

# Textbooks as mediators in the intellectual project of history education

Katalin Eszter Morgan (née Fenyves)

**Bibliographic information published by the Deutsche Nationalbibliothek**

The Deutsche Nationalbibliothek lists this publication in the Deutsche Nationalbibliografie; detailed bibliographic data are available on the Internet at <http://dnb.d-nb.de>.

**Morgan, Katalin Eszter:**

Textbooks as mediators in the intellectual project of history education.

ISBN 978-3-86376-043-4

**All Rights Reserved**

1. Edition 2013, Göttingen

© Optimus Verlag

URL: [www.optimus-verlag.de](http://www.optimus-verlag.de)

Printed in Germany

Paper is FSC certified (wood-free, chlorine free and acid-free,  
and resistant to aging ANSI 3948 and ISO 9706)

No part of this publication may be reproduced, stored in a retrieval system, or transmitted in any form or by any means, electronic, mechanical, photocopying, scanning, or otherwise without the prior written permission of the publisher. Request to the publisher for permission should be addressed to [info@optimus-verlag.de](mailto:info@optimus-verlag.de)

## Preface

The research on which this book is based was undertaken for a doctoral thesis at the University of Johannesburg, South Africa, between 2008 and 2011. The primary aim was to design a tool for the analysis of content and its presentation in high school history textbooks. This focus arises from a gap in the literature on theoretical considerations of textbook research. A secondary aim was to show how such a tool could be put to use. To this end, a particular chapter on the history of race and racism was compared across 10 different history textbooks. These 10 books were selected because all of them were officially approved for the South African school curriculum; in other words, at the time of the study, these were the books available to teachers in state schools.

While in more developed countries textbooks are likely to be one of many tools teachers have at their disposal, in the South African context they have a significant role to play, because many teachers have no access to any other media or sources of subject knowledge<sup>1</sup>. But even if teachers were not to use them at all, they can still be studied as examples of “history in the present”. They record the attitude of the ruling generation both towards the knowledge deemed important to pass down, as well as towards the next generation.

This is another way of saying that textbooks, and especially history textbooks, represent a sample of a body of knowledge which can be understood to pass on a certain sociocultural inheritance. This inheritance is encoded in a text-based reality (that) the textbooks represent. The encoding happens through language and images, as they record the education system’s position towards knowledge in a moment of time. This position is partly captured in the curriculum.

Post-1994 curricula devised for the South African school system have had an overtly transformative agenda. Apartheid-era curricula promoted the values of the country’s rulers: ‘white’, patriarchal, capitalist, Eurocentric and authoritarian. Not surprisingly, history as a subject became one of the main foci in the educational transformation project, since it is widely accepted that shaping the future relies to some extent on controlling how the past is presented. The

---

<sup>1</sup> This is strengthened by the 2009 speech of South African Minister of Basic Education, Angelina Motshekga, stating that the textbook is the most effective tool in curriculum delivery because it is the most effective tool to ensure consistency, coverage, appropriate pacing and better quality instruction.

study aimed to investigate how the transformation project was faring. To do this, the approach of the study is that of finding ways of uncovering the strategy of the text constructors.

Overall, for the design of a tool for history textbook analysis a bounded case study was used. The case was defined by the topic of 'impact of 19th century race theories leading to genocide' (shortened from the curriculum, Department of Education 2003, 26) as represented in the 10 textbooks and their respective teacher guides. The methods can be described as a hybrid of hermeneutic analysis, discourse analysis, visual analysis, question (pedagogic) analysis, critical analysis, and semiotic analysis. Such experimentation with a hybrid method can be justified, given that the process of analysis was itself an object of study.

A major conclusion of the study is that textbooks have many choices in how to address the intellectual project of history education. Even when they operate within the same curricular framework, they respond to it in remarkably different ways. Arguably, the study's main claim to originality lies in its identification of general principles for analysing historical-educational texts and the ensuing design of a model based on these principles. The tool helps to *identify* and *name* different features of educational media (for history) that may be important and helpful in all contexts. How these features are then *evaluated* in particular texts is a different matter. Other researchers may come to different results and conclusions, depending on their subjective positionings.

The model could be used by other researchers of history textbooks and perhaps also with other, related subject textbooks (such as social science or civics for example). The tool could also be adapted to analysing other educational media for history and social science, such as websites, museums, documentary films and so on. It could also be adapted to analysing classroom interaction. A further contribution of the study is a set of key recommendations to history textbook developers and evaluators. Others who may find the study of interest are postgraduate students doing textbook research on social science related subjects, history teachers and teacher educators, and social justice/human rights workers.

## Acknowledgements

I am greatly indebted to Prof Elbie Henning who was in every sense a *Doktormutter*. Her intellectual insight, clarity of thought, prompt and no-nonsense communication style, and unfailing sense of humour enabled me to carry out the study with optimism and confidence. I am grateful to the University of Johannesburg and the NRF (National Research Foundation) for securing funding for this research project. I also thank the Georg Eckert Institute for International Textbook Research (and the associated anonymous reviewers) for awarding me the prize for this work in 2012 for “*herausragende wissenschaftliche Arbeiten zur Bildungsforschungsmedien*” (Excellence in International Educational Media Research). Colleagues, friends and family stood by with patience and encouragement. In alphabetical order, I thank Jacqui Chetty; Paven Chetty; Marcelle Dawson; Josef de Beer; Facing History and Ourselves; Ivan Fenyves; Neil Gooch; Jennifer Gooch (and their sons Dawson, Hudson, Jonathon and Haddon); Sarah Gravett; Mike Horsley; Henning Hues; IARTEM; Debbie Kamang; Günther Kress; Cynthia Kros; Pia Lamberti; James McCall; Andrew Morgan; Slade Morgan; Jude Morgan; Glenn Morgan, Charmaine Morgan; Ruksana Osman; Samantha Perfect; Darryl Perfect; Kalem Perfect; Yvonne Reed; Arno Reints; Hanna Schissler; Staffan Selander; Rob Siebörger; Brigitte Smit; Martin Trümpelmann; and Johan Wassermann.

# Table of Contents

<b>List of Abbreviations</b> .....	V
<b>Introduction</b> .....	1
The theoretical orientation underpinning the main research questions.....	3
Socio-political contexts in South Africa .....	6
The choice of subject matter and the motivation behind this choice .....	8
The biographical details of the textbooks.....	10
The structure of the book.....	15
<b>Chapter 1 – Textbook research, history, curricula, and their hotspots</b> .....	17
<b>The nature and history of textbook research</b> .....	17
<i>What is a textbook?</i> .....	17
<i>Origins and purposes of textbook research</i> .....	18
<i>The importance and authority of textbooks</i> .....	20
<i>The interdisciplinary nature of textbook research</i> .....	24
<b>History as a discipline in school learning</b> .....	26
<i>Individuals and Society</i> .....	27
<i>Historical thinking</i> .....	28
<i>Value-judgements, moral understanding and the problem of presentism</i> .....	29
<i>Freedom of conscience</i> .....	33
<i>South African literature on textbooks and curricula</i> .....	36
<i>From isolation and division to transformation</i> .....	38
<i>Africanisation of the curriculum</i> .....	40
<i>South African textbook studies and their theory/methodology gaps</i> .....	42
<i>Affirmative action in history writing?</i> .....	44
<b>Stereotypes, prejudices, race and racism</b> .....	46
<i>Hidden stereotypes</i> .....	47
<i>Stereotypes have a function</i> .....	48
<i>“Race” in South Africa and in Germany</i> .....	49

<i>Race as a sociological concept</i> .....	51
<i>Race in-between the social and the physical</i> .....	52
<i>Racism as identity politics</i> .....	53
<i>Racism as Schimpfwort</i> .....	55
<i>Racism and injustice</i> .....	57
<b>Theoretical, philosophical and methodological considerations</b> .....	58
<i>The problems with finding criteria for assessing history textbooks</i> .....	58
<i>Theoretical possibilities regarding the object (textbooks)</i> .....	60
<i>Theoretical possibilities regarding the subject (researcher)</i> .....	63
<i>Text, semiotics and sociocultural theory</i> .....	64
<b>Consolidation</b> .....	68
<b>Chapter 2 – Designing a tool for history textbook analysis</b> .....	71
<i>Choosing the sample</i> .....	71
<b>The Three Stages of the Tool Design Process</b> .....	74
<i>Stage 1: Inductive analysis of textbook chapters – a grounded theory approach</i> .....	74
<i>Stage 2: Establishing central concepts from the literature</i> .....	77
<i>Stage 3: Establishing general principles underpinning the five-dimension tool and the finalisation of the dimensions</i> .....	77
<b>The analytical dimensions</b> .....	79
<i>Dimension A: Making own/personal historical knowledge</i> .....	80
<i>Dimension B: Learning empathy</i> .....	83
<i>Dimension C: Positioning a textual community</i> .....	85
<i>Dimension D: Fashioning stories</i> .....	88
<i>Dimension E: Orientating the reader</i> .....	90
<b>Examples from the data to illustrate how the 3-stage process of analysis worked</b> .....	92
<b>Consolidation</b> .....	94
<b>Chapter 3 – How the texts mediate the intellectual project</b> .....	95
A. How the texts mediate “making own historical knowledge” .....	97

---

B. How texts mediate “learning empathy” .....	110
C. How texts mediate “positioning a textual community” .....	119
D. How texts mediate “fashioning stories” .....	137
E. How texts mediate “orientating the reader” .....	147
<b>Chapter 4 – Making sense of the findings</b> .....	<b>153</b>
<b>A: Making own historical knowledge or ‘having to think’</b> .....	<b>154</b>
<i>Theme 5: Mediating critical thinking, curiosity and creativity</i> .....	155
<i>Theme 4: Promoting the intellectual project of history education         through modelling and scaffolding historical scholarshi</i> .....	159
<i>Theme 9: Enabling historical literacy through representing history         as a complex process of change</i> .....	164
<i>Consolidation</i> .....	170
<b>B. Learning empathy: moral astonishment and transformation of consciousness</b> .....	<b>171</b>
<i>Theme 8: Developing agency and empathy through the study of history</i> .....	173
<i>Theme 2: Compromising the intellectual project of history education         by over-simplifications and perpetuating stereotypes</i> .....	177
<i>Theme 3: Excluding pivotal historical information and obstructing         opportunity to imagine and understand the past</i> .....	184
<i>Consolidation</i> .....	188
<b>C: How textbooks position a textual community: a threat to curiosity?</b> .....	<b>189</b>
<i>Theme 1: Compromising the intellectual project of history education         by delivering anti-historical non-narrative content</i> .....	190
<i>Theme 7: Mimicking critical thinking</i> .....	197
<i>Consolidation</i> .....	200
<b>D. Fashioning stories: successful and unsuccessful narrative strategies</b> .....	<b>201</b>
<i>Theme 1: Compromising the intellectual project of history education         by delivering anti-historical non-narrative content</i> .....	202
<i>Theme 3: Excluding pivotal historical information and obstructing         opportunity to imagine and understand the past</i> .....	206
<i>Consolidation</i> .....	213

<b>E: Orientating the reader: decoding the visual grammar .....</b>	<b>214</b>
<i>Theme 6: Disorientating the reader .....</i>	<i>216</i>
<i>Consolidation .....</i>	<i>226</i>
<b>Conclusion: the implications for history textbooks as object of study.....</b>	<b>229</b>
Methodological implications for text analysis .....	231
Implications for textbook writing: some recommendations.....	233
What do the weaker books mediate?.....	235
How can the intellectual project of history education succeed by way of textbooks?.....	238
Where to from here?.....	242
<b>Appendix – Department of Education’s guiding criteria for selecting textbooks.....</b>	<b>245</b>
<b>References .....</b>	<b>249</b>