinations Council specimen question papers which could have been used as guides, especially in the formulation of assessment questions. In line with this challenge, it was reported that there were no specimen question papers even with the textbooks published in 2017 with the education ministry's approval (Interviewees D and J).

Another major problem was the shortage of teachers qualified to teach heritage studies, as neither teachers' training colleges nor universities trained teachers specifically to teach the subject before 2017. There has never been such a subject in the Zimbabwe education system since 1980. It was established that in many cases the teachers whose subjects were dropped as a result of the new curriculum had to teach heritage studies (Interviewees B, F, and H). Most of the 'victims' were teachers trained to teach history, geography, and religious Studies. Nevertheless, even those who trained as science and mathematics teachers were made to teach heritage studies in dire situations. In this regard, one may wonder or question the impact of teaching outside one's area of specialisation vis-à-vis the attainment of the national curriculum goals. This may result in teacher frustration and ultimately damage the integrity of the teaching profession.

Recommendations

Based on the study findings, the following recommendations are suggested:

1. If curriculum planners and policymakers wish to witness the successful adoption and implementation of curriculum reform, the issue of personnel and instructional resources needs to be adequately addressed. Information about the reforms should be adequately disseminated to teachers so that they are not imposed but accepted before being asked to implement such reforms. Teacher buy-in is crucial in any curriculum reform.

2. During curriculum reforms, the teachers-learners' workloads must be realistic and consultation among all key stakeholders is needed. This will alleviate both teachers and learners from the excessive burden that the new curriculum may come with.

3. High-quality resources must be developed well before schools are directed to implement curriculum reforms. In this case, the approved heritage studies textbooks for schools in Zimbabwe must be reviewed to establish whether the content is of good quality and depth and sufficiently in line with the Curriculum Framework.

4. Before a new subject is implemented in the school curriculum, teachers need to be adequately trained to teach the subject. In this regard, teachers' training colleges and universities can assist by providing such training. This training should not be rushed, and follow-up workshops should be conducted to address challenges

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faced during implementation. Mentoring support networks should also be established to help teachers teach the new subject, heritage studies.

5. A robust system for evaluating curriculum implementation should be established. Regular visits by district education officers to schools should be conducted to ensure that the curriculum is being implemented as intended and any deviations from the prescribed guidelines are promptly addressed. Such monitoring will also allow for real-time feedback and adjustments to improve the process.

Conclusion

This study aimed to assess the implementation of Zimbabwe's 2015 – 2022 curriculum reforms within secondary schools in the Mutare District, particularly in Heritage Studies and History. Using Furneaux and Brooke's five-step cyclical model for curriculum implementation review as the conceptual framework, the study provided a structured evaluation of the reform's processes and outcomes. The findings highlight that while the Ministry of Primary and Secondary Education made commendable efforts, such as conducting workshops and providing instructional materials, the rushed implementation process left teachers ill-prepared, with insufficient training and a lack of resources. This, coupled with overwhelming workloads and the shortage of qualified teachers for the new subject, heritage studies, negatively affected the achievement of the effectiveness of the reforms. The study further revealed that history was often marginalised in some schools, reducing instructional time and diminishing historical knowledge. The conceptual framework emphasised the importance of preparation, ongoing support, and evaluation in curriculum implementation, of which all were insufficiently addressed in this case. Despite the challenges, the research points to the curriculum's potential to foster critical thinking, patriotism, and national values provided that the gaps identified in this study are addressed. The success of curriculum reforms, whether in heritage studies or history, depends not only on the ambition of their design but on the quality of their execution. Therefore, while implementing the heritage studies and history curriculum reforms was partially a success, the challenges outweighed the successes in many instances. Like all studies, this study also has its limitations. The main limitation of this study was the unwillingness of some teachers to participate due to lack of time. In conclusion, the study has provided insights into the complexities and challenges surrounding the implementation of Zimbabwe's 2015-2022 curriculum reforms in heritage studies and history. Further research on topics such as the longitudinal impact on curriculum reforms, teachers' professional development, resource allocation, and policy effectiveness can provide valuable insights into this critical area and is therefore encouraged.

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Re-Writing His-Story: Exploring the Censorship of History through School Textbooks and Public Artefacts

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Abstract

This article, titled *Re-writing His-Story: Exploring the censorship of History through school textbooks and public artefacts*, explores how ideological and political differences of those in power can censor history, affecting how future generations engage with the past. As new regimes ascend, they promote a distinctive cultural narrative that could alter or omit long-standing historical narratives. Textbooks and historic monuments are cultural artefacts created at a specific time, in a space, and a particular context. In South Africa, for example (as in many other countries), historic monuments and public statues have been (re)moved, and selectively replaced by alternative heroes. Likewise, post-apartheid textbooks have been rewritten to include cultural diversity. Our principal concern is the restricted access to key symbols of the past as future generations lose crucial historical facts and a sense of identity as different histories are propagated. Located in the interpretive paradigm, the study utilises a desktop review incorporating critical discourse analysis to understand

how meaning is conveyed about textbooks and public artefacts in print media and online platforms. Using a wide range of case studies as its empirical base, the findings indicate that textbook content is censored due to the influence of socio-political, cultural, and religious reasons. Similarly, monuments, statues, and other public artefacts perceived as outdated or representing controversial histories are often targeted for removal.

Introduction

The story of the past is visualised and told in multiple ways and reaches people through various means, including the agency of books (such as popular, academic, and grey literature as well as school textbooks), physical artefacts, and oral history. Who tells the story, why, and for what purpose is an important facet of understanding history. While history is about the past and historians present a narrative that is their interpretation of evidence, it is recognised that historical accounts may be influenced by the agendas of people who record them. What is considered historically significant is contingent and open to interpretation. Across generations, the history that is written is done so *by* the 'important' people in society *about* people of 'importance' (i.e. the saying, 'history is written by the victors'). What remains in the public domain, literature, or artefacts is therefore in a state of flux as the purpose for writing often changes with the goals of people in power.

In our current, 21st century society, the ideal is that stereotypes and distortion of facts are removed while creating a more balanced, representative, and inclusive history. However, certain groups in history are still glorified to the detriment of others, breeding division in society. Such exclusionary practices in countries like South Africa have thwarted social cohesion resulting in a turbulent past and present. The transition to democracy in the 1990s brought significant transformation in the content and narratives of South African textbooks, aiming to promote reconciliation and inclusivity. The general aim of the South African Curriculum Assessment Policy Statement (CAPS) curriculum is to build critical thinking, inclusivity, and social transformation.[1] These competencies are important to develop informed citizens who can navigate complex societal challenges. To eliminate incomplete historical records or misinformation, learners are ideally taught to recognise and challenge biases, while embracing tenets of critical thinking and multiple perspectives.

Following generic guidelines in curriculum and policy, post-apartheid, the aim is integration and inclusion. However, as global historical instances have shown, the coexistence of diverse groups within the same territory often leads to a sense of alienation for some, stemming from how people are portrayed or omitted (silenced) from history textbooks and other texts. This is best captured in a quote by Michel-Rolph Trouillot when he states: "The production of historical narratives involves the uneven contribution of competing groups and individuals who have unequal access to the means for such

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1   Department of Education. National Curriculum Statement Grades R-12 Curriculum and Assessment Policy Statement, (CAPS) Social Sciences. (Pretoria, 2011), pp. 4-5.

production".[2] It is important to remember that the meaning of texts, whether written or visual, depends on the context in which they appear. There is an entire discourse, as Smith purports, on which the original inhabitants or Indigenous groups of a region or nation are, what constitutes 'Indigenous', and if their earlier occupancy establishes them as heirs to a legitimate narrative.[3] The presence of other groups gives rise to conflicting nationalistic sentiments and territorial disputes.[4] Considering the diverse nature of populations, characterised by, amongst other things, linguistic and ethnic differences, historical accuracy becomes obscured when disparities emerge. Moreover, with the shifting power dynamics, the historical storyline is subject to alteration.

Yet, times have changed and continue to change, and global movements have evolved and should integrate different dialects, cultures, respective histories, and favour a collaborative curriculum. Nonetheless, there is a question on the veracity of this occurrence. Knowledge is socially and politically constructed and is important in the formation of learners' worldviews. Likewise, myths, socially constructed truths, often appear in the form of ideologies and stereotypes.[5] For example, in Blank's review of "Questioning Ramayana's" he notes how "on December 6 1992, members of Hindu militant organizations tore down the Babri Masjid, a Muslim house of worship in the pilgrimage town of Ayodhya", because they believed it was built on the birth site of Lord Rama.[6] Thus, unless learners are taught to critically analyse the contents of textbooks, as well as critically engage with public works, such as statues of certain political figures perpetuating certain ideologies, they will remain exposed to a narrow version of the past as is presented in the limited scope of the curriculum.

In this paper, our primary aim is to elucidate the presence of biased histories in curricula across various nations to promote an alternate approach that duly recognises the

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2 MR Trouillot, *Silencing the past: Power and production of history* (United States, Beacon Press, 1995), pp. xxiii.

3 LT Smith, *Decolonising methodologies: Research and Indigenous Peoples* (London and New York, University of Otago Press, 2008).

4 This is observed in South African history, where conflict between indigenous groups and colonial settlers led to segregational practices known as apartheid in the 20th century.

5 See D Human, "Visual culture literacies: seeing is be.[lie].ving. Creating visual arguments through multimodal and multiliteracies pedagogy", A Engelbrecht & G Genis (eds.), *Multiliteracies in education: South African perspectives* (Pretoria, Van Schaik, 2019), pp.131 – 154 and M Sturken & L Cartwright, *Practices of looking: An introduction to visual culture* (New York and Oxford, Oxford University Press, 2018) (3rd ed.).

6 J Blank, Book review of *Questioning Ramayanas: A South Asian tradition*, P Richman (Berkeley: University of California Press, 2001). American Anthropologist, 104(4), 2002, pp. 1228-1230. https://www.jstor.org/stable/3567113

right to coexist and to legitimise competing historical and cultural narratives. To achieve our primary aim, we draw on examples found in the public sphere and consider how the visuality of certain ideologies is reflected in official textbooks. Thus, the questions directing our research are:

1.   How is censorship of textbook content and other public artefacts perceived in certain countries?
2.   To what extent do the data sources ascribe the responsibility for an inclusive history to the power structures in these countries?

To answer these questions, we provide background of what is happening in South Africa, India, and other countries. We integrate the data to ascertain global patterns, found for example through the Fall-ism movement and other incidents that reflect censorship or proscription of historical narratives.

Background and contextualisation: Textbooks

"For societies in transition, school curriculum and textbooks play a particularly important role as they attempt to stamp the values of new [or current] rulers on the societies. This often requires major distancing of the present from the past when the past is still present in the contemporary world in invisible and unspoken ways."[7] This quote by Chisholm aptly illustrates that the state uses content in textbooks to inculcate a 'master narrative' or view of history.

Content included in school textbooks, particularly in a subject like 'history', can perpetuate certain myths (socially and politically constructed truths) about those in positions of authority and those who are not. These narratives are consumed by the learners as 'truths' and consequently influence how they perceive themselves within the society (and world) in which they reside. "Whether we like it or not, the content and course design brought by a given textbook plays a role in what happens in the classroom of the teacher who has to work with it" and this places the teacher as the "sole mediator between this

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7 L Chisholm, Comparing history textbooks in apartheid South Africa and the German Democratic Republic: 1950-1990, *South African Review of Education*, 21(1), 2015, pp. 80-93, https://hdl.handle.net/10520/EJC193712.

pre-established representation of content and the learner."[8] Textbooks impart to learners a particular worldview or knowledge deemed valuable in society (or at least by the authors of the textbook and consequently those in power who decided for the said textbook to be used in the classroom). Textbooks serve as sources of historical data as they tell stories of societies over time. Analysing them allows insight into the trajectory of changes. While the objective is to encourage multiple perspectives and a comprehensive portrayal of a balanced history, textbook content is inherently shaped by curriculum guidelines.[9] By deliberately including specific content a corollary emerges: that of inherent exclusions. These omissions exert a discernable influence not only on the worldviews of the learners but also shape their identities and in turn, wield a significant impact on the enduring knowledge that is subsequently transmitted to future generations.

The type of national narrative conveyed in textbooks significantly shapes learners' viewpoints. Yet, the content should cater to learners' right to comprehend their nation's historical context and its perceived position in the global landscape. One disparity currently prevalent in history textbooks is the link between a learner's language, culture, and history. Politics can play a significant role in determining the type of knowledge that is favoured in the curriculum. This knowledge, in the form of activities or chapters in textbooks, can present a cultural stance in its use of visual or textual content. This content is also observed in the public sphere, such as advertisements of political campaigns on billboards, TV, magazines, or public artworks such as statues of prominent political figures, or even the erection of monuments and memorials.[10] There appears to be limited contestation by educators or school principals perhaps (at least in part) due to the authority already vested in the textbook knowledge as these books are approved by governmental bodies as curriculum-compliant.

Literature review on understanding textbooks

A vast bank of studies highlights that textbooks are not merely tools for academic learning, but also powerful ideological instruments that can alter a learner's view. Wassermann

8 E Waltermann & C Forel, Why and how to include textbook analysis in language teacher education programs, *Elted*, 18, 2015, pp. 43-48, here p. 43.

9 EV Eeden, South Africa's revised history curriculum on globalism and national narratives in grade 12 textbooks, *Historica*, 55(1), 2010, pp. 110-124, https://hdl.handle.net/10520/EJC38390.

10 Also see P Chandra & D Human, [Decolonising] the contentious politics of *seeing*: Reading visual cultures, *Alternatives: Global, Local, Political*, 2024. https://doi.org/10.1177/03043754241288097 (in press).

and Roberts discuss how "Loewen changed the way History textbooks were viewed irrevocably with Lies My Teacher Told Me: Everything Your American History Textbook Got Wrong (1995), which was republished in 2007 and 2018. In this, he laid bare how textbook producers and authors powerfully propagated one-sided views of History that were in many instances mythological."[11] Additionally, Bertram and Wassermann[12] provide an overview of studies in school history textbooks in South Africa, alluding to these studies manifesting at key points of political change. According to them, the first 'mini-boom' took place in 1960 when South Africa became a republic, the next at the dawn of democracy, and then post-apartheid saw an upward surge in textbook studies. Shifts in political power result in revised educational materials often aligned with the agenda of the ruling parties.

During the 1940s South Africa saw the National Party with a political will to drive Afrikaner nationalism and enforce the policy of apartheid and discrimination.[13] 'Apartheid' was a system of institutionalised racial segregation enforced in South Africa between 1948 and 1994 by Afrikaners who held significant political power. As a result, a distorted view of history in textbooks emerged, justifying racial segregation, land dispossession, and subjugation of non-white communities. Apartheid policies and structures, such as the Population Registration Act of 1950, were rooted in arbitrarily determined racial classifications, regulating all aspects of life. The histories of so-called Black, Indian, and Coloured race populations were marginalised with non-white people often portrayed as uncivilised and inferior. This notion was further observed through visual culture that was (and still is) utilised as a tool to enhance certain societal ideologies and myths. The frieze of the Voortrekker Monument, for example, an iconic symbol celebrating Afrikaner nationalism, depicts black people as (semi-)naked, savage, and uncultivated, as opposed to fully dressed, seemingly civilised Afrikaners.[14] The visual imagery was used to enforce

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11 J Wassermann & SL, Roberts. Making good use of textbooks: Introduction to the special issue on teaching with history textbooks. *Annals of Social Studies Education Research for Teachers*, 3(2), 2022, pp. 1-4. doi: 10.29173/assert54

12 C Bertram & J Wassermann, South African history textbook research – A review of scholarly literature, *Yesterday & Today*, 14, 2015. pp. 151-174. https://dx.doi.org/10.17159/2223-0386/2015/n14a7

13 C Verwey & M Quayle, Whiteness, race and Afrikaner identity in post-apartheid South Africa, *African Affairs*, 111(445), 2012, pp. 551-571, https://doi.org/10.1093/afraf/ads056.

14 Many conservative Afrikaners, particularly those conforming to Calvinist dogma and values, believed it was their God-given duty to 'educate' and convert indigenous groups to Christianity, as exemplified by Obermeyer and von Veh.

    J Obermeyer, "Apartheid South Africa's propaganda effort, c.1960 – 1980: The hearts and minds campaign of the National Party", (M.A., Stellenbosch University, 2016), p. 10.

    K Von Veh, "Transgressive Christian imagery in post-apartheid South African art", (Ph.D., Rhodes University, 2011), pp. 39-40.

notions of binary opposites: Christian/heathen, civilised/uneducated, white/non-white. As noted by JM Coetzee (1996) in *Giving offense: essays on censorship*:

> *When Europeans first arrived in southern Africa, they called themselves Christians and the indigenous people wild or heathen. The dyad Christian/heathen later mutated, taking a succession of forms, among them civilized/primitive, European/native, white/ nonwhite. But in each case, no matter what the nominally opposed terms, there was a constant feature: it was always the Christian (or white or European or civilized person) in whose power it lay to apply the names – the name for himself, the name for the other. The heathens, the nonwhites, the natives, the primitives of course had their own names for the Christian/European/white/civilized others. But to the extent that those who did this counternaming did not do so from a position of power, a position of authority, their naming did not count.*[15]

Therefore, by, for example, depicting the black body as naked, for instance, through representations of women in traditional clothing or with exposed breasts on postcards and in the cultural pages of magazines,[16] notions of their inferiority in a racist and patriarchal society were enforced.[17] These perceptions of roles ascribed to certain groups of people, in turn, have been preserved and historically recorded as so-called 'truths' in prevailing textbooks.

In South Africa, teachers are required to choose textbooks that are CAPS curriculum-compliant and included in the Department Catalogue for Learner and Teacher Support Materials.[18] The CAPS curriculum is a guideline of what needs to be included, but teachers have somewhat freedom in how they teach the content. While educators have some freedom and space for creativity, much of the freedom for planning learning programmes is taken away from teachers as topics are spelled out in the curriculum. Siebörger notes: "the level of content specification could reduce the scope for creativity in teaching".[19] The

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15 JM Coetzee, *Giving offense: Essays on censorship*, (Chicago, University of Chicago Press, 1996), p. 1-2.

16 C Webster, Seeing the odalisque: Aspects of the colonial gaze in South Africa 1845-1975, *de arte*, 34(60), 1999, pp. 20-28.

17 D Human, "Censorship and proscription of the visual arts in South Africa between the 1950s and 1970" (Ph.D., University of Johannesburg, 2022), pp. 75-78.

18 P Bharath, Tracing the substantive structure of historical knowledge in South African school textbooks, *Yesterday & Today*, 30, 2023, pp. 36-65.

19 R Siebörger, How should a national curriculum for history be quality assured? The case of the South African Curriculum and Assessment Policy Statement (CAPS), *Yesterday & Today*, 26, 2021, pp. 139-154, here p. 154, http://dx.doi.org/10.17159/2223-0386/2021/n26a7.

teacher's creativity is limited to his or her interpretation of the given topic. Questions that arise concern whether the knowledge that is shared is compliant, fair, and balanced and if it is conceived as inclusive.[20] Questions such as, 'Which people should be included?' and 'Why and what of their history is significant?' arise. The answers to these questions often highlight certain silences and exclusions. These silences or exclusions might not be overt censorship in its legislative approach, but rather represent a form of proscription that is subtly shaping the narratives that learners are exposed to.

Literature and discourse around public artefacts

Much has been written on public artefacts and monuments in South Africa (and elsewhere), particularly relating to their continued relevance in public spaces, including edited books by Miller and Schmahmann[21] and Freschi, Schmahmann and van Robbroeck.[22] Due to the nature and scope of this article, these texts are not discussed in depth, but relevant literature has been referred to throughout to substantiate our arguments.

Due to one-sided representations and the exclusion or silencing of certain groups, protests and a call to remove symbolic artefacts are inevitable. The removal of statues has long been linked to attempts at decolonisation, showing the need to address the histories – *his stories* – that these works perpetuate. Nicholas Mirzoeff notes: "The removal of racist, colonial, or otherwise offensive artworks, often statues, ends one form of visual dominance and creates the possibility of making a different visible relation."[23] The #RhodesMustFall movement in 2015, with the removal of the Cecil John Rhodes statue, previously on the University of Cape Town campus, encouraged a wave of national and international protests, known as Fall-ism.[24]

Not only is the removal of Rhodes' statue noteworthy, but the public engagement and artistic intervention(s) at the time are significant. During the process of removal on 9 April 2015, in addition to large, engaged crowds, South African Fine Arts master's student, Sethembile Msezane, decided to take a stand. In line with the statue and crane, she stood in

20 P Engelbrecht, Inclusive education: Developments and challenges in South Africa, *Prospects*, 49, 2020, pp. 291-232, https://doi.org/10.1007/s11125-020-09499-6.

21 K Miller & B Schmahmann (eds.), *Public art in South Africa: Bronze warriors and plastic presidents* (Indiana, Indiana University Press, 2017).

22 F Freschi, B Schmahmann & L van Robbroek (eds.), *Troubling images: Visual culture and the politics of Afrikaner Nationalism* (Johannesburg, Wits University Press, 2020).

23 N Mirzoeff, *An Introduction to Visual Culture*, (London and New York, Routledge, 2023) (3rd ed.), p. 149.

24 N Mirzoeff, *An Introduction …*, pp. 151-152.

costume atop a plinth, slowly lifting her arms to reveal the makeshift wings of a bird – later revealed to be representative of the Zimbabwe Bird wrongfully appropriated from Great Zimbabwe by the British colonialist, Rhodes, and which is still housed at his Groote Schuur estate in Cape Town. This incident occurred scarcely a month after this statue of Rhodes, sculpted by Marion Walgate in 1934, was tossed with a bucket of human excrement by a political student, Chumani Maxwele.[25]

Shortly before the statue's removal, someone outlined the shadow cast on the Jameson Steps and later filled it with black paint. While Rhodes' seat is now empty, his plinth continues to serve as a canvas for graffiti art and impromptu performances. His shadow, like his colonial legacy, remains. Perhaps the shadow is enough to remind future generations of what once was and allows for the layering of new understandings and meanings to present an inclusive history of humankind. Msezane describes her performance work as "a response, to get people to look at the landscape with a different eye. People haven't forgiven [n]or forgotten; they're still harbor[u]ring hatred. That's why the statue needed to fall. It fostered the kind of thinking that is dangerous to a country in healing."[26] These actions are indicative of the immense impact that public statues and their inherent meanings have on both individual and group identities. The artefacts embody colonial, imperial, or nationalist hegemonies, in which ruling parties' triumph and systematically suppress and silence the histories of their opposition (not necessarily even the minority, as exemplified by the historical context of apartheid South Africa). These omissions intend to place one group's history as superior, perpetuating myths surrounding their narratives as so-called truth, allowing them to remain in power. As Aldous Huxley writes in the foreword of *Brave New World* (1946): "The greatest triumphs of propaganda have been accomplished, not by doing something, but by refraining from doing. Great is truth, but greater still, from a practical standpoint, is silence about truth. By simply not mentioning certain subjects, … propagandists have influenced opinion much more effectively than they could have done by the most eloquent denunciations, the most compelling of logical rebuttals."[27] The preservation of "its imperial legacy", is seen, for example, by the British government, which

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25 K Miller & B Schmahmann (eds.), *Public art in South Africa: Bronze warriors and plastic presidents* (Indiana, Indiana University Press, 2017), p. vii.

26 S Msezane, "Sethembile Msezane performs at the fall of the Cecil Rhodes statue, 9 April 2015", 2015, (available at https://www.theguardian.com/artanddesign/2015/may/15/sethembile-msezane-cecil-rhodes-statue-cape-town-south-africa).

27 A Huxley (1946: foreword) in T Huckin, Textual silence and the discourse of homelessness, *Discourse & Society*, 13(3), 2002, pp 347-372, here p 347, doi:10.1177/0957926502013003054.

"passed a law in 2022 that made damaging a statue punishable by a ten-year jail sentence".[28]

Research design, methodology and theoretical framing

This study utilises the method of a desktop review. A desktop or conceptual review enables conceptual components of a complex phenomenon to be analysed.[29] This method incorporates critical discourse to explore how perceptions related to textbooks and public artefacts are articulated in both print media and online platforms. Critical discourse analysis (CDA), which Norman Fairclough (1993) argues is a methodology "to systematically question the open or latent mutual determination relations between discursive practices and social structure".[30] Brown and Yule highlight that discourse analysts are "committed to an investigation of what language is used for".[31] Our aim is to consider how language and texts (whether written, oral, and/or visual) are used to perpetuate certain ideologies and myths to keep the powers that be in authority and control. In order to achieve this, this qualitative, multidisciplinary literary study is located within a conceptual framework that addresses issues of interpretation and perception, namely, a hermeneutical and phenomenological approach. We rely on a range of literature, newspaper reports, and archival materials on and related to recent developments in textbook revisions, statues, and monuments available in the public domain. Insights are leveraged from international public discourse as manifested in the media to construct an informed understanding. We acknowledge that the discourses are more comprehensive and layered than detailed in our paper. While the totality of available discussions is impossible, we instead draw the readers' attention to the complexities surrounding the selected examples. Multicultural countries were purposively selected to scrutinise how they presented identities which were reconciliatory and peaceful. We acknowledge that meanings never remain static and question their relevance in changing environments.

Each individual's identity and perceptions of their environments are defined by their

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28 N Mirzoeff, *An Introduction…*, p. 149.

29 "TU Delft OpenCourseWare. Introduction desktop research and literature study. Multidisciplinary research methods for engineers", (available at https://online-learning.tudelft.nl/courses/efficient-hvac-systems//).

30 N Fairclough, Critical discourse analysis and the marketization of public discourse: The Universities, *Discourse & Society*, 4(2), 1993, pp. 133-168, here p. 135, https://doi.org/10.1177/0957926593004002 002.

31 G Brown & G Yule, *Discourse Analysis*, (Cambridge, New York, Port Chester, Melbourne, Sydney: Cambridge University Press, 1983), p. 1.

unique experiences, upbringing, beliefs and histories, what Martin Heidegger refers to as 'pre-understanding,'[32] or Gadamer describes as 'prejudice'.[33] Their prejudices influence how people interpret texts (visual or textual) and make meaning. These prejudices, situated in each individual's unique 'horizon', reside within both the interpreter (the public/ learner) and the creator (artist/author/policymakers). Meaning springs from overlapping horizons. However, meaning is not static as the horizons of both interpreters and creators are continuously shifting. Thus, the hermeneutic aspects of this study do not only include the horizon (encompassing the intentions, prejudices, and situatedness) of individual interpreters and creators (the authoritative entities) respectively but also include the cultural environments and social circumstances in which contemporary interpreters and historians are situated.[34] We, therefore, infer that those interpretations of artefacts (textbooks and public statues and monuments) do not only rely on socio-culturally contributed meanings but are also influenced by the agendas of those in power.

Antonio Gramsci (1971) alludes to the fact that cultural institutions like schools can disseminate biased knowledge.[35] Gramsci's notion of hegemony here refers to the socio-culturally dominant structures within a specific context, which determine the acceptable modes of thinking, doing, and living in that society. The struggle of social reality is defined by John Storey, who suggests that certain cultures "make the world (and the things in it) mean in particular ways and with the particular effect of power".[36] The readers of any text (visual or otherwise) should be aware that some meanings "acquire their authority and legitimacy, knowing that dominant modes of making the world meaningful are a fundamental aspect of the process of hegemony".[37] Michel Foucault's writings on knowledge and power, and his texts on silence as a form of oppression, are instrumental in our investigation, as for Foucault, "silence is more fundamental than truth or identity since it exists before discourse is ever initiated. 'Discourse' is his term for the various ways societies impose power relations on their members".[38]

The silencing of voices or the censorship of 'undesirable' materials by bodies in

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32 M Heidegger, *Being and Time* (New York, Harper & Row Publishers, 1962).

33 Hans-Georg Gadamer, *Truth and Method*. (New York, Crossroad Publishing, 1989) (2nd ed.).

34 See P Chandra & D Human, [Decolonising] the contentious politics of seeing: Reading visual cultures, *Alternatives: Global, Local, Political*, 2024. https://doi.org/10.1177/03043754241288097 (in press).

35 J Zajda & R Zajda, The politics of rewriting history: New history textbooks and curriculum materials in Russia, *International Review of Education*, 49(3-4), 2003 pp. 363-384, here p. 372.

36 J Storey, *Culture and power in cultural studies: The politics of signification*, (Edinburgh, Edinburg University Press, 2010).

37 J Storey, *Culture and Power …*, pp. viii; ix.

38 S Bindeman, *Silence in philosophy, literature, and art* (Leiden, Brill-Rodopi, 2017), p. 143.

authoritative positions is not a new concept and is observed in different ways globally. For example, as is well known, South Africa operated one of the most draconian censorship systems in the world at the height of apartheid, by implementing, for example, the Publications and Entertainments Act of 1963.[39] Censorship laws supported the government's goals, serving as a mechanism to ensure they remained in power and control. Knowledge is power, and political censorship becomes a tool used by those in power to manipulate knowledge and silence any opposition, consequently remaining in power. While the process of writing, reviewing, and rewriting history textbooks is not comparable to the draconian approach of apartheid censorship as seen through the Publications and Entertainments Act of 1963, for example, various forms of historical censorship do exist. Censorship is not only observed in South African history. It is a global phenomenon that spans centuries. This process is also observed in the case of Indian history textbooks.

Results and discussion: Global patterns of history censorship

Our findings indicate that textbooks hold a prominent role in conveying historical and cultural knowledge and what is deemed valuable within the curriculum context. As discussed above, knowledge is power, and textbook content is determined by people in certain positions of power. The way content is framed is important as it has considerable sway over learners' perceptions and understanding of the world and themselves.

Juxtaposing international reviews on textbooks and Fall-ism, a global phenomenon is presented. Like South Africa, India grapples with a tumultuous, multifaceted, and diverse past. While South Africa ostensibly demonstrates a transformative stance by incorporating a spectrum of historical narratives into its history curriculum, India's situation is fraught with dissension over its national identity. The rise to power of Hindu nationalist (or *Sangh Parivar*) organisations at the national level in 1998 resulted in a change in textbook content. While earlier curriculum frameworks emphasised "democratic values, social justice, and integration through appreciation of the different subcultures, the chief end of history", and "of education as a whole, was presented as the development of national consciousness through its unique 'religio-philosophical' ethos, which was presented as primarily Hindu".[40]

Similarly, in the context of the United States, the Sangh's Hindu associations also

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39 D Human, "Censorship and proscription …", p. 6.
40 K Visweswaran, M Witzel, N Manjrekar, D Bhog & U Chakravatri, The Hindutva view of history, Rewriting textbooks in India and the United States, Georgetown, *Journal of International Affairs,* 10(1), 2009, pp. 101-112, here p. 101.

claimed that the portrayal of Hindus in Californian textbooks was demeaning. The call for textbook edits, as suggested by the Hindu American Foundation and the Vedic Foundation, was to disseminate false notions of Indian history, including that "Aryans" constituted the original inhabitants of India and that the essence of Hinduism lies in the Vedic religion of Aryans. The objective was to promote the political and cultural position of the authority in power at the expense of the minority group. The violence against Muslims in Gujarat, where the Bharatiya Janata Party (BJP), Sangh Parivar's political arm, "first came into office in the mid-1990s, suggests that a curriculum can create a setting in which social intolerance and injustices against minorities can be justified".[41]

Social outrage has been reported in public responses to the current edit of Mughal history[42] in India's history textbooks. The educational environment is polarised as the claims about a distortion of the past gain momentum. The removal of sections of Mughal history from Indian textbooks has accelerated tension in a country already dominated by religious and cultural differences. The National Council of Educational Research and Training (NCERT) defended the deletions from Indian textbooks as a "rationalization" to reduce the academic burden on learners post-Covid.[43] Among the deletions were the removal of Darwin's theory of evolution, proof of the Pythagoras theorem, and the periodic table below Class 11.[44] There are claims that a pattern in specific deletions is observed, highlighting "whether they serve to purge textbooks of 'anti-Hindu bias or imbue them with pro-state feeling-dilute any understanding of citizens' rights to be informed, protest and demand rather than lie low, applaud and obey", reducing both access to knowledge and the ability to develop critical thought.[45] More than 30 academics involved in the process of textbook 'rationalisation' have requested to have their names withdrawn, commenting on the obstinacy of NCERT which had implications for constitutional democracy.[46]

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41 K Visweswaran, M Witzel, N Manjrekar, D Bhog & U Chakravatri, The Hindutva view of history…, p. 101.

42 The Mughals were the Muslim dynasty ruling over most Hindus between 1526-1858.

43 A Pasricha, "Revisions of history in school texts stirs controversy", *Voice of America. South and Central Asia*, 10 April 2023 (available at https://www.voanews.com/a/in-indiarevision-of-history-in-school-texts-stirs-controversy/7043585.html).

44 A Pasricha, "Revisions of history in school texts stirs controversy", *Voice of America. South and Central Asia*, 10 April 2023 (available at https://www.voanews.com/a/in-indiarevision-of-history-in-school-texts-stirs-controversy/7043585.html).

45 P Sharma, "Textbook revisions will hit lower-income students the hardest", *Voices, Newsblogs India*, 10 July 2023 (available at https://timesofindia.indiatimes.com/blogs/voices/textbook-revisions-will-hit-lower-income-students-the-hardest/).

46 PR deSouza, "Why I withdrew my name from NCERT books", *The Indian Express Journalism of Courage*, 17 July 2023 (available at https://indianexpress.com/article/opinion/peter-ronald-desouza-why-withdrew-name-ncert-books-8667205/).

This is accompanied by, amongst others, the renaming of landmarks, towns, and roads that had Muslim-sounding names as part of a cultural purge. There are removals of sections in history textbooks on the extremist background of Mahatma Gandhi's assassination and the 2002 Gujarat riots which occurred under the watch of the present Prime Minister of India Narendra Modi.[47] Additionally, mosques, like Shahi Masjid, in India were being demolished as they were said to be originally temples that were forcefully converted by Muslim rulers into mosques.[48] Ellis-Peterson notes: "The version of history propagated by BJP leaders, government-backed historians and school curriculums was that of an ancient Hindu nation oppressed and persecuted by ruthless Muslim invaders, particularly the Islamic Mughal empire. The alleged destruction of Hindu temples to build mosques has been central to this narrative".[49] State-approved textbooks thus present the 'official knowledge' to school learners transmitting the dominant political ideology. Pradyumna Jairam suggests that "the BJP carried out processes of omission and decontextualization to ensure that its vision of identity is imparted, creating a linear progression of history in which conflict and controversy are minimized for the sake of its master narrative".[50]

The study of the Mughal Empire is included in the South African school history syllabus for Grade 10. The Curriculum Assessment and Policy Statement (CAPS) document published in 2011 lists content under Section 3 for Grade 10 to include the theme '*What the world was like around 1600?*' The background and focus of the section present the statement: "The studies of the three empires should include accounts of the first contacts with Europe before conquests when relationships were still balanced."[51] The broad comparative overview of countries to be discussed includes China, Songhai, India, and European societies. Interestingly, Indian history (1526 to 1858) focuses on the:

- Mughal Empire: government and society

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47 A Jha, "Why is Modi so scared of history textbooks?" *Al Jazeera*, 13 April 2023 (available at https://aljazeera.com/opinion/2023/4/13/why-is-modi-so-scared-of-history-textbooks?traffic source=KeepReading).

48 A Sara, "Politics of ruin: Why Modi wants to demolish India's mosques". *Al Jazeera*, 3 April 2023 (available at https://www.aljazeera.com/opinions/2023/4/3/politics-of-ruin-why-modi-wants-to-demolish-indias-mosques).

49 H Ellis-Peterson, Thousands of mosques targeted as Hindu nationalists rewrite India's history. *The Observer, India*, 2022-10-30 (available at https://www.theguardian.com/world/2022/oct/30/thousands-of-mosques-targeted-as-hindu-nationalists-try-to-rewrite-indias-history).

50 P Jairam, Securing identity via history: Majoritarian frameworks of history writing in Rajasthan, *Journal of Educational Media, Memory, and Society*, 15(2), 2023, pp. 45-70.

51 Department of Education. National Curriculum Statement Grades R-12 Curriculum and Assessment Policy Statement. Social Sciences. (Pretoria: Department of Education, 2011), p. 13.

- Traded in the Indian Ocean and Islamic World
- Astronomy and technology architecture in the 16th and 17th centuries: the Taj Mahal
- Britain and the end of the Mughal Empire

This content provides a one-sided perspective of history and marginalises India's Hindu history. The current question around India's Hindu nationalist history is perhaps necessary when here in South Africa we study a Mughal-centric Indian history (1526 to 1858).

Similarly, Japanese publications of history textbooks create a rift between Japan and its neighbouring countries over its colonial expansion in World War 2. Japan justified its invasion of other countries with its educational ministry ordering the word 'invade' to be changed to 'advance' and identifying Korea's Dokdo (Takeshima in Japan) as Japanese territory in all 2012 middle school textbooks. The Korean government did not want Japanese children to believe that Dokdo was their so-called rightful territory and consequently lodged an official dispute, accusing Japan of playing with words to "obscure historical facts, understate and evade its historical responsibility and deny and misrepresent its history of aggression".[52] While research shows that historians from China, Korea, and Japan are collaborating towards a more accurate and balanced history to achieve harmony, a new 'standard map' updated annually by the Chinese Communist Party (CCP) has created outrage among other claimants. The map depicts a 'nine-dash line' incorporating territorial grabs. Some of this land, claimed by Brunei, Malaysia, the Philippines, Taiwan, and Vietnam is rich in natural resources and encompasses vital shipping lanes with three trillion dollars of annual trade. Williams writes that "books are scrutinised by the CCP, to the extent that many foreign publishers avoid putting any type of map in publications destined for China", because there is an intensive censorship process.[53]

Censorship in Florida, United States, reared its ugly head when education officials rejected 35% of social studies textbooks. Publishers were urged to change other textbooks due to "inaccurate material and other information not aligned with Florida Law."[54]

52 J Griffiths, "Japanese textbook row threatens diplomatic progress with South Korea, China". *The Globe and Mail Asia Correspondent*, 31 March 2023 (available at https://www.theglobeandmail.com/world/article-japanese-textbook-row-threatens-diplomatic-progress-with-south-korea/).

53 I Williams, "China's 'standard map' is a chilling reminder of its imperial ambitions", *The Spectator*, 3 September 2023 (available at https://www.spectator.co.uk/article/chinas-standard-map-is-a-chilling-reminder-of-its-imperial-ambitions/).

54 J Hernandez, "Florida rejects some social studies textbooks and pushes publishers to change others". *NPR*, 10 May 2023 (available at https://rb.gy/6k4a4).

Republican Governor Ron DeSantis is said to have influenced what is taught in the state's public schools by removing inaccuracies or ideological rhetoric. Books were rejected because of politically charged language, unsolicited topics, and others not being age-appropriate. Exclusions involved the topics: *The African American experience*, H*istory of the Holocaust*, and *Modern Genocide*, another teaching on the Holocaust. NAACP President and CEO, Derrick Johnson, has stated to CNN that "Governor Ron DeSantis is committed to erasing our history and unraveling our democracy by indoctrinating our children and stripping away our fundamental freedoms."[55] An investigation by the Fordham Institute in America revealed a process of sanitisation of textbooks was done to conform to the preferences of special interest groups.[56] In pursuit of publication, the authors self-censored content, leading to the alteration of certain content.

The current controversy in Houston, United States includes textbook use in public schools. Chapters about vaccines and climate change have been redacted because of "a perception that humans are bad".[57] The 'Texas Freedom to Read Project', fighting the bans, believes that withholding information from students is unconstitutional and takes away their access to real-life ideas. Salam argues that "book bans become a core element of platforms of well-funded far-right politicians, who have tried to win a larger presence on school boards across the US".[58]

Textbooks are used by learners and teachers and so the content becomes important to scrutinise. Unless learners are taught to critically analyse the content (thus focus should be both on content and critical skills) inside and outside of their cultural situatedness and question the information while developing multiple perspectives, they will lack a holistic understanding of the history of humanity and consequently their perceptions will be skewed. A vital part of human history will be lost for future generations. Yet, the narrative presented in the textbooks is also the content they have to learn and be tested on, and so the beliefs and values embedded in the text, as determined by those in power, tend to influence learners. While history is about the past, history is also about people, written and

55 J Hernandez, "Florida rejects some social studies textbooks and pushes publishers to change others". *NPR*, 10 May 2023 (available at https://rb.gy/6k4a4).

56 M Matusevich, Strange bedfellows: Censorship and history textbooks, *Social Studies Research and Practice* 1(3), 2006, pp. 359-373, https://doi.org/10.1108/SSRP-03-2006-B0006.

57 E Salam, "'Scary': public-school textbooks the latest target as US book bans intensifies", *The Guardian,* 19 May 2023 (available at https://www.theguardian.com/us-news/article/2024/may/19/us-public-schools-texas-book-bans).

58 E Salam, "'Scary': public-school textbooks the latest target as US book bans intensifies", *The Guardian*, 19 May 2023, p.1. (available at https://www.theguardian.com/us-news/article/2024/may/19/us-public-schools-texas-book-bans).

told by people so future people will know the so-called 'truth' – his-story (or her-story). Yet, what is true and to whom it is true, are highly philosophical and contestable questions. In history we deal with the human element, each with a different experience, perspective, and purpose, and so a different story and narrative is crafted individually, a story told from a personal dimension. Our findings show that controversy sets in if one experience is seen as more valuable or powerful than the next. We suggest that alternative interventions and engagement with textbooks and their content should be considered to create 'our-story', representative of all.

Creative interventions and alternative histories

One attempt at creating an 'inclusive' monument in South Africa is the Long March to Freedom National Heritage Monument. Originally comprising ten sculptures of apartheid freedom fighters, the display was exhibited in 2015 at the Walter Sisulu Square in Kliptown, later moved to Fountain's Valley in Pretoria, then Maropeng in the Cradle of Humankind and is now residing at Century City, a Cape Town, mixed-use suburban area. The body of work has grown to encompass over 100 life-sized bronze sculptures, created by various South African artists. The display comprises key figures throughout South African history, ranging from 18th-century rebel chiefs and missionaries to prominent freedom fighters during apartheid.[59] This monument could perhaps be seen as a counter-monument to the countless statues of colonial leaders, many still proudly displayed in the public domain and representing a one-sided history.

Yet, while many diverse leaders are depicted, it is not all-inclusive. And since it is in a separate, isolated location, accessible only to a few, the needed conversation between the statues (amongst themselves) and the public is still missing. As Kirsten points out:

> relationship[s] between monuments, memorials, and collective memory involves another dimension – the space in which monuments/memorials are interacted with, and in which monuments/memorials are located and invoke a collective memory. Henri Lefebvre (1991:33) shows that space is not a neutral and natural entity, but one that is socially produced, containing the relations of its production, including Foucauldian

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59 M Kirsten, The march continues: A critique of The Long March to Freedom statue collection exhibited in Century City, *Image & Text*, 24, 2020, pp. 1-16, here p. 1, doi: /10.17159/2617-3255/2020/n34a8.

relations of power, in 'the form of buildings, monuments and works of art'.[60]

Thus, the space in which these statues are encountered carries inherent meanings that are not easily erased or forgotten. As Huckin emphasises "often what is not said or written can be as important, if not more so, than what is".[61] Thus, silences speak louder than words. Kirsten continues that "the permanence of statues and large-scale memorials in many ways makes permanent the discourses and ideologies that the statues or memorials carry traces of".[62] Likewise, the histories removed from textbooks are not forgotten or erased. Yet, like the sculptures in the example above, their accessibility and effectiveness are questioned. While teachers could take their learners on field trips to spaces such as the one described above when discussing certain historical components of the curriculum, accessibility is limited due to location and resources. Furthermore, if references to these spaces or the figures they represent are not included in the curriculum, a field trip to such a space may not be warranted or supported by the school principal or governing body.

Chandra and Human (2024) refer to participatory art and participatory viewing as a way for the public to engage with visual materials that may be contested. They state that "forms of participatory art have often emerged in spaces of political contestation and upheaval", and continue that "in such a context both the artist and the audience are placed in a participatory or dialectic exchange, through active participation or even through protest, to express ideas, public moods, political ideologies and contestations within a lived visual culture".[63] Brenda Schmahmann refers to "creative interventions",[64] in which artists' engagements with existing monuments and memorials are considered, as seen, for example, in Sethembile Msezane's performances. Perhaps these interventions are needed to renegotiate the often contested meaning and purpose of these artefacts in a contemporary context. However, they may also serve as inspiration for history teachers to approach certain curriculum content and history lessons. Teachers could, for example, ask learners to engage critically with contested histories. As noted by Chandra and Human (2024): "An alternative to dismantling these statues could be using them as subjects for a historical study of the context they represent, and preserving and commemorating the

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60 M Kirsten, The march continues, p. 2.

61 T Huckin, Textual silence and the discourse of homelessness, *Discourse & Society* 13(3), 2002, pp 347-372, here 348, doi:10.1177/0957926502013003054.

62 M Kirsten, The march continues, p. 3.

63 P Chandra & D Human, [Decolonising] the contentious politics …, 2024 (in press).

64 B Schmahmann, 2018, p. 147 in M Kirsten, The march continues…, p. 3.

history through the medium of visual cultures. An artwork depicting a problematic idea or icon can also be used as the starting point into the inquiry of the history of said event or icon and the context in which they operated".[65] This approach will not create 'new' histories, but may provide learners with a more holistic understanding of certain histories and their representations. Schmahmann highlights the importance of "facilitating interventions with statues and objects of similar significance":

> *While total removal of a work associated with ideologies that have fallen from favo[u] r raises a host of difficulties, it is surely also highly problematical to continue to exhibit and display such an object without critical mediation or contextual explanation of it. Lack of any intervention to such an object may well be construed as suggesting that it continues to be venerated, and overlooks its capacity to promote feelings of exclusion as well as offense.*[66]

Perhaps an artistic 'creative intervention,' as seen through the Plastic Histories project at the Vryfees at the University of the Free State in 2014, by Cigdem Aydemir, could allow for more open discourse on the meaning and continued purpose and relevance of public historical monuments and the history of humanity, while engaging a broader audience that may include the school learner. Aydemir integrated augmented reality and physical space by shrinkwrapping monuments of two historical male figures, President Martinus Theunis Steyn and President CR Swart, in pink plastic.[67] This engagement with existing statues questions their continued purpose and relevance. Aydemir notes that:

> *Most 19th Century, and even contemporary monuments in post-colonial countries such as South Africa are typically a celebration of men's achievements in serving the empires or their nations. These monuments serve to shape collective memory in public spaces, and ensure against the failure of individual memory. Yet, we now know that our memory, far from being set in stone (or bronze), is plastic in the sense that it is constantly shaped and mo[u]lded based on our new knowledge of the past. We also*

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65 P Chandra & D Human, [Decolonising] the contentious politics ..., 2024 (in press).
66 B Schmahmann, 2016, p. 103 in M Kirsten, The march continues ..., p. 3.
67 Both these statues were eventually affected by the #RhodesMust Fall campaign by being either vandalised or removed.

J Jansen, "'It's not Even Past': Dealing with monuments and memorials on divided campuses", F Freschi, B Schmahmann & L van Robbroek (eds.), *Troubling images: Visual culture and the politics of Afrikaner Nationalism* (Johannesburg, Wits University Press, 2020), pp. 119-139, here p. 133.

know that there are multiple histories in every era, and that often these alternative histories are not represented in public space. Plastic Histories is an attempt to visualize this by uncovering alternative Histories …[68]

Other attempts at forging dialogues can be seen at the Voortrekker Monument, entrenched with Afrikaner nationalist symbolism and the adjacent Freedom Park, or the 2006 Peter Hall *Dinuzulu ka Cetshwayo* bronze statue on a beehive base designed by Erhard Huizinga in conversation with Anton van Wouw's 1921 bronze statue of *Louis Botha* situated in Durban, Kwa-Zulu Natal. Another example can be seen through a much earlier intervention by John Nankin, *Mister Rhodes* in 1999, in which he hung bricks on ropes from the Henry Alfred Pegram 1908 bronze sculpture *Cecil John Rhodes*. The dangling bricks from the north pointing arm of Rhodes "alluded to riggings in mining in Kimberly while simultaneously suggesting gold bars, which served to suggest 'a burden or retribution' and thus an 'invasion of the idea of accumulation'".[69] These cases may serve as examples in the South African history classroom to obtain a more holistic view of our country's past.

Jonathan Jansen, in response to the Plastic Histories project, writes that:

Plastic can and does change shape and colour under the hands of real human beings. Here is the case for agency and activism; history is not simply given, it is made and remade by all of us in formal settings like schools and universities but also in everyday life by what we talk about, remember and construct alongside, or in place of, others' sacred statues.[70]

Similarly, Denise Bentrovato argues that collaborative textbook work can build peace, dialogue, and social cohesion if prejudices are challenged.[71] Eichner reports a revolution of textbooks by Saudi Crown Prince Mohammed bin Salman as he oversees the removal of

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68 C Aydemir, *Plastic Histories* (Introduction of catalogue, Public art project by Cigdem Aydemir at the Vryfees in Bloemfontein, South Africa, 14 July – 1 August 2014),(available at chrome-extension://efaidnbmnnnibpcajpcglclefindmkaj/https://vrystaatkunstefees.co.za/wpcontent/uploads/2022/07/Plastic-Histories-2014.pdf, accessed on 15 February 2024).

69 K Miller & B Schmahmann (eds), *Public art in South Africa* …, p. xxvii.

70 Jansen in De Jesus & Peach 2015 in J Jansen, "'It's not even past'…", p. 131.

71 D Bentrovato, History textbook writing in post-conflict societies: From battlefield to site and means of conflict transformation", C Psaltis, M Carretero & S Cehajic-Clancy (eds.), *History education and conflict transformation*, (Switzerland, Palgrave Macmillan, 2017), p. 37-76.

anti-Israeli and antisemitic content and gender issues in Saudi Arabia.[72] While these Saudi Arabian textbooks do not recognise Israel or teach the Holocaust, terminology directed at Israel was moderated. Since these textbooks are distributed and studied by Muslim communities around the world, these silences/exclusions would have a definite impact on how the history of certain cultures and groups of people will be perceived and remembered. Notably, on 16 July 2023, Marcus Sheff, the CEO of IMPACT-SE stated that textbooks from Palestine, Jerusalem, and Gaza were replete with incitements against Jews and Israel and that there had been no progress made in this regard. Unrelenting in their radicalism, their textbooks drive the vision of 'one-state', gained through Jihad and martyrdom, encouraging children to sacrifice themselves physically. To encourage contents of peace and tolerance according to the standards of UNESCO, Sheff advocates for new material in textbooks which, like Saudi Arabia, is highly critical of terrorist incitement.[73]

Conclusion

Constructing a curriculum requires adequate representation and expertise of people from all fields, historians, political leaders, publishers, educators, curriculum and subject advisors, unions, the public, newspaper reporters, and learners to balance the broad spectrum of viewpoints. Transparent consultations with the public, opinions shared over open forums, dialogues, and surveys should guide the decision-making process. History is not a static subject but one that is informed by time and change. As there are updates, different perspectives, and discoveries, a wide range of new stakeholders and their expertise motivate alternate proposals.

There must be ongoing evaluation, moderation, and mediation so that factual errors, misinformation, and stereotypes that perpetuate discrimination and distorted perspectives are removed. Silences should be carefully re-evaluated. There are calls for vigilance to identify propaganda and ideology enhancement in history to ensure social tolerance and religious freedom. Teachers need comprehensive training in well-defined history methodologies which can affect the way they teach. Teachers play a critical role in teaching content as gospel, compelled to complete a defined syllabus from the curriculum document. Conversely, they can teach evolved content using the current methodology of history and

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72 I Eichner, "No more 'monkeys' and 'pigs': Anti-Israeli content removed from textbooks in Saudi Arabia". *Ynetnews.com*., 16 July 2023 (available at https://www.ynetnews.com/article/r1qvgpwqn).

73 M Sheff, "*Removal of antisemitic content*", International Research and Policy Institute. *Ynetnews.com* CEO IMPACT-SE, 16 July 2023 (available at https://www.ynetnews.com/article/r1qvgpwqn).

deviate from expectations. They need to be aware of their influence and authority, without allowing their personal beliefs to cloud their teaching. Awareness of the contentious nature of the narrative, teachers should teach historical thinking and assist learners to evaluate information and approach learning critically. Close supervision and monitoring can deter this.

Continuous textbook research is mandatory to identify and call out inaccurate information and ensure the content is relevant. History is source-based, depending on a multi-text environment to offer divergent views, content, methodology, and approaches. Educational materials are required to be inclusive and accurate. While in a country like South Africa it may seem difficult to address all the needs of a culturally diverse population with twelve official languages and differing belief systems, comparing and holistically balancing perspectives are important strategies to teach history, develop critical thinking, and strive for an inclusive narrative to be remembered by future generations.

GBL in History Education: Insights from Dogs of War

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Abstract

Game-Based Learning (GBL) is increasingly recognised for its ability to enhance educational outcomes through interactive and immersive experiences. However, there is limited empirical data on its effectiveness in promoting historical thinking and Self-Directed Learning (SDL), particularly in history education.

This study examines the impact of the *Dogs of War* (DoW) card game on historical thinking skills and SDL among history student teachers. It also explores the potential of GBL to enhance history teaching by fostering critical analysis skills.

A qualitative research approach was employed, analysing playtest sessions with 15 history education students who played DoW. An open survey collected participants' experiences, focusing on the game's complexity, rule clarity, engagement level, effectiveness in conveying historical content, and stimulating interest in World War II history.

The DoW game effectively increased players' interest in historical subjects and promoted strategic thinking and problem-solving skills. While responses varied regarding the game's complexity and rule clarity, the study identified a need for modifications to

maximise educational benefits. Participants reported heightened motivation to explore World War II history further due to the game.

This study highlights the importance of GBL in history education, demonstrating its potential to improve historical thinking and SDL. Balancing challenge and clarity in game rules is crucial. Further research is needed to enhance game design and implementation for better educational outcomes in history and other fields.

Keywords: GBL; SDL; History education, World War 2, heuristics, historical thinking

Introduction

GBL is an educational strategy that integrates gameplay into the learning process, allowing students to engage with course material in an interactive and immersive environment. GBL has gained popularity for its ability to enhance motivation, critical thinking, and subject-matter retention by leveraging the engaging nature of games (Subhash and Cudney, 2018:192).

Games have played a role in education for thousands of years, starting with ancient civilizations such as Egypt and China, which used games like Senet and Go to teach strategy and problem-solving (Jabbar and Felicia, 2015:742). In more modern times, wargames became prominent in military education. The Prussian military, for instance, formalised wargaming in the 19th century with *Kriegsspiel*, a system designed to train officers in strategic thinking (Heede, 2020:12). These historical precedents demonstrate how games simulate complex real-world scenarios, enabling learners to engage deeply with content, which has been a foundational principle for the use of GBL in education.

In the context of the Grade 9 CAPS history curriculum, the game DoW directly aligns with its focus on developing historical understanding and critical thinking, particularly regarding World War II. The game's mechanics, which involve strategic decision-making based on real historical events, help students not only to learn factual information but also to engage with the causes, consequences, and ethical dimensions of historical conflicts. By embodying leaders and military factions, students are guided toward deep, inquiry-based learning that fosters historical empathy and problem-solving—core aims of the CAPS curriculum (Vlachopoulos & Makri, 2017:106).

Educators have been adopting innovative strategies to engage students and improve learning outcomes, notably through GBL which leverages the engaging nature of games (Subhash & Cudney, 2018:193). Card games, in particular, are favoured for their ability to develop critical thinking and deepen knowledge of subjects like history (Subhash & Cudney, 2018:194). An exemplar of this is "to engage students and improve learning outcomes, notably through GBL which leverages the engaging nature of games" (Subhash & Cudney, 2018:194). Card games in particular are favoured for their ability to develop critical thinking and deepen knowledge of subjects like history (Subhash & Cudney, 2018). An example of this is the DoW card game, designed to teach history through strategic play and SDL (SDL) (Jabbar & Felicia, 2015:745).

DoW serves as an exemplary GBL tool in the context of history education. It is designed to promote historical thinking, problem-solving, and SDL by immersing students in World

War II scenarios, where they take on the roles of military leaders making strategic decisions based on historical events.

Set during World War II, DoW allows players to engage with historical events and figures through strategic decision-making and resource management (Cheng & Milikich, 2023:16). Players take on roles as leaders of WWII factions, utilising trading card game mechanics to manage troops and resources, aiming to outmanoeuvre opponents. The game educates on WWII history and encourages players to learn independently through a tangential learning approach (Armstrong, 2004:22). Each card includes QR codes linking to detailed historical information, enhancing the educational experience.

The rules of DoW involve strategic card play where players control one of six factions from World War II. Each faction includes various unit types (land, air, and sea) and unique generals with special abilities. Players utilise these cards to manage resources, deploy units, and engage in combat. The objective is to defeat the opposing player's general by strategically using unit abilities, managing resources effectively, and leveraging faction-specific strengths and weaknesses. The game also includes special event cards that can influence the course of play, adding a layer of complexity and historical context to the gameplay.

This research examines how DoW serves as a pedagogical tool, promoting historical thinking and SDL among students. Analysis of feedback from history student teachers has provided insights into how GBL can be effectively integrated into history education (Gee, 2003:20; Subhash & Cudney, 2018:196). The study contributes to discussions on improving history teaching through innovative educational methods. Before engaging with *DoW*, students receive training on the game's mechanics and the embedded historical content. The game is integrated into a digital learning environment where students have access to necessary Information and communication technologies (ICTs), ensuring equitable participation. Moreover, the students' digital literacy is assessed, and additional support is provided to those requiring assistance in using the game effectively.

Therefore, this study aimed to answer the following research questions:

How does DoW foster historical thinking skills among students?

What is the impact of DoW on promoting SDL in the context of history education?

How do students interact with historical content through GBL environments?

Rationale

The motivation for this study arises from the increasing acknowledgement of the significance of historical thinking skills and SDL in the field of history teaching (Kusuma

et al., 2021:890). Historical thinking encompasses the meticulous examination of historical materials, the creation of historical narratives, and the assessment of historical interpretations (Cheng & Milikich, 2023:18). By actively participating in a card game that is centred on historical knowledge, students can enhance their skills in a dynamic and participatory setting (Ghannem et al., 2019:15).

Moreover, SDL has become a core skill in the modern educational environment, empowering individuals to independently manage their learning journey, establish objectives, and actively seek knowledge (Vero & Barr, 2023:2). Research has demonstrated that GBL enhances SDL (SDL) by empowering learners with control, offering feedback systems, and creating chances for introspection and metacognition (Kuran et al., 2018:96). This study aims to further our comprehension of how games might cultivate self-directed, lifelong, learning habits by examining the influence of the DoW card game on SDL (Holbert & Wilensky, 2014:57).

GBL is notable for its ability to use the natural engagement of games, offering dynamic and immersive learning experiences (Habgood & Ainsworth, 2011:172). This approach, moreover, provides a promising option in history education, where standard narrative methods may fall short of capturing the complexity of historical events. The DoW card game offers a valuable chance to assess its impact on promoting historical analysis and independent learning among history student instructors. DoW exemplifies an innovative convergence of gameplay and historical subject matter, providing a distinctive medium for the dissemination of historical knowledge (Vlachopoulos & Makri, 2017:108).

Therefore, investigating the efficacy of this game in fostering historical thinking and SDL (SDL) has consequences for designing curriculum, implementing instructional methods, and incorporating GBL in history classes (McCall 2016: 520), ensuring that games are developed within a context that appreciates the diverse roles and impacts of various stakeholders.

Problem statement

While GBL (GBL) is increasingly recognised as an effective educational strategy, empirical support, especially within history education, is limited and mixed (Kordaki & Gousiou, 2017:125). Historical thinking and SDL are essential for students to analyse historical narratives and sources effectively. However, the ability of games like the DoW card game to enhance these skills in history education has yet to be thoroughly investigated. This lack of evidence highlights the need for more empirical studies focusing on GBL's role in

developing historical thinking and SDL skills.

The existing research also lacks depth in understanding how students interact with historical content in game-based settings and how certain game elements may affect the development of these critical skills. Additionally, the potential of GBL to engage student teachers in a meaningful exploration of historical events, themes, and figures through gameplay is not well understood. This study seeks to fill these gaps by exploring the educational potential of the DoW game to enhance historical thinking and SDL among history student teachers.

The goal is to assess the educational value of the DoW card game and contribute to discussions on innovative methods for teaching history.

Literature review

Educational games, particularly card games, are recognised for fostering interactive learning, critical thinking, and problem-solving skills (Odenweller et al., 1998:78). They provide an active learning environment that boosts engagement and participation which is crucial for effective learning (Aburahma & Mohamed, 2015:59). Studies indicate that these games can enhance traditional teaching by making learning more interactive and enjoyable, thus improving retention and understanding (Fipps & Rainey, 2021:2535). Furthermore, card games have proven effective across various educational fields like biology and chemistry, aiding in complex subject comprehension and increasing student motivation (Su et al., 2014:505; Gutierrez, 2014:77; Camarca et al., 2019:2540).

GBL (GBL) offers significant benefits in numerous academic areas by improving engagement and facilitating deeper understanding (Gee, 2007:20; Boyle et al., 2012:97). In history education, GBL engages students with historical contexts, enhancing analytical thinking and empathy, and deepening their grasp of historical events (Van Eck, 2006:19; McCall, 2014:517). This review discusses the role of GBL in history education, particularly through games like 'DoW,' highlighting its impact on developing historical thinking and SDL capabilities.

Flow

Mihaly Csikszentmihalyi's concept of "flow" is highly relevant when discussing GBL (GBL), as it captures the state of deep engagement and absorption that players experience when the challenges of a game are perfectly matched with their skills. Flow is characterised

by complete immersion, a sense of control, and the merging of action and awareness, where players lose track of time and external distractions as they focus solely on the task at hand (Csikszentmihalyi, 1990:49). This is the ultimate goal of any game, whether analogue or digital, as it ensures that players are fully engaged with the content, leading to enhanced learning experiences (Subhash & Cudney, 2018:195). In the context of GBL, achieving flow can greatly enhance educational outcomes by fostering intrinsic motivation and deep cognitive engagement. Games like DoW are designed to elicit this state by balancing challenge and skill, encouraging students to be fully absorbed in the historical scenarios presented, which facilitates critical thinking and problem-solving (Jabbar & Felicia, 2015:744). Thus, engaging with Csikszentmihalyi's flow theory underscores the pedagogical value of GBL in creating optimal learning experiences.

Historical thinking and GBL

Students must possess historical thinking abilities to analyse historical content and develop significant interpretations of the past (Seixas & Morton, 2013:4). Educational games offer an interactive platform for cultivating these abilities through the simulation of historical events, enabling students to examine many viewpoints, evaluate data, and make well-informed choices (Levstik & Barton, 2015:3). The DoW game, which takes place during World War II, allows players to fully engage in historical storylines, make strategic choices, and contemplate the wider consequences of their actions in the game's universe (Squire, 2006:20).

By engaging in gameplay, students can cultivate essential historical thinking abilities, including historical empathy, causation, and contextualisation (Wineburg, 2001:23). Through the process of analysing primary sources, interpreting historical facts, and assessing conflicting accounts, individuals develop the ability to think critically about historical events and gain an understanding of the intricate nature of historical interpretation (Barton and Levstik 2004: 5). Moreover, the interactive character of educational games promotes active learning, motivating students to participate in inquiry-based activities, and cultivate a more profound comprehension of historical themes (Shaffer et al., 2005:106).

SDL and GBL

SDL (SDL) is a process in which learners assume control and accountability for their learning. This involves defining objectives, acquiring resources, and evaluating their

progress (Knowles, 1975:18). GBL environments are conducive to encouraging SDL (SDL) because they give players autonomy, choice, and possibilities for exploration and discovery (Gee, 2003:25). In the field of history education, games such as DoW give students the ability to have control over their own learning experience. This allows them to interact with historical material in ways that are in line with their individual interests and preferred methods of learning (McCall, 2012:1405).

By engaging deeply in historical narratives, undertaking thorough research, and working together with their peers, students can cultivate the skills and attitudes essential for continuous learning throughout their lives (Steinkuehler & Duncan, 2008:532). Educational games, due to their open-ended character, promote experimentation and risk-taking, enabling players to delve into historical subjects extensively and pursue their own paths of research (Squire & Jenkins, 2003:207). By engaging in gameplay, students cultivate metacognitive abilities, including the capacity to establish objectives and evaluate their own progress, which are crucial for SDL (Bereiter & Scardamalia, 1989:365).

Synthesising Historical Thinking and Self-Directed Learning

Combining historical thinking skills with SDL in GBL environments offers a powerful method for teaching history. Educational games like DoW enhance critical thinking, problem-solving, and metacognitive skills by immersing students in authentic historical analysis (Bender, 2009:50). In such games, students actively contribute to historical knowledge creation rather than passively consuming information (Reisman, 2017:1402).

Students take on various roles within the game, conduct research, and make decisions affecting historical outcomes, which helps them develop a deeper understanding of historical complexities and their role as proactive participants in society (Klopfer & Squire, 2008:205). GBL environments also promote engagement with historical topics, encouraging students to pose thoughtful questions, seek relevant information, and construct evidence-supported narratives (Clark et al., 2016:87).

This literature review highlights how GBL can enhance history education by fostering historical thinking and SDL. Games like DoW allow students to engage deeply with historical settings, leading to enhanced analytical skills and meaningful learning experiences (Shaffer et al., 2005:107). While GBL is promising as a modern educational strategy, further research is needed to assess its effectiveness across different settings and to find the best ways to integrate games into history education. This review aids in understanding

how GBL can be used to improve historical thinking and SDL, thereby enriching the educational experience in history classrooms.

Below is a table that summarises the key historical features in the DoW card game. These features were taken directly from the rulebook of the game. During the design phase of the game, the researcher focused on integrating WWII historical features into the game.

Table 1: Key Historical Features in DoW

Historical Feature	Description
Major WWII Events	Key battles, turning points, and significant events such as D-Day, Battle of Stalingrad, etc.
Historical Figures	Leaders and military figures, including their roles and impacts.
Military Strategies	Tactics and strategies used by different factions during key battles and campaigns.
Political Alliances	Formation and impact of alliances like the Allies and the Axis.
Economic Factors	Economic conditions and resource management.
Social Impact	Effects of the war on civilian populations, including home front activities and war propaganda.
Technological Advances	Innovations in warfare technology, such as tanks, aircraft, and naval vessels.
Cultural Aspects	Cultural changes and propaganda during the war era.
Post-War Consequences	Outcomes and aftermath of the war, including treaties, reconstruction, and geopolitical shifts.

Methodology

This study used a qualitative approach to explore how participants experienced the DoW card game as an educational tool, highlighting its instructional potential (All et al., 2016:92). It focused on qualitative methods to deeply understand players' views and preferences, employing playtest sessions within a history curriculum for student teachers (Hwang & Wu, 2011:267; Yu et al., 2014:9690). Participants provided feedback through a detailed survey designed to gather insights into their gaming experience and suggestions for improvements (Watson et al., 2011:470).

Fifteen third-year history student teachers participated, selected via convenience sampling (Kordaki & Gousiou, 2017:132; Lee et al., 2021:21). Data were collected using an open survey post-playtest, covering various aspects of the game experience and seeking in-depth responses (Jabbar & Felicia, 2015:745; Vlachopoulos & Makri, 2017:109).

The thematic analysis was conducted on the survey responses to identify patterns and themes, enhancing understanding of the game's impact on players (Tannahill et al., 2012:210; Kordaki & Gousiou, 2017:136). The study's validity was reinforced through careful data handling and methodological transparency, ensuring the findings' credibility, transferability, dependability, and confirmability (Wu & Wang, 2012:5; Watson et al., 2011:472).

Ethical approval was secured, participants gave informed consent, and measures were in place to protect their privacy and the confidentiality of their responses (Kuran et al., 2018:10; Kordaki & Gousiou, 2017:134).

The participants for this study were 35 third-year BEd history student teachers in a history education module which was based on the Second World War. These students who are training to be future history teachers were exposed to different forms of education technologies, one of which is game based learning tools like DoW. Since their interest in using such technologies was not gauged prior to the study, the program enhances the teaching strategies which include the use of digital and analogue games in the classroom.

Thus, the sample size of this study comprised of 35 students. To prepare for the use of DoW, they were given a brief on the rules, mechanics, and objectives of the game to enable them to use correctly to improve their knowledge of World War II content. The introduction offered an explanation of how the game fits the historical thinking and critical analysis skills and how it can be used in future classrooms. The total number of the students in the module was 35, which provided a broad range of opinions concerning the effect of the game on historical thinking and SDL.

The DoW game is mainly intended for use in higher education, particularly for teacher training and later on for implementation in Grade 9 classes. Using the game with undergraduate students, especially those pursuing history education, has two objectives. First, it enables future history teachers to play the game and assess it as a pedagogical tool to be able to use games in their classrooms in the future. These students are able to learn critical historical thinking skills by participating in the game, and gain better understanding of how this tool could be useful in a classroom to improve the students' learning. Second, this testing phase is useful to get feedback on the game mechanics as well as the content to make sure that all of these are in line with the Grade 9 Term 1 CAPS curriculum regarding World War II. The final target is to use DoW in Grade 9 history lessons and contribute to the better comprehension of historical events and concepts defined by the CAPS curriculum, as well as to enhance learners' autonomous learning and critical thinking skills. Hence, it is important that undergraduate students are involved in the testing phase to ensure that the game is ready for its intended target population of high school students.

Results and Analysis

The survey data obtained provides insights into the students' impressions of several game features, evaluated on a scale ranging from 1 (Very Easy) to 5 (Very Difficult). A total of 15 respondents provided ratings for each element for the data collected between 31 July 31 2023 and 25 August 25 2023.

While the study utilized a Likert scale to capture participant opinions, it predominantly focused on aspects such as rule clarity and engagement level. However, it is important to recognise that individual perceptions of difficulty may vary. For instance, one participant's rating of '5' for difficulty may differ significantly from another's rating of '5' for the same aspect. To address this limitation, future research could incorporate additional measures such as pre-assessment surveys of familiarity and experience with card games, and semi-structured interviews. These methods would provide a richer description of the interaction and help identify the underlying factors influencing participant responses. This approach would, moreover, enhance our understanding of the quantitative data and clarify the elements contributing to different reviewer ratings.

Question 1: Difficulty

The feedback from participants indicates that the DoW game is seen as moderately

challenging. Eight out of fifteen players had a neutral perspective on the game's difficulty, while four found it difficult, resulting in an average difficulty rating of 3.2. This aligns with prior research suggesting a preference for games with a moderate challenge level (Jabbar & Felicia, 2015:746). However, the varied responses also highlight potential issues with game accessibility and the learning curve.

Players found the game to be complex, with an average complexity score of 3.33, suggesting that while some managed well, others struggled. This indicates a need for balancing complexity to maintain player engagement without causing feelings of being overburdened (Ghannem et al., 2019:12). Opinions on the game's strategic depth varied, with an average score of 2.93 indicating it was seen as relatively straightforward, yet seven respondents found it easy to manage. This disparity points to potential gaps in the game's strategic elements, possibly affecting its depth and engagement (Kuran et al., 2018:15).

Player engagement through gameplay was highly rated, with eight players finding it easy to interact with others. This suggests that while social interaction is a strong point, it may also indicate a lack of complexity in player dynamics, potentially affecting long-term interest (Aleksić, 2019:284). Resource management was identified as the most challenging aspect, with six players finding it difficult and an average score of 3.13. This underscores the importance of effective resource management systems in strategy games to enhance player control and decision-making for a more satisfying experience (Jabbar & Felicia, 2015:748).

Question 2: Rules

The survey on the rules showed varied player experiences, from clear understanding to specific uncertainties. Seven participants found the rules clear, suggesting the rulebook effectively communicated key gameplay information. However, four encountered confusion, highlighting areas needing further explanation. Specific issues included difficulties with the mechanics of card sacrifice or discard and understanding the criteria for card power and interactions, indicating a need for more detailed guidance or examples. Challenges were also noted in navigating tokens and understanding currency mechanics. Despite these issues, most players found the rules to be clear or somewhat clear, affirming the rulebook's overall effectiveness. Yet, the presence of confusion among some players points to opportunities for improvement, particularly in clarifying complex game mechanics and enhancing rulebook clarity. Further analysis could help pinpoint the causes of confusion, whether due to language ambiguity, layout, or the intricacies of game mechanics.

Question 3: Attention

The playtest findings indicate that DoW captured the attention of a considerable number of participants. Curiosity, competitiveness, and strategy greatly affect player involvement. However, uncertainty among certain individuals suggests that clearer explanations of the game's rules and procedures could increase participation. Developers can improve user engagement and pleasure by removing accessibility barriers and boosting game success. Most respondents (13 out of 15) reported positive interest during the playtest, indicating that the game kept their attention. This means that many gamers enjoyed the gameplay. Curiosity about the game, its content, and its gameplay mechanics contributed to this positive attention. Fjaellingsdal and Klöckner (2017:5) agree with previous player engagement studies that curiosity and intrinsic motivation are crucial to long-term gaming enjoyment.

Competition and complexity are also important for player involvement. Scanlon et al. (2011:4) found that a player was motivated by the game's competitiveness, demonstrating that challenge and competitiveness can boost player engagement. Another player noted that the game's strategic features were highly fascinating, showing that anticipating and planning kept students interested.

Only two participants exhibited mixed or reduced interest, citing a lack of understanding of the game's rules and mechanics (Kuran et al., 2018:12). Despite showing little interest, the respondent was willing to learn and play. The resolution of comprehension barriers may lead to interest.

Question 4: Learning

Around 11 players said the game taught them about WWII. This suggests that the game educated a large portion of the player base about historical events. Four reported learning "a few things", indicating modest educational value. The group in question may not have learned as much new material as those in the "quite a lot" or "significant amount" categories, but their recognition of learning at least some information implies that the game enhanced their historical knowledge. A thorough analysis of the themes or facts players find most informative could improve the game's instructional components. Examining the key features of World War II history that impacted players can inform future game improvements by prioritising those factors (Ñриан & Griban, 2020:43). The potential correlations between players' prior knowledge of World War II and their self-reported learning outcomes may

reveal the game's efficacy for players with different degrees of expertise.

The results suggest that DoW has mostly succeeded in teaching participants about World War II. The game's intriguing gameplay and informative elements have helped gamers grasp this vital historical period. Further research and development could improve the game's pedagogical efficacy, ensuring its long-term instructional value.

Question 5: Engaging Elements

Game mechanics were identified as a prominent factor in engagement by the respondents. The mechanics mentioned by approximately one respondent include point calculation, card selection for defence, card flipping, and the strategic element of playing the strongest card. These factors enhance the interactive and dynamic nature of the gameplay, offering players chances for strategic decision-making and tactical manoeuvring (Lee et al., 2021:22). In addition, a small percentage of respondents found historical elements, such as the leaders of countries involved in World War II and the repercussions of the conflict itself, to be intriguing. Integrating historical content enhances the game experience by providing players with not just amusement, but also a chance to acquire knowledge and engage in introspection.

In addition, one respondent found competitive features, such as the excitement of battling against opponents, appealing. This implies that the competitive element of the game is essential in sustaining player engagement and drive throughout the gameplay (Jabbar & Felicia, 2015:747). Approximately two respondents found the game's rules and expectations engaging due to their clarity and simplicity. Explicit guidelines not only enhance comprehension but also enhance the fluidity and pleasurable nature of the gaming encounter. Players value having clear expectations and a comprehensive understanding of how to effectively engage in the game (Clark et al., 2016:92).

Question 6: Frustrating Elements

Game mechanics were also noted as a key concern for some players among the categories of frustration. One participant expressed irritation with certain elements of the game mechanics, such as obtaining coupons, making payments with two cards, and the distribution of resources with every turn. These frustrations may arise from intricacies or incongruities within the game mechanisms, emphasising places where simplification or elucidation may be required to improve user experience (Ke et al., 2018:1190). Furthermore, a single

respondent explicitly expressed frustration with the game rules. This is consistent with previous evidence that shows difficulties in comprehending the rules, implying that the game's design still needs development in terms of clarity and understandability.

In addition, another participant identified unclear instructions as a cause of annoyance. Although the game may provide enjoyment, ambiguous instructions can impede players' capacity to fully immerse themselves in and value the gaming encounter. This highlights the significance of offering unambiguous and easily understandable directions to promote seamless gameplay and optimise player contentment (Wu & Wang, 2012:7). Notwithstanding these sources of annoyance, a substantial majority of players (about nine participants) did not encounter any aspects of the game that were annoying or uninteresting. The affirmative reaction signifies widespread contentment with the game among the majority of participants.

Nevertheless, it is crucial to acknowledge that a small number of participants gave vague answers, such as responding with "Nope" or "N/A", which creates uncertainty regarding whether they had any issues or simply did not mention them. Obtaining additional clarification from these respondents could yield significant insights regarding their gaming experience and identify areas that can be enhanced.

Question 7: Motivation

Out of the identified categories of motivation, two respondents indicated a drive to get a strategic advantage in the game by enhancing their awareness of the historical context of World War II. Players' recognition of the correlation between historical knowledge and gameplay success indicates the educational worth of the game in improving strategic thinking abilities (Kuran et al., 2018:18). Moreover, three of the respondents were driven by the game's capacity to modify historical results, perceiving the possibility of constructing alternative histories as fascinating. Students were still being facilitated by the researcher while playing, to address any misunderstandings with alternative historical scenarios. This demonstrates an interest in hypothetical situations and the examination of many storytelling options, which can encourage analytical thinking and imaginative understanding of history in individuals who participate (Lee et al., 2021:22).

In addition, almost three respondents were motivated by their fascination with certain countries or alliances depicted in the game, suggesting a curiosity regarding the roles and interactions of different nations during World War II. This underscores the game's ability to ignite curiosity in particular historical subjects and promote additional investigation and

discovery outside of the game's virtual setting (Ghannem et al., 2019:11).

Around five respondents indicated a general curiosity or fascination with World War II, sparked by their engagement with the game. Although the exact reasons for this interest differed among the participants, the general agreement highlights the game's efficacy in promoting a wider involvement with historical material. Furthermore, two respondents stated that the game gave them a fresh viewpoint or enhanced comprehension of World War II, motivating them to actively search for more knowledge. This implies that the game has the capacity to provide distinctive perspectives on historical events, enhancing players' comprehension and admiration of the subject matter (Kuran et al., 2018:19).

All 15 participants explicitly stated that playing the game served as a powerful catalyst for their desire to acquire more knowledge about World War II. This clearly illustrates the game's significant influence in fostering enthusiasm and inquisitiveness among its players. The uniform interest in the game highlights its efficacy as an instructional tool and indicates its capacity to stimulate additional investigation and learning beyond the gaming encounter (Watson et al., 2011:470).

Questions 8 and 9: Comparison and Recommendation

Participants recognised the game's distinctiveness (four respondents), high engagement level (five respondents), and complexity (two respondents), indicating its novelty and potential to captivate learners (Ghannem et al., 2019:12; Lee et al., 2021:22; Vero & Barr, 2023:3). The requirement for strategic thinking (two respondents) and the game's effectiveness as an educational tool (two respondents) were also praised, demonstrating its value in enhancing cognitive skills and historical knowledge (Yu et al., 2014:9691; Kuran et al., 2018:19).

Feedback for improvement included the need for clearer rules (six respondents), gameplay alterations for added excitement (three respondents), and better integration of educational content (one respondent). However, a notable proportion (four respondents) expressed satisfaction with the game in its current state.

The data suggests that while the game is well-received as a learning aid, refining rules, gameplay, and educational content could further its effectiveness and educational impact (Gee, 2003:23; Shaffer et al., 2005:109; Wideman et al., 2007:15; Jabbar & Felicia, 2015:748).

Discussion

The analysis of participants' responses to the DoW game's difficulty level underscores the delicate balance required in GBL environments to optimise educational outcomes. Research suggests that a game's challenge level significantly influences engagement and motivation; too little challenge can lead to disengagement, while excessive difficulty may induce frustration and hinder learning progression (Silva et al., 2017:78; Power et al., 2019:45). Participants' varied perceptions of difficulty highlight the importance of tailoring challenges in educational games to enhance critical thinking, problem-solving skills, and persistence. Consequently, adjusting the difficulty to provide a supportive yet challenging learning environment is crucial for fostering self-efficacy, motivation, and a sense of mastery among learners, thereby maximising the educational effectiveness of GBL.

The clarity and coherence of game rules are vital for ensuring that students grasp the intervention's objectives and mechanics, fostering a level playing field and promoting fairness within the educational setting (Garris et al., 2002:458; Wouters et al., 2013:23). Clear, well-defined rules not only structure the learning environment but also drive student motivation and engagement by presenting challenges that are both stimulating and achievable, thus encouraging active participation and perseverance (Annetta, 2008:34; Wang & Yao, 2022:55). Moreover, by delineating constraints and objectives, game rules enhance critical thinking and decision-making skills, as students must strategise and make informed choices to navigate the game effectively (Dhatsuwan & Precharattana, 2016:191; Brennan, 2019:89). This structured interaction and rule-based decision-making are instrumental in improving cognitive abilities and overall learning outcomes, highlighting the importance of meticulously designing game rules to maximise the educational effectiveness of GBL.

Our analysis also highlights the importance of maintaining student interest in GBL to enhance the learning experience and attain outcomes. Engagement, enthusiasm, and motivation are fundamental, as they significantly impact student participation and learning performance (Wang, 2015:37; Hamari et al., 2016:302; Licorish et al., 2018:62). Sustained student interest is essential for long-term engagement and learning retention, with studies showing that situational interest triggered by games can evolve into individual interest, encouraging students to reengage with the learning activities over time (Kiili et al., 2021:210). Designing GBL interventions that captivate students' interest is thus crucial for creating effective learning environments that support enhanced learning and achievement.

Feedback on the game illustrates the critical role of effectively conveying subject

matter in GBL to enhance student outcomes. Studies show that interactive games improve learning over traditional methods by encouraging active engagement with the content (Vogel et al., 2006:230; Sitzmann, 2011:664). Moreover, incorporating subject matter into game scenarios allows for a deeper understanding and application of knowledge (Corredor, 2018:19). A balance between educational content and gameplay ensures enjoyable and effective learning experiences, leading to better engagement and knowledge acquisition (Juveng, 2019:31; Yang & Hsuan-Yu, 2018:110). Therefore, identifying, integrating, and conveying educational content into games is essential for promoting active learning and improving student outcomes.

Incorporating features that boost engagement, motivation, and enjoyment, such as challenges, rewards, and interactive gameplay, can deeply immerse students, keeping their interest peaked and motivation high (Habgood & Ainsworth, 2011:175; and Jabbar & Felicia, 2015:747). These elements, by stimulating both cognitive and affective engagement, foster an optimal learning environment conducive to active participation and knowledge retention (Ke et al., 2015:293; Alserri et al., 2018:12). Effective GBL design, blending entertainment with educational content, not only heightens student interest but also promotes deeper learning and skill development across various educational fields (Fanfarelli, 2019:45; Kiili et al., 2021:209). Moreover, engaging GBL interventions cater to various learning styles and preferences, creating authentic, interactive experiences that encourage collaboration and problem-solving, thus enhancing engagement and facilitating meaningful learning (Li, 2020:17; Stohlmann, 2022:39). Therefore, the strategic incorporation of engaging elements is crucial for enhancing student engagement, motivation, and overall learning outcomes, underscoring the need for educators to develop games that are both entertaining and educational.

Key to capturing learners' interest and stimulating intrinsic motivation are elements like challenges, rewards, and immersive gameplay (Кайрат, 2020:65; Toquero et al., 2021:83; Bennis et al., 2022:112). To sustain motivation, it is crucial for educators to incorporate games that harmonise entertainment with educational value, incorporating meaningful challenges and immediate feedback to support ongoing engagement and learning progression (Hwang et al., 2014:210; Gamlo, 2019:59). Moreover, adding social elements, customisable content, and gamified features can further elevate motivation and maintain learners' interest (Ji, 2017:91; Liu et al., 2020:301). Integrating GBL with experiential activities and interactive interfaces enhances motivation and engagement, encouraging active participation and skill development (Zahra et al., 2022:18; Shen, 2023:31). Utilising analytics and learning technologies allows educators to tailor GBL

experiences to individual needs, optimising learning outcomes. Thus, GBL, through engaging and interactive experiences, promotes deeper learning engagement by nurturing motivation and enjoyment.

While the sample size of 15 participants is small, this study's qualitative data can go a long way in helping us construct theoretical models and schemas pertaining to player experience in GBL. While the results presented herein focus upon findings specifically related to a CCG game, there still may be some transferability of observed principles of engagement, thinking historically and SDL that could guide educational efforts in other types of games.

Therefore, the paper answers the following research questions:

How does the DoW card game facilitate the development of historical thinking skills among history student teachers?

The game facilitates historical thinking by requiring students to make strategic decisions based on real historical events, encouraging them to analyse causes and effects, reflect on consequences, and engage with historical narratives critically.

What is the impact of GBL on the SDL abilities of participants within a historical context?

DoW promotes SDL by allowing students to explore historical content independently, make decisions, and seek additional information beyond the game. This autonomy fosters deeper engagement and independent inquiry into historical topics.

How do players perceive the effectiveness of DoW in combining gameplay with historical content for educational purposes?

Players generally perceive the game as an effective educational tool, noting that the integration of gameplay with historical content enhances their understanding of World War II while making the learning experience engaging and interactive.

Historical Engagement and Learning through Gaming (HELG) Model

To understand how such games can help in the learning of history, the Historical Engagement and Learning through Gaming (HELG) Model was proposed. This model relates to the article since it offers a theoretical foundation that explains how games may contribute to historical thinking as well as self-regulated learning, which are both goals of the study. This paper is valuable to the understanding of how the game can be used to simulate historical events, and thereby foster critical thinking, decision making, and reflection skills which are important in any learning process.

The applicability of the HELG Model can be explained by the fact that it can assist in the development and evaluation of educational games. In this study, it helps reveal how DoW contributes to the improvement of the students' interest, motivation, and performance, which is critical when it comes to analysing the overall effect of GBL in history teaching and learning.

Integration of Educational Content

The HELG Model integrates history seamlessly into gameplay, ensuring an effective learning experience within an interactive medium. It emphasises objectivity and historical accuracy, working closely with credible historians to maintain high standards. QR codes and external resources enhance learning by providing additional educational materials.

Gameplay Design

The model balances complexity and user accessibility, making it suitable for both newcomers and seasoned players. Basic rules facilitate easy entry, while strategic depth challenges experienced players, keeping the game engaging and enjoyable.

Historical Accuracy and Authenticity

Collaboration with historian partners ensures that themes in DoW are historically accurate and meet high standards. Detailed historical narration on engine technology, weapons, and biographies deepens players' understanding and engagement with the game.

Historical Accuracy and Authenticity

One of the most important qualities of the HELG Model is ensuring historical accuracy and authenticity. By working closely with historian partners, the themes in "This Land Is My Land" are not only historically accurate but consistently meet a high standard. Players can dive deeper into the story behind engine technology, weapons, and biographies through detailed historical narration, making these elements even more captivating.

Motivation & Engagement

The model uses game mechanics that make players interact with elements they love. Competitive and cooperative elements, various rewards, and challenges create a community atmosphere, keeping players engaged with the learning process.

Flexible and Individualised

The HELG Model offers choice and flexibility, providing varying levels of challenge based on students' needs. There are multiple pathways and historical scenarios for players to explore, helping them connect learning experiences to their own interests.

Feedback and Reflection

An essential part of the model is delivering real-time feedback, promoting reflection on learning. Players are encouraged to deal with history by weighing perspectives and power structures. Debriefing sessions and discussion guides are provided to help players discuss the historical context they experienced during gameplay.

Research & Collaboration

The model promotes historical research by partnering with historians, educators, and content experts. Player and educator feedback is continuously collected and considered for game improvements. Collaborative play is encouraged, pushing players to work together on research and problem-solving tasks within the game.

Recommendations

Further research should be done on class-based experiences with a view of finding the experience of learners and teachers in using DoW in Grade 9 history classes. It would indicate how the game affected students' interest, motivation, and historical analysis. The teachers' view may also help in establishing the extent to which it is an effective teaching tool.

Also, the effect of the game on assessment should be examined. DoW can be used for developing critical thinking skills and decision-making that can be applied to formative assessments which are not mere the memorisation of facts and dates. Through the use of motivation that results from GBL, there is a possibility that the game could positively impact the academic achievement of students, hence being a useful tool in teaching and learning history.

Conclusion

The feedback generated from participants on the DoW game suggests potential as an enjoyable educational tool for World War II learning, this study is subject to limitations including a small sample size and reliance upon subjective survey data. While the mechanics and historical content would certainly appeal to players, one should not overgeneralise these responses as definitive indicators of how a game experience may be used as an educational tool. Given the response, we suspect that many would enjoy a deeper dive of looking at historical context—seeing how this could be possible to use as an educational resource. But critiques, like suggestions for clearer rules or game mechanics that are more effectively woven into the educational content, show where there is room to make DoW better. To further expand on the findings, longer and more detailed player experiences should be sought out by means of including pre-assessment surveys to inquire about participants' background with card games as well as qualitative interviews that can shed light on how players perceived different elements present in DoW. Also, more expansive and heterogeneous samples are needed to confirm these consequences in extended games of different game types. Overall then, the study results presented above indicate that while it holds potential as an instructional intervention for fostering historical thinking and SDL behaviours among those who play it is certainly suggestive of that—interpretive caution is warranted concerning the DoW game. Thus, more research on game design and implementation mechanisms is needed to improve the educational effects of history

education using games (and other subjects) in the learning context.

Developers could use this feedback to refine the DoW game, enhancing its appeal and educational quality. By aligning with GBL principles, they can improve the game's impact, making it more immersive and educational.

This analysis suggests a framework, the Historical Engagement and Learning through Gaming (HELG) Model, for developing educational games that not only entertain but also significantly enhance learning outcomes in history education. This model is crafted from key components identified as vital for the success of educational games, aiming to optimise historical thinking and SDL.

Use of Generative AI

Quillbot was used to help refine text into manageable portions for the manuscript.

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Can history be used to build the nation? An analysis of the idea of a compulsory school history curriculum in post-apartheid South Africa

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Abstract

Despite the critical role of education in peacebuilding, few studies in South Africa have interrogated the role of the school history curriculum on nation-building, leaving a critical gap in our understanding of the impact of a wrongly designed, developed, and implemented history curriculum. This conceptual paper, informed by the sociological foundations of education, responds to one question underpinning this study: What opportunities and threats are there for making school history compulsory in a country composed of diverse histories? Using the case of South Africa, the paper deploys document analysis to explore the risks and possibilities for making a school history curriculum compulsory. The findings replicate that making school history compulsory can be useful for nation-building. The study also argues that school history has two faces: rather than promoting nationalism and social cohesion it can also be a wedge that divides and fragments the society. Considering

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these findings, the study argues that the curriculum is a product of people and recommends that the school history curriculum in any country must be a selection from the history of all people. Significantly, this study extends and enriches the yet small number of studies that debate making school history compulsory for nation-building. The paper contributes practical insights into how the school curriculum can be designed, developed, and implemented for the good of the whole nation.

Introduction

While empirical evidence exists on the critical role of education in peacebuilding, little is documented in South Africa on the impact of the school history curriculum in nation-building. This conceptual paper navigates this under-researched territory and explores the opportunities and challenges of making the school history curriculum compulsory in post-apartheid South Africa, a country characterised by a heterogeneous society. Before 1994, South Africa was marked by racial segregation in all aspects of social, political, and economic life. The arrival of Europeans in Southern Africa, their progressive subjugation of African peoples, the creation and exercise of colonial power over Africans, and, subsequently, apartheid all had significant effects on group identity development and social cohesion (Baloyi, 2017). Despite the known immense contribution of education in peacebuilding, few studies in South Africa have interrogated the influence of the school history curriculum on nation-building, leaving a critical gap in our understanding of the impact of a wrongly packaged history curriculum. While a good curriculum draws from the histories of all kinds of people in society, namely the minorities, majorities, once colonised, colonisers, men and women; a wrongly packaged curriculum is selective and its narratives are confined to very few people in the country. What ignites this study is that the purpose of school history is always being questioned anew because societies are constantly re-locating themselves (Furrer et al., 2023). What we little understand in the studies is an analysis of the opportunities and threats of the proposal to make school history a compulsory subject in South African schools.[1] The current study contributes to this debate using sociological perspectives as the theoretical lens. The study is underpinned by the question: What opportunities and threats are there for making school history mandatory in a country? The study argues that history can be used for nation building and this can be possible when history is made compulsory. Nation-building is constructing or structuring a national identity using the power of the state (Mylonas, 2017). The goal of nation-building is to bring the people of the state together so that the country can endure politically and economically. Given the limitations of the current school history curriculum as explained by the History Ministerial Task Team (HMTT) (2018), the study claims that a

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1   History Ministerial Task Team (HMTT) was set up in 2015 to investigate whether history should become a compulsory subject in the school curriculum. Then the Ministerial Task Team, after public consultations, recommended in 2018 that history be made compulsory at the Further Education and Training (FET) phase (Grades 10-12). Up to the time of writing this report, History has not yet been made compulsory.

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new curriculum can be crafted that considers all citizens to build South Africa and be made compulsory to all phases of education in South Africa.

By exploring the opportunities and constraints derived from making school history mandatory in a country, the study hopes to unlock more practical insights into how the school curriculum can be designed, developed, and implemented for nation-building. The paper extends and enriches the yet small number of studies that debate making school history compulsory in nation-building.

Literature review

Post 1994 history reforms in South Africa

Dismantling the education system implemented during colonial apartheid, which was based on race, class, gender, and ethnicity and prioritised separateness, overlooking shared citizenship, has been a monumental task for South Africa since the country's independence in 1994 (Maluleka, 2023). In response to that segregation, numerous curriculum reforms were implemented across all subject areas. The curriculum for school history was not an exception, and changes were made in three different areas. As explicitly explained by Maluleka (2023) the reforms made sure that history teachers and their learners acquired the necessary historical skills needed to engage effectively and meaningfully with the past, developed a common national identity through studying history, and finally encouraged social cohesion in the hopes of breaking down racial, class, and ethnic boundaries by recognising the problem of prejudice and the challenges that a multi-cultural community faces. The reforms were facilitated by the rainbow nation discourses, which assumed that a new country would be reborn and that the newly created South Africa would primarily depart from apartheid's racist and racialised logic, fostering diversity, social justice, and democratic tolerance in its foundation (Hlatshwayo, 2021). As a result, the history curriculum has undergone numerous reforms, ranging from cleansing the content following apartheid to eliminating disciplinary boundaries (HMTT, 2018; Wasserman et al., 2023).

The first attempt at curriculum reform resulted in the introduction of the Interim Core Syllabus (ICS), which sought to rid school history of any sexist or racist content, eliminate inaccuracies in subject content, and establish a common core curriculum (Bertram, 2006; Maluleka and Ledwaba, 2023). In 1997, the Outcome-based Education Curriculum 2005 (C2005) was adopted as the second attempt at changes that abolished disciplinary barriers and fostered a constructivist approach. The failure of the C2005, which was attributed to

'its epistemic and recontextualization logics were still very much dominated and controlled by government officials, academics, policymakers, curriculum developers who were still very much aligned with colonial-apartheid' (Maluleka, 2021: 78), led to the adoption of the third curriculum reform, the Revised National Curriculum Statement (RNCS) in 2002. This reform was intended to encourage reparation, reconstruction, and reconciliation while remaining outcome-oriented. According to Maluleka (2021), Euro-western knowledge traditions and canons have received disproportionate significance in the RNCS, displacing African-centred knowledge forms. To overcome these restrictions, the fourth attempt at curriculum reform, known as Curriculum and Policy Statement (CAPS), was launched in 2011. This reform reduced the history curriculum and returned to a content-based approach, with a stronger emphasis on citizenship (HMTT, 2018). While the content of teaching African History in CAPS remains sanitised, there were concerns that the youths in South Africa do not respect their country's and the African continent's histories. As a result, calls have been made to make the school history curriculum compulsory for the Further Education and Training (FET) phase (Grades10-12) in South African schools.

It is imperative to note that South Africa has not yet decided to make school history a compulsory subject at Grades 10-12 and thus this is still a contentious issue. At present and as part of social sciences, history is a compulsory subject until Grade 9 and an elective subject at Grades 10–12. The proposal was first premised on the recommendations of the Ministerial Review Committee appointed in 2000 (Maluleka and Ledwaba, 2023), which in part pointed out that there was a need to make the school history curriculum more understandable in South African classrooms (Chisholm, 2005) by promoting values that were:

> To ensure that a national South African identity is built on values different from those that underpin apartheid education. The kind of learner envisaged … is one who will be imbued with the values and act in the interests of a society based on respect for democracy, equality, human dignity, life, and social justice (Department of Basic Education [DBE], 2002: 8).

Second, the History Ministerial Task Team (2018) was formed in response to concerns that South African youths do not respect their country's and the African continent's histories, following a spate of violent and xenophobic acts in 2008 and 2013. The presumption was that these attacks were the result of a lack of awareness about the continent's history (Davids, 2016). Following that, the South African Democratic Teachers Union (SADTU)

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argues that history should be made a compulsory discipline in schools to improve students' understanding of the fact that African countries and Africans are not defined by their borders. That, and subsequent discussions on the idea, sparked a heated debate about the proposal's feasibility since the curriculum derives directly from society and serves as both an ideological instrument and a vehicle for social change driven by the dominant social group (Ndhlovu, 2009). Nation-building is undeniably difficult in countries with diverse cultural, ethnic, racial, religious, and other social identities. To address this difficulty, the Ministerial Task Team (MTT) advised that history be declared a compulsory subject for the FET phase and that the history curriculum should be updated using an African nationalist paradigm influenced by the *Ubuntu* framework (Nussey, 2018). In this study, we set out to proffer insights on the opportunities and threats that can be derived from making school history compulsory in South Africa for nation-building.

Context of the study

The proposal to compulsorily introduce school history at the FET phase in South African schools has generated mixed reactions from diverse academics in South Africa and globally. As confirmed by Furrer et al. (2023) the fundamental uncertainty about the goal and purpose of history education stands in strange contrast to the public sphere because confidence in the orienting function of history in both the present and the future is low. After noticing that young people in South Africa did not appreciate the country's history and that of the African continent, the Minister of Education set up a Ministerial Task Team (MTT) in 2015 and enlisted it to advise on the feasibility of making history compulsory in the FET phase among other tasks (Davids, 2016; MTT, 2018). After public consultation with the country's provinces, the MTT recommended that history be made compulsory in Grades 10 to 12. However, up to now, History is a compulsory subject until Grade 9 which is the General Education and Training (GET) phase. History is an elective subject in the FET phase (Grades 10–12). After the announcement of the intention to make school history compulsory in South Africa, several studies that explored and reflected on the possibility of launching it in all phases in South African schools emerged (Chisholm, 2018; Davids, 2016; Mavhungu and Mavhungu, 2018; Nussey, 2018). A recent study by Maluleka and Ledwaba (2023: 91) reflected on the History Ministerial Tasks Team's report and argued that school history should not be used for 'political expediency that would result in a nationalistic approach to constructing a new school history curriculum.'

Wasserman et al. (2023) employed a case study to interrogate the teachers' opinions

on the matter and reported that two opposing positions emerged, of which some argue for the subject to be compulsory as they regarded it as a way for them to enjoy an elevation of their personal and professional benefit. Other teachers criticised the move as they feared a return to the old times when the subject was employed as a political tool during the apartheid period because by that time the curriculum was tilted towards the ruling class. Less recent studies such as the works of Mavhungu and Mavhungu (2018) reported that it was a noble idea with a novel intention so that learners get a grounding in their country's history. However, Nussey (2018) criticises the proposal because of the fear of the temptation to repeat the faults of the past, namely to use history education during apartheid as an instrument of propaganda and to justify a particular interpretation of the past which stimulated abhorrence and skirmish among a diverse population. The study of Davids (2016) also reveals that the call to make history compulsory in all phases of schools has reawakened this fear. More studies will probably emerge to get insights from stakeholders such as students and parents to have a comprehensive understanding of the proposal. This study adds to these scholarly voices on the debate by using sociological perspectives to interrogate the viability of the proposal.

History curriculum design: A global perspective

History curriculum design and implementation remain a global concern. While some countries push for a school national history curriculum that speaks to their ideologies, others implement the history curriculum faithfully without creating division within the country. The promotion of patriotic history in countries across the globe is attracting considerable critical attention. The concern revolves around transforming school history into patriotic history, which is commonly at variance with scholars and democrats. As Kończal and Moses (2022: 153) argue:

> *The state-mandated or state-encouraged "patriotic" histories that have recently emerged in so many places around the globe are a complex phenomenon because they evolve around both affirmative interpretations of history and celebration of past achievements and an explicitly denialist stance opposed to acknowledging responsibility for past atrocities, even to the extent of celebrating perpetrators.*

This suggests that making history compulsory can be politically inspired and likely to reflect the country's intention to use the subject as a tool to strengthen its hegemonic control at

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the expense of nation-building.

Recent evidence suggests that many countries have changed their history curriculum so that it promotes patriotism and thus becomes commensurate with their intents and ideology. For instance, the Chinese Ministry of Education demanded in 2016 that patriotic education be incorporated into university and school curricula, educating Chinese students to always follow the political party line and strengthen their sense of national identity (Buckle, 2016). Not to be outdone, in America, the 1776 Commission was established in 2020 with the goals of promoting patriotic education and defending American history against revisionism on the left and by liberals (Baker, 2020). Politicians in Germany have openly called the Nazi past 'bird droppings' in the country's one-thousand-year-old history and called for a 180-degree turn in German memory politics to advance narratives that glorify the nation and its merits (Volk, 2022). The Indian state government, as submitted by Sarkar (2022), has reportedly implemented a curriculum on patriotism for all pupils enrolled in all government schools in classes 6 through 8, requiring them to learn about the subject for forty minutes every day. According to the Chief Minister, the foundation of the course is the history of earlier national heroes. In a similar vein, the Russian government has worked to tighten its hold on historical education. The Ministry of Education in February 2013 was instructed to write textbooks that would teach the history of Russia in a way that avoided contradictions (Koposov, 2022). Taken together, these studies provide important insights into how nations promote their ideologies. However, loyal patriotism based on patriotic history can lead to a forced commitment to one's native place, a narrow view of history, and an unhealthy sense of cultural superiority. A non-patriotic history takes everyone aboard and can be used to unify the country. History will teach learners various skills and values, including the promotion of peace, human rights, social rights, empathy, tolerance, and non-racialism. Given such a context, South Africa is on course to make the school history curriculum compulsory after three decades of political independence. In support of that position, this study argues that making school history curriculum compulsory is a noble idea with a novel intention to build the nation. However, this is not feasible with the current history curriculum, considering the weaknesses pointed out by the HMTT (2018). Using sociological perspectives, the study argues for a harmonious history curriculum that can be used for nation-building.

Theoretical framework

This conceptual article uses the sociology of knowledge as a theoretical framework.

The sociology of knowledge is one of sociology's most recent disciplines (Mutekwe, 2012), and it arose from Karl Mannheim's pioneering work. It relates to the existential determination of knowledge (Goodman and Ritzer, 2007), a distinct corpus of writing about the social nature of knowledge. At the heart of the sociological perspectives is the agreement among sociologists that knowledge, or what constitutes valuable information, is socially constructed, stratified, and disseminated. Viewed in this way, knowledge is seen as having a social character. Mannheim (1971) observes that the sociology of knowledge is a field that enables society to examine how the various intellectual standpoints and styles of thought are rooted in an underlying historic social reality. Focusing on the different theoretical viewpoints about knowledge is what Mannheim termed doing sociology of knowledge which implies a process of undertaking a critical assessment of the social roots of knowledge or that which is considered worthwhile knowledge by a given social group (Turner, 1995; Mannheim, 1971; Mutekwe, 2012). According to Coser and Rosenberg (1989) the sociology of knowledge studies the relationship between thought and society and includes the entire range of intellectual activities such as ideologies, doctrines, dogmas, and theological thoughts, among other things. Mutekwe (2012) shares that in all these fields, the main concern of the sociology of knowledge is examining the relationship of ideas/knowledge to the sociological and historical settings in which such ideas are produced and received. Doing sociology of knowledge is appropriate for this study as it can pose questions to challenge certain assumptions about the history curriculum. The theory was helpful as it provided questions such as: what counts as the history curriculum, who defines what suitable knowledge for teaching and learning is in schools, and why knowledge is stratified. As supported by Simonds (1978) the sociology of knowledge promises its followers a careful unmasking of the distortions associated with what counts as knowledge in any given society. The study benefits from the sociology of knowledge as a tool for understanding the social roots of school history, its stratification, and social distribution in South Africa. Employing the sociology of knowledge in this study was useful as it assisted us to bisect the usefulness of the call to make school history compulsory in South African schools by x-raying and undressing the social character in the projected implementation of the history curriculum in the context of South Africa, given that the country is a heterogeneous society.

Methodology

Employing the sociology of knowledge as a theoretical framework, this study explores

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and reflects on the opportunities and threats of making school history in South Africa compulsory, drawing references from the literature. We searched the literature in different electronic databases, namely the ERIC, Google Scholar, JSTOR, and Science Direct, using the phrase 'making school history compulsory in South Africa' as search words. There were over 52 journal articles that appeared initially from various databases. A check for relevance using the abstracts was conducted and 14 articles were engaged for content analysis based on the research question. To complement data from the journal articles, the study employed Curriculum Assessment Policy Statement (CAPS) documents and the Ministerial Task Team Report (2018). The study included document analysis which was effective because the findings were not completely affected by the researchers' influence (Morgan, 2022). As such, using documents as data-generating tools was useful in reducing the researcher bias. The documents also ensured the trustworthiness of the study as they could allow replication of the study (Cohen, Morrison and Manion, 2018). This was quite helpful in examining the contents of documents pertaining to initiatives to make the school history curriculum compulsory. All sociological perspectives were employed to unpack the affordances and threats. They proffered insights on the usefulness and the perceived challenges of making school history compulsory for nation-building and on the way forward. The arguments presented were themed according to sociological perspectives to unpack the research questions.

Findings and Discussions

Functionalists' perspective on making history compulsory

Drawing on the functionalists such as Auguste Comte, Talcott Parsons, and Emile Durkheim, education instils in children the values and conventions that society requires, as does school history. Functionalist theorists maintain that education serves society's needs and is only dysfunctional when social knowledge is so severely criticised as to upset the social equilibrium, lead to social pathology, or have other dysfunctional effects on society (Mutekwe, 2012). Because it is essential for acclimating students to societal norms, school history has a functional purpose for society's survival as well. School history teaches pupils about many cultures, civilisations, and ideologies, building empathy and global awareness. Based on these insights, school history is a gateway to understanding our past, including the victories, failures, and moments that changed humanity. Additionally, as students examine historical events, identify trends, and form conclusions, history fosters critical

thinking skills. However, such attributes are not promoted by the CAPS document at the FET phase as argued by the MTT (2018: 40) report that the main objective of history education is to 'produce a learner who knows the "story" of who we are in its many layers. It is not just content for content's sake as the CAPS history curricula seems to suggest.' This suggests that a new history curriculum is needed in South Africa for those attributes to be inculcated. Since history education has a role in socialising the youth, as pointed out above, where society's identity is passed down from one generation to the next for the benefit of all citizens, there is a need for it to be made compulsory at all levels for nation-building. South Africa must therefore implement a compulsory history curriculum at both the GET and FET phases since history is one of the subjects that can socialise students into good citizens. While some scholars, for example, Nussey (2018) and Jansen (2018) argue that the idea of making history a compulsory subject at schools may reawaken fears of a second abuse of school history like what happened during apartheid, it may be a panacea for South Africa's social ills through its socialisation function. According to Davids (2016), SADTU argues that school history should be taught to develop young South Africans who are patriotic, aware of the nation's past, and eager to help create the kind of progressive society South Africa wants. All of this comes down to the idea that teaching history in schools helps society survive by instilling in young people a sense of nation-building.

Considering that, despite over three decades of democracy, South African society lacks social coherence, compulsory school history is a novel idea (Chimbunde, Moreeng and Barnnet, 2024). With the idea of nation-building and the spate of conflicts in South Africa stemming from differences in race, languages, and culture, we contend that mandatory school history is a commendable proposal with a noble goal if the country is to be rebuilt using school history curriculum. The Department of Basic Education's History Ministerial Task Team report argues that 'history is necessary to inspire the psyche of the nation' (MTT, 2018: 8). This statement also demonstrates how history promotes understanding and problem-solving of the state's tasks and issues (Furrer et al., 2023). To back up this idea, there is a need to adopt an eclectic approach to capture the history of all tribes of the country considering the heterogeneous nature of the society to develop a sense of togetherness. As argued by Hawkey (2015), in most cases school history has traditionally aimed to develop national identity, which is regarded as an important means of providing social cohesion in society. To fulfil this concern, the history curriculum should be constructed around all people's histories to serve as a bridge that connects citizens to different cultures and eras.

We argue that teaching history in schools is functional because it equips the next generation with the knowledge, skills, and perspective to navigate an increasingly complex

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world. Rather than only understanding the causes of past conflicts to prevent future ones or appreciating the origins of modern-day democracy, history also offers a wealth of truths that hold today just as they did centuries ago. Thus, drawing from the functionalist perspective embedded in the sociology of knowledge, we advance that a discourse of nation-building, national identity, and social cohesion using the school history is of national imperative for a successful South Africa. Therefore, an essential function of history is that it presents identities. As such, the history of history teaching in schools is nevertheless marked by the fact that socially desired knowledge is disseminated (Furrer et al., 2023). This implies that South Africa's self-image can be shaped by a national-political view of history and therefore can create the desired citizens it envisages by making school history compulsory in schools. According to Mavhungu and Mavhungu (2018), SADTU advocates that history be a compulsory subject in schools to raise awareness amongst the students that Africa and Africans cannot be defined by borders. To SADTU, making history compulsory to the FET phase is a welcome move and goes beyond nation-building but extends to continent-building.

The conflict perspective and the compulsory school history

The conflict perspective draws insights from Karl Marx who advances the argument that society is made up of social classes competing over scarce resources leading to conflicts. The ruling class dominates the working class. While Karl Marx and Friedrich Engels wrote little about education, their followers called the Neo-Marxists such as Louis Althusser, Pierre Bourdieu, Basil Bernstein, Samuel Bowles, and Herbert Gintis drew on their ideas to amend or extend them (Gwirayi, 2010; Marshall and Scott, 2005) and did a sociology of knowledge (Mutekwe, 2012) by examining how the school curriculum as a value-laden aspect promotes the propagation of ruling class values or ideologies disguised as knowledge (Bowles and Gintis, 1976). According to Cole (2018), Althusser sees education as an ideological state apparatus that propagates the opinions of the privileged implying that the elites may influence and control the educational system to further their goals. Thus, the underlying presumptions of the conflict perspective on educational implications are that the views of the powerful, whether found in mass media, schools, colleges, universities, families, or religion, predominate over those of their subordinates. According to Burges (1985), school knowledge or what passes for knowledge in educational institutions is a product of ruling class ideology designed to distort members of the subject class's perspective of reality and uphold the status quo of social class disparity. Althusser (1971) and Bowles and

Gintis (1976) further note that all the values cherished in educational institutions are pro-capitalist in that in the final analysis they benefit the power elite. As such, the contributors to the conflict perspective view the education system as an extension of the bourgeoisie's ethics and morals in line with their definition of pedagogic relevance (Mapindani, 2015). Benefitting from this argument, the curriculum from the conflict perspective is designed to suit and communicate the intents and purposes of the bourgeoisie for the subjugation of the struggling proletariat.

Employing the sociology of knowledge from the conflict perspective, we argue with Neo-Marxists that making school history curriculum compulsory in South Africa can be used to inculcate the dominant ideology and that what children may learn in schools as school history may be knowledge that is wrapped in the ideology of the ruling class. This is because school history taught in schools, drawing from the Neo-Marxist perspective, can suffer flagrant distortion of historical evidence by the State or elites (Cole, 2018). For instance, attempts may be made to avoid painful aspects of a nation's past that dehumanised people. Cole (2018) also supports that education in everyday usage is no longer perceived as neutral in a party-political sense. We also assert that, even without any attempt at deception or manipulation, most school history teaching will represent the biases and goals of those who create and instruct the curriculum, resulting in an uneven narrative that emphasizes events that further certain political objectives while downplaying others. Such was the case with South Africa's pre-1994 school history curriculum, which was known to be ideologically prejudiced against the vast majority of South Africans and in favour of the political establishment. Because of this, several academics in South Africa worry that making school history mandatory in schools may lead to a repetition of the apartheid era when the history curriculum contained inaccurate facts (Davids, 2016; Jansen, 2018; Maluleka and Ladwaba, 2023; Nussey, 2018; Mavhungu and Mavhungu, 2018). As claimed by Davids (2016), the proposal to make school history compulsory has strong political intentions. In support, Nussey (2018) contends that the proposal has reawakened fears of how history education was abused during apartheid. The fear expressed by academics and stakeholders emanates from the claim by Mavhungu and Mavhungu (2018) that history is written by the victors who have the power to shape historical narratives through school textbooks, public iconography, movies, and a range of other mediums. This resonates with the sociology of knowledge from the conflict perspective that advances the bourgeoisie fails to offer real education, and instead education is used to spread bourgeois moral principles (Cole, 2018). According to Ndhlovu (2009), political elites use the curriculum to safeguard their power. This point was raised by Basil Bernstein, a Neo-Marxist when

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he defined curriculum as a message system and demonstrated how shifts, ruptures, and dislocations at the societal, political, educational, and pedagogical levels manifest as reconstructions at the curriculum level (Ndhlovu, 2009). From the Neo-Marxists' views, school history can destroy a country if the elites are allowed to craft the curriculum on their own. Chimbunde et al. (2024: 898) state that 'some interferences by elites dilute and usurp the strength endowed in a history curriculum that considers all people'. Therefore, we argue with Davids (2016) who contends that school history must be taught to advance nation-building, healing of wounds, and bridge the gap between the rich and the poor in South Africa to enable nation-building. In concurrence, Giroux (1997: 5) claims that history education must provide a vehicle for developing a 'collective critical consciousness, and through developing historical consciousness those who study history are enabled to live together in a heterogeneous society'. Seen in this way school history can be used for nation-building where citizens will live together harmoniously, and making it compulsory will go a long way in reaching this goal.

The feminist perspective

The feminist perspective, an offshoot of the conflict perspective, draws inspiration from the Marxists' views that society is conflict-ridden (Gwirayi, 2010). The feminist perspective is a window through which women's issues are viewed and thus is a perspective for women, about women, and by women. Feminists query men's control and monopoly over the production and use of knowledge. Feminist perspectives address 'the question of women's subordination to men: how this arose, how and why it is perpetuated, how it might be changed and what life would be like without it' (Acker, 1987: 421). To the feminists there is conflict between males and females. Feminists are concerned about the subordinate position of women in society. The perspective argues that the oppression and marginalisation experienced by females are influenced not only by gender but also by other environmental or social factors such as race and class (Msambwa et al., 2024). When juxtaposed with education, feminists argue that schools transmit the ideas and values of males overlooking those of females. As such, their ideas are pushed to the margins because males dominate the society. Borrowing from feminist discourses, school history can be used to transmit male values, the same way it can be used to inculcate the values of the elite. According to Mutekwe (2012), feminists have discovered that there is a tendency for men's experiences and observations to be regarded as knowledge while women's experiences and observations are marginalised in many, if not all, societies. For a balanced school history,

curriculum designers and implementers must not perpetuate male values by glorifying only males through history narratives, pictures, and textbooks but rather must also have women as heroines in the making of a country's history, given that the thrust of feminists is to emancipate women from oppression and exploitation by men. When the school history curriculum captures the women's stories in the national history, then school history seen this way can be used for nation-building.

Symbolic interactionist perspective

Symbolic interactionism seeks to explain how meanings generated during the interaction process influence the development of the self or human behaviour. According to Blumer (1962), the core interactionist perspective is that humans are active, creative, and interpretive beings capable of creating their social world. As such, people create symbols to which they attach meanings and respond accordingly (Ritzer, 2012). These symbols and their meanings are learned or socialised through social interaction. People interact based on shared meanings, and without shared meanings meaningful social interaction may not be possible. Symbols and their meanings are not fixed entities, hence are modified and changed through negotiation. Interactionists argue that social order and change are based on negotiation and shared meaning (Mutekwe, 2012). Drawing from symbolic interactionism, the development of the school history curriculum is a negotiated process that must involve key players to establish social order, which is necessary for nation-building. Furthermore, symbolic interactionism suggests that education is a social construct and therefore the curriculum designers must negotiate with all stakeholders to construct a harmonious curriculum if it is to be used for nation-building. Since meanings are not fixed, so is the school history curriculum. This suggests that the school history curriculum must be revised regularly should it not serve the purpose of a group as exposed by the HMTT (2018). We, therefore, argue that the school history curriculum in South Africa must be renewed first before it is made compulsory if nation-building is to be achieved by that curriculum.

Reflections and the way forward

The importance of school history justifies its inclusion in the curricula of any country. However, making school history compulsory in South African schools has generated debates among academics premised on its feasibility and viability given the heterogeneous nature of the country. Despite many opportunities that school history can offer, it can

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sometimes be manipulated to drive a wedge between tribes, rather than drawing them closer together. In short, school history reflects the society around it. We conclude that school history curriculum packages using an eclectic approach promote tolerance but will have little impact if they are delivered within educational structures that fundamentally promote political expediency. History education cannot succeed without measures to tackle the destructive educational practices that fuel hostility. We argue that making school history compulsory has two faces (Bush & Saltarelli, 2000): rather than promoting nationalism and social cohesion, it can also be a wedge that divides and fragments society.

The erstwhile discussion has shown that since the history curriculum is prone to political manipulation for nation-building, it is essential that both good and bad examples be examined so that we know what to avoid and what to emulate. Furrer et al. (2023: 17) argue that some countries focus on issues of multi-perspectivity, global citizenship, or transnational issues that we believe South Africa intends to do, and 'others demand historical knowledge about their national pasts and seek to encourage a positive view of the nation' When countries avoid the multi-perspectivity approach, it corroborates the Neo-Marxists' view that education is an ideological state apparatus used to disseminate the ideas of the elite. For example, in the United Kingdom the Chief Inspector of Schools made announcements in 2017 that 'pupils should learn how they became the country they are today and how their values make them a beacon of liberalism, tolerance and fairness' (Furrer et al., 2023: 17). In their study, Mbapndah and Eloundou (2023) report that state power and authority are used to influence the teaching and learning of Cameroonians' history for identity construction and nation-building through prescribing the content, purpose, and teaching methods of the subject and that alone has manipulated the school history for identity construction. Zimbabwe is another example of a country in Africa that has used a history curriculum to perpetuate the interests and hegemony of the rich (Ndhlovu, 2009; Ranger, 2004) that cannot be reconciled with the notions of respect for diversity and cosmopolitanism. For example, the history curriculum that was made compulsory in Zimbabwe was officially called Syllabus 2167. That syllabus was crafted in such a way that it lessened the analytical load of earlier curricula and presented a national history of the struggles for independence by the key Black Nationalist movements in Zimbabwe against imperialism (Moyo, 2014). That demonstrated a state-driven fixation with history—but for political reasons, and not for educative analytical purposes.

While learners in South Africa must be taught in line with the nation's aspirations, we also believe that the way the school curriculum is designed and implemented must be treated with caution given the heterogeneous nature of the country. The obvious danger

of any history curriculum that is politically subordinate as in Zimbabwe, is that it does not produce critical history graduates but instead extremely biased and dangerous citizens who cannot embrace difference and diversity (Ranger, 2004). Thus, it becomes highly undesirable for students to be exposed to misinformation peddled in history classes, which can lead to violence, hatred, or discrimination. Since the government plays a central role in the development and reproduction of society over time and geographical area, we implore the South African government to adopt a multi-paradigmatic approach to school history curriculum design and implementation to help beneficiaries unmask the distortions associated with the social roots and social stratification of what counts as school history in the classroom. The MTT (2018: 40) advises that the various 'contextual factors and concerns or challenges specific to South Africa would have to be carefully considered, for example: capacity, teacher training, content, budgetary implications, and planning'. This shows that making school history compulsory in schools needs resources.

Doing the sociology of knowledge, phenomenologists view knowledge as inter-subjective or social where there is reciprocity of perspectives in which people assume that other people exist and objects are known or knowable by all (Mutekwe, 2012; Turner, 1995). This suggests that the assumption that education transmits elite values and intents is not completely true since the education system is a dialogue between entities that encompasses stakeholders, teachers, and students (Alant, 1990). Given the diversity and inequities in the South African education system, there is a need for the South African government to engage all tribes and key stakeholders for homogeneity in curriculum design and implementation of a compulsory school history curriculum in school. Consequently, students will be examined and instructed using the same rubrics irrespective of their race, sex, social class, or ethnic background.

Now that we have seen the fears expressed by the academics in their studies, we suggest that history must be compulsory on condition that the curriculum content covers national issues without favour and that the textbooks are edited so that they articulate the desire of the people of South Africa rather than be confined to the ruling class. So, when South Africa intends to make history compulsory, it must determine whether it will be a tool by the ruling class by checking the composition of the curriculum designers, the topics to be covered, the teaching methods, and the textbooks to be used. These three are intertwined and inseparable. All stakeholders including parents, academics, teachers, policymakers, and community and church leaders must be consulted to develop a comprehensive history curriculum. This suggests that diverse groups come together to make a harmonious curriculum possible at school, district, provincial, and national levels. The findings from

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these levels on the harmonious curriculum are then collated and refined at the national level by experts drawn across political divides.

We advance the proposal that when South Africa finally decides to make the history curriculum compulsory, it must ensure that the textbooks do not communicate the positions of the ruling class. Clark et al. (2024) remind us that in many educational jurisdictions around the world, textbooks are either selected or developed under government direction and then officially approved for classroom use. As such, if not properly edited, the chances are high that the books may be written to suit the political circumstances which might promote divisions among the people of South Africa. This is common in countries where totalitarians are reigning. For example, authorities in Hong Kong recently erased references in new textbooks to the fact that it was a colony of Britain from 1898 to 1997 (Oung, 2022), and Russia is currently reviewing its history textbooks to make them more patriotic by removing references to Ukraine (Clark et al., 2024). We argue for neutrality in the production of textbooks because history textbooks are the official source of knowledge that usually portrays the preferred history of the nation.

Conclusions

The study set out to explore the opportunities and threats for making a school history curriculum compulsory in South Africa for nation-building. Given the diversity and inequities in the South African education system, using the school history curriculum to promote social cohesion and nation-building is a noble idea with a noble intention, though it is a long process. We contend that school history in South Africa can be used to build the country. However, the current form of school history cannot achieve this given the limitations cited by the HMTT (2018). We conclude that if the country intends to use history for social cohesion and nation-building, the current curriculum must be revised so that it aligns with all people's aspirations in the country because sociological perspectives have assisted us in understanding that knowledge or what counts as valuable knowledge is socially constructed, socially stratified, and socially distributed and so does the school history curriculum. Taken together, we argue that the HMTT's (2018) recommendations to make school history compulsory at the FET (Grades 10-12) as well, after consultations and undertaking several case studies, remains valid and can promote nation-building. We argue that in South Africa nation-building efforts can be aided by the way historical events and activities are portrayed, packaged, and distributed. Seen this way, school history education is a vital component for creating, preserving, and fostering a shared sense of

national identity. The subject also conveys collective historical memory and shapes imagined communities, hence better positioned to further the interests of the state in nation-building. Arguing from a functionalist perspective, school history has the potential to boost nation-building as it allows a social process of 'transforming a divided society into a community with peace, equal opportunities and economic viability within which individuals enjoy dignity, basic human rights and the prospect to observe their own culture and language in harmony with other people who may function within other traditions' (Vorster, 2005: 474). History education and history curriculum reforms can therefore be used by different nations to instil the values of patriotism, national identity, and cultural heritage (Zajda, 2015), provided it is a result of unbiased interpretations. Consequently, that will lead to building a nation of citizens who respect democracy and tolerance of others. As such, school history provides a common ground, regardless of age, race, language, or religion, for cultivating a sense of national belonging, loyalty and political consciousness, and encouraging constructive criticisms towards the institutional structures to enable self-improvement. As such we see no harm in making school history compulsory in South African schools to foster nation-building. When countries such as the United Kingdom, Cameroon, and Zimbabwe have adopted a nationalist history, is it wrong that South Africa also took the same stance but with caution? What is important for South Africa is to learn the limitations witnessed in other countries and then purge the threats to make school history usable for nation-building efforts. The study is limited because data generated were from journal articles and policy documents. Further empirical studies can be undertaken to enrich, confirm, or reject the findings and discussions made herein.

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The pros and cons of history as a compulsory subject in South Africa from the lens of history teachers in the Frances Baard District

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Abstract

The recommendation by the Basic Education Ministerial Task Team to phase in history as a compulsory school subject from Grades 10 to 12 in the Further Education and Training (FET) phase has been one of the most controversial curriculum topics in South Africa in recent years. This uproar can be connected to the fact that the importance of history as a school subject has been topical at local and international levels including certain countries phasing out the subject. This study aimed to establish the views of history teachers from the Frances Baard District on the effectiveness of the call to make history a compulsory subject in South Africa particularly during the FET phase. This study used a qualitative research approach that employed an interpretive paradigm. Semi-structured interviews were employed for data collection and a thematic analysis technique was used to distinguish different themes. Social constructivism was adopted as the theoretical framework to

nuance the findings and determine what influenced the teachers' perspectives. The findings indicated that history is still full of great worth in the social and academic fabric of South Africa and for this reason it should be made a compulsory subject in school. The study also assumes that implementing history in the FET band will give more dignity to the discipline leading to improved teaching slots and times.

Keywords: CAPS; Compulsory school subject; Frances Baard; History; Ministerial Task Team; Social constructivism

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Introduction

History studies past local and global human events that have shaped the present world (Carr, 2018). In the South African context, following the end of apartheid in 1994, significant reforms were introduced to address the injustices of the past. These reforms spanned various sectors, including economics, housing, and education. In the realm of education, policy and curriculum planners implemented several curriculum models: Outcomes-Based Education (OBE) in 1997, Curriculum 2005 in 1998, the Revised National Curriculum Statement (RNCS) in 2002, and the Curriculum and Assessment Policy Statement (CAPS) in 2012. While history played various roles in these educational frameworks, at no point during these phases was there a concerted effort to make history a compulsory subject in the Further Education and Training (FET) phase.

Jansen and Taylor (2003:7) argue that, "Post-Apartheid South Africa has experienced a sequence of policies, regulations, and laws aimed at improving the state and quality of education more than any other transitional democracies." However, despite these extensive educational reforms, the specific question of making history a compulsory subject in the FET phase remained unaddressed. Davids (2016) points out that even after more than two decades of democracy, South Africa continues to struggle with issues such as social cohesion, nationhood, racism, and xenophobia. These social challenges informed the formation of a Ministerial Task Team in 2015 whose job according to Oteng, Mensah, Babah, and Swanzy-Impraim (2023), was to establish the possibility of the implementation of history as a compulsory subject in the FET phase and to engage in comparative analysis internationally in case of implementation.

While debate and discussion continue surrounding the ministerial decision, the voices of history teachers themselves have not often been heard. This omission is significant, given that teachers are the ones who will be expected to enforce any curriculum changes that may result from this debate (Woods *et al.*, 2019). This paper aims to fill this gap by investigating the perspectives that history teachers have on the likelihood of making history a compulsory subject in South African schools, particularly at the FET level because as Sleeter and Carmona (2017) submit, curriculum implementation essentially depends on teachers.

Review of the literature

Status of history in the basic education CAPS

In the intermediate phase consisting of Grades 4, 5, and 6 and the Senior Phase made up of Grades 7, 8, and 9 as prescribed in CAPS, history is compulsory. In these phases, history is combined with geography under the umbrella of social sciences. However, in the FET phase (Grades 10–12), learners have a choice of dropping history and choosing other subject possibilities. Polakow-Suransky (2002) demonstrated that Curriculum 2005 emphasised marketable skills and developments in the area of Science, Technology, Engineering and Mathematics (STEM) to be critical for South Africa's economy. Since history was not consistent with these market requirements, it was downplayed as a compulsory subject.

Making history an optional subject from the FET phase has raised some concerns (Becher and Maclure, 2024). Many think that the exclusion of history from the list of mandatory subjects has a negative impact on society. Some have opposed the recent changes recommended by the Ministerial Task Team (MTT) such as making history a compulsory subject in the FET phase starting from 2023. Curriculum specialists have expressed concerns that history could be used as a political tool to promote specific agendas. Wahlström (2018:33) argues that "national school systems are political projects", indicating that history might serve the interests of curriculum designers rather than promoting critical thinking. Liz (2015) adds that history does not have practical applications in everyday life and suggests a greater focus on science and technology.

Contrary to these counterarguments, history has a core function of orienting citizens to be informed, empathetic, and tolerant. According to Ramphele (2018), "history is about understanding and accepting one another", and states that it is vital that learners be taken through a historical overview of the South Africa experience. Fru (2015) further stresses that the teaching of history cultivates responsibility and cognitive skills necessary for decision-making on issues of society. The CAPS document (2012) subscribes to this view by asserting that history in a democratic state empowers the people to practice, contest, and uphold constitutional rights; confront bigotry; and embrace stewardship of social and natural resources.

Ministerial task team recommendations report

The feasibility of making history a compulsory subject during the FET phase was examined

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by the Minister of Basic Education by a Ministerial Task Team since 2015. According to Van Eeden and Warnich (2018), the MTT's report issued in May 2018 highlighted that history should be taught as an essential subject for Grades 10, 11, and 12 instead of life orientation, starting from 2023. This was the result of a cross-national study. This report also recommended an increase in the teaching time from 27.5 to 31.5 hours per week so that learners could have a minimum of eight instead of the previous seven subjects (Department of Basic Education, 2018).

Some of the MTT's suggestions were predicated on the notion that making history compulsory could address nation-building issues and lack of social cohesion. Nevertheless, these changes present different problems (Sibanda and Blignaut, 2020). For instance, increasing teaching hours would require teacher retraining and adjustments to the school timetable. Moreover, curriculum specialists have raised concerns about the potential political manipulation of the content. It is essential to analyse the report regarding its focus, content, and assumptions to understand the full scope of its recommendations and their impact on teaching history.

The status of history as a school subject in selected countries outside South Africa

To provide a broader perspective on how other countries approach history education, this section examines the cases of the United States of America, Rwanda, and India. These countries were selected because they represent educational systems and socio-political histories relevant to post-colonial and democratic contexts, similar to South Africa (Koopman, 2017).

<u>The United States of America</u>

The educational system in the United States is highly decentralised, and each state has its own curriculum standards that reflect its concerns (Lee, 2002). Due to this, the place of history as a school subject is not fixed, but it differs from one state to the other. Some states have set history as obligatory throughout the elementary, junior, and higher grades while in other states history is recommended for the elementary and junior grades but optional in the higher grades (VanSledright, 2002).

As noted with the decentralised education system in the USA, history has not been immune from controversy regarding its teaching in the country. The Republican/ Democrats' ideological differences have informed changes in learning policies regarding

controversies such as racism, gay rights, and climate change. For example, in Michigan, the Board of Education purged texts from any references to democratic values or gay rights (Fink, Furrer, and Gautschi 2023). This perfectly explains why it is hard to maintain a non-politically charged history syllabus in a polarised society. The USA has learned some lessons that could help South Africa, especially regarding the issues of civic education and political polarisation.

Rwanda

In Rwanda, history is taught from lower primary to lower secondary level, with lower primary being from Grades one to seven, and lower secondary from Grades eight to nine (Department of Education, 2010). In these grades, history is offered with social and religious studies making the learners learn the association between history and social practices. At the upper secondary level, history appears as an individual content area and may or may not be taken together with other contents (Moshman, 2015).

Rwanda's perspective of teaching history emphasised the approach to nation-building and reconciliation. After the 1994 genocide, the government realised that history education has the potential of fostering unity, reconciliation, and peace. The efforts to promote history-citizenry synergy in secondary grades are intended to prepare citizens for functioning in the Rwandan socio-political context (Moshman, 2015). This constitutes a useful lesson for South Africa where history could also be employed to unify the nation and compensate for problematic aspects of social segmentation.

India

In India, history is a part of the curriculum for social study starting from Grades six to nine (Moshman, 2015). In the humanities stream, history is offered as an elective course in Grades 10 to 12. Due to the focus on STEM areas in the Indian educational curriculum, history is given little importance as the government has relegated subjects considered less relevant to the economic potential of the country (Clarke, 2018). The case of India highlights the tension that exists between economic gains and cultural and historical knowledge retention.

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History as a compulsory subject: International lessons and implications

South Africa can learn important lessons from the United States, Rwanda, and India about the implications of making history a compulsory course. In the USA, history has been used to support the principle of civil tolerance alongside supporting civic values albeit with controversy. Analysing the Rwandan history curriculum after the genocide has shown that reconciliation and unity can be important outcomes of promoting history education (Fried, 2017). The case of India where the history course takes a subordinate role to STEM subjects indicates how the subject can struggle to remain relevant as the economy advances.

History as a compulsory school subject to promote social cohesion and nation-building

In recent times South Africa experienced numerous racial and xenophobic incidents that have threatened social cohesion and nation-building. Nussey (2018) states that the common occurrence of xenophobia in South Africa is clear evidence of the youth's lack of historical knowledge and appreciation for humanity and diversity. In Nussey's argument, this would mean that if history is made a compulsory subject, a sense of multiracial, multicultural, and diversity appreciation will be instilled in the youth. In Nussey's study, there is much emphasis on the African philosophy of *Ubuntu*, which is regarded as one of the important human traits in African people. Social cohesion, nation-building, and *Ubuntu* can be enhanced if history becomes compulsory. Masooa and Twala (2014) state that as much as society is dominated by the demand for science and technology, the place and role of history should not be underestimated as it plays an important role in shaping and moulding people and society. The authors make this statement by looking at how history contributes to build conscious citizens who can value the history of society. Some teachers argue that mandatory history would elevate their personal and professional status and that of the subject (Wassermann, *et al*, 2023). This can be achieved by emphasising a memory-style, politically orientated history which would turn learners into good citizens knowledgeable about South African history. At the same time, the perceived generic value of the subject would be shared with parents, teachers, and learners alike.

Therefore, a viable way to build and establish well-rounded, responsible citizens is by emphasising the study of history at school, which can be achieved by making the discipline compulsory.

Arguments against history being a compulsory school subject

There is also literature that opposes the decision of history as a compulsory school subject. For instance, Legodi (2001) argues that history education will be used as an instrument of propaganda to justify or legitimise a particular interpretation of the past. Because education is the foundation of every country, this is the way that a country builds its desired citizens. Therefore, history as a school subject may imprint biased political ideas. Mosooa and Twala (2014) also allude to the fact that teaching compulsory history in many parts of the world has been and still is well aligned with promoting political ideologies and political exigencies. Drawing from South Africa's difficult past, teachers in a similar study conducted by Wasserman, *et al* (2023) were concerned that history as an analytical discipline need not become compulsory because in the process it will be devalued and become a political tool in a manner reminiscent of the apartheid era.

Social constructivism theoretical framework

Social constructivism is the process through which individuals construct knowledge based on their subjective experiences, ideas, and social interactions (Haryadi and Nofriansyah, 2016). According to constructivist theory, knowledge is constructed and therefore people who are learning make their construction based on their existing experiences and ideas (Mogashoa,2014). This study utilised social constructivist theory because the history teachers' perceptions developed from their teaching practice and concern for mandatory history education. The aim is to uncover the complexities of making history a compulsory subject through the lens of those who will ultimately be tasked with its delivery: the teachers themselves. Based on the argument of Haryadi and Nofriansyah (2016), two major concepts are associated with social constructivism, namely, knowledge construction and cognition-accommodated concepts. This research adopted the constructivist research paradigm by engaging history teachers in the co-construction of knowledge regarding the proposed subject becoming compulsory. Haryadi and Nofriansyah (2016) also second the view that knowledge and ideas are constructed by the social context. The social context was considered in this study through the recruitment of history teachers from three different demographic backgrounds. Consequently, the views expressed by those teachers were shaped by the different social contexts of their lives. Moreover, as supported by Barak (2017), in line with social constructivism, it was found that raw knowledge is constructed in social practice and then individually appropriated.

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Methodology

According to McMillan and Schumacher (2010), qualitative research is especially suitable when a researcher has the intention to establish the participants' perceptions, views, and experiences. As was mentioned earlier, the objective of this study was to identify the attitudes of history teachers to the option of making history a core subject; therefore, a qualitative research approach was most suitable. This paper also employed an interpretive paradigm, which according to Given (2020), enables the study of interpretive rather than determinative paradigms. This paradigm was chosen to facilitate an understanding and explanation of the findings from the participants' perspective.

The target group for the study was the history teachers in the Frances Baard District. Six teachers from the FET phase were purposively sampled from this population. Employing purposive sampling, which does not involve random selection of individuals, participants appropriate for the research problem were selected (Allwood, 2012). Particular attention was paid to ensuring that the selected teachers have experience teaching history in the FET phase. The teachers in this study are referred to as Participants A, B, C, D, E, and F for anonymity (Van den Berg and Struwig, 2017).

Semi-structured interviews were used to collect the data because they provide the freedom of an unstructured interview while they have a structure that guides the interaction between the participants (Easwaramoorthy and Zarinpoush, 2006). This process allowed the participants to give more elaborate information regarding observed tendencies and ideas and expand the list of topics that might be important during the discussions. Face-to-face interviews were also used to afford every opportunity to get to know one's respondent and to guarantee specificity and confidentiality. The technique used in the data analysis was thematic analysis. Alhojailan (2012) defines thematic analysis as analysing data by identifying themes that emerged from the coded data. As with all the participants in the study, their responses were systematically coded to identify similarities. These commonalities were then sorted into related themes that provided the essence and voices of the teachers regarding the concepts.

Findings and discussions

The data collected through interviews were analysed, coded, and grouped into different themes based on the research objectives. The findings were categorised into pros and cons, as promised in the title and the aim of the study.

Content overload

The first theme that emerged was content overload, reflecting teachers' concerns about the amount of material in the current history curriculum. Participants A, B, D, E, and F expressed similar views on this issue.

Participant A mentioned that:

"My wish is that some content should be removed because it's way too much, and here at our school, we have countless problems which affect teaching and learning, eventually making learners lose interest in the subject."

Participant B shared similar thoughts, stating:

"Most learners are lazy to read; history requires a lot of reading and understanding because the topics are many and interrelated."

While these responses highlight the challenge of content overload, it is essential to relate them to the issue of making history a compulsory subject. Teachers are concerned that with the current curriculum already demanding extensive content coverage, making history compulsory may exacerbate these challenges, leading to potential disengagement among learners. This sentiment aligns with findings by De Sousa and Van Eeden (2009), who argue that the comprehensive nature of history makes it challenging for students to grasp. Robinson (2019) further supports this by stating that overloaded curricula lead to surface learning rather than deep understanding, a potential issue if history is made compulsory without addressing the current content structure.

However, it is important to emphasise how making history compulsory could either solve or worsen these issues. The concern is that if history becomes mandatory for all students in the FET phase without content adjustments, teachers may continue to prioritise curriculum coverage over in-depth learning.

Participant D also remained within the borders of content overload by stating that:

"History is a content-driven subject…. It requires a lot of reading. Learners end up getting discouraged and only study for assessment purposes and not to learn really".

Participant D further explained the complexity of history as a subject and of misconceptions

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that might occur as a result of the overloaded content. Furthermore, Participant E shared the same opinion as other participants by stating that "the only hiccup can maybe be that the contents are far stretched and too much". Participant E implied that the contents of the subject are overloaded, which according to Davidson (2018), is perceived by learners as a barrier. Participant E also stated:

"But Yoh! …, the time given for us to complete the syllabus is not equivalent to the contents that need to be taught. Sometimes we end up teaching for assessment purposes and suffocate intensive teaching and learning".

This means that the academic year allows too little time to cover the contents of the subject. Participant F argued that content overload leads to teachers emphasising coverage at the expense of in-depth teaching and learning. The perspectives shared by the participants in this theme are supported by Schmidt and Houang (2012) who state that priority is often allocated to the coverage of wider content which leads to more surface learning rather than deep learning. This is also supported by Robinson (2019) who argues that lately schools are characterised by overcrowded classes which results in teachers being overwhelmed by marking; they end up teaching for assessment instead of understanding. To further support and elaborate his argument, Robinson (2019) continues to argue that school management teams rely a lot on numerical targets with the priority being on examination results instead of qualitative targets which is in-depth teaching or learning. This pressurises the teachers to meet expected targets by management and the teachers end up pushing for curriculum coverage and assessment-based teaching to satisfy targets set by management instead of teaching for understanding (Lund and Kirk, 2019). These perspectives shared by teachers under this theme are also parallel to the social constructivist theory by Brau (2020) who adds that individuals draw conclusions to a certain social phenomenon based on their social and contextual experiences. Taking into account the responses received from participants, it is evident that their perspectives are influenced by their social and contextual experiences as most of their responses are drawn from their experiences in teaching the subject.

History as an easier option

The second theme that derived from the analysed data was history as an easier option. The responses of participants C, D, and F made it clear that history is used as an easier option by learners. Participant C responded by stating that:

> *"I have also realised how learners tend to see history as a subject they can run to when the going gets tough with their other subjects, apart from learners escaping to history from math and science, they also do not seem to have much interest in history and fully learning it, and that becomes a defect in the subject because they only do it to pass".*

Participant C touched on the trend that some learners choose history only as a subject to avoid the challenges and difficulties of maths and science. These perspectives from participants are in line with claims made by Wassermann *et al.* (2018), who state that in the majority of schools, history is mostly reserved for learners who can't cope with science and mathematics. This implies that history is used as an easier option subject. Participant D concurred by stating that:

> *"All learners want is a matric certificate, therefore, most learners choose and go for history so that they can have an easier way out of the FET Phase. For example, you will always find a class of physical science having far way fewer learners than in history".*

Participants C and D shared the same sentiments that learners take history as an easy way out to escape maths and science. Participant D mentioned the higher number of learners in a history class than in maths and science classes. The participant responses are in line with the opinion of Kastrup and Mallow (2016), who state that learners have anxiety about maths and science. Participant F also touched on the issue of history being used as an easier option by stating that, "some learners have the perception that history is an easy subject and only choose it to pass". All the above quotes imply that history is used as an easier option subject.

History must become a compulsory subject.

Another theme that was discovered from the analysed data was a clear call from history teachers that history must be converted into a compulsory school subject in the FET band. History is currently a selective subject in the FET band whilst other subjects such as life orientation and mathematics are compulsory subjects across the FET curriculum. History as a compulsory subject would imply it is no longer an optional subject but a subject that is taught to all learners in Grades 10-12. All participants interviewed in this study submitted that history should become a compulsory subject in the FET Band. There was a high level of support for history to become compulsory, as can be seen from the participants' responses.

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Participant A agreed by stating that:

> *"I think it is good. History is a dying breed, and it should be made compulsory because it helps us all to become more sympathetic and understanding towards what happened in the past".*

Participant A agreed by referring to how it can assist the nation and individuals in understanding our past. However, participant B agreed on the basis that the subject might be taken seriously by learners if it became a compulsory subject, stating that:

> *"The importance and significance of the subject can and will only be visible to the learners if it becomes a compulsory subject".*

On the other hand, Participant C condoned history becoming a compulsory subject and supported the idea by touching on issues of nation-building. Participant C stated that:

> *"The recommendation that history should become a compulsory subject across all South African schools, allows for the present generation to better confront nation-building issues because we will understand where we come from as a nation. Therefore, I condone the proposal that history should become a compulsory subject".*

Participant C believed that for nation-building to take place, history needs to be made compulsory so that as a nation we understand where we come from. These claims are supported by Ramphele (2018), who states that:

> *"We all know that history teaches us about empathy and tolerance. We think that it is important that all our learners are exposed to the struggle and our history".*

Participant D specifically touched on compulsory history as a healing mechanism by stating:

> *"I think I fully agree with that. What is wrong with it being taught across all grades? My reasons are history brings healing, closure, and discipline. I quote Desmond Tutu, there is a need to confront the past deal with it and healing will take place."*

Participant E also condoned history becoming a compulsory subject by stating, "yes, it will help learners avoid repeating the mistakes of the past". Participant E's view was that history as a compulsory subject would be able to assist learners and the nation at large to learn from past mistakes and avoid making them again. Last, participant F also agreed that history should become a compulsory subject by stating:

> "It is about time our learners know where they come from to truly know where they are heading systematically, academically and socially."

The views of the participants are supported by Fru (2015), who states that the teaching of history allows learners to become responsible, reflective, and active citizens who can make relevant and informed decisions regarding societal issues.

History as a compulsory subject will help South Africa promote nation-building and social cohesion.

The fourth theme in this study was that compulsory history will promote nation-building and social cohesion. All participants believed that history as a compulsory subject could help South Africa in nation-building and social cohesion. Participant A believed that history as a compulsory subject can promote nation-building and social cohesion by stating:

> "I think good history education if taught well to the student may teach them not to repeat the past which in many ways will motivate learners to work together and create a better- future for everyone."

Participant B also agreed that history as a compulsory subject will condone unity and harmony amongst South Africans by stating:

> "Yes, it will make us understand and appreciate our different cultures, religions, and traditional practices. Such will make us come together as one nation."

In support of this response, Nussey (2018) states that the common occurrence of xenophobia in South Africa is clear evidence of the youth's lack of historical knowledge and appreciation for humanity and diversity. Participant C agreed that history can promote nation-building and social cohesion by touching on the current state of South Africa's

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societal and economic differences, and how history as a compulsory subject can end it. This was evident from participants C's response, who stated:

> *"South Africans still look at each other differently because of societal and economic statuses, and this gives rise to social cohesion as a challenge in South Africa, whereas the discussion and teaching of history would work against dividing and uniting the nation based on their historical background."*

Participant D stated:

> *"Yes. As history is revisiting the past, it will teach us about mistakes of the past and rectify them, for example, whites would learn what has happened and rectify their mistakes and blacks will also learn and rectify their mistakes as well. To add on that, nationalism was achieved with gruesome measures done by whites and blacks, especially in our country, such measures need to be taught at the school level and to take account of their action, this will enhance social cohesion and nation-building without anyone being blamed for what has happened in the past".*

Participant D reflected on critical historical events which could serve as a reminder of where we come from as a nation and how such events can encourage nation-building and social cohesion. Participant E also believed that history as a compulsory subject could promote nation-building and social cohesion by stating:

> *"Yes, it will help learners avoid repeating the mistakes of the past. By understanding how our history informs our current attitudes towards each other, we can begin to understand each other and to come together to build the nation".*

Last, participant F joined all other participants in agreement with the view that history as a compulsory subject can promote nation-building and social cohesion. Participant F reasoned:

> *"In my capacity, history as a compulsory subject will help us as South Africans to form a socially cohesive and united nation because disparities, or rather problems, that we presently face as a society could most definitely be traced to the past."*

All participant responses are substantiated by Masooa and Twala (2014) who state that as much as society is dominated by the demand for science and technology, the place and role of history should not be underrated as it plays an important role in shaping and moulding people and society. All perspectives shared by teachers under this theme are in line with the recommendations made by the Ministerial Task Team which was appointed to do a study on the feasibility of history becoming a compulsory school subject in South Africa. After a series of research and comparative studies, the Ministerial Task Team recommended that history become a compulsory school subject in South Africa.

Teacher empowerment

All participants responded by stating that there is a need for teachers to be trained hence the theme of teacher empowerment. All participants highlighted different reasons why they think it is important to train teachers. Participant A touched on the need for both in-service and preservice teachers to be trained in alignment with the new content, by stating:

> *"Preservice - these teachers need to be well-trained. The content which is introduced will be new to them, and they need to be taught the right skills. In service - these teachers will need to be taught about the new content."*

Participant B believed that teachers need to be trained so that they can gain sufficient subject knowledge and master history as a subject. This is evident in Participant B's response, which stated that:

> *"The teacher should gain enough knowledge on history as a subject matter, as he or she will be the one who has to help learners to comprehend difficult social and political issues."*

This is supported by the literature drawn from Nolgård et al. (2020), who state that history becoming a compulsory subject needs a great change pedagogically and methodologically in how the subject is taught. Participant C also condoned teacher training and stated that:

> *"Pre-service teachers at higher education levels will need to be trained in line with the revised and modified history curriculum. In-service teachers will also need to be trained by the Department of Basic Education through normal programs like workshops and*

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clinics."

Participant C considered how teacher training should be executed in the two education sectors. Participant C highlighted the role of higher education in pre-service teacher training and also emphasised the role of the Department of Basic Education in in-service teacher training.

Participant D stated that "the other thing now is that as teachers, we are lifelong learners, we have to upgrade our understanding with regards to what is our core role". Participant D pointed out that the role of the teacher changes with time, therefore teachers need to be trained to match the current expectations of the curriculum and their roles in teaching. Participant E also agreed that teachers need to be trained suggesting that all teachers need to be trained to avoid a shortage of history teachers. Participant E stated that "all teachers should be trained in teaching history to ensure that we do not have a shortage of history teachers". Participant F highlighted the significance of teacher training by stating:

> *"It is also important to note that such a reasonable academic standard for history will also increase. It is about time that we realise that supplementary training for compulsory history teaching will create a major interest for our people to embark on historical programs, subjects, and career paths."*

Participant F looked deeper into how teacher training for compulsory history would raise the level of teacher employment. Participant F also implied that there would be more prospective learners and students embarking on history-related careers. McCully (2012) shares this sentiment by stating that there should be a shift from focussing on lesson plans to developing a historical, inquiry-based methodology. Schellnack-Kelly (2019) also states that if history is taught for two hours per week by people who are not true historians (because there are not enough history teachers), then history may become watered down. This implies that teacher training and empowerment are important elements in the implementation of history as a compulsory school subject.

History as a compulsory subject will prolong the timetable and working hours.

Should history become a compulsory school subject across the FET band, an additional subject will be added to the seven subjects that learners are already studying. According to the views of the teachers, an eighth fundamental subject in the FET band has the potential

to prolong the timetable and working hours. Participants A, B, C, and F believed that history as a compulsory subject would mean that the timetable would be prolonged and working hours would increase. Participant A stated that:

> *"Teachers will work longer and harder. More history pupils mean that the history educator will do more assessments and have more marking to complete."*

Participant A implied that history as a compulsory subject would mean more learners and more learners would mean an increased workload for teachers. This would directly impact the school hours and timetable by prolonging them. Participant B also believed that the working hours and timetable would be prolonged, stating that, "it will affect the timetable and the working hours. Teachers will work longer and harder". These perspectives shared by the above-mentioned participants are supported by the Ministerial task team (2015) which states in one of their scenarios that the teaching time would be increased from 27.5 hours per week to 31.5 hours. The learners would be offered a minimum of eight subjects per week instead of seven.

Participant C also believed that the working hours and timetable would be prolonged. Participant C touched on the current hours allocated to history as an elective subject and how the hours might increase if history became compulsory. This is evident from participant C's response:

> *"Currently, history in the FET phase is allocated four periods per week. Compulsory history means that all learners across the FET band will need to be taught history. This means that classes will increase, and this directly affects the timetable implying that more hours should be added to the timetable making working hours longer."*

Participant F considered the prolonged timetable and working hours as an advantage to teaching and learning by alluding that increased working hours and a prolonged timetable will mean more teacher-learner contact time, which would assist in building effective teacher-learner relationships. This was evident in Participant F's response:

> *"I believe that adding history as a compulsory subject will mean longer learning hours for the student and additional working hours for the teacher. As such this will provide a much more way to effectively enhance teacher-to-learner relationship and contribute to the quality of teaching and learning, not only for history but for other school subjects*

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as well."

The possibility of a prolonged timetable and working hours means that the Curriculum and Assessment Policy Statement should be reviewed as it serves as a policy document that also guides the number of periods that history as an elective subject is given in a cycle.

However, participants D and E believed that the working hours and timetable would not be affected if history became a compulsory subject. This is evident as Participant D stated:

> *"I do not think the impact will be that much because like I said, everything needs to be planned properly to fit in the timetable and school hours without impacting on working hours. If we want this to work, then proper planning needs to be in place."*

Participant E stated that:

> *"If we restructure other subjects and re-evaluate the relevance of some of the other compulsory subjects, then this does not have to affect the timetable too much."*

Participants D and E believed that if proper planning were to be employed and executed, there would not be a need for the working hours and timetable to be adjusted.

History and life orientation are equally valuable subjects.

This theme was derived as a result of antagonistic views by teachers on the prospects of history replacing life orientation (L.O.) as a fundamental subject in the FET band. Participants A, B, and F did not agree with the suggestion that L.O. should be replaced by history. Participant A believed that L.O. is an important subject as it prepares learners for life after school. This was evident from Participant A's response, who stated:

> *"I don't think L.O. should be replaced because it serves its purpose. It in many ways prepares the learners for the realities they will face out of school."*

Participant B stated:

> *"My view is that they should not completely throw out life orientation but rather instil*

history as another compulsory subject in schools. Life orientation equips our learners with other skills such as teaching them how to apply for jobs and prepare them for life after school, I am thus stating that life orientation is equally important."

From Participant B's response, it is clear that Participant B also agreed that L.O. is an important subject as it equips learners with the necessary skills to tackle life after school. In agreement with the reasons provided by participants A and B, participant F also defended the value of L.O. as a subject. Participant F stated that:

"I do not support and subscribe to those suggestions, history as a subject should not take the place of life orientation as a compulsory subject since life orientation plays a significant influence on the daily lives of our learners."

Participants A, B, and F all believed that L.O. should not be replaced, as it plays a critical role in equipping and preparing learners with the life skills needed to survive.

However, participants C, D, and E took the stance that history should replace L.O. The responses from participants C, D, and E were in line with the suggestion from the Ministerial Task Team (Department of Basic Education, 2018:33), that: "History should become a compulsory [stand-alone] subject in 2023 by replacing Life Orientation with it."

The participants gave different reasons why L.O. should be replaced by history as a compulsory subject. Participant C stated:

"To a certain extent, I agree. How about the tables be turned in such a way this same life orientation is only taught in the intermediate phase and senior phase? It will make sense in that way. Then history will be compulsory for all learners in the FET Phase without impacting the timetable and so forth."

Participant C's suggestion implied that L.O. taught until Grade 9 would be sufficient for learners to gain the necessary life skills. Therefore, history could then become compulsory in Grades 10-12 without impacting the timetable. Participant D also agreed that L.O. should be replaced by history by arguing the significance and value of L.O. at the Higher Education level, by stating that:

"Already L.O. is doomed, especially with our higher institutions, as it is not counted in the scores of institutions, so why not replace it with history? And L.O., by the way,

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is integrated towards a lot of subjects, which means learners can still get L.O. in their other subjects as it will be integrated with other subjects."

Participant E joined the same line of reasoning as Participant C. Participant E also agreed that L.O. taught until Grade 9 would be sufficient, by stating that:

"I agree with this suggestion. Life orientation is largely repetitive. Everything that needs to be taught in Life orientation can be covered by the end of Grade 9, leaving that time open for history in the FET phase."

History is a subject and not a political tool

The final theme that derived from this study was that history is a subject, not a political tool. All participants interviewed in this study opposed the claims made by Legodi (2001), who argues that history education could be used as an instrument of propaganda to justify or legitimise a particular interpretation of the past. Participant A placed the responsibility on the teacher by stating:

"No, I do not agree with the claims. It can be used as a tool to achieve political agendas, but teachers should not use it in such a way."

Participant B also agreed that history is not used as a political tool by stating that:

"I do not concur with this statement, I have always thought about history teaching being a platform for learners to see why things are perceived as it is in the present, for them to clear up misunderstandings on social and political issues rather than history being used as a means to pursue political agendas."

Participant C believed that politics have no space in history teaching, as teachers are not politicians. Participant C stated:

"History is taught by teachers and not politicians. So how can it be used as a political tool? Maybe the curriculum planners want to achieve political agendas. However, myself is the teacher and executor of the curriculum I teach history and not politics."

Participant D stated:

> *"I disagree with that, history is about what happened in the past and we cannot change that, hence I said the past can be addressed and be rectified, it would be wrong to say that history is used to achieve political agendas, this is a subject that has discipline because we can learn from it."*

Participant D implied that the contents of istory did not address politics but taught about what happened in the past. Similar to participant A, participant E disagreed that history was used as a political tool, by placing the responsibility on the teacher. Participant E stated that:

> *"It would be the teachers' responsibility to ensure that they teach history in an unbiased way. That way, any political agenda will fail because learners will learn the unbiased truth."*

Lastly, participant F also disagreed with claims that history is used as a political tool, by stating that:

> *"No, it is not. The reality is that our history is our history. It was written and taught in the way that it transpired. Such claims tend to imply that our history should be modified so that it does not offend anyone and that is highly impossible."*

Participant F implied that the content taught in history was purely based on what transpired in the past and did not address any political agendas. The participants' responses all contradicted claims made by Liñán (2012), who states that history is one of the most dangerous weapons that can be used to achieve political aims.

Reflections from the findings

According to the MTT's prioritised list, history was phased in as a compulsory subject from 2023 in Grade 10, from 2024 in Grade 11, and from 2025 in Grade 12. From the participants' responses, it is suggested that there should be an acceleration of the process. As much as the participants appreciated the recommendations being made, some of them brought up the concern that time had already been wasted in coming up with such recommendations.

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According to Hoadley (2017), since history is an endorsed teaching subject that applies critical thinking skills with the ability to address social issues like social inclusion, racism, and xenophobia, among others, fast-tracking is imperative since this could unlock positive changes borne out of the reform.

One of the major concerns was a proposal to address the issue of life orientation by replacing it with history. Most participants were against this notion because life orientation teaches human rights, democracy, and individual transformation. Consequently, the recommendation, in line with Bartelds et al. (2020), is made that life orientation should not be done away with but should instead be timetabled for once in a cycle. This would enable the system to accommodate history alongside the retention of life orientation which empowers learners to face other social/civic and personal challenges.

One of the important questions resulting from the findings was the problem of excess in the use of content in the current history curriculum. In their interviews, participants raised the issue of teachers managing to deliver large amounts of content within a constrained time frame. In light of this, Loewen (2018) recommends that the history curriculum be reviewed comprehensively with the involvement of curriculum designers, history subject specialists, history subject advisors, and teachers. It was stated that the nature of the review should involve the removal of content and its condensation to enable the client to explore critical subjects and not just give cursory attention to several issues (Paraskeva, 2021). This would help teachers to devote adequate time towards effectively and efficiently teaching and learning the content instead of cramming through the content.

In addition, due to current demands added by making history a core subject, it is suggested to increase the amount of time used for teaching. According to Haydn and Stephen (2021), changes to the academic timetables must be done in a way to give history teachers enough time to teach the course effectively and espouse the principles of 'time understanding' rather than 'time coverage'. This would also help prevent the saturation of content and increase substantial interaction with the topic.

Teacher support is another essential factor of this recommendation. Implementing history as a compulsory course will increase the work burden of teachers and make them feel the need to undergo necessary training and other forms of professional development (Crocco and Marino, 2017). The phased-in approach articulated by the MTT should be backed by strong professional development initiatives for teachers to enable them to implement said curriculum in positive ways. Stronge (2018) noted that there will also be a need for sustained professional development to enable the teachers to change and meet the delivery needs of the content.

Lastly, the history learning area should cover a compulsory curriculum that has to foster nation-building and social harmony actively. In the same vein as Fried (2017) and Wassermann, *et al.* (2023), participants in this study believed that history education can promote values such as appreciation, tolerance, and citizenship as well as embracing the multiple histories of South Africa. When history is a curriculum subject of learning learners should be in a position to embrace such values. Hence a positive implication in pulling off an integrated society in as much as issues of inequity, racism, and xenophobia, among others, are of extremely negative implications (Ndihokubwayo and Habiyaremye, 2018).

Conclusion

The debate around the prospects of history becoming compulsory has been a controversial subject within the academic and socio-political space in South Africa. Amid all such debates, it was important to explore the perspectives of history teachers, who through their practices and social experiences have demonstrated with strong convictions the benefits of history becoming a compulsory school subject in the FET band in South African schools. This study concludes that the Department of Basic Education should implement the MTT recommendations.

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Iingoma (Traditional Songs) and Izibongo (Traditional Poems): Implications for History Teaching and Learning in South African Schools

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Abstract

This article examines the embedding of *iingoma* and *izibongo* as valuable historical sources that should be utilised by educators in history classrooms in South African secondary schools. It shows how these sources can be used effectively by history teachers to re-enact the past in the classroom. Interviews with elderly people and *iimbongi* as well as written sources showed that traditional songs and *izibongo* are valuable historical sources that can be used to present a balanced account of the past in the classroom. *Iimbongi* claim that the use of *izibongo* in teaching history enhances understanding of South African history. Thus, *iimbongi* gave their own perspective on the significance and implications of employing *izibongo* as historical sources in the decolonisation of history. Written sources and interviews with *iimbongi* and elderly people were used as a basis for arriving at why and how sources like *iingoma* and *izibongo* may be incorporated into the history classroom to decolonise South African history. Using these historical sources in the teaching and learning of history helps to present different perspectives on the history of South Africa. The incorporation of *iingoma*, freedom songs, and *izibongo* in the Further Education and Training (FET) phase, as well as in Social Sciences, is a strategy to acknowledge and address the biases that exist in written history. It became evident that there is a link between written history on the one hand, and *iingoma* and *izibongo* on the other hand. The link is critical for engaging in the

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process of transforming and decolonising South African history. It is recommended that the Department of Basic Education (DBE) should conduct in-service training/workshops for history teachers.

Keywords: Songs; Traditional poems; Historical sources; Re-enactment; Unforgotten people; Critical method

Introduction

Since the advent of democracy in South Africa in 1994, there emerged a debate around the teaching and learning of history in South African schools. This debate emanated from a view that during apartheid, history was presented and taught in schools in order to buttress the South African government policy of apartheid, which was bent on entrenching separateness, underdevelopment, inferior education for Africans, and inequality in all spheres of life, such as political, educational, cultural, residential, economic, and social areas. Under apartheid laws, South Africans were classified as first, second, and third-class citizens with unequal rights and privileges. These laws entrenched unequal access to resources and opportunities for Africans. Whites were the most privileged class, while Africans enjoyed no privileges at all. According to the "National Party's traditional hierarchical race structure"[1] and racial inequality, the apartheid government enacted laws that discriminated against Africans and debarred them from being citizens of South Africa, thereby pushing them to the periphery of the country.

To contextualise this article, the tumultuous changes that had been effected by the Department of Education (DoE) over the past twenty years and the turbulent history of curriculum transformation in terms of content[2] are examined to show how different history-teaching strategies came into being. Noteworthy, the use of *iingoma* and *izibongo* in history teaching and learning are dealt with in the context of how these historical sources help to decolonise South African history in the classroom.

The desire to transform history and to present it in such a way that it reflects the objective and critical historical development of the people of South Africa gave rise to the introduction of a new education system, Outcomes Based Education (OBE), which intended to prioritise the inculcation of skills, values, attitudes, and knowledge in learners. Killen aptly contends that while teachers have a responsibility to help "learners develop knowledge or skills… no single teaching strategy is effective all the time for all learners".[3] Different factors, most of which are beyond the control of teachers, render the teaching and learning activities a complex process.

The National Curriculum Statement (NCS) for history, in line with OBE, Curriculum 2005 (C 2005), and the Curriculum and Assessment Policy Statement (CAPS), intended

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1   M Lipton, *Capitalism and apartheid South Africa, 1910 – 1986* (Cape Town, David Philip, 1987), p. 23.
2   W Hugo, "Editorial", *Journal of Education*, 60(1), 2015, p. 5.
3   R Killen, *Teaching strategies for quality teaching and learning*, 2nd edition (Cape Town, Juta & Co, 2015), p. 25.

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to make history learner-centred, emancipatory, and skills-based thereby placing learners at the centre of teaching-learning activities. These activities include giving learners topics to discuss as groups based on questions designed by the teacher or assigning learners the roles of historical figures in order to make them empathise with people from the past and understand how and why they acted and/or responded in particular ways. This teaching strategy enables learners to put themselves in the shoes of historical figures in order to enhance their empathetic understanding of the past. Robinson and Lomofsky correctly argue that, while OBE was an approach to teaching and learning, "NCS focussed more on outcomes and integration of content from different subject areas than on teaching content of specific subjects per grade".[4] The latter set out to simplify the teaching approaches and strategies as well as learning experiences. In the words of Killen, most learners "learn best through personally meaningful experiences that enable them to connect new knowledge to what they already believe or understand".[5]

The introduction of CAPS was "a way of restoring teachers' authority as subject specialists"[6], with guidance being given on content specification and clear and concise assessment requirements. The motto of CAPS is structured, clear, and practical instructions, helping teachers unlock the power of NCS. No wonder, then, that NCS and CAPS are based on similar principles, including Indigenous Knowledge Systems (IKS). In terms of the NCS and CAPS requirements, learners must be given tasks/projects and assignments to investigate heritage as a compulsory activity in which learners are required to investigate local or national heritage sites, community memorials, and museums. The DBE prescribes that NCS and CAPS principles should be implemented in the teaching and learning of history. One of the seven principles of CAPS is: valuing IKS by acknowledging the rich history and heritage of this country as important contributors to nurturing the values contained in the Constitution.[7]

Valuing indigenous knowledge systems deals with the acknowledgement of the rich history and heritage of this country as important contributors to nurturing the values contained in the Constitution.[8] These aims can be realised when learners are eager and

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4 M Robinson & L Lomofsky, "The teacher as educational theorist", S Gravett, JJ de Beer & E du Plessis (eds). *Becoming a teacher,* 2nd edition (Cape Town, Pearson Holdings, 2015), p. 70.

5 R Killen, *Teaching strategies…*, p. 26.

6 M Robinson & L Lomofsky, "The teacher…", S Gravett, JJ de Beer & E du Plessis (eds). *Becoming…*, p. 70.

7 Department of Basic Education (DBE), Curriculum and Assessment Policy Statement, History Further Education and Training (FET) Phase Grades 10 – 12. Pretoria, Government Printer, 2011b, p. 5.

8 DBE, CAPS, History FET Phase Grades 10 – 12. Pretoria, Government Printer, 2011b, p. 5.

ready to conduct oral research among the previously subjugated and voiceless people such as workers, women, 'terrorists', and the 'illiterate' class—women, children, and people with disabilities—in order to recover the subjugated voices and the voices of the powerless and the vulnerable groups. Memories and experiences of men and women, the rich and the poor, the voiceless and the politically powerful should be given equal treatment, recorded, and made accessible to humankind through representations in the history of South Africa. These diverse voices should be reflected in history and be heard in the classrooms. Not only should our classrooms become a place where voices are heard, but these voices must also be subjected to critical scrutiny by being critically analysed, debated, and comprehended. Thus, IKS—of which oral tradition, genealogies, chiefs' bulls, songs, and *izibongo* are part—is another significant instrument of re-living the past[9] which, according to Lekgoathi, provides for innovation and critical inquiry in the history classroom.[10]

The Report of the History Ministerial Task Team (MTT) released in May 2018 to Minister Angie Motshekga further drew the attention of stakeholders. The MMT recommended that history be made compulsory in the Further Education and Training (FET) phase.[11] The MTT also recommended that history should not only replace life orientation but also be a stand-alone subject in the General Education and Training (GET) phase. The implementation year was to be 2023, as recommended by the MTT. The challenge of the non-availability of adequately trained history teachers to meet the demand and the timeous provision of textbooks to schools catering for the restructured history content was cause for concern. Hence, the History MTT recommendations have not yet been implemented. Thus, in terms of the History MTT Report of May 2018, history should be made compulsory in the FET phase, with effect from 2023.[12]

Different approaches and strategies for history teaching and learning can be used, including the use of *iingoma* (traditional songs) and *izibongo* (traditional poems) not only as sources of historical knowledge but also as significant components of indigenous knowledge. Both are strategies that can be used by teachers to introduce history learners to various historical perspectives in South African history and to compare written sources with *iingoma* and *izibongo* in interpreting history. Schellnack-Kelly and Jiyane contend that

9   J Mvenene, "Orality: Opportunities and challenges, a case study for research in Thembuland, Eastern Cape, South Africa", *Indilinga: African Journal of Indigenous Knowledge Systems*, 12(1), 2013, p. 35.
10 SP Lekgoathi, "Voices of our past: Oral testimony and teaching history", J Bam & C Dyer (eds), *Educator's guide to the UNESCO General History of Africa for the FET Curriculum* (Pretoria, New Africa Education, 2004), p. 41.
11 E Van Eeden, "Editorial", *Yesterday & Today*, 19, 2018, p. i.
12 E Van Eeden, "Editorial", *Yesterday & Today*, 19, 2018, p. i.

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indigenous knowledge is "a tool fundamental to understanding…the need for Africa to consider this knowledge rather than exclusively"[13] Western-aligned knowledge. Western culture and civilisation have considerable influence on the indigenous knowledge and culture of the African people. Western knowledge systems had made an impact on indigenous peoples' mother-tongue languages. Thus, the main purpose of integrating *iingoma* and *izibongo* in history teaching and learning was and still is to decolonise school history and use African perspectives on historical narratives in the classroom. It also brings diverse teaching and learning strategies for effective and quality teaching and learning into the classroom.

Iingoma, songs, and history teaching

Iingoma and songs, whether freedom songs or songs by mineworkers at work are historical sources that paint a picture of a particular period and the milieu of the time. Indeed, freedom songs can no longer be sung in public spaces as this may likely promote hate among South Africans. However, these liberation songs can be used as a vehicle for transporting learners back to the past and as examples of the content and context of apartheid. In this way, the history teacher can move cautiously and extract what is historically relevant from the songs to enhance learners' understanding of the past.

There is a difference between *iingoma* (traditional songs), *izibongo* (traditional poems), and more contemporary or choral music. *Iingoma*, unlike Western music, are not notated. Hence, reference is made to *iingoma* sung on different occasions, such as *imidudo*, *iigwatyu*, *umyeyezelo*, and traditional leaders' songs. The mention of liberation songs, like *iingoma* by mine workers at work, is relevant because it follows the pattern of traditional songs. Thus, there is a difference between traditional songs and music. The spotlight is on *iingoma* and songs. How *iingoma* and *izibongo* provide more perspectives on South African history is pivotal in decolonising history and introducing history learners to multi-perspectivity and diversity.

Iingoma and songs take learners back to the past and provide a picture of what could have been the historical context and how people thought about their conditions. *Iingoma* were sung without any tune and notations, that is, they are not regulated.[14] They were

13 I Schellnack-Kelly & V Jiyane, "Tackling environmental issues in the digital age through oral histories and oral traditions from iSimangaliso Wetland", *Historia*, 62(2), 2017, pp. 117-118.

14 Khuthala Ngoma, Personal interview on 30 October 2024, Department of Humanities and Creative Arts Education, Walter Sisulu University, Mthatha Campus.

sung on different occasions such as *umdudo* and *umngqungqo*, during *umgidi* ceremonies (*umyeyezelo*) and war times (*igwatyu*). When dealing with relations among the colonial governing authorities, traditional leaders, and missionaries, the history teacher may use *igwatyu* to show African people's determination to defend their land, independence, and prestige against White extension of power into African spheres of influence. On a lesson about Nongqawuse's cattle-killing vision of 1856-1857, and Nongqawuse's blood relation with Mhlakaza, traditional songs can be used to highlight the importance and influence of *amagqirha* during colonial times. Traditional doctors (*amagqirha*) sang *umhlahlo*.[15] TB Soga provides a classification of traditional songs as *Igwatyu* (*eyomkhosi*), *Umqolo wenamba* (*eyohlanga*), *Ingoma kaMhala* and *Ingoma kaNdlambe noNgqika*.[16] The importance of traditional leaders' songs for Africans indicates the respect with which chiefs and kings were regarded. Learners may be made aware of why chiefs' and kings' songs were sung on important occasions like raining ceremonies. Songs served as unifying elements in African communities. They maintained people's allegiance to their traditional leaders.

There were songs of freedom and about the liberation struggle in South Africa. Following the banning of political organisations by the National Party (NP) government in 1960, the African National Congress (ANC) and its allies, the South African Communist Party (SACP) and the Congress of Democrats (COD), operated a clandestine station called Radio Freedom in South Africa. Not only did Radio Freedom broadcast news from the ANC perspective but it also served as a channel to broadcast political music and freedom songs and to mobilise supporters within South Africa.[17] These songs are important because they express the feelings and wishes of the people who fought for freedom. When teaching the Road to Freedom section of Grade 12 history, these songs could add more meaning to the history of the liberation struggle. They re-live the past.

It is important to point out that Gunner comments that "music functions as a trenchant political site in Africa primarily because it is the most widely appreciated art form on the continent".[18] She goes on to state that music is Africa's most prominent popular art and it is most widely and systematically transmitted through the mass media which gives

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15 TB Soga, *Intlalo kaXhosa* (Lovedale, Lovedale Press, 1937), p. 152.

16 TB Soga, *Intlalo…*, p. 152.

17 SP Lekgoathi, "Radio freedom, songs of freedom and the liberation struggle in South Africa, 1963 – 1991", C Landman (ed.), *Oral history, communities and the liberation struggle: Reflective memories in post-apartheid South Africa* (Pretoria, UNISA Press, 2012), p. 187.

18 L Gunner, "Jacob Zuma, the social body and the unruly power of song", *African Affairs*, 108/430, 2008, p. 29.

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it an extremely wide reach.[19] Gunner contends that music "constitutes a large, powerful platform through which public opinion can be influenced".[20] Revolutionary songs and political music served as pervasive and pivotal elements in mobilising the struggle against the oppressor.[21] Freedom songs were the prevalent musical form of popular expression under apartheid especially at mass protest gatherings, celebrations, and political funerals. Freedom songs, together with cultural forms such as poetry, theatre, and dance played a pivotal role in mobilising international support for the struggle against apartheid.[22] One example of a freedom song is given below:

> *Sobashiya' bazali ekhaya*
> *Savuma, sangena kwamanye amazwe*
> *Lapho kungazi khona ubaba no mama*
> *Silandela inkululeko*
> *Sobashiya abafowethu*
> *Savuma sangena kwamanye amazwe*
> *Lapho kungazi khona ubaba nomama*
> *Silandela inkululeko*
> *Sithi salani, salani, salani ekhaya*
> *Sangena kwamanye amazwe*
> *Lapho kungazi khona ubaba nomama*
> *Silandela inkululeko*
> *We shall leave our parents behind*
> *We agreed and we entered other countries*
> *Where neither father nor mother had ever been before*
> *As we pursue freedom*
> *We shall leave our siblings behind*
> *We agreed to go to other countries*
> *Where neither father nor mother had ever been before*
> *As we pursue freedom*

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19 L Gunner, "Jacob Zuma…", *African Affairs*, 108/430, 2008, p. 29.

20 L Gunner, "Jacob Zuma…", *African Affairs,* 108/430, 2008, p. 29.

21 SP Lekgoathi, "Radio freedom, songs of freedom and the liberation struggle…", C Landman (ed.), *Oral history, communities and the liberation struggle…*, p. 189.

22 SR Davis, "The African National Congress, its radio, its allies and exile", *Journal of Southern African Studies*, 35(2), 2009, p. 349; SP Lekgoathi, "The African National Congress's radio freedom and its audiences in apartheid South Africa, 1963 – 1991", *Journal of African Media Studies,* 2(2), 2010, p. 139.

We are saying goodbye, goodbye, goodbye to everyone at home
As we entered other countries
Where neither father nor mother had ever been before
As we pursue freedom[23]

This freedom song takes us back to the apartheid era, which was characterised by brutal oppression when people sacrificed their parents, siblings, and home comforts to fight for freedom. Gasa and Lekgoathi contend that the above-mentioned freedom song originated among black youth expressing pain and resolve to be trained in other countries and return to free their land and people.[24] One informant pointed out that freedom songs were used to encourage freedom-loving people and opponents of apartheid to pluck up courage and be committed to the struggle for a free and democratic South Africa.[25] This was endorsed by Sikhelenge when he claimed that without singing freedom songs it was not possible to face the police dauntlessly and to continue fighting for the liberation of South Africans from the yoke of oppression.[26] They are of historical significance in enhancing the teaching and learning of history in South African classrooms.

Another song that, according to Gunner, "was often [sung as] a means of uniting those who faced a dangerous and powerful enemy, examples of which stretch back at least to the first use of *Nkosi sikelel' iAfrika* by the ANC in the second decade of the twentieth century"[27] is:

Siyaya ePitoli
Tambo siyaya ePitoli
Siyaya soyinyova
Pasopa we mabhulu
We are going to Pretoria
Tambo, we are going to Pretoria

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23 SP Lekgoathi, "The African National Congress's radio freedom…", *Journal of African Media Studies,* 2(2), 2010, p. 141.
24 N Gasa, This song gives voice to our History. *The Sunday Independent*, 12 May 2011; SP Lekgoathi, "Radio freedom, songs of freedom and the liberation struggle…", C Landman (ed.), *Oral history, communities and the liberation struggle…*, p. 189.
25 Wiseman Mbulelo Ntenjwa, Personal interview on 20 August 2012, Qobo-qobo Village, Centane.
26 Ndyebo Sikhelenge, Personal interview on 12 September 2012, Extension 1, Butterworth.
27 L Gunner, "Jacob Zuma, the social body and the unruly power of song", *African Affairs*, 108/430, 2008, p.37.

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We are going to cause mayhem
Watch out, you Boers![28]

On examining the history of the mining industry and the working conditions of the mine workers, a look at songs which mine workers sang when work became unbearable, gives one the feel of the time. The significance of singing by mine workers was that they plucked up courage and were invigorated to continue working through their songs which were sung to the tone of traditional songs. They would sing *Shosholoza*, which ran as follows:

Shosholoza, shosholoza, kulez' intaba (x2)
Isitimela sibuya eSouth Africa
Wen' uyabaleka, wen' uyabaleka,
Kulezo intaba
Isitimela sibuya eSouth Africa
Push, push in those mountains
The train is coming from South Africa
You are running away, you are running away,
In those mountains
The train is coming from South Africa.

The working conditions of the workers are implied in the song itself, as it takes one back into the past and enables teachers and learners to conjure up images of the mining industry, long working hours, hard labour, and how workers united in the face of unbearable working conditions. For a history teacher and learners to understand and reflect on the deeper meaning of 'Shosholoza', they must have knowledge of the language and culture of the people who sang the song. As Seelye has noted,

knowledge of the world's languages and cultures is more vital than ever. In order to compete in the global community, we must be able to communicate effectively and to appreciate, understand, and be able to work in the framework of other cultures.[29]

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28 SP Lekgoathi, "The African National Congress's radio freedom…", *Journal of African Media Studies,* 2(2), 2010, p. 145

29 HN Seelye, *Teaching culture: Strategies for intercultural communication* (Illinois: NTC Publishing Group, 1994), p. vii.

In terms of CAPS, learners should "engage critically with issues of heritage and public representations of the past"[30] in the history curriculum. Through songs, learners "recognise that there is often more than one perspective of a historical event".[31]

The importance of culture as an aspect of IKS is also evident in Goulet's assertion:

> *when people are oppressed or reduced to the culture of silence, they do not participate in their own humanisation. Conversely, when they participate, thereby becoming active subjects of knowledge and action, they begin to construct their properly human history and engage in process of authentic development.*[32]

It must be pointed out that history learners and most history teachers do not relate and align isiXhosa literary genres with the history of South Africa and, subsequently, do not use them to enrich their knowledge of history. Thus, the link between written history and oral history as an indigenous methodology of research in the form of oral evidence, oral tradition, *iingoma* (songs), *izibongo* (praises), *izikhahlelo* (praise names), chiefs' bulls (*awakuloNkomo*: counsellors), and *iminombo* (genealogies) is blurred. This lack of such an important source of knowledge was and still is critical for hindering the process of transforming and decolonising South African history.

Iingoma are also forms of historical sources that paint a picture of a particular period and portray the milieu of the time. *Iingoma* carry a historical message about the culture, customs, and traditions of a nation. For example, *iingoma* were sung during the era of industrialisation in Butterworth, which depicted the life led by factory workers. This *ingoma* is reminiscent of the social and economic conditions of workers in the Butterworth industries during the 1960s, 1970s, and 1980s. It ran as follows:

> *Intsimi yam itshile,*
> *Ndinomolokazana, owakh' umolokazan' akenjenjwalo,*
> *Ndiyamba, wayibulal' ibhodi xa izakuphatha.*
> *Soze ndingendi mlingane, ndiyahamba.*
> *Lishush' ibhelu ematankini.*
> *Owakh' umolokazana akenjenjwalo*

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30 DBE, CAPS, History FET Phase Grades 10 – 12. Pretoria, Government Printer, 2011b, p. 9.

31 DBE, CAPS, History FET Phase Grades 10 – 12. Pretoria, Government Printer, 2011b, p. 9.

32 D Goulet, "Participation in development: New avenues", *World Development*, 17(2), 1989, p.165.

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My mealie field is barren and scorched

I have a daughter-in-law whom I endeared and loved like yours

I will leave my homestead for you bewitched a sub-headman on the eve of assuming rulership

Nothing will temper with my marriage, my fellow women, I will go and see my husband

But I will leave to catch my husband's concubine in the Tank Town

As you respect and revere your daughter-in-law, so should I do

Iingoma were sung on important occasions, such as those performed during the rituals of passage from boyhood to manhood (*uSomagwaza*), during war times (*iGwatyu*), during ancestral worship rituals (*uMdudo*), and during *umgidi* ceremonies.[33] Each *iKumkani* (King) and *iNkosi* (Chief) had his *ingoma*. For example, *UKumkani* Sarhili's *ingoma* was *uMqolo weNamba*; *uNkosi* Rharhabe's (d. 1782) was *uMdudo*. *UNkosi* Maqoma's (1798-1873) ingoma was: *uGusawe*. *UNkosi* Ngqika's (c. 1775–1829) *ingoma* was: *iNjinana*.[34] *UNkosi* Ngqika's sons from various houses were Sandile (1820-1878), Maqoma, Tyhali (d. 1842), Anta (1810-1877), Xhoxho (d. 1878), Matwa (1810-1847), and Thente (d. 1842). *UNkosi* Ndlambe's *ingoma* was: *uWankuntuza* (*ingoma kaMfi*). *UNkosi* Ndlambe (1740-1828) was the brother of *uNkosi* Mlawu (d. 1782), and both were sons of *uNkosi* Rharhabe and Princess Nojoli.[35] (Mqhayi, 1914:50). On the death of Mlawu in 1782, a regency was created under Ndlambe, who initially refused to surrender his regency to the 17-year-old Prince Ngqika (1775-1829) in 1795. Notable African Church leaders did have their own songs. For example, one of the prominent Church figures, Richard Tainton Kawa's favourite *ingoma* (song) was *Umhlaba weAfrika uyalila*.[36] Ntsikana (d.1822) was popularly known for his *ingoma*: *ulo Tixo mkulu/uloNgub'enkulu*, which was recorded in 1844 by Ludwig Dohne, a German missionary working among the amaXhosa.[37] According to uKumkani Xolilizwe Mzikayise Sigcawu, *iingoma* were and are used on interacting with ancestors during ancestral worship to honour and show respect to ancestors.[38] These were sung to

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33 KS Bongela, *Amagontsi: Uncwadi lwemveli* (Umtata, Afro Publishing Co, 1991), p. 68.

34 For more on *iingoma*, see SEK. Mqhayi, *Ityala lamawele* (Lovedale, Lovedale Press, 1914); J Mvenene, "The implementation of Indigenous Knowledge Systems in the teaching and learning of South African History: A case study of four Mthatha high schools" (D.Ed, Walter Sisulu University, 2018).

35 SEK. Mqhayi, *Ityala*…, p. 50.

36 SEK. Mqhayi, *Ityala*…, p. 66.

37 Jacob Ludwig Dohne, *Das Kafferland und sein Bewohner* (Berlin, 1844), pp. 69-70.

38 UKumkani Xolilizwe Mzikayise Sigcawu, Personal interview on 10 June 1992, Nqadu Komkhulu (Great Place), Gatyana.

connect with the ancestors and to foster a sense of identity and belonging. [39]

Tracey eloquently states that: "in this respect it is like language. We all express our thoughts in words but use a great number of different languages. So, it is with music."[40] They carry messages reflecting the nature, course, and motives behind the rituals. Thus, *iingoma* carried a historical message about the culture, customs, and traditions of a nation, which is important for a clear understanding of the local and regional history of a community. Most of these songs are passed from one generation to another and are performed only during special occasions.[41] An example is that of *izibongo zeenkosi*, which give genealogies and examples of participation in battles in defence of the land. Similarly, *iingoma* sung during war times take warriors back to the past and detail how the forebears defended their country as a means of motivating men to march forward.

The historical value of *izibongo* in the history classroom

Izibongo or praise lyrics contain information that has historical interest. Vansina states that they usually contain phrases composed during the reign of a chief or king, thus giving lengthy historical accounts of the reign of the traditional leader, his character, and vision.[42] They also include poetry for wedding ceremonies, for relaxation and entertainment, and for funerals of well-known personalities.[43] Praise poems provide an image of the period under study and depict people's views and opinions about the traditional leader and their times. The historical importance of praise lyrics lies in the fact that they not only provide an understanding of the 'feel' of the time in which they were created, but also help to transfer the historian and learners mentally and imaginatively to the earlier time. They portray the world and a particular setting, putting the history teacher/historian in touch with the past, particularly with respect to the attitudes and feelings of the people.[44] Importantly, praise lyrics are not, like tales, handed down in freestyle; they have fixed texts, which are handed

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39 UNkosi Dalubuhle Rholihlahla Maphasa, Personal interview on 16 March 2006.

40 H Tracey, *Ngoma* (London: Green & Co, 1921), p. 12.

41 T Qwabe, "Too vulgar and socially embarrassing, yet exceptionally and temporally acceptable: Songs performed in the rituals of passage to womanhood in rural KwaZulu-Natal", C Landman (ed.). *Oral history: Representing the hidden, the untold and the veiled* (Pretoria, UNISA Press, 2009), p. 99.

42 J Vansina, *Oral tradition: A study in methodology* (London, Routledge & Kegan, 1965), p. 149.

43 G Emeagwali, "*African Indigenous Knowledge Systems: Implications for the curriculum.* New Jersey: Africa World Press, 2003 (Available at www.africahistory.net, as accessed on 12 Feb. 2017), pp. 4-5.

44 J Mvenene, "Orality: Opportunities and challenges…", Indilinga: *African Journal of Indigenous Knowledge Systems*, 12(1), 2013, p. 32.

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down unchanged from generation to generation.[45] This contributes to their historical veracity.

In another context, Lott, as cited by Bailey, declares that *iimbongi* "are considered to be the keepers of history and pass on information on the trials and tribulations of their people from one generation to the next."[46] Opland and Lott further state that *iimbongi* narrate the story of their people and use their knowledge of the past to educate and warn of misconduct.[47] They fulfil a complex role in society, inciting the audience to loyalty to their chief/king through the medium of their eulogistic poetry.[48] In their *izibongo* they reveal *umnombo* (genealogy) of their people and encourage community members to strengthen the society by building on their heritage.[49] Thus, *izibongo* are partly historical in content and intent.

Opland in Saunders and Derricourt made mention of *izibongo* of major historical figures such as *ooKumkani* (kings) Shaka, Dingane, and Cetshwayo, as well as collections of isiXhosa *izibongo*—one by Rubusana and two by Ndawo—as invaluable source collections of history to which scholars should turn their attention.[50] Yali-Manisi wrote a poem on *uKumkani* (King) Sabata Dalindyebo (1928–1986) in which he likens the abaThembu king to the sun, the elephant, and the python and further compares the king to his counterparts in other abeNguni kingdoms. This magnifying device shows that Dalindyebo was highly respected by abaThembu and other southern abeNguni communities.[51] Examples of traditional poems abound, such as *Aa! Zweliyazuza! ITshawe laseBhritani, ESandlwana, Umkhosi wemidaka* 11[52], *Izibongo* of *uKumkani* Hintsa[53], *A! Jonguhlanga!*[54], and *uKumkani* Shaka's praise poetry.[55]

45 A Van Jaarsveld, "Oral traditions of the Ndzundza Ndebele", HC Groenewald (ed.). *Oral studies in Southern Africa*. (Pretoria, Human Sciences Research Council, 1990), p. 18.

46 J Lott, "Keepers of History", *Penn State Research,* 23(2), 2002, p. 89, cited in HA Bailey, "Perspectives and the mapping of Africa", J Bam & C Dyer (eds). *Educator's Guide to the UNESCO General History of Africa for the FET Curriculum*. (Pretoria, New Africa Education, 2004), p. 9.

47 J Opland, "Praise poems as historical sources", C Saunders & R Derricourt (eds). *Beyond the Cape frontier: Studies in the history of the Transkei and Ciskei* (London, Longman, 1974), p. 8; J Lott, "Keepers…", *Penn State Research,* 23(2), 2002, p. 89.

48 J Opland, "Praise poems…", C Saunders & R Derricourt (eds). *Beyond the Cape frontier…*, p. 8.

49 J Opland, "Praise poems…", C Saunders & R Derricourt (eds). *Beyond the Cape frontier…*, p. 8; J Lott, "Keepers…", *Penn State Research*, 23(2), 2002, p. 89.

50 J Opland, "Praise poems…", C Saunders & R Derricourt (eds). *Beyond the Cape frontier…*, p. 8.

51 J Mvenene, "Orality: Opportunities and challenges…", Indilinga: *African Journal of Indigenous Knowledge Systems,* 12(1), 2013, p. 33.

52 SEK Mqhayi, *Inzuzo* (Johannesburg, Witwatersrand University Press, 1943), pp. 70, 90, 98.

53 WB Rubusana (ed.), *Zemk' iinkomo, magwalandini* (Lovedale, Lovedale Press, 1906).

54 St J Page Yako, *Ikhwezi* (Lovedale, Lovedale Press, 1977), p. 35.

55 S Nyembezi, *Izibongo zamakhosi* (Pietermaritzburg, Shuter & Shooter, 1958), p. 22.

A closer look at *uKumkani* Shaka's praise poem shows that for an understanding of its content and context, a teacher and learner must have insight into the amaZulu cultural expression, history, and language. By reading this poem and relating it to the Shakan period, learners could expand their historical knowledge of the origins and making of *uKumkani* Shaka. This understanding enables the teacher to appreciate the meaning contained in the symbols, metaphors, and similes used in the praise poem. As Nyembezi wrote:

> *Ulusiba gojela ngalaphaya kweNkandla,*
> *Lugojela, njalo ludl'amadoda.*
> *Indlondlo yakithi kwaNobamba,*
> *Indlondl'ehamb'ibang'amacala*
> *The feather that swallowed beyond Nkandla*
> *It swallows as it eats men.*
> *Old-Mamba from Nobamba,*
> *Old-Mamba that goes around causing trouble.* [56]

UKumkani Shaka is likened to a feared Mamba that sets out to murder and kill men, a merciless, bloodthirsty, and violent tyrant. Clearly, learning the praises of *uKumkani* Shaka is delving deeper into "a form of precolonial history outside of the dominance of settler colonial versions of history".[57] As can be observed from this poem, oral traditions, especially in the form of the praises of the kings, are historical records that are not just for memorising. Oral tradition, argue Schellnack-Kelly and Jiyane, though previously sidelined by colonial and apartheid dispensations, has become historically relevant and is "often associated with communities whose history and narratives have been largely neglected".[58]

Thus, it is necessary to know the historical explanation behind the idioms and literary mechanisms that make up the poem.[59] This suggests that the praises of chiefs and kings require that a learner learn to engage analytically at the level of idiom, at the level of historical facts, and at the level of sociological understanding—that is, understanding the history and culture of a people. WB Rubusana sang *izibongo* of *uKumkani* Hintsa (*A! Zanzolo!*):

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56 S Nyembezi, *Izibongo…*, p. 22.
57 *Daily Dispatch*, 29 August 2017, p. 9.
58 I Schellnack-Kelly & V Jiyane, "Tackling environmental issues in the digital age…", *Historia*, 62(2), 2017, pp. 115.
59 *Daily Dispatch*, 29 August 2017, p. 9.

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NgusoRharhoba, uhlwath' olumadolo luka-Khala,

Umhle ka-Nyawoshe, uso-Zanzolo.

Umbheka ntshiyini bathi uqumbile,

Udumbhele imilenze, isibi esikhethwayo kweziny' izibi;

U-Nondwangu, imbhabalana entsundwana,

Abayikhuz' ukuhlaba ingekahlabi.

Ngu zigodlwana zemaz' endala,

Zingahlal' endleleni zilahlekile.[60]

He is Reverence, the sweet tall grass of Khala,

Graceful in movement, Starer,

Whose anger's seen in his eyebrows.

Hefty-legged, a better mote than others,

Wide-awake, the dusky little bushbuck,

Acclaimed for stabbing before it stabs.

He's the stumpy horns of an old cow,

If they keep to the path they're lost

It is worth noting that *UKumkani* Hintsa had *iKomkhulu* (a Great Place) on the banks of the Gcuwa (Butterworth) River on the site of the present-day Town Hall of Butterworth, and others at Holela (*kulo* Nogqoloza[61]) in Centane, Gatyana (Willowvale), and another at Mbinzana in Lady Frere near Komani.[62] This poem is significant for history teaching and learning. In terms of CAPS, learners must "organise evidence to substantiate an argument in order to create an original, coherent and balanced piece of historical writing".[63]

In one of *uKumkani* Sarhili's (*Aa! Ntaba!*) praise poems there is a section that reads as follows:

Yinamb' enkulu ejikel' iHohita.

Ovuk' emini akabonanga nto.

Kub' engayibonang' inamb' icombuluka.[64] *signifying:*

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60 WB Rubusana (ed.), *Zemk' iinkomo …*, p. 13.

61 Nogqoloza was one of uKumkani Hintsa's (1789 – 1835) unmarried sisters after whom his iKomkhulu (Great Place) was named. She had a hump on her back (isifombo).

62 *Daily Dispatch*, 22 July 1922.

63 DBE, CAPS, History FET, 2011b, p. 9.

64 WG Gqoba, Isizathu sokuxhelwa kweenkomo ngoNongqawuse, WB Rubusana (ed.), *Zemk' iinkomo, magwalandini* (Lovedale, Lovedale Press, 1906), p. 228.

> *He is the great python which encircles Hohita.*
> *He who is a later riser would have missed something.*
> *If he fails to witness the uncoiling of the python.*

This poem reflects that *uKumkani* Sarhili (1809–1892) had a great dynasty before whites usurped the power, authority, and influence of the traditional leaders. At the time, Sarhili lived at his *iKomkhulu*, in *Hohita*, Cofimvaba, before he was forced off his land by Cape Governor Sir George Grey in February 1858. His territory was about 2,535 square miles (4,079.687 square kilometres).

This poem is pregnant with symbolism and meaning. It reflects that *uKumkani* Sarhili's life was punctuated with setbacks and challenges. Before the Nongqawuse cattle-killing mania (1856–1857), *amaGcalekaland*, Sarhili's political domain, stretched from the Mbhashe River (currently a boundary between the Amathole District Municipality and the Oliver Reginald Thambo District Municipality) to Gqeberha (formerly Port Elizabeth or eBhayi) and extended as far north as Komani (Queenstown).[65] It also encompassed iSidutyini (St Marks) and Hohita in Cofimvaba.[66] However, at the time the colonial towns of East London, Qonce, and Komani were not yet in existence until after the war of *Ngcayechibi*. Wielding much power, Sarhili was considered as great, valiant, defensive, dignified, and fearful. Thus, this poem is also relevant regarding land claims.

Herewith follows Melikhaya Mbuthuma's *umbongo* (praise poem) in honour of *uKumkani* Sabata Dalindyebo (*Aa! Jonguhlanga!*):

> *A! Jonguhlanga!*
> *A! Jonguhlanga!*
> *Yinina mntan' enkos' am ungasandijongi nje*
> *Thole lesilwangangubo sakwaNdyebo*
> *Ngqayi ngqayi yokuqhayisa*

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65 Mager posits that the district of Queenstown (Komani) was named after Cape Governor Sir George Cathcart's (1794-1854) hometown. See AK Mager, "Gungubele and the Tambookie Location, 1853-1877: End of a colonial experiment", *Journal of Southern African Studies*, 40(6), 2014, p. 1159. However, uNkosi Mbuzo Ngangomhlaba Mathanzima asserts that the name referred to uKumkanikazi Nonesi, that is "the town of Queen Nonesi.", UNkosi Mbuzo Ngangomhlaba Mathanzima, Personal interview on 25 July 2018, Myezo, Mthatha.

66 UNkosi GawushiGqili Mcothama, Personal interview on 24 September 1999, AmaKhweleshe Komkhulu (Great Place), Centane; Robert Ndenze, Personal interview on 22 September 1999, Lusizi Village, Centane.

Isilo sam siyoyikeka

Sihlabe ngophondo phezu kweBumbana

Zatshw' izizwe zonke zanguqhusa-qhusa

Nditsho kuwe ke bhelu lentombi yakwaKhonjwayo

Hayi ke madod' umntaka Sampu madoda

Hayi ke madoda umntan' esilo madoda (1971).

A! Jonguhlanga!

A! Jonguhlanga!

Why are you avoiding my eyes, child of my chief?

Young son of the vulture chief of Ndyebo,

Clay pot, clay pot to be proud of.

My frightening animal,

It stabbed with its horn above the Bumbana.

All the nations started to scatter.

I refer to you, beautiful son of the daughter of the Khonjwayos.

Oh men, the child of Sampu, men.

Oh men, the child of an animal, men (1971).

The above poem is significant. It informs learners and teachers about *uKumkani* Sabata's *iKomkhulu* of Bumbane, Mthatha. His paternal and maternal origins are also mentioned. The poet tells the reader that Sabata was the son of *uKumkani* Sampu. It also highlights his maternal relations with amaKhonjwayo in amaMpondoland.

About the Nongqawuse cattle-killing vision of 1856-1857, Yali-Manisi produced the following *umbongo*:

Yayilishobo kwaloo nto

Ukuqalekiswa kwesizwe sikaXhosa

Kusuk' umntw' ebhinqile

Ath' uthethile namanyange

Uthethe naw' ewabonile

Azi babeye phi n' abantu balo mhlaba

Zaziye phi n' izigwakumbesha

Zaziye phi n' izidwangube.(1971)

That in itself was a shame

A curse to the land of Xhosa

For a female to emerge
And proclaim that she was addressed by the ancestors,
That she spoke to them in person.
Where were the people of this land?
Where were the great men?
Where were the dignitaries?

Contrary to the popular view based on written sources, Manisi presents a different opinion, which is in conflict with the assessment of Nongqawuse's role in the cattle-killing episode. According to the above poem, Nongqawuse's prophesy should not have been believed by the amaXhosa as it ran against their cultural beliefs and practices. Peires claims that between April 1856 and May 1857, it is estimated that about 40,0000 cattle were killed and about 40,000 amaXhosa died of starvation.[67] These figures exclude the number of cattle killed by lung sickness. Crais opines that "In killing, and not specifically sacrificing their cattle [to the ancestors], many Xhosa may have hoped to prevent further spread of the disease".[68]

Manisi exonerates Nongqawuse as the cause of the destruction of the amaXhosa through her prophesy. He puts the blame at the door of the whites, Sir George Grey in particular, and the missionaries in general. As he eloquently put it:

Kwaqal' ingqobhoko sathi samkel' uThixo
Kanti loo Thixo sithi siyamamkela
Le Bhayibhil' izel' inyumnyezi
Iphethwe yindod' ekhol' ijong' entshonalanga
Apha ngaphambili ngumqukumbelo
Ngasemva yil' ntunj' yokuhlal' amabhabhathane
Kanti kulapho kugangxwe khon' inkanunu
Evela phantsi kwendleb' iphum' esilevini
Kant' iqhawul' iminqambulo kwabanga phambili
Uthe wakuxakeka k' umhlaba yangena yajojobala
Yangena yathomalalisa
Inj' enkul' into kaGreyi

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67 JB Peires, *The dead will arise Nongqawuse and the great cattle killing movement of 1856-7* (Johannesburg, Ravan Press, 1989), p. 94.

68 CC Crais, *The making of the colonial order: White supremacy and Black resistance in the Eastern Cape, 1770-1865* (Johannesburg, Witwatersrand University Press, 1992), p. 209.

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Bayawath' ukuyibiza yingang' uJoji

KaGreyi

Yath' iyawulungis' umhlaba

Kanti ngexesha lenyala lesikizi

Ibimele mgama yakh' umkhanyo

Ijong' isiphumo sokufa kwezidumbu

Abantu bequngquluza bengatyiwa nkanunu

Kuba babekwaz' ukurhubuluza ngezisu

Bepheph' inkanunu besiya kumbulali

Ncincilili!

Ncincilili

It all started with religion, when we said we would accept God;

Yet this God we said we would accept,

This Bible is pregnant with abomination.

It is held by a man whose collar looks westward.

In the front is the turned over part of the collar,

At the back is an opening where butterflies stay,

And that is where a cannon is lodged

Which appears below the ear and comes out at the chin,

And it shatters the sinews of those in front.

And when the country was in a plight,

The cannon penetrated deeply,

It penetrated and calmed things down.

The great dog, the child of Grey,

Who is called Big George,

The son of Grey,

Said he was rearranging the land,

Yet in this time of shame and scandal

He stood apart, and shaded his eyes,

Watching the result of the piling of corpses.

People lay stark without any shots fired,

Because they knew how to crawl on their bellies,

Avoiding the cannon as they made towards the killer.

Ncincilili!

Ncincilili.

As reflected in the *izibongo* cited above, learners can learn and recite *izibongo zikaShaka*, *zikaHintsa*, and *zikaDalindyebo* as a way of ensuring that they "have a strong epistemological arsenal by which to critique Christian Nationalist history".[69] Mpela's and Maliwa's observations seem apt when they point out that *izibongo* are the cultural and historical sources that enhance teaching and learning of history.[70] They claim that most of *izibongo* trace the history of a nation and present the genealogy of a traditional leader of that particular nation. It may be a chief or a king whose historical background is brought to the surface through izibongo.[71]

Conclusion

Opland, in Saunders and Derricourt, points out that "historians will have to consider a number of factors in the evaluation of this [izibongo] material, factors such as the reliability of oral transmission or the problem of feedback".[72] Teachers and scholars need to tread cautiously when assessing the reliability of *izibongo* as historical sources. However, *iingoma* and *izibongo*, like oral traditions and *iziduko*, are foundational concepts to history learners at schools and students at universities.[73]

It is important to state that traditional songs and praise poems have a historical significance that history teachers and oral researchers must take heed of when preparing lessons and assessment tasks for learners. They play a crucial role in demystifying untruths, myths, prejudice, and bias and thus uncover the hidden voices, untold stories, and veiled memories of African societies[74], especially in a country like South Africa where voices of the non-hegemonic classes have been ignored or silenced for a very long time.[75] The use of these sources enables learners to "understand the range of sources of information available

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69 *Daily Dispatch*, 29 August 2017, p. 9.

70 Rachel Mpela (imbongi), Telephone interview on 30 October 2024; Babalwa Maliwa (imbongi), Telephone interview on 31 October 2024.

71 Rachel Mpela (imbongi), Telephone interview on 30 October 2024; Babalwa Maliwa (imbongi), Telephone interview on 31 October 2024.

72 J Opland, "Praise poems…", C Saunders & R Derricourt (eds). *Beyond the Cape frontier…*, p. 8.

73 *Daily Dispatch*, 29 August 2017, p. 9

74 SP Lekgoathi, "Orality, literacy and succession disputes in contemporary Ndzundza and Manala Ndebele chieftaincies", C Landman (ed.), *Oral history: Representing the hidden, the untold and the veiled* (Pretoria, UNISA Press, 2009), p. 46.

75 T Moloi, "Oral testimonies by former members of the Azanian National Youth Unity (AZANYU): The sayable and unsayable in an oral history interview", C Landman (ed.), *Oral history: Representing the hidden, the untold and the veiled* (Pretoria, UNISA Press, 2009), p. 17.

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for studying the past".[76] Learners will also develop skills in extracting and interpreting information from a number of sources. It is partly through using these historical sources that the history of different communities, political organisations, political leaders, and traditional leaders previously ignored are unearthed. Thus, these history sources remain relevant in uncovering hidden histories or untold stories.[77]

However, like written historical sources, songs and poems should be approached meticulously by subjecting them to critical analysis. It is the duty of a history teacher to put both written and oral sources under a microscope by applying critical analyses to available evidence. While songs and poems contribute towards uncovering or shedding light on the hidden or untold histories, they have certain limitations as historical sources. One of its limitations is flawed or selective memory, which in the words of Tosh, "can be gleaned from surviving members... of groups, like the memories of mostly old people about their youth which is often confused as regards specific events and the sequence in which they occurred".[78]

76 DBE, CAPS, History FET, 2011b, p. 9.

77 M Marks, *Young warriors: Youth politics, identity and violence in South Africa* (Johannesburg: Wits University Press, 2001), p. 15.

78 J Tosh, *The pursuit of history: Aims, methods and new directions in the study of modern history* (United Kingdom: Longman Group, 1991), p. 210.

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BOOK REVIEWS

States and the Making of Others: Perspectives on Social State Institutions and Othering in Southern Africa and Western Europe

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Introduction

States and the Making of Others: Perspectives on Social State Institutions and Othering in Southern Africa and Western Europe is a collection of essays that is a recent contribution to studies on social identity, political science, sociology, and anthropology employing an interdisciplinary and comparative approach. The central theme of the book is the process of othering which is inherent to institutionalisation and the formation of the state. The authors explore processes of othering in state and social institutions across geographical settings in Western Europe and Southern Africa. By drawing on empirical and theoretical frameworks, the book provides insights into how state institutions create, reinforce, and sustain categories of "Others". Using the notion of othering as a central analytical concept, the authors achieve a nuanced exploration and understanding of the making and reproduction of Others by state institutions. The book contributes to the research on the state-Others relationship with regard to the ambivalent politics of recognition,

redistribution, redress, the differentiated legacies of former states' modes of categorising Others, and the globalised trends of neoliberal reforms of state institutions. Focusing on contemporary social and political issues, the authors investigate how mechanisms within institutions and state shape societal views based on race, class, gender, sexuality, nationality, and socio-political grounds.

States and the Making of Others provides a detailed analysis of how state-led othering not only enforces social hierarchies but also plays a critical role in shaping the nature of statehood and governance. The book is a thought-provoking and timely examination of the power dynamics embedded within state institutions. Its analysis of othering practices across different socio-political contexts provides valuable insights into how states shape and control societal boundaries, often to the detriment of marginalised groups. By exposing the exclusionary practices inherent in institutions like education, health care, and immigration, the book challenges conventional perceptions of the state as a neutral entity, prompting readers to reflect on the ethical implications of state-led othering.

The authors do not perceive the Others as refugees or migrants but approach them as "home-made products" (p. 6). The Other is depicted as the unwanted existence of someone who differs from the ideal citizen who is generally associated with affluence and whiteness. Boundaries are created between individuals and groups on the basis of othering to determine who shall qualify for economic and social rights and privileges, such as education, health care, safety, access to employment, access to reproductive rights, and the recognition of sexual and gender minorities.

The book is divided into four parts. First, it deals with conflictual definitions of the nation and its diversity through the "repositioning of the past Others". Second, the book looks at the moral construction of social order through othering. The third part explores the politics of rejection and subordination by welfare state institutions while the fourth and last part examines gatekeeping practices in the granting of international protection. The book opens with a persuasive proposition that state institutions are powerful structures which define social boundaries, create hierarchies, and produce exclusionary categories that distinguish "us" from "them". Drawing on the parallels between Southern Africa and Western Europe, the authors argue that despite cultural and historical differences, states in both regions utilise similar mechanisms to marginalise certain groups, suggesting a shared strategy in the politics of exclusion. The empirical case studies in each chapter provide historical contexts, particularly in regions such as South Africa, where apartheid policies explicitly categorised and divided citizens along racial lines, leaving lasting impacts on institutional practices and public consciousness. Similarly, the European context is analysed

through the lens of migration policies, revealing how postcolonial power dynamics and increasing nationalism shape contemporary practices of exclusion.

Part 1 of the book focuses on the obliteration of the Other through history teaching. The first two chapters engage with national history as a dimension of nation-building that symbolically and epistemically enshrines belonging and hierarchies of citizenship among formerly disenfranchised groups. Drawing on studies of high school history education in Zimbabwe and South Africa, Reim and Robinson explore the ways in which certain communities became othered. The chapters show how forms of othering may emerge as states tend to create rather rigid versions of such narratives following protracted liberation struggles.

At the dawn of independence and democracy for many African countries, both Zimbabwe and South Africa were tasked with writing new histories to unite what were, in both cases, highly diverse populations. While their struggles for liberation came with a sense of unity for those who fought against oppression, discourses of united Black or African struggle were also used to downplay the diversity, frictions, and alternative strategies that existed among oppressed groups. Both reveal that such state practices of othering do not occur only through outward "demonisation", but can also take more subtle forms of silencing or side-lining. Drawing on interviews with Ndebele-speakers from the Matabeleland region, Reim (Chapter 2) shows how many people in these regions feel alienated from Zimbabwe's official national narrative. Importantly, this is linked to the "silencing" of a period of violent state repression that occurred in these regions in the immediate post-independence period. At the same time, it referred to negative depictions of the pre-colonial Ndebele State as well as a liberation narrative that privileged the contribution of the current ruling party (ZANU-PF) over that of the "other" liberation movement (ZAPU), to which most freedom fighters from the Matabeleland region had belonged.

In chapter 3, Robinson speaks of the South African youth and shows how the inclusion of "Coloured" identity within a wider political understanding of "Black" identity as synonymous with "historically oppressed" means that a distinctive "Coloured" identity is effectively excluded from the national narrative. She describes it as a process of state-sponsored "subsuming" of a minority group. Furthermore, Reim and Robinson show that feelings of alienation from national narratives are tied to a broader sense of rejection from South African and Zimbabwean national identities. However, reactions to such

alienating narratives differ. On the one hand, both chapters find that some of the young people interviewed expressed a sense of disengagement or disinterest in learning "their"

country's history. On the other hand, some informants actively engaged in reclaiming or unburying history. In Reim's study on Matabeleland, some of those engaged in producing historical counter-narratives sought to reinscribe Matabeleland within the Zimbabwean nation; others, however, sought to crystallize a separate Ndebele history and identity in ways that feed into claims for separate nationhood.

The second part of the book explores how the production of Others is rooted in political assumptions about the threats to social disorder , and states' attempts to protect and promote the morality and the dignity of the "good" subjects. It examines two institutions that are heavily regulated by the state: labour and family, respectively in Malta and in France.

In chapter 4, Puygrenier discusses how some sub-Saharan asylum seekers who reached the island of Malta on the border of Europe were prosecuted for "leading an idle and vagrant life" in a surprising revival of the old Victorian provision used to regulate the roaming presences in the port region. Drawing on the comparison of old and new "vagabonds" in Malta, Puygrenier argues that othering is intricately bound up with state authorities' attempts to regulate production and public space and their claims to determine what constitutes respectable employment and activities at a given time.

Pursuing the reflection on the articulation between othering and the promotion of social order, Chabanel, in chapter 5, focuses on the recommendations issued by the French National Consultative Committee on Ethics to advise the government on reproductive matters. Focusing on the designation of gestational carriers as "surrogate mothers" ("*mères porteuses*"), Chabanel highlights the discursive production of other mothers (both gestational carriers and the women who turn to their services) seen as disrupting traditional motherhood. In this instance of what Chabanel calls an "epistemic injustice", the denunciation of these new Others at the margins of law and order turns out to immediately serve a discourse on the proper or conventional practices people are expected to embrace. In both chapters, Others appear as unruly subjects, created by state institutions as a way of enforcing the activities and behaviours of the "normal" or "honest" individuals; the latter and the former are the two sides of the same coin. Others, whether women who engage in surrogacy or migrants who are undocumented are ultimately charged with a defining power: they are instrumental in drawing the contours of the community of "good" subjects. Othering, in this perspective, is inseparable from the very act of governing populations.

Part 3 focuses on gatekeeping and the subordination of the Other through public welfare delivery. This part offers views of the ways in which othering occurs in state institutions renowned for their "caring" for the "vulnerable" (i.e., the sick, the elderly, and children) through the school system in South Africa (Chapter 6) and the health and elderly

care system in France (Chapter 7). Both present themselves as state institutions in which othering is less likely to occur. While the South African school system was historically segregated, it became centrally invested with the mandate of "redress" and "transformation" for the benefit of formerly disenfranchised groups under the democratic dispensation.

Similarly, in the management of its employees, the French public system aims to embody a "republican" ideal associated with values such as meritocracy and impartiality, which take on heightened significance when state work involves care work. The two authors demonstrate how these features counterintuitively inform processes of othering directed at subgroups of intra- and international migrants, by investigating the inner workings of the institutions in relation to national as well as metropolitan contexts that concentrate immigrant populations, economic opportunities, and state resources. They pay attention to historical and structural dynamics, legal and policy frameworks, policy instruments, as well as everyday professional practices of state agents in (re)producing unequal treatment toward specific Others that generate material and subjective processes of exclusion, subordination, and stigmatisation.

In chapter 6, Jeanne Bouyat discusses the imperatives of the post-apartheid school system to ensure socio-historical justice for the formerly oppressed in South Africa and highlights the intensification of prevalent and state-sponsored xenophobia. This translates into practices of gatekeeping and criminalisation directed at foreign Others at school and the resultant effect on access to education. Marine Haddad shows in Chapter 7 how the legacy of colonial labour immigration schemes and a colourblind ideology that underpins public hiring in France (re)produce a segmented public job market, in which French Caribbean women are relegated to subordinate positions. Their "dirty work" at hospitals and nursing homes puts them in direct contact with patients, which exposes them to racist interactions that they tend to minimise. Both Chapters 6 and 7 appropriate the concept of institutional racism to make sense of multi-level, heterogeneous processes of state othering. Marine Haddad incorporates institutional racism to reveal how racism intersects with class, gender, and migration trajectories to produce segmentation within citizenship. Jeanne Bouyat's chapter contributes to the application of theoretical and methodological frameworks to investigate state othering based on multiple intertwined criteria or on the distinctive salience of a line of division. She expands on institutional racism by explaining how institutional xenophobia fuels the national/non-national divide in the post-apartheid school.

Part 4 contests Othering, neoliberal politics of recognition, and assignment of alterity. The authors expand on the discussion on recognition and care by analysing how measures

designed to counter othering can ultimately end up reinforcing these dynamics. Focusing on European policies (Chapter 8) and on the French asylum administration (Chapter 9), both chapters highlight how seemingly protective measures in asylum policies actually contribute to creating ambiguous Others in the context of a restrictive control of human mobility. In Chapter 8, Le Bellec argues that it is important, when analysing the recognition of LGBTIQ+ asylum seekers in European migration policies, to never view this "new" form of protection in isolation from the broader political context of migration. She shows how discourses of recognition can feed the dynamics of othering. Based on interviews with actors involved in LGBTIQ+ asylum policies at the EU level and on document analysis, the chapter shows how the recent progressive development of European asylum policies has perpetuated the assignation of LGBTIQ+ groups to essentialised otherness.

In chapter 9, Maxime Maréchal questions the provision of language interpreters as a guarantee of procedural equality. Based on interviews with professional interpreters and on archival analysis, the chapter focuses on the French asylum adjudication body, to show that interpreters are assigned to an ambivalent function. In a context of institutionalised suspicion, the neutrality of interpreters is threatened by their own migratory background and their key role in inquisitional asylum interviews. They appear as internal Others who adopt multiple positions toward claimants and the institution, thus ambiguously participating in the constitution of otherness that is at the core of the administrative decision.

Conclusion

States and the Making of Others make a significant contribution to discussions on statehood, identity, and power by foregrounding the role of state institutions in the creation of social hierarchies. The book's interdisciplinary approach, by incorporating insights from sociology, anthropology, and political science, enriches its analysis, making it accessible to readers from various academic backgrounds. However, the comparative scope sometimes falls short of addressing local complexities. Some chapters, for instance, highlight distinctions between Southern Africa and Western Europe without fully accounting for unique historical and cultural nuances that might influence state practices differently. Additionally, while the theoretical foundations are robust, the language can be dense, potentially limiting accessibility for readers unfamiliar with specialised sociological or political terminology. Despite these limitations, the book succeeds in offering a compelling critique of state institutions and their role in perpetuating social inequalities. It challenges readers to

question the neutrality of public institutions and to consider how these bodies might be transformed to better serve all citizens, rather than reinforcing existing hierarchies. While challenging in parts, the volume is essential reading for those interested in social justice, state-building, and institutional reform. The book does not only enrich the academic discourse on othering but also invites policymakers and activists to reconsider how state practices might be reoriented to promote inclusivity and equality.

Anthem to the Unity of Women

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Introduction

The book is a biography of Lydia Kompe, entitled *Anthem to the Unity of Women*. The author is Kally Forrest, a former trade unionist whose contribution to the *South African Labour Bulletin* as an editor has been remarkable. Jacana Media published it in 2024 in Johannesburg. Extensive research conducted by several scholars in historical studies across the contemporary landscape uncovered many unsung heroes and heroines of South Africa's liberation struggle. They received little historiographical attention in the mainstream accounts of apartheid South Africa and her transition to democracy. *Anthem to the Unity of Women* seeks to bring forth the struggles of women in patriarchal societies. Lydia Kompe's journey from oppression to liberation is pivotal to these challenges. The periodic episodes of her struggles form an integral part of engagements in this book. It further navigates the complexities of colonial imposition and its impact on individual identities. The intersectionality between rural and urban patterns that account for the plight of South African women has been widely covered in the book.

Summary

The book is primarily centred around the struggles of South African women. The author navigates Black women's imposed roles, particularly in rural communities. The focus is on

how Lydia Komape experienced life in Limpopo, where she grew up. She was confronted with a two-pronged struggle. The first phase was patriarchy, while the other one was more political. These struggles imposed severe limitations on her. Despite these uphill battles, Lydia was unrelenting in her quest for social justice. She tried hard to educate Black women in her community about human rights, gender equality, and political emancipation. There is less contestation of narratives, chiefly because both the author, Kally Forrest and the biographee Lydia Komape share perspectives on the nature of the struggle that South African women face. The biographer comes from a rich political background. She played a significant role in politics. She was a trade unionist, fighting for the rights of workers. Kally is highly recognised and respected in political circles amidst her immense contribution to the *Bulletin on Labour Relations* as an editor. Her ultimate goal has always been the emancipation of black women from the shackles of patriarchy as well as the politics of oppression and deprivation. Kally's fight against the oppression of women found expression in several biographies that she wrote for various organisations and their impact on individuals and broader society in pre-democratic and post-apartheid South Africa. What also comes through in this biography is Lydia's identification with life in the rural areas of Limpopo and its pressing challenges. These include abusive labour practices such as ploughing the fields, harvesting the crops, and fetching wood and water. It is interesting how Lydia navigated the complexities of her journey, fought against all odds, and made it to the top. When South Africa attained political independence in 1994, she was among the first people to serve in President Nelson Mandela's cabinet, a significant milestone in her political career. As she was affectionately called, Mam Lydia became a voice for the voiceless women in South Africa, especially those based in the country's rural areas. Her personal experiences of apartheid and its oppressive laws shaped the narrative of women's struggles for emancipation. The extent to which she experienced the oppression of women in various forms within patriarchal societies under the apartheid regime represented the majority of women across the racial spectrum.

Analysis

Lydia's biography enables readers to recast their frame of mind to an earlier period in history to understand the essential realities of the country's political landscape. She navigated her political journey with so much determination that it impacted even white women activists. The struggle for women's rights and privileges reached its peak from the 1970s right up to the 1980s. It entailed, among other things, workers' rights and entitlement to land. The

biography brings into sharp focus the different forms of discrimination that Lydia had to endure during the years of her struggle. One would perceive it as double jeopardy in the sense that she got it for being a woman in a patriarchal society and for being a black rural woman in an apartheid country. The writer has captured the essence of the struggles black rural women bear in a South African context well although the biography traversed through other terrains of the liberation struggle wherein black women featured prominently. The narrative is not only confined to the life of women in the rural areas of Limpopo; it stretches over to other forms of the struggle which impacted South African women across the board. The biography demonstrates the effects of rural and urban influences on the struggle and how they determined approaches to different episodes of women's fights for justice.

Data were generated mainly through personal interviews. In the main, interviews are considered credible accounts in generating historical data. The writer relied on interviews chiefly because no primary sources, such as letters and diaries, documented Lydia's lived experiences. The narrative was driven by first-hand accounts, which reflects the strength of this biography. Furthermore, the voice of the biographee is dominant, permeating all chapters of the book. Lydia's accounts resonated with the general experiences of most women in rural Limpopo province. The literary style is quite intriguing. The sub-titles of the chapters are thought-provoking. They arouse curiosity and enhance critical engagement. The use of pictures, particularly in chapter 9, compliments the entire literary work and makes it an exciting read. Pictures constitute visual memories in history, shaping readers' perceptions of various histories. They make it easier for the readers to capture the essence of historical narratives. The shared photos reflect a juxtaposition of narratives. The writer presented a contestation of narratives in this biography so well. Lydia's shared personal anecdotes about her early life and its challenges have been presented alongside her navigating the complexities and challenges on the political front.

Critique

There is unity between the title and the content. It puts the reader into proper perspective regarding what the biography seeks to interrogate. The cover and design make the book attractive to readers. The title: "*Anthem to the Unity of Women*" blends well with the content. However, the downside of this biography is that it relies too much on personal interviews. Lydia is the only person driving the narrative. Her story has been used to gauge the sentiments of South African women amidst the struggles of diverse magnitudes they were confronted with. There is neither contestation of narratives nor competing perspectives in

this biography, yet it touches on the struggles and challenges faced by other women. Their perspectives would have been more welcome. Their experiences might vary and shape their perspectives differently. As a critical driver of stories about the oppression of women, Lydia also relied heavily on assumptions about the impact of the apartheid regime and patriarchy on women in rural Limpopo. There is no evidence in the biography suggesting any interaction with these women. There is no record of personal interviews conducted with them. There is no information about debate platforms created for these women to share and debate pertinent issues. Lydia has primarily driven all the stories about their plight.

Conclusion

The overall thoughts and impressions of the biography reflect its general acceptance by a broader reading audience. It speaks to various forms of the struggles black women in rural parts of the country have endured. It is interesting to learn that the lived experiences of women in the rural parts of Limpopo represented the sentiments of most black women throughout the country. This biography has been meticulously written and captured the essence of the topic. It succeeded in its navigation of black South African women's struggle against the oppressive rule of the apartheid government. The attempt to establish an alignment between rural and urban environmental influences is one of the highlights of this biography. It would undoubtedly serve as a constant reminder of where we come from, where we are, and where we are going. It will contribute immensely to the political literature that continues to shed some light on the dynamics of the liberation struggle. It will enable women in South Africa across the racial spectrum to reflect on women's struggles through its prism.

Finally, one would strongly recommend this biography as a must-read for all, as it illustrates a tactical shift from collective legacies to individual legacies.

In Whose Place? Confronting Vestiges of Colonialism and Apartheid

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Introduction

Most African countries have been moving relatively slowly since independence from colonial rule in terms of dismantling the legacies of colonial domination. They remain a constant reminder of the magnitude of oppression that Africans across the continent had to endure. The fundamental question remains: Which of the legacies of colonialism are worth preserving and why? That also brings into question the historical narratives that should be embraced as part of nation-building and the ones to be negated. The most challenging aspect is the historiography in postcolonial Africa. Ideally, all histories should be captured objectively regardless of their status and impact on broader society. The contestation of historical narratives should be navigated with extreme caution to prevent historical bias and subjectivity. The book, therefore, seeks to unravel such dichotomies. It highlights the roles that historians, heritage practitioners, anthropologists, and political activists should play in helping the nation re-position itself and map its vision for the future. History education becomes a key driver in shaping discourses and determining the goals pursued in the postcolonial dispensation. The book deals specifically with the remnants and relics of colonialism that continue to permeate our environmental spaces. The current debates, particularly in South Africa, are centred around preserving colonial infrastructure to embrace diversity, while its removal is perceived as promoting political expediency.

Analysis and Critique

The cover and design of the book are eye-catching. It is attractive to a reading audience. The title has been spelt out and quite intriguing. It leads a reader to navigate the vestiges of colonialism and apartheid in a South African context. It also provides a summary on the cover page of the key aspects and issues to be tackled in the book's chapters. The literary style is user-friendly. It enables the reader to quickly grasp the essence of the fundamental problems that the editors seek to address. Although it exhibits a rich vocabulary and good choice of words, it is written in a simple language that falls within acceptable levels of intellectual capacity. However, it has a limiting factor in that only highly learned, intellectually intelligent people can fully grasp the narratives that the scholars in the book drive. It leaves little room for the uneducated, creating a disjuncture between the educated and ignorant people in broader society.

The chapters have been well-structured and carefully woven together to drive the narrative coherently.

Chapter 1 deals with the collapse of infrastructure, particularly in the city of Durban, as a direct consequence of the government's reluctance to preserve national heritage sites throughout the country. It questions the level of historical consciousness among South African citizens and the extent to which people are educated in the ideals of the sentimental values of monuments and heritage sites in our country. The editors lament the politics of ownership, which sometimes is not congruent with the historical underpinnings. Furthermore, debate platforms have thus been created to correct distorted histories. It has translated into the reclaiming of some buildings within the city as community spaces.

Chapter 2 navigates the resilience of communities in fighting the scourge of forced removals in South Africa. It is part of an ongoing campaign by various communities across the country's nine provinces to reclaim what they believe is rightfully theirs. Historian Ali Khangela Hlongwane took it upon himself to dig for historical evidence to validate these claims. Fietas Museum and Heritage Trail in Johannesburg provided oral testimonies and archival material. In this chapter, the writers illustrate the magnitude of unresolved histories and the importance of historical evidence to appropriate historical narratives.

Chapter 3 looks at the removal of colonial legacies from public spaces. The fortress of Cacheu in Guinea-Bissau and the Portuguese colonial legacy are brought into sharp focus. In this chapter, the scholars interrogate the logic behind the removal of colonial statues after independence. In South Africa, most of the statues associated with colonialism were removed from public spaces. However, no clear-cut direction regarding the history ideal for

postcolonial Africa exists. The politicisation of history can impose limitations and partiality on the entire historiography. Including such concerns in this chapter would have been more welcome.

Chapter 4 laments the demolition of derelict buildings within the city of Johannesburg. These buildings should be preserved as part of our heritage and historical legacies. In the main, this chapter navigates the conflict between preservation and urban development.

All chapters in this volume lament the preservation of colonial infrastructure throughout the country and the demolition of buildings and community structures that bear historical significance.

Recommendations and conclusion

The book provides a tapestry of narratives that seek to interrogate the past to challenge motives in the present. It further probes the extent of colonial impositions on African people since independence. The colonial legacies continue to linger on in our society. Therefore, the book becomes a valuable tool and a guiding light regarding our history and future possibilities. The authors are highly commended for sharing incisive accounts of the vestiges of colonialism and apartheid in South Africa.

Finally, in light of the extensive coverage of pertinent issues around history and heritage, this book is recommended to all South African citizens and the entire global community seeking critical engagement with unresolved histories in a postcolonial era.

Fighting for my country

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Introduction

There has been an outcry for the recognition of liberation fighters in post-apartheid South Africa. Their contribution to the struggle for political emancipation did not enrich the pages of history. Many such histories are trapped underground. Some stalwarts took it upon themselves to tell their own stories. Sandi Sijake is no exception in this regard. His memoir entitled *Fighting for my country: The Testimony of a Freedom Fighter* is a testament to his contribution to South Africa's liberation struggle. That is where his lived experiences and challenges find expression. The narratives in this memoir have accommodated other freedom fighters whose stories have not been told. Navigating through the episodes of his battles will put different layers of his struggles in proper perspective. Sijake's memoir provides first-hand accounts of his political life in South Africa from Apartheid to Democracy. It does not have an introductory note; it dives straight into chapters.

Analysis and Critique

The cover image is illustrious, and the title is inviting to the reading audience. His image on the cover page compliments the memoir. A summary on the back cover provides a brief background to his experiences on the political front. The memoir boasts twenty-nine chapters, which reflect the depth of his political journey. These segments of the political terrain he traversed make it much easier for the reader to capture the essence of his share

of the political struggle.

Chapter 1 touches mainly on his early life. He shares his childhood experiences and how he navigated the challenges thereof. The informal education he received from his parents and community elders helped him shape his outlook on life. Sejake's transition from informal to formal education enabled him to tap into the essential realities of life and politics through interaction with schoolmates and the knowledge gained from teachers. He also learnt about the limitations imposed on people who live in rural areas. The deprivations of rural life engendered a new political culture that dominated his psychological makeup as a young man.

Chapter 2 covers his introduction to politics. There was no free political activity in South Africa at the time. Political activists operated underground. The police were on a mission to purge black rural areas and townships of any form of political activism. He shares the support he received from his teachers, including the school principal. One gets a sense that Sejake exhibited some traits of a liberation fighter. He posed a threat to the apartheid regime. He had to hide from the police, who were pursuing him constantly. His political consciousness was informed by the implementation of the apartheid laws and their adverse effects, particularly on black people. There were competing perspectives among members of his community, including reverends and teachers. Some religious leaders supported the government system, claiming that God sanctioned it, while others expressed misgivings and rejected it outright.

Chapter 3 details how Sejake was introduced to the African National Congress and later joined it. That marked the beginning of his long journey of the liberation struggle. He drew inspiration from some political activists who were militant, radical, and unrelenting in their quest for emancipation from the shackles of apartheid. They were eager to go into exile and continued the fight against apartheid. In the subsequent chapters, he provides accounts of the highs and lows of his encounters while traversing the terrain of the liberation struggle. However, this memoir offers a narrative account of the author's experiences. It is written from an individual perspective. One of its downsides is that it cannot be used as a barometer to gauge the collective sentiments of the freedom fighters as it does not represent their views, sentiments, and aspirations.

Recommendations and Conclusion

The memoir by Sejake provides insightful accounts and sheds some light on the dynamics of the political struggle in South Africa. It is highly recommended to any reader seeking to

tap into the genesis of the fight for liberation, its periodic episodes, trials, and tribulations. Furthermore, the narratives in this memoir reveal many freedom fighters who are largely ignored in the mainstream accounts of South Africa's struggle against apartheid.

Finally, the memoir has been meticulously written and enjoyable to read. It is a constant reminder of the missing pieces of our democracy and the need to unearth the histories that remain trapped underground. That includes unsung heroes and heroines of the liberation struggle.

Apartheid Remains

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Introduction

The book's cover has been beautifully designed, bearing visual images of the central theme. The title is precise, simple, and easily understandable by any reader. It provides a summary at the back of the cover of what it seeks to interrogate. It begins with an introduction, highlighting the key aspects to be discussed in more detail throughout the book, including pictures which complement the book and maps indicating the geographical location of places mentioned. The author presents a dark phase of post-apartheid South Africa. Since the independence from apartheid, the country has barely recovered from the devastating consequences of this oppressive regime. Years have passed, yet little progress has been made. The legacies of apartheid still linger on in most parts of the country. Durban is one of the cases around which the book's narrative is centred.

In the first chapter, the author questions the remains of the concentration camps in Durban in Merebank and Wentworth. These camps are a constant reminder of the Anglo-Boer War of 1899 to 1902, fought on South African soil. The Afrikaners lost to the British during this war. It is not the legacy that is worth preserving. Black people were not directly affected by the South African war, as some historians call it. Sharad, the author, is astounded by colonial infrastructure in most public spaces within the country.

The second chapter discusses the co-existence of Indians and Coloureds, particularly in

Merebank and Wentworth. It also features economic activities in these areas. Issues of land dispossession challenged them. The prevailing circumstances predisposed them to navigate these challenges collectively.

Chapter 3 demonstrates the continuation of segregation in black communities amidst claims of emancipation from colonial rule. Some apartheid settlement patterns continue to exist in most black townships. This colonial imposition seriously affected the South of Durban and the surrounding areas.

Chapter 4 presents a narrative that centres on gender in the entire analysis. Gender-based oppression and discrimination were getting along with rapid strides unchecked, particularly in the southern parts of Durban. The writer also interrogates incidents of exploitation of women in most factories within the employment sectors. The struggle in the postcolonial and apartheid South Africa continued in various forms.

Chapter 5 discusses the continued existence of colonial structures in most black townships around Durban. People found themselves embracing such colonial legacies. The writer laments a general complacency that permeates communities in most parts of Durban.

The subsequent chapters present a series of unresolved issues in a postcolonial era. The fundamental question that springs to mind is: Why not fight against the remnants of colonialism and apartheid after putting up a struggle against these oppressive systems? The magnitude of political activism during the liberation struggle in the country does not match the current approach to the legacies of apartheid that continue to plague our nation.

Recommendations and Conclusion

The book presents a tapestry of narratives that illustrate the power of colonialism and its manifestations across the political landscape in a postcolonial period. It further demonstrates the extent to which people respond to the dictates of colonial impositions. Although southern Durban is the main focus, these realities cut across the country. The book's chapters include documentary photography that enhances the presentation of different layers of history. This innovative strategy makes the book exciting and magnetic to a broader audience. Colonial authorities' control over the country's natural resources is pivotal to the lamentations encapsulated in the narratives. The author mentions the submerged legacies of the Indian Ocean, which is deeply unsettling.

The book comes across as a must-read, given its in-depth and critical analysis of our geopolitical situation that continues to glorify the legacies of colonialism and apartheid

in a postcolonial dispensation. In most townships within the country, the colonial and apartheid structures have not been dismantled, thereby affecting our national identity. Our nation's greatest challenge is the colonial mindset, which must be dealt with decisively.

Finally, Sharad Chari, the author of this insightful and magnificent work, has done exceptionally well in motivating South African citizens to get emancipated from the colonial mindset. The book has shed some light on the devastating effects of the existing colonial structures in a postcolonial dispensation.

TEACHERS VOICE / HANDS-ON ARTICLES

Strengthening the history curriculum by reimagining what we teach in the classroom: scaffolding through the FET phase, using the work of historians from a decolonised perspective

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Positionality

In foregrounding our positionality, we teach history through Grades 8 to 12. We teach the CAPS curriculum at a Quintile 5 co-educational government high school in Cape Town, where our candidates write the National Senior Certificate (NSC). It is a fee-paying school, and we acknowledge the privilege associated with the space. We are fortunate to have developed a constructive and open relationship with the Western Cape Education Department, particularly our Subject Advisor (History) of the Central District which we fall under. As a result, we provide everything we do to our Subject Advisor.

It is also important to acknowledge that we issue a textbook to all history pupils in the FET phase, Grades 10 to 12, at the start of every academic year. But we seldom, if at all, use them in the classroom. We intentionally read historians' work and infuse it into the narrative and storytelling in our history classrooms. Where relevant, chapters of the historians' work are provided as readings to our class via Google Classroom, which we often read together in school. Extracts of the work of the historians are also used as written sources in assessments to determine the learners' understanding. Both written and visual sources are included in our teaching PowerPoints, with explicit questions and marking allocations, to complement

the teaching of the topic (content) with the development of history skills.

From a national discussion to a local application—unpacking 'strengthening the curriculum'

The term *'strengthening the curriculum'* requires contextualisation before we explain what we are doing in the classroom. In 2019, the Department of Basic Education began strengthening the CAPS curriculum. It is assumed that this process may have been delayed due to COVID-19. Over the weekend of 9-10 September 2023, a DBE-hosted Consultative Conference was held to focus on the *curriculum strengthening* of the CAPS. It was emphasised to all present that the CAPS was not being rewritten and would remain content-based. *Curriculum strengthening*, it was explained, involved a deliberate and systematic infusion of competencies into the CAPS curriculum. In other words, as distinct from competency-based, curriculum strengthening advocates for competency-infused curricula where content remains core; the competencies are developed through content, and, in turn, the content is strengthened via competency infusion.

Stages of the Curriculum

Intended Curriculum	Implemented Curriculum	Assessed Curriculum	Attained Curriculum
CAPS Ideals Subject Learning Outcomes (knowledge and skills) Competencies **What we hope will happen?**	**Teachers** LTSM Learning environment Guided by annual Learning Programmes **What happens in the classroom?**	**Assessment** Formative Summative Guided by Assessment Statement, Exam guidelines, and competency markers **What we test for?**	**Actual** knowledge, Understanding, skills and attitudes the pupils gain (e.g ability to rote learn, pass tests) **What is actually taught?**

Hidden Curriculum

Hidden values that underlie the curriculum, and world view of teachers e.g. the value placed on culture, language, local knowledge, place of the pupil...

Impact on the pupil's world view and self-esteem, motivation, and entry-point into learning

Source: Adaptation, by the authors, of an infographic provided at the DBE-hosted Consultative Conference, 9-10 September 2023, on 'Strengthening the Curriculum'.

We are reminded that in teaching the CAPS curriculum in our respective schools and classrooms, the intended curriculum of CAPS is very different from that of the implemented curriculum. Using the Grade 12 History curriculum as an example, before the impact of COVID-19, which resulted in revised teaching programmes (RTPs), many schools did not teach all the topics (content) of the entire Grade 12 History curriculum. This approach directly affected what they assessed and prepared their history classes for—that is, the NSC Final Examination. In addition, when marking the NSC Grade 12 Final History Examination, it is evident that a significant number of schools which offer history as an elective subject only teach three of the six topics of Grade 12 Paper 1, and similarly, three of the six topics of Paper 2—the minimum number of topics which candidates are required to respond to in the Grade 12 NSC History examination(s).

Where this happens in schools, it is impossible to teach the intended curriculum with the scaffolding of knowledge and skills through the FET phases of Grades 10, 11, and 12. There is, therefore, a total disjuncture between the intended curriculum and the curriculum that our learners have attained.

There is a desperate need to consciously strengthen the intended curriculum of CAPS.

As colleagues in our own school's History Department, we deliberated over this. We agreed on core values and attitudes which we wanted to infuse into all that we do in our classrooms from the first academic day of 2024. The five values and what we mean in terms of the values are:

- **Respect** (for one another in the classroom; for the importance of the subject that contributes to one's understanding of our local and global community)
- **Accountability** (for one's views, ideas, and actions)
- **Academic excellence** (believing in the potential of all pupils to develop a deep understanding of history, both its content and skills)
- **Compassion** (for both the voiceless and marginalised in society, and seeing and recognising the humanity in others, underpinned by *Ubuntu*)
- **Inclusivity** (conscious of accepting and celebrating diversity in our society, underpinned by *Ubuntu*)

The attitudes we want to have in our history classroom, which will inform all that we do in the process of teaching and learning, are:
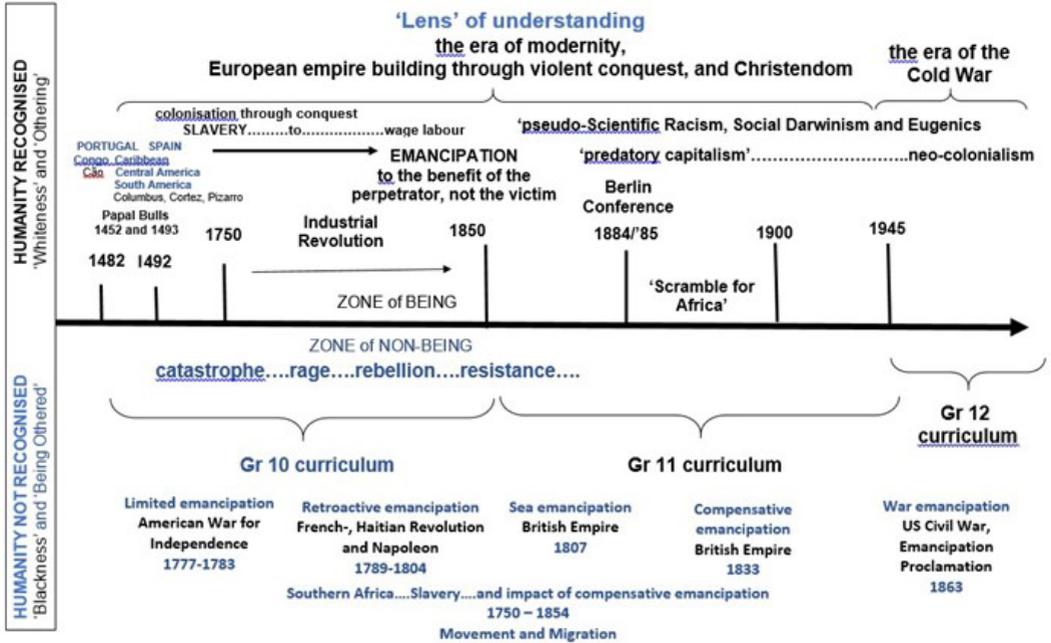
- **Social conscience** (a sense of responsibility and concern for the problems and

injustices of/in society)

- **Occupational consciousness** (an ongoing awareness of the dynamics of hegemony and recognition that dominant practices are sustained through what people do every day)
- **Advocating for human dignity**
- Intentionally working towards the **achievement of both equality and equity in society**
- **Advocating for the advancement of human rights and freedoms**

The lens of understanding as we scaffold the FET phase of the history curriculum

The scaffolding of Grade 10, 11, and 12 curricula is reflected in the '*lens of understanding*', which is informed by the values and attitudes we intend to infuse into the learning and teaching within our classrooms and WHY and WHAT we teach in 2024 as we scaffold the curriculum through the FET phase. The period covered in the Grade 10 and 11 curricula, from +1450 to 1950 (basically the end of WWII), is the era of modernity. This is followed, in terms of the Grade 12 curriculum, by the era of the Cold War. Siddharth Kara (2023:12) reminds us in *Cobalt Red, How the Blood of the Congo powers our lives*: "So much time has passed, so little has changed." The era of modernity is the period of European empire building through violent conquest and colonialism, establishing what Franz Fanon refers to as the 'zone of being'.

'Lens' of understanding
the era of modernity,
European empire building through violent conquest, and Christendom — the era of the Cold War

HUMANITY RECOGNISED — 'Whiteness' and 'Othering'

colonisation through conquest
SLAVERY.........to.................wage labour

'pseudo-Scientific Racism, Social Darwinism and Eugenics

PORTUGAL SPAIN
Congo Caribbean
Cão   Central America
      South America
      Columbus, Cortez, Pizarro

EMANCIPATION
to the benefit of the perpetrator, not the victim

'predatory capitalism'..............................neo-colonialism

Papal Bulls 1452 and 1493

1750

Industrial Revolution

1850

Berlin Conference

1884/'85

1900

1945

1482 1492

ZONE of BEING

'Scramble for Africa'

ZONE of NON-BEING

catastrophe....rage....rebellion....resistance....

HUMANITY NOT RECOGNISED — 'Blackness' and 'Being Othered'

Gr 10 curriculum

Gr 11 curriculum

Gr 12 curriculum

Limited emancipation
American War for Independence
1777-1783

Retroactive emancipation
French-, Haitian Revolution and Napoleon
1789-1804

Sea emancipation
British Empire
1807

Compensative emancipation
British Empire
1833

War emancipation
US Civil War, Emancipation Proclamation
1863

Southern Africa....Slavery....and impact of compensative emancipation
1750 – 1854
Movement and Migration

Based on the work of Frantz Fanon: Drawing on and adapting the work of Cornel West (2017), Susan Williams (2021), Howard French (2021), Kris Manjapra (2022), Frank Kronenberg (2022), Siddharth Kara (2023), and Patric Tarik Mellet (2024)

Source: Prepared by the authors

Having briefly taught the topic entitled the 'World in 1450', we begin with the topic referred to as Early Spanish Colonisation but from the perspective of the early evolving of European conquest and enslavement of those categorised as heathen by Christendom, in the year of modernity. The Papal Bulls articulated what has come to be described as the 'Doctrine of Discovery', which provided the theological justification for conquest and slavery. The catastrophe of enslavement for those victims whose humanity was not recognised resulted in rage, resistance, and rebellion. At the forefront of most people's contemporary consciousness is the association of the word catastrophe with the '*nakba*' in the Palestine mandate of 1947/1948. However, here we refer to a disaster which unfolded over 500 years. We intentionally elevate the voice of rage, resistance, and rebellion to the unfolding catastrophe in the era of modernity and argue that we are teaching and learning from a decolonised perspective. Manjapra (2022) explains that the contradictions which developed in capitalism, confronted by the revolt of those enslaved, resulted in the perpetrators evolving 'emancipation' to their benefit while the victims were negated.

From this perspective, a series of topics are then taught in the Grade 10 curriculum. The subsequent issues speak to different forms of emancipation by the perpetrators—to their benefit: limited emancipation (Britain and its Empire during the American War of Independence), retroactive emancipation (French Revolution, Haitian Revolution, and Napoleon), sea emancipation (Britain and its Empire), compensative emancipation (Britain and its Empire), and war emancipation (in the context of the American Civil War). We conclude the Grade 10 curriculum with Movement and Migration, which we have reframed as 'Southern Africa, slavery, and the impact of compensative emancipation (1750-1854)'.

Reimaging the Grade 10 curriculum, informed by the lens of understanding

The '*lens of understanding*' was vital for us as teachers of the Grade 10 curriculum to engage with at the start of the 2024 academic year as we reimagined what we were teaching in the Grade 10 classroom.

We had to ensure each history classroom would undertake teaching and learning from a similar decolonised perspective. We, as the four history teachers responsible for teaching Grade 10 history classes, had to be on the same page as we unpacked the topics throughout the year. Each teacher was encouraged to place an A1 image of this '*lens of understanding*' on their classroom wall, which could be referred to regularly as the year unfolded. In addition, at the start of each new topic, this '*lens of understanding*' would start the PowerPoint teaching aid, and where the topic being addressed is located within the era of modernity.

Let the learners evaluate the utility of the lens of understanding.

Towards the end of the third term (2024), we, as a History Department at the school, requested all history learners (from Grades 8 through 12) undertake an evaluation of both their history teachers, the content of the curriculum, and the classroom space in which teaching and learning take place. Completing the assessment was voluntary, and 149 out of a possible 650+ history learners completed it … a 23% return, which is disappointing. We can also gauge the relative percentage of the returns to the respective history teacher in 2024.

We posed a question to learners in the FET phase about the utility of the 'lens of

understanding' that we had adopted in 2024. The question posed was as follows:

"Has providing a 'lens of understanding' for the era of Modernity at the start of the year assisted your understanding of how topics are linked through the year and how the curricula are scaffolded through the years of the FET Phase?" The question required a YES or NO response. Sixty per cent responded YES to the question. They then had to explain their response to the question.

Included here are a few explanations for the YES response:

- "Yes, it lays out a clear route the history department wants to go down through the year."
- "It gives a good overview of all the topics we will be learning and following, and learning context before the next topic."
- "It makes sense how everything is connected, which was something I struggled to do."
- "The 'lens of understanding' perfectly maps out the different history topics that will be covered and illustrates their relation to each other as we gradually progress through them all. The order of the topics and way of teaching them have created a clear illustration of how certain events in history influence the ones to come, and how history can often repeat itself."
- "At first, it's quite a lot to look at, I will admit, but after we've learnt all the information, it makes a lot of sense and is like a map of what we've learnt. But I think it also conveys an essential message that not many people get to see."

Those who responded NO indicated they could not understand it or found it too complex.

Where to from here?

We would suggest the following:

First, the teaching aids and the assessments we have used this year are freely available through our zero-rated drive. All the topics we engage within the classroom are available in the form of a PowerPoint, an elaboration in the text form of each slide, and the entire topic is recorded as an MP4 video lesson. Each topic begins with a slide of the lens of understanding. We make the three teaching aids available to our classes via Google Classroom in addition to the hardcopy of the PowerPoint we provide in note form to each

pupil at the start of each topic. These aids assist the pupils in consolidating their learning before an assessment at the end of the topic to determine their understanding of both the contents and related history skills.

Second, as history teachers, we should be encouraged to share what we do in the classroom with colleagues, on both high school and tertiary levels. We make available all our teaching aids to the Western Cape Education Department through the District Subject Advisors and (on request) to any history teaching colleague.

Third, it is hoped the Department of Basic Education (DBE), its 'Learning Recovery and Curriculum Strengthening' Directorate, will take note of what is happening in some history classrooms around the country.

Fourth, where reimaging the teaching and learning of the FET phase of history from a decolonised perspective is unfolding, such sites would be helpful to the academy in undertaking further research.

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1. *Yesterday & Today* is a scholarly, peer-reviewed journal and is accredited since the beginning of 2012.

2. History Education, History in Education, and the History of Education and where research related submissions are welcomed.

3. Authors may submit individual contributions or contributions created in teams.

4. All manuscripts are subjected to a double-blinded review process.

5. The language of the journal is English. However, abstracts may be in any of the 11 official languages of South Africa.

6. Contributions must be accompanied by an abstract of not more than 250 words.

7. The titles of articles should preferably not exceed 15 words.

8. The names of authors and their full institutional affiliations/addresses, city and country of the institution must accompany all contributions. Authors also have to enclose their E-mail addresses and orchid numbers.

9. The Harvard or the Footnote methods of reference may be used. 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 *Yesterday & Today* guidelines for either the Harvard reference method or the Footnote reference method must be scrupulously followed.

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11. Articles should be submitted online to Professor Johan Wassermann, the editor-in-chief, can be contacted electronically at: Johan.wassermann@up.ac.za Notification of the receipt of the submission will be done within 72 hours.

12. The text format must be in 12pt font, Times New Roman and in 1.5 spacing. The text should be in Microsoft Word format.

13. The length of articles, all included, should preferably not exceed 8 000 words.

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Both the footnote reference method and the Harvard reference method are accepted for articles in *Yesterday & Today.* See some guidelines below:

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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.

The titles of books, articles, chapters, theses, dissertations and papers/manuscripts should NOT be capitalised at random. Only the names of people and places (and in some instances specific historic events) are capitalised. For example: **P Erasmus, "The 'lost' South African tribe – rebirth of the Koranna in the Free State",** *New Contree***, 50, November 2005, p. 77;**
NOT
P Erasmus, "The 'Lost' South African Tribe – Rebirth of The Koranna In the Free State", *New Contree*, 50, November 2005, p. 77.

<u>**PLEASE NOTE**</u>: Referencing journal titles imply that every word of the journal must start with a capital letter, example: Yesterday&Today Journal.

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.

To:

P Erasmus, "The 'lost' South African tribe…", *New Contree*, 50, November 2005, p. 77.

[Please note: ONLY the title of the article is shortened and not the finding place.]

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 Transgariep tot 1870* (Universiteit van die Vrystaat, Bloemfontein, 1989), pp. 33-34.

[**Please note: The reference variety to page numbers used.**]

Example of a shortened version of a reference from a book

From:

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.

To:

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

Example of interview reference

K Rasool (Personal Collection), interview, K Kotzé (CEO, Goldfields, Johannesburg Head Office)/E Schutte (Researcher, NWU, School of Basic Science), 12 March 2006.

Example of shortened interview reference (after it has been used once in article)

K Rasool (Personal Collection), interview, K. Kotzé/E Schutte, 12 March 2006.

Example of an Electronic Mail - document or letter

E-mail: W Khumalo (Bigenafrica, Pretoria/Z Dube (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.

[Please note: After the first reference to the National Archives or Source Group for example, it can be abbreviated to e.g. NA or DE.]

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.

Shortened version:

D Dollar, "Asian century..." (Paper, GDN Conference, 2007), p. 7.

B Sautmann, "The forest for the trees: ..." (Paper, Public Seminar: China in Africa: ..., University of Johannesburg [or UJ]), p. 7.

GENERAL

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References are cited in the text by the author'(s) surname(s) and the year of publication in brackets, separated by a comma: e.g. (Weedon, 1977:13).

If several articles by the same author and from the same year are cited, the letters a, b, c, etc. should be added after the year of publication: e.g. (Fardon, 2007a:23).

Page references in the text should follow a colon after the date: e.g. (Bazalgette, 1992:209-214).

In works by three or more authors the surnames of all authors should be given in the first reference to such a work. In subsequent references to this work, only the name of the first author is given, followed by the abbreviation *et al.*: e.g. (Ottaro *et al.*, 2005:34).

If reference is made to an anonymous item in a newspaper, the name of the newspaper is given in brackets: e.g. (The Citizen, 2010).

For personal communications (oral or written) identify the person and indicate in brackets that it is a personal communication: e.g. (B Brown, pers. comm.).

Ensure that dates, spelling and titles used in the text are accurate and consistent with those listed in the references.

List all references chronologically and then alphabetically: e.g. (Scott 2003; Muller 2006; Meyer 2007).

List of references

Only sources cited in the text are listed, in alphabetical order, under References. Bibliographic information should be in the language of the source document, not in the language of the article.

References should be presented as indicated in the following examples. See the required punctuation.

Journal articles

Surname(s) and initials of author(s), year of publication, title of article, unabbreviated title of journal, volume, issue number in brackets and page numbers: e.g. Shepherd, R 1992. Elementary media education. The perfect curriculum. *English Quarterly*, 25(2):35-38.

Books

Surname(s) and initials of author(s) or editor(s), year of publication, title of book, volume, edition, place of publication and publisher: e.g. Mouton, J 2001. *Understanding social research*. Pretoria: JL van Schaik.

Chapters in books

Surname(s) and initials of author(s,) year of publication, title of chapter, editor(s), title of book, place of publication and publisher: e.g. Masterman, L 1992. The case of television studies. In: M Alvarado & O Boyd-Barrett (eds.). *Media education: an introduction*. London: British Film Institute.

Unpublished theses or dissertations

Fardon, JVV 2007. Gender in history teaching resources in South African public school. Unpublished D.Ed. 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.
Website references: No author:
These references are not archival, and subject to change in any way and at any time If it is essential to present them, they should be included in a numbered endnote and not in the reference list.

Personal communications

Normally personal communications should always be recorded and retrievable. It should be cited as follows:
Personal interview, B Ndlovu (Journalist-singer)/S Ntini (Researcher), 2 October 2010.

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3. **Author's details: Provide the following in 10pt:**
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     Example:

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     University of Pretoria

     Pretoria, South Africa

     Johan.wassermann@up.ac.za

     0000-0001-9173-0372

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 heading of the Abstract: Bold, italics, 12pt.
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5. **Keywords:** The keywords should be placed on the first page below the abstract. The word **'Keywords':**10pt, bold.
   - 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. **Title of the article:** 14pt, bold.

7. **Main headings in article:** 'Introduction' – 12pt, bold.

8. *Sub-headings in article: 'History research'* – 12pt, bold, italics.

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    Example: p. space 23 – 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 longer that 5 lines, 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**

20. **2010; NOT** 23/12/2010 [**For additional guidelines see the Yesterday & Today Reference guidelines**].

21. 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)'.