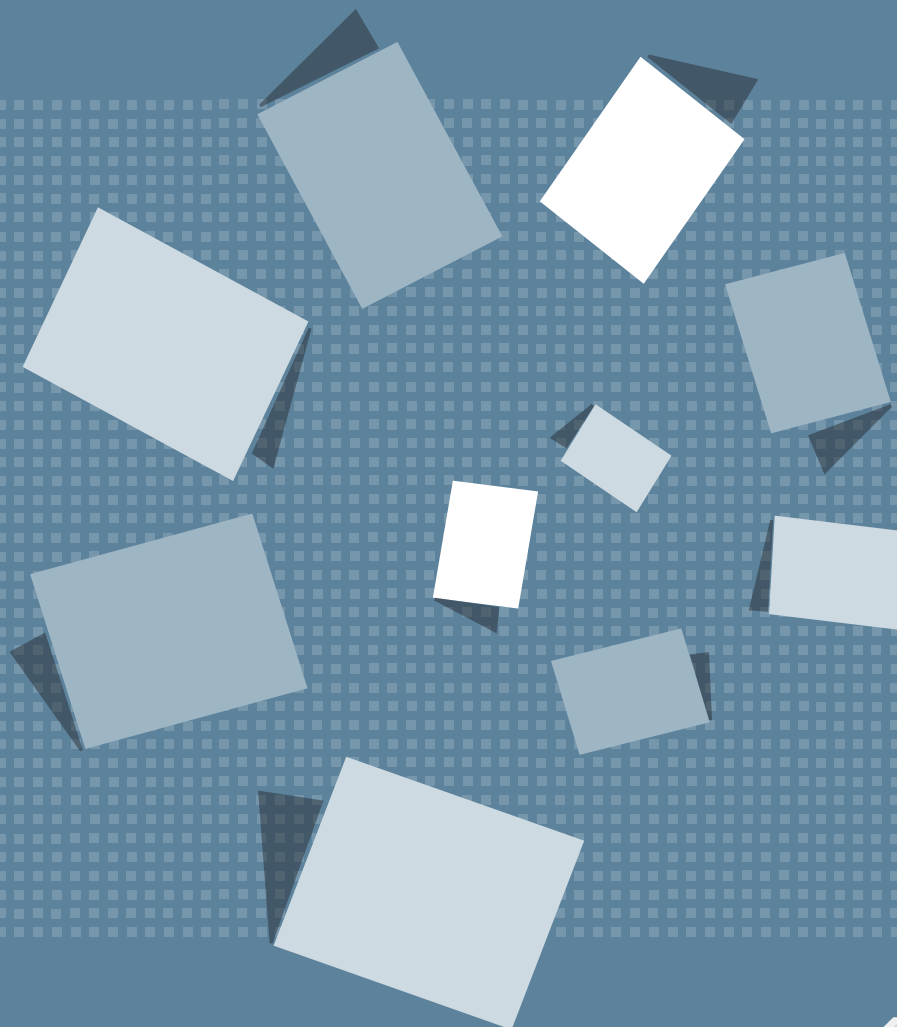


INTERNATIONAL SEMINAR

# HISTORY AND SOCIAL SCIENCE TEXTBOOK

SANTIAGO DE CHILE 2008



GOBIERNO DE CHILE  
MINISTERIO DE EDUCACIÓN

**INTERNATIONAL SEMINAR**

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# PRESENTATION

The School Textbook Division from the Chilean Ministry of Education has carried out experience-sharing instances and reflection processes oriented to improve the quality of textbooks, adapting them to new learning strategies, to the demands of the school system as well as to the state-of-the-art in research in education worldwide.

Since the successful First international Seminar on school textbooks- SITE 2006, the Textbook Division has decided to keep on with these initiatives that feedback Public Policies in relation to the provision of textbooks and the development of academic competences. Along the same lines, the International Seminar on History and Social Science Textbooks took place in November 2008; forty outstanding Chilean and foreign experts lectured in conferences and panels full of enthusiastic audiences.

This experience allowed the exchange of studies and researches among those who work in the didactic of social sciences and/or are involved in the area of history and social sciences textbooks, both nationally and internationally, and contribute to their quality concerning the didactic design and the treatment of their contents, considering new approaches in relation to historicity and spatiality of the social phenomena.

Diversity and richness of the works that dealt with the key topics of the Seminar –didactic of history and social sciences in textbooks; new approaches to the didactic of history, geography and other social sciences and its application to school textbooks; analysis of contents in history and social science textbooks and the formation of citizens through these textbooks– also favored the exchange of experiences and orientations in relevant topics such as historical memory and construction of local identities, national and global, cultural and social diversity: multiculturalism and cultural pluralism.

In this way we have been able to put forward the discussion about the importance and the real value of history and social sciences textbooks in the formation of our students as citizens, comparing the Chilean experiences to those of other countries.

The publication of the works exposed in the Seminar, expresses the commitment of the Ministry of Education to the development of textbooks as an important pedagogical resource. At the same time, it is an invitation to the academic community, especially in the area of Education and Social Sciences, to develop competences and increase the existing capacities in the production, use, training and research on school textbooks.

Ana María Jiménez Saldaña  
*Head School Textbook Division  
Curriculum and Evaluation Unit  
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*Santiago, August 2009*

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# History School Textbooks as a Means of Reconciliation? Some Remarks on Bilateral Textbooks and “Common Histories”

SIMONE LÄSSIG

I am delighted –indeed honoured– to be invited as keynote speaker to this important international conference. Of course, this is partly due to the beauty of this country, its fascinating capital and the friendliness of its people, all of which I was fortunate to encounter in the first few days. Even more significant for me, however, is the conference’s theme and subject matter, which is closely connected with the work of the institute I direct. I am impressed by the fact that you have organised such a significant international conference on the “History and Social Sciences Textbook”, thus initiating dialogue between scholars and political representatives.

In my lecture I am going to concentrate on the question as to whether history textbooks today might contribute to reconciliation between former enemies in different settings. For two reasons I will primarily –although not only– refer to a German and a European perspective. Firstly, there is the traumatic experience and legacy of National Socialism and the Holocaust; the unconceivable mass murder that will always be engraved in the history of Germany and the Germans. The challenge the Germans have faced in dealing with this legacy is domestic as well as international. It has meant not only promoting both reconciliation and mutual understanding between Germany and its former enemies, but also critical debates on issues of guilt, atonement and responsibility *within* German society itself. From this point of view, German and European approaches towards overcoming conflicting memories and national/ethnic prejudices via school textbooks might also be of *general* interest for other world regions.

The second reason is that after 1989, reunified German society was confronted by the question of how to deal with its second –different kind– of dictatorship. Essentially it was –and still is– the question as to how history and history teaching could support the merging of two very different societies, cultures, and memories if one side were remembered by the history books as the “winner” and the other side as the “loser” of contemporary history. This is a situation that *other* “split societies” share by tendency.

This lecture will address four aspects. The first section will explore the fundamental characteristics of textbook knowledge in general and of history textbooks in particular.

Secondly, I will sketch several approaches towards conceptualising textbooks as instruments of international understanding *between states* that share a conflicting and entangled history. In the third section, I will discuss history textbooks as *means of “internal reconciliation”* within a society that must address a modern history affected by serious conflicts between different ethnic, religious or political groups. The fourth and last section of my lecture will consider whether multilateral regional textbooks can be a timely and appropriate option and an answer to the growing heterogeneity of societies in the era of globalization. I will concentrate here on the idea of a common European textbook.

To my first point: What are the specific characteristics of textbook knowledge? Who defines and interprets what children read in their textbooks and why do textbooks, of all things, so frequently become subjects of political conflicts?

1. Knowledge has always been (and still is) dependent on what a given society pre-structures and conveys via its media. Ever since the emergence of the modern school system, textbooks have carried the function of *privileged* media in this regard. For the state, they are the ideal instruments of national education and for good reason: They are media that enjoy more-or-less blanket coverage in their distribution, available to almost everyone during a formative phase of life. Textbooks are, therefore, a specific type of “mass media”, one that, however, is directly or indirectly influenced, defined and in many ways certified, by the state.
2. Textbook knowledge, ladies and gentlemen, is always highly selective. Anyone who writes textbooks must select and omit, condense, structure, reduce and generalise as well as substantiate information.
3. Textbooks specifically transport *authorised* information. The stores of knowledge and interpretations to be found in textbooks are seen as particularly objective, accurate and relevant. Curricula and textbooks thus appear to a certain extent to sport an official “stamp” promising “the truth”.
4. If we bring to account this wide distribution and the fact that textbooks to a large extent are approved by the state, their relevance as instruments of political influence and social control becomes apparent. The picture, however, would not be complete if we were to attribute all the power in defining textbooks to the state. At least for open democratic societies textbooks and curricula are also a product of scholarly, political and societal discourses. Up to a certain point, textbook knowledge is socially divided knowledge that is constructed via complex, multilateral and long processes of negotiation between various groups. By tendency, it is a matter of “canonised knowledge”; a knowledge which has been selected, filtered, evaluated and didactically coded by a range of highly diverse entities and therefore allows for conclusions about

the definitive political and cultural ideas and values of their time and social order. Textbooks reflect not only scholarly knowledge but also that conveyed via various media; they do so directly in the sense of absorbing information and indirectly in providing an interpretative framework. They are therefore also mirrors of the *zeitgeist*. They reflect the ideas that should be written into the nation's cultural memory; they demonstrate which views and perceptions of reality are substantially indisputable, and which cultural norms and which concepts of a social and political order are accepted by such a majority as to be passed on to the next generation.

5. Textbooks thus transport not only data but also cultural, social and political codes. Since these codes can become controversial and be completely suspended, especially if social structures and cultural hegemonies fundamentally change, if political systems are eroded or if conflicts arise with an historical dimension, textbooks often become a subject of political debate and provoke conflicts of recognition and awareness, between the various groups within a given society as well as between nation-states.

This is especially true for *history* textbooks. In nearly all states they occupy a quite central role in constructing identities and conveying official historical conceptions. All over the world, they transport the symbolic spheres of meaning and values that might help to create cohesion and produce political legitimacy within their societies. They do not only transmit facts or data but also specific self-images, images of the "other" and images of the "enemy". History textbooks thus serve as instruments of state remembrance policy and as key resources in projects of identity and nation-building through knowledge production.

On the other hand, history textbooks are also considered to promote international understanding, tolerance, and even reconciliation between states, societies or groups that have developed a conflicting and probably even violent relationship in a recent or more distant past.

This ambivalence is by no means a topic reserved for the 20th century, a century extremely affected by violence and war, battles of ideologies, civil war and genocide. It is, however, an extremely relevant and challenging topic of our present which must address new constellations and challenges, but also with which seemingly dated questions and painful legacies of a given society's past. What do I mean? On the one hand, we live in an age of globalization, multi-ethnic environments, and forced integration. These are developments that *neglect* national boundaries and establish new forms of representation and belonging between – as well as within – societies. On the other hand, however, we are witnessing processes of compensatory nation-building, in which history is used as a central argument and a major tool of legitimacy. This is also the case –indeed particularly so– for those states and societies that, like the Balkans or Rwanda, have experienced war and violence and are now struggling to define the extent to which history lessons should and can explain, justify or –in the interests of reconciliation– suppress these conflicts.

This brings me to my second point, which is related to this ambivalence: On the one hand, textbooks cause or reflect conflicts and on the other they have often been seen as particularly suitable instruments for the promotion of tolerance and mutual understanding - especially *between states* that share a conflicting entangled history. I will focus on the latter point.

The belief in a mediating role of history textbooks has a long tradition. The roots go back to the 1920s. Subsequent to the hyper-nationalism of World War I, individuals, associations and organizations realized that creating enemies in school textbooks might be instrumental in inspiring collective hatred; a hatred which breeds violence and war. Textbooks, those people realized, form concepts of the self and the ‘other’, of belonging and not-belonging, of inclusion and exclusion across generations. That is why they have frequently been instrumentalized for purposes of war, of demonizing the opponent, and of justifying one’s own national standpoint.

The detrimental role of textbooks in shaping views of the enemy therefore became the major interest of the first textbook committees that were founded. In order to promote international understanding and peace, the League of Nations in particular began to search for ways to combat mutual xenophobia through international textbook dialogues or committees. Their task was to analyze and eliminate stereotypes and prejudices. In 1937, 26 states signed the first, and until now, the only international declaration regarding the teaching of history and the revision of school textbooks. At this early stage, however, efforts to “detoxify” textbooks were not yet truly successful. Or to be more specific: international textbook consultations flourished mainly in regions where neighbouring states had *already* enjoyed peaceful relations over a considerable period of time and where an atmosphere of confidence already existed. This was particularly the case in Latin America and the Nordic countries.

In the collective shock left behind by the *Second* World War and the Holocaust, it was UNESCO that took the initiative in picking up this thread – supported by teachers associations and scholars. Now, *Germany*, where all Nazi textbooks and the entire school curricula had to be revised, became a centre of such activities. This is certainly no coincidence, because after the Holocaust and two lost wars many Germans developed an increasingly distanced relationship to their own nation; even today, the Germans find it difficult to demonstrate national pride and patriotism. And anyone who tries to “flee” his or her own nation as a consequence of an extremely problematic past will be particularly motivated to liberate the textbooks in his or her own country and also those in other countries, from nationalistic ideas. This does not mean, however, that all Germans immediately became active advocates for a critical public debate about collective or individual guilt and responsibility. On the contrary: the process of significantly *shaping* public discourse within German society would not gain momentum for at least another generation.

One of the figures who became active much earlier – which actually means immediately after the end of the war - was the German historian Georg Eckert. By organizing textbook conferences with Germany’s neighbours and especially with its previous enemies such as France, Great

Britain, Poland or Israel, he and his partners made a major effort to remove prejudices, to do justice to the values contained in different cultural traditions and to contribute to reconciliation. These are the very roots of bilateral textbook commissions such as the Franco-German, the German-Polish or the German-Israeli Commission. The main goal of these commissions was to focus on comparisons of different or controversial depictions and perceptions in order to find a *compromise*. In order to avoid or minimize conflicts, this consensus-oriented model of textbook revision seeks an historical narrative that is acceptable to both sides. This has often required avoiding issues that were still controversial and emphasizing the aspects both were able to agree on.

If we consider the Polish-Israeli or the German-Polish textbook recommendations of 1976, for instance, there can be no doubt that this model produced remarkable results. Let me mention just four of them:

1. Textbook commissions of this type contributed towards reconciliation during the Cold War. Their recommendations were discussed by a wide public, sometimes controversially. In this way, many people became aware of historical burdens and conflicts for the first time and were inspired to examine more closely the interpretations of the self and of the “other”.
2. Following this European model, bilateral and multilateral textbook commissions were founded in different parts of Europe as well as in Asia. Here, reconciliation between the former war enemies is still a major challenge. From this point of view it is important that those commissions and their products (such as a Chinese-Korean-Japanese textbook) offer a wider perspective and do not only reflect a canonized national narrative. The main difference to Europe is that the Asian commissions are rarely supported by governments but mainly by NGOs.
3. One of the most recent results of the bilateral approach is the Franco-German history textbook; two of three volumes were published in 2006 and 2008. It is the first bilateral textbook to be approved by all relevant governments (which in Germany means the ministries of education in all 16 federal states). It has been highly praised for finding an historical narrative of compromise for two nations that have been recognized as ‘arch enemies’ for nearly a century.
4. Last year a commission was established to write a German-Polish history textbook. If we compare German-Polish history and relations with those between France and Germany, the former are even more fragile and the entangled history of Germany and Poland is even more conflict-laden. The common textbook is therefore seen as a *particularly* ambitious and challenging project. It would be unthinkable without the solid foundations laid by more than 35 years of formal textbook dialogue and without a political environment that proves to be supportive for this – to a certain extent revolutionary - idea.



How sustainable is this model however, and to what extent can it be transferred to other regions or other historical conflict situations?

If we initially approach this problem from a *didactical* perspective, it is primarily a question as to the extent to which joint textbook recommendations or even common history textbooks can improve the education of responsible, critically thinking, tolerant and self-confident citizens. The answer is ambivalent - even for democratic societies. From a scholarly point of view, pupils might be rendered particularly sensitive to historical conflict situations. And from a political point of view, the recommendations and particularly the public debate they aroused have also contributed to overcoming nationalistic interpretations and deeply rooted resentment. Joint textbooks thus mark the symbolic destination of a thoroughly successful journey towards international understanding, peace, and transnational thinking.

The orientation of modern history didactics, however, aims towards plurality and controversy; in other words, towards familiarising pupils with *different historical* perspectives and a variety of opinions. Bilateral textbooks have great potential here too. However, if the learning cultures of the countries in question differ dramatically, this potential can only be used to a limited extent, if at all. To make it clear: In every bilateral textbook project a compromise must not only be found regarding historical knowledge, values and perspectives presented or omitted in the given textbook. Compromise must also be developed regarding the question of multiple perspectives in the learning process. Perhaps this conference will bring about progress in this regard and convey new insights via an international comparison of historical learning cultures.

Let me call your attention to another important point: This kind of bi- or trilateral cooperation only works as a cooperation on *equal* terms and under the condition that results are negotiated in a rational discourse by *scholars*, not by politicians. It is essential that all partners recognize each other and work on a *symmetrical* basis. The results of such negotiations are placed at the disposal of publishers, teachers and politicians, who will be free to respect and to adapt or to ignore them. This consensus-driven approach has been especially successful:

- a) With the continuous support of the government or leading political powers
- b) Within stable political and democratic structures
- c) Within a comparatively strong and vital civil society
- d) With a long preparation period and consistent, sustained contact.<sup>1</sup>

Following the end of the “Cold War” and the implosion of many former socialist states new conflict constellations relevant for writing and negotiating history developed. Especially since the early 1990s, we have witnessed the resurrection of the nation state and new types of war and internal conflicts - like the genocide in Rwanda, the Balkan wars in South-Eastern Europe and the escalating conflicts in the Middle East.

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<sup>1</sup> The Franco-German textbook, for example, evolved more than half a century after the foundation of the Franco-German Textbook Commission, and in the German-Polish case, almost four decades passed between founding and the production of a textbook.

Under these circumstances we have also witnessed a revival of history as a source of national and political legitimation. Once again, textbooks have become an important instrument in inspiring a sense of identity via the notion of 'difference'. And this in turn often implies the continued existence or the massive revival of stereotypes and prejudices. The re-nationalization of countries that were once part of supra-national and multiethnic entities is clearly reflected in countless history textbooks. Particularly, yet by no means *only*, in Eastern Europe, many history textbooks are imbued with nationalistic perspectives and subcutaneous ethnocentrism.

This brings me to my third point - the question as to which role history textbooks could play as *means of "internal reconciliation"* for a society coping with a most recent history affected by serious conflicts. The basic constellations clearly differ in many ways from those of "classical" bilateral textbook work as developed by Germany since the end of the 1940s in dialogue with its former enemies. I would like to emphasise just the following aspects:

In situations when conflicts are still virulent it is mostly impossible to find an historical consensus and to write a joint historical narrative. One reason is that the partners in conflict and post - conflict environments mostly do not recognize each other as equal partners. The dialogue is therefore missing two principal conditions - symmetrical relationships and political stability.

In Germany, textbook dialogues have become a part of efforts made by society as a whole towards coming to terms with the past, towards reconciliation and compensation. It is however important to remember that it was not until the 1970s and 1980s that historical reconciliation became an issue for German *society*. The temporal distance between the historical events and their critical reflection was relatively large. In the "new textbook conflicts", however, textbooks are negotiated in the environment of a conflict that is still *fresh* and heavily laden with historical arguments.

This means: *those* textbook conflicts refer not only to a "closed history", but also and primarily to *most recent* struggles surrounding political and cultural hegemony and in some regions even to open and violent conflicts in which teachers, parents and curriculum experts, and perhaps even pupils were involved on one side or the other. If we take countries like South Africa, Spain, Portugal or –our host country– Chile into account, the challenge to cope with "fresh" internal conflicts and even civil wars in society and education has evidently not been a *completely* new phenomenon; new however was the combination of new kinds of nation-building and the strong will to use history and history lessons as a "sword" in the battle for legitimacy and power. As Charles Ingrao has put it regarding the situation in South-Eastern Europe, history textbooks have frequently become "weapons of mass instruction" in this new constellation.

And *history* education does indeed play a crucial role: On the one hand, it should explain why and how the conflict developed and who/which group must take responsibility for it. On the other hand it has to offer a (new) historical narrative that can enhance inclusion and social as well as cultural and political cohesion within the disturbed society. This is a true challenge:

discussing the roots, causes and responsibilities for most recent conflicts always provokes controversy and painful discussions, discussions which are more likely to divide societies than to bring them together or even inspire reconciliation.

This latent conflict potential not only concerns contemporary history. It also affects interpretations of the more distant past such as the middle ages or even antiquity. These periods are often used to find or to reactivate national, religious or ethnic foundation myths suitable for constructing a convincing national narrative.

One example for enacting a *completely* new national narrative as a means of reconciliation within a society is to be found in Rwanda. Here the new government tried to foster reconciliation by outsourcing responsibility for racism and ethnic hatred to the colonial powers. According to the new official narrative, all Rwandan groups had been living in harmony until the Europeans created turmoil between these groups. Notwithstanding this harmonizing approach, no attempt to write an official textbook on the contemporary history of Rwanda has been successful yet. The reason is obvious: The people who would have to write those textbooks and to interpret them in the classroom were involved in the conflicts and will therefore not be able to adopt objectivity and distance. Discussing the reasons, the structure and the liabilities of a violent conflict or even genocide will arouse strong emotions, because perpetrators and victims remember the same past in different ways.<sup>2</sup> It is, therefore, very difficult to develop a climate necessary for a rational debate conducive to history research as well as to history teaching.

In Bosnia-Herzegovina this constellation was anticipated by various stakeholders: The Council of Europe therefore proposed a moratorium (which is still in force). Over the course of a given period of time, it should be impossible to teach the most recent past at all. On the other hand, the Council of Europe has encouraged historians, other scholars and teachers representing the major ethnic groups to discuss appropriate methods for teaching about civil war and inhumanity that still seems to be part of the present.

The role of politicians and the state in conflict and post-conflict societies marks another difference: All traditional textbook commissions and joint textbook projects are based on a comparison of scholarly concepts and –more or less– rational discussions. Usually those projects are supported, sometimes even initiated, but at least tolerated by the relevant governments. In conflict and post-conflict societies however, additional actors claim and win agency: Very often, national and international NGOs initiate and accompany the revision or the rewriting of school textbooks. The advantage is that these organizations can act with flexibility and effectiveness, because they are not directly involved in the conflict. They appear distant, objective and reliable. The problem is that NGOs can only rarely influence the processes of implementation. While the Franco-German history textbook, for instance, bears the official seal of both governments and therefore serves as an official textbook, books written with the support of NGOs are usually not approved as standard but as additional teaching material at best.

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<sup>2</sup> Pingel p. 187

One example is the Israeli-Palestinian History Textbook written in the last three years. Although this textbook has not yet been approved by either side, it will probably become a paradigm-breaking model of a history textbook that might help to reconcile ethnic, religious or political groups suffering from mutual violence. In the last few years there have been *several* attempts to make history teaching a means of promoting peace in the Middle East; however, most have failed, along with the idea of a *common* historical narrative each side could live with. One of the major problems was –and still is– the asymmetrical constellation, the instable political situation and the fact that neither government will support any initiative of this kind.

Based on such insight, an NGO, the “Peace Research Institute in the Middle East” (PRIME) and scholars of our institute have developed a different model. They have brought together teachers from both sides forming a group that wished to write a common textbook on contemporary Israeli-Palestinian history. The main purpose of this experiment was to build up a sustainable relationship of trust and to promote mutual understanding in a region of seemingly permanent and violent conflict between groups that have mistrusted each other for decades. As their perspectives were so completely different and contradictory, the first and fundamental aim of the meetings was to agree on the fact that each side had the right to present its own historical perspectives. The main task was to get to know each other’s narrative, to inspire empathy by discussing different viewpoints and interpretations. The textbook consequently has a dual structure – on each side of the book the pupils find a different interpretation of the same historical event. Between the two narratives there is a blank space in which pupils and teachers may write down their own interpretation and arguments. This means that the principal task is not to inspire harmony and promote reconciliation after a *terminated* conflict as it is in the more traditional approaches to textbook revisions; rather, the goal is communication and the development of mutual recognition and empathy. The core idea behind this concept is that by taking into account the other’s perspective, one is inspired to change one’s own perspective and self-image. (Pingel 190)

It remains an open question whether and to what extent teachers are able and motivated to teach a controversial history of this kind. This is not only an unresolved problem for the Middle East but it may be one of the future’s most intriguing questions for history teaching and writing altogether. As far as we can tell at the moment, in most societies and learning environments around the globe, a strong multiple-perspectives approach is difficult to implement in schools. Teachers and scholars are often not sufficiently trained to develop such material and politicians are often not willing to accept it. (Pingel 192). This is by no means a challenge only for post-conflict societies and societies in the process of national redefinition, but also for relatively stable and democratic societies. The library of our institute features a unique collection of history, geography and civics textbooks from more than 150 countries, but only a minority of those textbooks strongly follow a multiple-perspectives approach. This seems to be a contradiction not only to the principles of contemporary didactic scholarship but also to the profile of our societies; societies that are defined by globalization, migration, plurality and diversity.

Here I come to the fourth and final point – the question as to whether supranational textbooks can be a timely and appropriate response to the growing heterogeneity and the widely felt lack of coherence in contemporary societies. I will concentrate here on the idea of a common European textbook.

The growing diversity in most European countries inspires a feeling of insecurity for many people; the quest for self-assurance is apparent at many levels. This inspires the political elites of the EU to discover as many commonalities as possible in the often-praised diversity of Europe. According to the cultural turn in politics, history and memory are considered to play a major role in promoting social and cultural cohesion – especially with respect to the younger generation and thus school education. Some opinion leaders and politicians render history textbooks an important instrument of a common narrative that will effectively *connect* national, ethnic and trans-national perspectives by defining a European canon of historical values.

What basis this process would require and the part to be played by historians within it are both topics of fierce debate; a debate that demonstrates the significance and conflict potential inherent in questions of a collective European identity. Given the obstacles presented by the new strongly patriotic textbooks in Eastern Europe, one can –at first glance– not help but wonder *why* this project is widely criticized. Shouldn't we be happy that our politicians wish to use history not as a means of creating *national* identity and stereotypes, but in order to promote the breaking of historical boundaries and the development of international understanding? What's wrong with the idea of representing Europe's shared history in a school textbook? Wouldn't the development of a European historical awareness actually encourage cultural understanding in Europe and integrate the 'new' member states and the peripheries?

Such questions are absolutely justified. But a European history textbook as currently under discussion could neither answer these questions nor could it fulfil the expectations and hopes attached to them. In fact, several arguments speak *against* these expectations:

1. One reason is the lack of clarity surrounding the term 'Europe' and the continent's boundaries. 'Europe' is and has always been a variable concept; each generation, each region and each nation has developed its own representations of 'Europe'. Over the course of the continent's history, there have been long periods in which the term was used with either more breadth or restriction than it is today, including, for instance, cultural spaces such as present-day Turkey. Today, however, Turkey –to continue the example– is conceived of even by renowned historians as a 'non-European state of Asia Minor', the population of which 'neither share the essential European identity that has developed over the course of history, nor could it ever contribute to identity constructions in the future'.<sup>3</sup> That means: What Europe was and is, where it began and where it ended, was and is a question of historical perspective, which in turn

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<sup>3</sup> Wehler, *Der Türkeibeitritt zerstört die Europäische Union*, in: Rehberg, *soziale Ungleichheit*, p. 1145f.

differs from country to country, even within the same society. And it is repeatedly re-negotiated on different levels.

2. Europe is confronted with *particularly* diverse memories and it has to deal with the precarious and ambivalent aspects of a memory that is both shared and divided. There are former enemies as well as victims and perpetrators, and sometimes it is difficult to decide who belongs to which group. Today, there are at least as many different interpretations of European history as there are European states; to say nothing of the fact that national identities are always in flux, and that every culture experiences diversity within itself. If we were to undertake, for example, a comparison of the crimes of Hitler and Stalin, we would very soon discover how far we are from a 'shared memory culture'. While Western Europeans emphasize the normative axiom of the singularity of the Holocaust and use it as the basis for their human-rights discourse and attempts at political integration, many Eastern Europeans are primarily occupied with a reappraisal of the injustices of a communist dictatorship. This often leads to interpretations that diverge dramatically as well as to a certain 'perpetrator-victim rivalry' which to a great extent blocks the path towards a shared historical memory.
3. Recent European integration coincides with the late process of 'nation building' and a recurrence of ethnocentrism – mainly in former socialist states. In most cases, those 'new states' have serious difficulties sharing the historical narrative of others. One reason for this is that the narrative in question is often that of a recent or former hegemonic power. States and societies that wish to be respected as partners at eye level have a strong interest in strengthening their national self-esteem and culture first – even if they wish to ultimately become or to be part of a larger union. Nearly all of these states have felt the need to legitimize their own national existence or the role they wish to play within the EU *historically*. Textbooks have played a crucial role in providing this legitimacy, in creating new national identities and –often in line with this– in underlining their own "Europeanness".
4. A further argument is the historicity of the 'European canon of values'. 'Europe' is associated by contemporary supporters of the European idea with, primarily, Christianity, civilization, enlightenment, law and order, and progress. Recognition of human rights and democracy has, however, by no means always been a consistent feature of Europe and Europeans. Europe is associated with the dictatorships and wars, banishments and genocides of the 20th century just as much as with colonialism and the exploitation of other world regions. Furthermore, the historical narrative offered to the new members and candidates of the EU is hardly attractive to them. 'Europe' and its history are mostly understood merely in terms of values and ideas coming from the *current* European centres. Consequently, most images of Europe are affirmative, teleological and created by the hegemonic powers. It is mainly a *Western* narrative that does not really include the historical experiences, interpretations, and

identities of pupils from European peripheries or of immigrants from non-European countries. Even if we are often completely unaware of it, and the effect is utterly unintentional, as long as European history is written merely as the history of Latin Christianity, the Enlightenment and progress, we will be working with hierarchies. We divide Europeans into genuine and acquired, native and immigrated Europeans –in other words– into first - class and second-class Europeans. For them, the typical master-narrative does not offer much to identify with or to be proud of. Historical narratives, however, can only be socially effective if they are the result of inclusive processes of negotiation on the one hand, and on the other hand, if they refer to the real experiences and memories of those whom they wish to integrate. Therefore, a mere compilation of different national histories, which would be built on cultural exclusion, could not lay the foundations for a true European identity.

5. Finally, we must remember that any depiction of the past is always a construct, reflecting specific interests, fears, prejudices and hopes. ‘The Europe and world of the future’, comments D. Offenhäuser, ‘will be a Europe and a world of many peoples and many different viewpoints.’<sup>4</sup> Anyone wishing to encourage young people in schools in a pro-European direction must give them the opportunity to learn about different historical narratives, regardless of whether they are Eastern or Western European, Arab or Chinese. Irrespective of their religious upbringing, young people must have the opportunity to get to know the narrative of the ‘other’ and –ideally– to develop some kind of empathy. It is precisely this, however, that would be hindered by an undisputed ‘Western’ master narrative.

And so it is no coincidence that all attempts at writing a *standardized* history of Europe have failed up until now. The only solution –I believe– is to remain consciously open to the *diversity* of European histories and to respect the fact that many different versions of one and the same story can exist parallel to one another. History instruction and its teaching materials should help pupils to discover these *different* pictures of history, to analyze them critically and to weigh them up against one another.

As I mentioned earlier, this is certainly not easy. I am more than aware of the fact that we are confronted by a lack of knowledge, of appropriate methods in textbook writing or historical teaching and also –in many countries– a lack of political will. And I am also aware of the fact that our institute’s new project to digitalize and translate representations of Europe from various European and non-European countries is just one small step forwards (although I still hope to get you interested in it).

I am, however, convinced that in the long run, history can only serve as a means of reconciliation and mutual understanding once we have found appropriate ways to sensitize our pupils to the *differences* in historical viewpoints, the competition in historical perspectives, the variety of

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<sup>4</sup> Offenhäuser, Dieter: Wer kennt Daniel O’Connor? (Who knows Daniel O’Connor?), in: Unesco heute 41 (1994) III, pp. 294-97

representations and to the right every group, state or nation has to its own history. The most challenging question for history textbook writing will be how to achieve the goal to teach each other's narrative without demonizing the "other". Up until now there has been no universally valid strategy in this direction; there is, however a great need for scholarly analysis and reflection and for a broad exchange of *international* experience. From this point of view too I am delighted that you have made this possible here by organising this interesting exchange of ideas and I extend once again my warmest thanks to all organisers of this conference.



# Social science, geography and history textbooks and the development of civic competences<sup>1</sup>

JOAN PAGÈS BLANCH

“**A** book should not be a terminal product, but rather an instrument open to the teacher’s initiatives and one which suggests new activities and diverse learning experiences. (...) A book and the different didactic materials should not only be a unique reference based on the scientific contents, but rather a field in which attitude, scaled values and competences are created (...)”

As good as the textbook may be, it shall be an inefficient instrument in the classroom if it does not count with the teacher’s work, an indispensable factor of educational action”.

Conclusions from the III Congress on Textbooks and Didactic Documents  
*(Encuentro Nacional sobre el Libro Escolar y el Documento Didáctico en la Educación Primaria y secundaria. Actas del III... Universidad de Valladolid, 1990. Secretariado de Publicaciones: 9-10)*

While presenting the “Rosa Sensat” Movement for Pedagogical Renovation of Cataluña monography, devoted to the use and misuse of textbooks I wrote (Pagès: 2006, 13): “The selection and use of a textbook, or any other material that could be used in education, has generated debate and controversy for some time. Why are certain books chosen and others cease to be selected? What elements predominate in the selection: price, content, activities, images? In our view, textbooks should meet certain criteria in order to at least consider: a) the concept of selected knowledge and its social and educational relevance, b) the protagonism it gives teachers to be able to tailor content and activities to the characteristics of its students and its context, and c) the role of a trainee in relation to the ways of accessing knowledge and how to use it”.

<sup>1</sup> This work also reflects on educational competences in:  
PAGÈS, J. (2007): “Un itinerario por el mundo de las competencias en ciencias sociales, geografía e historia a través de distintos currículos”. *Iber. Didáctica de las Ciencias Sociales, Geografía e Historia*, nº 52, pp. 29-39, April 2007.  
PAGÈS, J. (ongoing): “Las competencias ciudadanas, una finalidad de la enseñanza de la historia”. MUÑOZ, Ignacio (ed.): *La didáctica de la historia y la formación de ciudadanos en el mundo actual: el oficio del historiador en el aula*. Santiago de Chile. Dirección de Bibliotecas, Archivos y Museos.

There exists a long tradition of investigation into our discipline's textbooks that concentrate fundamentally on the analysis and valuing of their contents; on what is available and what is not. However, there exists much less investigation into the analysis explaining why teachers and centres come to select certain textbooks and, in particular, the way in which they are used. This unawareness could now have negative consequences when thinking of textbooks that obey the curriculum's rationality of competences and encourage, in the case of social sciences, geography and history the development of democratic civic competences to our countries' young students.

My intervention shall set out the relationships between three important aspects of the world's current educational situation. The first is that which brings us to this seminar: textbooks, in particular social sciences, geography and history textbooks. The second aspect: competences, especially social, geographical and historic competences, and the third: citizenship. The teaching of social sciences, geography and history has been, is and will in all probability be a fundamental instrument in the shaping of civic consciousness in infants and young people in school education, or at least, it has tried and shall continue to do so. I will try to pin point disciplinary competences that facilitate the development of civic competences in the students of primary and secondary school. And as a beginning, end and backdrop will insist on the importance of the teachers in developing the competences by using textbooks creatively, a use which could, in turn, promote professionalising competences.

## **TEXTBOOKS**

I do not intend to lecture on what a book is because I presume that all the teaching professionals know only too well what is being discussed here and what are their functions along with their core and general characteristics of that which we also call "textbook". We also know how it is produced, scientifically, on an editorial level and how it reaches teachers and students.

In any case, it can be easy to forget that the object, the "textbook" is no more than that, an object. Full of ideology, contents, images, activities on... educational potentials. But it does not stop being an object that, like any other object, is "nothing" in itself. It all depends on how it is put to use. A good textbook, badly used, cannot create either good teachings or proper learning; and, on the contrary, a poor textbook, well used, can generate excellent learning.

The main objective of textbooks is to help pupils learn; they are tools for learning. However, this main concern converts them into information tools for teachers and teaching instruments. In reality, the decisions taken by teachers when selecting a textbook are basically based on their judgement on the kind of knowledge that the textbook contains, on the importance it places on teaching (as a general rule, books that confer high importance to teachers seem to sell less) and on the importance it places on the pupil's learning. These are the three areas that influence curriculum competences.

However, what role do textbooks have today and how are they valued by teachers and society at large?

In the words of Daniel (2003) when referring to geography textbooks, “if didactic arguments, such as the adaptation between the knowledge of books and academic knowledge, the image statute, the underlying ideology or editorial conformism, are related to the debates geographers had about textbooks, the judgements are more emotive among the general public, which does not mean that a level of subjectivity existed in the first few. Regardless of their level of study, each person maintains a more or less precise memory of textbooks that they consulted, with which they worked with in class or used to learn from. The deforming prism of memory, reinforced by common sense, glorifies the supposed efficiency of textbooks of the past in comparison with those of today. It is, in effect, one of the main arguments put forward by critics of today’s textbooks”.

Today there is an important segment of teachers who believe that textbooks have ceased to be an important tool. Another more positive segment thinks that given their massive consumption, they continue to be a product that can achieve good results if used critically and creatively. And, finally, the majority continues to use textbooks, at times in a non-critical and non-creative manner, as a unique, or almost unique, teaching material.

Among those who argue the textbook has stopped being a useful instrument, Martínez Bonafé (2006) is particularly noteworthy. This professor from the University of Valencia questions the reasons that explain the role of textbooks today, “a format to codify school knowledge that relates more to the cathedral’s olden times than with modern times of the worldwide web and internet users” (p. 2). The analysis proposed by Martínez Bonafé highlights those aspects which validate textbooks as an instrument for effective learning. First to be criticised is the fact that textbooks set determined cultural concepts in order to organise school learning. This conception presents culture as something static, finished and closed, and knowledge as something external to the person who is learning, as well as to his or her problems and experiences.

This author considers that textbooks have not been granted “the importance that they should have in the control over design and development bears over teaching, over teaching work, on the manner in which technocratic, scientific and instrumental rationality have over the concept of how the theory and practice of teaching should relate to one another” (p. 6). The problem that the teachers face consists in knowing when to mechanically and technically apply that which others have thought, “(...) textbooks are a preconceived tool, a work tool-a means of cultural production- separated from products and the processes of cultural production” (p. 7).

Martínez Bonafé draws attention to alternatives to textbooks starting with pedagogical alternatives to hegemonic discourses: from the works of Freinet and the Popular Culture Movement, to projects by Lipman that teach philosophy to children, those related to the study of surroundings and the investigation and the role of the Pedagogical Renovation Movements. The author asks, “when will the hegemony of textbooks cease to exist? (p. 9). As an alternative, more to technocratic rationality that governs rather than textbooks, this concept of curriculums suggests the creation of centres for curricular development. It comes to the

following conclusion: “there are alternatives. The teacher’s creativity, didactic investigation, militant commitment with change, shared imagination between diverse professional groups, and the history of pedagogical renovation can nurture critics, arguments and very compelling practical strategies. The so - called new technologies can contribute towards making all this much easier. What are we waiting for? Each and everyone of us must make a small effort” (p. 11).

Faced with this situation, shared in some aspects by those who subscribe to this text, there has been and there are other more possible and realistic positions, for example, that of the German professor Jörn Rüsen (1997, original edition in 1992). Rüsen argued something that remains valid more than fifteen years later, “textbooks are the most important tools in the teaching of history” (p. 79). He continued by stating the existing limitations surrounding this instrument and, almost simultaneously, in its educational possibilities in teaching history from the fulfilment of set criteria.

His work was in line with the little attention that had been dedicated until that time to the elaboration and distribution of criteria in the teaching profession, “it is symptomatic that in the German setting (apart from a few examples worthy of attention) no great work on which criteria can be systematically developed to analyse textbooks exists. Their practical utility is tested, their examples on textbook analysis is examined or conclusions are made from the results of the analysis so as to elaborate textbooks” (p. 80). A thought that is complemented by “nearly no empirical investigation exists on the use and the role that textbooks perform within the learning process in classrooms” (p. 80-81).

Despite this situation which, in my opinion, has not changed much, Rüsen carries out a realist suggestion on how to use a history textbook in the classroom. And, in a way similar to that of Martínez Bonafé, but from a radically different perspective, he relates textbooks to a specific concept of teaching history, with some existing normative criteria on the learning of history. For Rüsen, these criteria arise from the concept of history and its teaching, “historic consciousness is both the field and the objective of historic learning” (p. 81).

The learning of history from this perspective supposes the development of a series of competences in historic memory. And fundamentally from narrative competence that according to Rüsen is “one’s ability to represent the past in such a clear and descriptive manner that the present converts itself into something comprehensible and that one’s own vital experiences acquire some solid future perspectives” (82). This competence can be separated into three that refer respectively to the perceptive competences or that based on experience –“to be able to perceive the past as such, that is to say, by distancing and differentiating it from the present”–, interpretative competences –“to know how to interpret what we perceive as having happened in a relationship and a significant connection and with a sense of reality”–, and finally, guiding competences –“to receive and integrate past experiences in the framework of cultural orientation of vital personal experiences” (82-83).

Based on these considerations, Rösen lists a series of characteristics of the ideal history textbook. Some more formal, concerning format, others relating to the use of historic material (images, maps, texts, etc.) and others more to do with teaching and learning. For example, with regard to learning, Rösen criticises the cognitive overload of texts “that greatly complicate its reception” (p. 84), suggests that the content, “must keep a connection between the pupils’ experiences and expectations” (p. 84), and that, “historic experience has its own potential to fascinate which can be used as an opportunity to learn” (p. 85). He also brings up that a book is a work instrument and its utility depends on it being used in the classroom: “the capacity to judge and argue is an inalienable objective (as well as being highly accepted) of the teaching of history, and this objective cannot be reached through mere exposure that does not grant the pupils space to develop their capacity to argue, criticise and judge” (p. 85). Undoubtedly, a history book should do more than merely contain information; it should be an instrument which services the building of contents and the development of competences on behalf of those who learn.

In this sense, it is fundamental that the teaching profession is in possession of ample criteria to help select textbooks and use them according to their content. For Bosch, Canals and González (2006), the criteria that defines a good social science textbook derives from how the contents, images, activities and evaluation are treated. They also consider that, on a general level, a good social sciences, geography and history textbook should, among other things:

- show a general vision of what is intended to be taught so that the teaching profession and pupils globally understand the criteria used in their design, criteria which should be explained at least in relation to the understanding of epistemological, psychological and pedagogical, ... along with the planned sequence;
- bear in mind different contexts in which they can be used and include guidelines on how to plan the contents in various ways;
- treat current and innovative issues relating to daily-life dilemmas and frequent social problems;
- offer different interpretations of a particular problem or of a specific event;
- train the pupils for an autonomous trade which allows them to carry out a cooperative trade as well as develop as many abilities and competences as possible; etc.

Some of these criteria coincide with educational intentions and competences, and are to be developed by the pupils.

Valls (2008: 35-36) having presented proposals for analysis and evaluation of history textbooks by three authors (Weinbrenner, Selander and Rösen), fulfils an integral proposal. He takes into consideration four major criteria to analyse and value history textbooks. First is the “level of correspondence between basic characteristics of historiographic knowledge and the proposed academic knowledge (didactic transposition)” that includes epistemological and methodological aspects. A second criteria refers to the “function assigned to the history taught in relation to

the pupil: past-present-future connection (...); discursive-reasoning capacity and the reductive understanding of reality”: The third criteria is based on the “prioritised didactic model” that, in his opinion, must include, amongst other things, aspects such as “divide into topics and resolve the matters dealt with”, “develop the pupil’s discursive capacity”. Finally, the fourth criteria is based on “the adequate legibility and structure of the textbooks” with aspects such as coherence between macro and micro sequences, the adequacy of development zones next to the pupils, the texts and other textbooks induced use, etc.

Possessing the clearest criteria possible on the use of textbooks is, in my opinion, a key element to be used in developing competences. It is not, however, the only one.

### **A CURRICULUM FOR COMPETENCES**

In order to teach social sciences, geography and history and manage that the pupils develop disciplinary, civic and citizen competences, we should firstly be aware of what characterises a curriculum for competences and how we define them. These are not, however, the objectives of this presentation. The discourse on educational competences deserves a different, more in-depth, treatment than can that of a seminar of this kind. Nevertheless, some references are essential.

My concept of the role that educational competences play both on the curriculum and on teaching are fairly similar to those of the Canadian professor Legendre (2008). In her opinion, shared by many other authors, the notion of competences in current curricular changes is justified by the step from the behavioural paradigm to the cognitive, constructivist or social-constructivist paradigm. “In this sense it reflects the concern for the knowledge acquired in school to be more significant and relevant and to recall upon the students cognitive activity and its impact on his or her learning”. But, “the competences programmes are equally included in a wide movement towards professionalising teaching which presents relations with the evolution of the organisation of work. From this perspective, it aims at offering teachers a greater range of drills, transforming the profession into a new framework marked by the decentralisation of powers, the responsibility of various protagonists belonging to the educational system and installing a school culture of participation and collaboration” (p. 41).

This professor makes a distinction between competences as the organising principle of the curriculum or the method of preparation of curriculum, and competence as the renewed vision of learning which underlie the new formation orientations and references. This differentiation can be very useful in establishing associations between textbooks and the development of competences.

For Legendre, competences do not mainly constitute an instrument for elaborating programmes. What is more, “their operation in programmes is not exempt from a certain number of difficulties both relating to the forming of competences and the manner of articulating them among themselves and with the knowledge to who these programmes integrate and mobilise” (p. 41). This situation has led to being presented in different ways and with different names in the

curriculum articulated surrounding competences. This author believes, following Perrenoud (1997), that there are three meanings of the notion of competence that influence the way they operate in the programmes. The first meaning relates to the notion of objects, “conceived as observable and measurable behaviours” (p. 42). The second, “the notion of competences is associated to the opposition between *competitiveness* and *output* [performance] in that the main virtue is to distinguish the observable manifestations (performance) of the non-observable dispositions (competences) and not reduce the second into the first” (p. 42). The third conceives competences as “a generic capacity, such as linguistic proficiency or other general aptitudes relating to the potential of human intelligence” (p. 43).

This situation has led Legendre to distinguish between approaching competences as a method for developing the curriculum and as the expression of more integrated training objectives.

“(…) the first can be backed by very different learning and teaching concepts, some programmes simply substitute the concept of competences with that of objectives without training being for the purpose of the training is not yet reconsidered. The second is closely linked to a renewed vision of learning, which largely relies on the contributions of cognitive science. In this view, the mere fact of adopting the language of competences does not necessarily lead to profound change in the curriculum. What is at stake is not so much the rethinking of the language competence programmes as such as a change in the concept of learning and its impact on teaching profession” (p. 43).

This second option is one which seems to have much more possibilities of changing the educational practice and generate learning that the pupils can use and transfer to their daily-life. Textbooks, however, as long as they contain developed and set programmes, will resemble curriculums and have the same limitations. On the other hand, its use by teachers, linking and adapting its proposals to a specific and unrepeatable group of pupils can convert it into an instrument for developing competences such as the expression of integrated training objectives.

In any case, the change of educational practices in teaching social sciences, geography and history and the development of competences imply a determined concept of curriculum and theories that it associates. For Tutiaux-Guillon (2008) it is essential to read educational reality in terms of what she calls “pedagogical paradigm”. Tutiaux-Guillon (2008) uses the term “pedagogical paradigm” to emphasise the connection between knowledge, teaching and learning and characterises the classic positivist paradigm and the alternative paradigm, the critic constructivist one, through two didactic triangles.

“In an education that follows with the positivist pedagogical paradigm, the teacher has authority as a custodian of knowledge and master of the presentation while the pupils are almost absent, with a limited role to reproduce, adhere to and accept. Becoming a citizen means first accumulating knowledge to make informed decisions, beyond schooling. The critical constructivist pedagogical paradigm defines teaching as a process where pupils not

only engage through “active methods”, but also face the plurality of interpretations early on and are invited to reflect on how knowledge is scientifically validated. The pupils acquire civic competences by doing so. As for teachers, he or she is the master but whose place and role must be redefined, valuing among other things his or her creativity” (p. 145).

Tutiaux concludes her work with the following statement, “in the teaching of history and geography in France there is a heavy weight imposed by a structure of knowledge that is the expression of reality and science. Placing history and geography on the same level of the world legitimises its teaching. Reality is given to pupils through the education and means chosen by the pupil, but these interventions disappear, leaving only the descriptions / stories / naturalised explanations. This gives taught history and geography a great sense of conviction. This concept holds out to questioning which shakes the renewal of reference sciences. It is not that history or geography do not change, but rather that the imported content from reference sciences are reconfigured into the curriculum, textbooks, classrooms, so as to flow into this “same level [plain pied]” paradigm in the world and its past” (pp. 145-146).

According to Tutiaux a reading in terms of “pedagogical paradigm” introduces the objectives as reasoning and answer to academic disciplines. The pedagogical paradigm that was installed in the 20th century is, according to this author, the “pedagogical positivist paradigm” which associates citizenship to membership, that is to say obedience, acculturation and realistic, closed, and extensive knowledge on the one hand and exposure practices and tax refund on the other.

Tutiaux finishes her work with the following question: “are French history and geography unique cases?” (146). Without a doubt, in some respects the status of the teaching of geography and history in France is unique, but this uniqueness is becoming increasingly smaller and the problems of these lessons are very common throughout the world and the entire world depends on the dominant curriculum concept as it has analysed the history for some years already (Pagès, 1994). Today’s singularity perhaps lies in the fact that such a prescriptive and centralist model as the French one is much more impervious to the introduction of educational competences than other models just as Tutiaux-Guillon has pointed out in another work (Cardin/Tutiaux-Guillon, 2006).

The contributions made by Legendre and Tutiaux-Guillon provide, in my opinion, a more realistic understanding of the treatment that is being given to the competences in some curriculums and alternative proposals and should also provide a creative use of the proposals presented in textbooks.

In any case it should not be forgotten that the most commonly used sense of educational competence defines it as the ability to respond to individual or social needs, or perform an activity or task. This competence is, as defined in the DeSeCo draft by the OECD (2002), a combination of practical and cognitive interrelated skills, knowledge (including tacit knowledge), motivation, values, attitudes, emotions and other social and behavioural factors that may be mobilised together to act effectively.



The competences need to be learned from a variety of activities and experiences on knowledge, skills and values both diverse and heterogeneous but directed, in my view, towards a fundamental purpose: the shaping of democratic citizens.

Can the curriculum provide this objective? The curriculum is, like textbooks, an object that, depending on how it is used, can promote the development of competences or, conversely, prevent it. There are curricular proposals that tend to facilitate change because the teacher takes on the new curricular approach for competences. Perhaps one of the most interesting is that proposed by the local government of the Canadian province of Quebec (2006).

The local government of the Canadian province of Quebec establishes two types of competences that facilitate the understanding of this concept and its educational purpose. In the general design of the pupil's training in first cycle of secondary school establishes a system based on pupils, who as people, must structure their identity, build their vision of the world and develop their power of action. To do so, it proposes three arenas of decisions: the domains of general training, competences and the domains of learning competences and disciplines:

#### **1. General training fields:**

- 1.1. Health and welfare,
- 1.2. Guidance and entrepreneurship
- 1.3. Environment and consumption
- 1.4. Media
- 1.5. Living in community and citizenship: Steering the pupils towards participating in democracy in the classroom or the school itself and develop an attitude of openness to the world and of respect for diversity.

#### **2. Cross-curricular competences:**

- 2.1. Intellectual competences: exploit information, resolve problems, exercise their critical judgement and develop their creative thinking in a practically manner.
- 2.2. Methodological competences: adopt efficient working methods, exploit information and communication technologies.
- 2.3. Powers of personal and social competences: update their potential and cooperate
- 2.4. Communication competences: communicating in an appropriate manner

#### **3. Fields of learning. Disciplinary competences:**

- 3.1. Field of personal development: physical and health education, moral education, moral education and Catholic religion, Protestant religion and moral education
- 3.2. Field of arts: drama, visual arts, music and dance
- 3.3. Language field: French, the language of instruction; linguistic integration and school, English, second language
- 3.4. Mathematics, science and technology fields: mathematics, science and technology
- 3.5. Social field of the universe
  - Geography: Read the organisation of a territory, interpret a territorial problem, build their citizenship on a global scale
  - History and civic education: examine social realities from a historical perspective, interpret social realities with the help of historical methods, build their citizen with the help of history.

GOUVERNEMENT DU QUÉBEC (2006): *Programme de formation de l'école québécoise. Enseignement secondaire, premier cycle.* Ministère de l'Éducation

As previously stated, the proposal by the Quebec local government may facilitate the development of civic competences since it very clearly spells out the place and purpose of the competences, particularly in citizens, in the three areas in which it develops educational action. Probably, if the teaching profession understands these areas as the central issue that Tutiaux-Guillon called “critical-constructivist pedagogical paradigm” it shall find alternatives to changing their practices and thus, achieve greater competences in learning about their students. In addition, the proposal put forward by the Quebec local government on the teaching of history is linked to education for citizens.

### **SOCIAL SCIENCES, GEOGRAPHY, HISTORY AND CIVIC COMPETENCES**

The relationship between teaching social sciences, geography and history and civic training goes back a long way. Essentially, teaching social sciences, geography and history has been since the beginning of time, an instrument of socialisation in the hands of political power.

Schnapper (2006) recalls the case of France: “the teaching of history was meant to provoke a feeling of historic community and constitutes a privileged means of extending a truly national education to all future citizens. The account of the past, scientifically established, allows collective identity and encourages contemporaries, heirs to this glorious identity, to prolong the inheritance of the past and continue to the common action. The School was both the citizen’s and the nation’s School” (XVI).

Many other investigations exist concerning this matter focusing on textbooks. There exist many examples in this respect (among the most recent, the work by Cucuzza, 2007, on the building of the Argentine nation in textbooks). For Carretero, Jacott and López-Manjón (2004), “it is precisely in these last years that a fruitful field of study into the manner in which textbooks have contributed to the distribution and maintaining prevailing values has blossomed, in matters referring to familiar roles, moral values, as those associated to history, such as heroes (Ossenbach and Somoza, 2001)”. (p. 176)

I myself, alone or alongside Santisteban, have treated the matter on other occasions (for example, Pagès, 2003, 2005, 2007, Pagès and Santisteban 2006, 2007 a and b). Furthermore, it is increasingly common to come across continuous references to the importance of history, geography and, in general, of social sciences to develop civic competences. In this case, for example, the South African, Wray (2005) states:

“In *Facing the Past*, one of the ways of getting children to develop critical thinking, which must be a constant process, comprises of learning about history through different –sources, primary, secondary and others– considering the actors’ points of view. The children may be given two versions of the same event in the hope that they appreciate people’s interpretations, instead of merely extracting information and seeing what happens, and analyse why each one of them says something different. This leads them to seek out more information on these people and to understand how the past affected their perspective, just as the truth is not absolute, but depends from which angle it is taken. If children come forward with different questions

about the source and the information that are more than a mere piece of information, it is a sign that a critical analysis is being developed. And should the teachers manage to awaken human rights, when children are 18 years of age, they will probably be able to transfer this analysis to the decisions that they take in their daily lives and will give them an opportunity to create communities and become active members of their society” (p. 42).

In England, the relationship between Education for citizens and the teaching of geography and history has been made explicit by active and passive documents found in the official curriculum and in contributions made by different authors. For example, to Huddleston and Kerr (2006) history provides examples from the past that provide a context for understanding the pupils of the problems of the present, while the Education for citizens can:

- give more importance to geography lessons
- help pupils understand the importance of geography
- promote the understanding the questions concerning development, for example, in fair trade
- encourage pupils to participate in local environment projects, for example, in recycling and conservation.
- According to these authors, civic education and geography and history share concepts, contents, procedures, approaches to learning, and, of course, competences. For example, in local studies:

The Second World War- investigate the experience of local people	- Interview elderly people to pull together their memories; creation of a web site for the local population
Memories of migration in Brittany	- Relate with the participation of the community, the inheritance of the community, intergenerational projects.
Plans to improve roads and city centre	- Investigate a project which improves surroundings: take pictures, carry out a study - Identify problems/suggest solutions - Reflect on decision taking when budget is limited - Consider who takes the decisions and how the local population can present and make their points of view heard

The guides elaborated by English educational authorities to present the geography and history curriculums incorporate examples so as to ease this relationship.

It is also part of the many didactic discourses that establish this relationship. This is, for example, the case of Xose M. Souto (2007), when presenting the case of the Didactic Geographic Magazine No. 9 dedicated to civic education, raises the question of, “why the didactics of geography is preoccupied with encouraging a magazine such as this one?, what scientific disciplines can bring to civic forming?, why have we sought to relate the field of geography and citizenship through an educational proposal?, what does geography bring as a school

subject?” (p. 7), and answers, “firstly, due to the very analytic tradition of this science in its own right to critically know the relationships between society and territory. (...) Secondly, due to its conclusion with regard to the identity of people in relation to the environment in which they live. (...) And thirdly, due to its capacity to relate local and universal problems in a moment that is defined as the era of globalisation. (...) (pp. 7-8).

This is not the only case however as can be easily proved. Thus, for Audigier (1999: 38-39), the disciplines related to social studies (history, geography, economy, social and family life, etc.) are those that have the most connection with civic education. “As long as through these subjects pupils begin to understand today’s society, regardless of their denomination, they are intrinsically civic. They are so in that their extent goes hand in hand with their problematic aspect, which treats objects debated about in our societies; these are directly immersed in the debates that they feed and express. Therefore, following history’s scientific development, their teaching in schools constantly swings between two poles: to introduce pupils current social realities, justifying and encouraging pupils to take an active role although a compatible and respectful one, or present themselves as a critical tool to insist on the failures and inequities and inviting them to take an active role, yet a critical and transforming one. “That is to say, civic education and the teaching of social sciences aim at socialising or un-socialising future citizens”.

Among the social disciplines, Audigier, like many others, highly ranks the role of history. He does not believe in civic or citizen education without a strong influence of an historic element exists. Moreover, both the teaching of history and civic education depend first and foremost on a future project. “It’s based on our perception of the future, according to our values, our expectations, the choice of what we consider important and what is not, that we think and build the past, that we seek to build the stories that are of convenience” (p. 42).

Peter Brett (2004) also favours the teaching of history since he believes it is a powerful vehicle in helping students to develop their analytical and critical competences. This English author further points out the similarities in content between citizenship and history. In his view, the teaching of history provides opportunities for children to:

- increase their knowledge on different peoples and cultures, and appreciate the plural nature of Britannic and European societies,
- understand how values and human rights emerge within society,
- analyse a variety of social perspectives on a national and international level,
- discuss the value of the evidence, motivations and opinions of people from different social, economic and political contexts,
- develop the ability to make value judgements and be familiarised with moral aspects of historic studies,
- learn about the development of democratic processes in Germany
- trace the development of citizens’ rights.

And finally one last reference to justify the importance of the relationship between citizens and the teaching of social sciences. Canals (2008) considers that the contribution made by the teaching of social sciences, geography and history to the development of basic competences and, in particular, to citizen consciousness in students of secondary school must touch on the following: a) the development of social thinking, b) an approach on the contents in the form of problems and on the basis of relevant special problems, c) the use of methodological strategies that favour the students' participation, intervention and cooperation, and d) the development of cognitive-linguistic capacities for the reconstructing and communication of social knowledge.

What civic competences are the pupils supposed to develop through the teaching of social sciences, geography and history? In literature and curricular documents we found three typologies of different competences: cross-curricular, civic and disciplinary competences. The first brings together the general abilities that can, and must be developed in our disciplines since they are fundamental in acquiring competences with procuring, analysis, and critical valuing of information. Civic competences because they offer political knowledge, and approaches, that are not always classic disciplines in our field, in geography and history, and that can be determined by encouraging commitment and the social and political participation of young people. Finally, the disciplinary competences as they incorporate aspects to do with theory, procedure and attitude. I shall now present a series of examples of the latter two typologies.

### **a) Civic Competences**

The civic competences affect, for some authors, together with academic knowledge and have a cross-curricular character. So, for example, Bolivar (2008: 111-112) considers that “the education for the exercise of the civic trade begins, then, with access to writing, language and dialogue; continues with access to aspects such as writing, language and dialogue, continues with everything that constitutes cultural tradition and reaches critical levels during adolescence, with learning and the practice of content and values. Therefore, citizenship also includes the field of basic knowledge and a wide cultural guidance that will allow citizens to analyse, think and criticise the proposals and social policies. Learning to live together implies, among other things, the ability to exchange ideas, to reason, compare, that an inclusive school should actively promote”.

Other authors, such as Pagé (2004) or Torney-Purta and Vermeer (2004), make a more specific and more focused proposal concerning the different areas that should be developed, in an integrated manner, civic competences.

Pagé (2004) finds that there are six aspects of the development of civic socialisation that constitute civic education:

1. The complex social identities:
  - Structuring identity, knowing oneself (primary school competences)
  - Build civic consciousness with the help of history (secondary)

2. The awareness of collective interests
3. Communication in the political and social deliberation
4. Cooperate with equality and accept its autonomy
5. Understand the operation of the process of political decision-making
6. The practice of democracy in schools

For their part, Torney-Purta and Vermeer (2004) introduce civic education in three areas that form an interlaced set of civic or citizen competences. These three axes are:

- *Civic-related knowledge*, historic and contemporary, such as the understanding of the structure and the constitutional government's mechanisms and the knowledge of these local political actors and the manner in which democratic institutions work.
- *Cognitive and participative competences* (and associated conducts), such as the ability to understand and analyse problems relating to the government and local problems, and competences to help pupils resolve problems.
- *Civic dispositions (motive of conduct and values/attitudes)* that can include the support of justice and equality and a sense of personal responsibility. The pupils do not necessarily connect knowledge and skills with their inexperienced civic dispositions or (without) a reason for creating that their participation is worthwhile. (p. 1)

More concrete examples of each of these three axes focusing, in turn, on the following three categories: democracy, civil / human rights and civil society. Let us now look at two of the examples that are more related to the teaching of social science, geography and history:

- Knowledge concerning the "Citizens / Human Rights":
  - Understand the legal system and citizens' rights, including freedom of religion, thought and association, in balance with the responsibilities of citizens,
  - Know how citizens can act and have acted in the past to make changes,
  - Understand the ideologies and other bases with which political organisations (such as political parties) were formed, and that they also form the media or interest groups.
- Examples of competences related to the "Civil Society" category:
  - Being able to analyse how the conditions in the community are related to political decisions,
  - Ability to act in a group with others and respect their views,
  - Ability to resolve conflicts and build consensus in a group,
  - Ability to develop a plan of action on community problems and encourage others to obey it.

One perspective, complementary to the aforementioned examples, is the proposal made by the New York State Department of Education carried out by State University (2002). This

proposal is based on the development of skills in Social Studies and is presented in two main categories: the first is dedicated to thinking skills such as that of uniting, interpreting, organising, analysing, evaluating and synthesising information. While the second is based on thinking strategies and include resolving problems, taking decisions, investigating and conceptualising.

This proposal organises social studies skills into the following four groups: gathering of information, presentation of information, and the participation in interpersonal and grupal dealings. The competences for resolving the problems are presented in sequences in these four large objectives:

1. The pupil must be capable of finding problems (ask questions related to the problem, recognising that the problem exists, use high level thinking competences to understand, analyse, synthesise and evaluate the problem)
2. The pupil must be able to solve problems identified by the teacher or the pupil (set the problem in writing, to develop a plan to solve the problem, obtain information from diverse sources, evaluate information resources, organise and use data obtained when necessary to redefine the original problem or identify “new” problems, develop a product or a conclusion that summarises the information and can be shared)
3. The pupil must be able to work with others involved in the search and resolution of a problem (group participation of planning and discussion, incorporate positive attitudes to learning, recognising and using non-verbal communication)
4. The pupil must be able to communicate orally, visually and/or through written results of the efforts to seek and solve a problem

#### **b) Disciplinary competences**

These powers emanate directly from the disciplines of all social disciplines and, in particular, geography and history. Some proposals presented, firstly, common competences to all disciplines of social order to, secondly, focus on geographical or historical competences. The following examples come from Belgian, French, Italian and Colombian documents and curricular proposals.

For the *Ministère de la Communauté Française* of Belgium (1999), “l’*éveil*” or awakening and training for history and geography are in primary and the first cycle of secondary school, privileged domains in which pupils can become aware of the problems of society and the environment and discover that they belong to diverse and multicultural human groups. “These disciplines aspire to the construction of spatial, temporal and social benchmarks, and sensitise pupils to their responsibility as citizens. In this way, they become aware that they must take an active role in society. The powers proposed here will enable you to open up to the world and develop their critical thinking. These two disciplines, each with its own particularities, jointly contribute along with others to integrally train people” (p. 5).

The domain of a competence in this disciplinary field is carried out progressively. There is an initiation (I), a certification (C) and maintenance. They are established in the following phases: firstly, entrance to the educational system at the end of 2nd year primary, secondly, from third through to sixth grade, and thirdly, the first two years of secondary teaching.

The common procedures to the two disciplines are as follows:

- Ask questions
- Put forward an investigation
- Gather information
- Exploit information and verify its pertinence relating to the investigation
- Structure the investigation’s results, and validate its approach
- Communicate results
- Transfer to new situations
- Act and react
- Let us examine the phases of these two procedures:

**Transfer to New Situations:**

	1	2	3
Apply knowledge and constructed procedures...	C... in situations similar to learning situations	C... in situations explicitly relating to learning situations	C... in situations implicitly related to learning situations

**Act and react** is to practice criticism, engage and make a commitment and play an active role in the drafting and implementation of a project to promote justice, solidarity, a sense of responsibility with others, the environment, with patrimony...

	1	2	3
With regard to facts, situations, problems related to Human Rights, the patrimony, the environment	I... have an opinion and express it	I... emit one’s opinion, adjust, modify and come to a personal conclusion	I... emit an opinion, adjust, modify, come to a personal conclusion and express it in an argumentative manner

Geography and history competences that are to be developed are based on procedures and the following knowledge:



HISTORY TRAINING		GEOGRAPHIC TRAINING	
PROCEDURES	KNOWLEDGE	PROCEDURES	KNOWLEDGE
Use a temporal reference, representations of time Read a vestige from the past Exploit historic resources	Organisation of time: situate The way in which people live in a determined period: identify and characterise The evolution of the way of life people lived: describe. The nature of a vestige from the past: identify, classify...	Use spatial references, social representations... Locate a place, a space: situate, orientate Read a landscape, a geographic image	The components of scenery: identify, characterise “Natural” environments: identify and characterise The organisation of space: characterise functions, structures and dynamics Human interaction/ space: identify

The Belgian Walloon Community’s geographic and history curricular competences have been developed in a more concrete manner by Mérenne-Schoumaker (2005 and 2006), in the case of geography, and by Rey and Staszewski (2004) for history. Mérenne-Schoumaker (2006) follows the guidelines set by the Belgium’s Walloon Community Ministry of Education, which presents the competences in three groups: a fundamental competence (a) and disciplinary and cross-disciplinary competences (b). The key competence, made in the form of capabilities, is that the pupil is able to “describe and explain the workings of a territory-society (city, region, country, groups of countries, world)”. To achieve this competence, the following cross-disciplinary competences must be developed first (p. 633):

DISCIPLINARY COMPETENCES	CROSS-CURRICULAR COMPETENCES
<ul style="list-style-type: none"> <li>- Guide and get around with the aid of a map</li> <li>- Locate and pin point the territory or problem on a map of a different scale</li> <li>- Identify the territory or problem’s components and analyse them according to the change in scale</li> <li>- Relate these components through maps and synthetic sketches</li> <li>- Investigate causes and consequences of the studied phenomenon as well as actors involved.</li> </ul>	<ul style="list-style-type: none"> <li>- Present a set of problems concerning a territory-society (question oneself)</li> <li>- Gather diverse information that permits an answer to this set of problems (document and inform oneself)</li> <li>- Treat and analyse (read, describe, and interpret) the information</li> <li>- Relate the set of results analysed</li> <li>- Compare the investigations results with models and theories</li> <li>- Create a synthesis of different ways (systematic, cartographic, schematic, etc)</li> <li>- Draw up an answer to the set of problems and put forward a proposal for improvement</li> <li>- Present results of investigation through different means (maps, images, plans, etc.).</li> </ul>

According to this author, one of teaching geography’s essential objectives consists in “preparing for action, not for exceptional action, but rather daily action: circular, travel, understand information coming from mass media, being a responsible citizen, being preoccupied with the environment...” (p. 630-631). That is to say, it consists in the development of civic competences required to live in and alongside others in a democracy.

The competences in history for primary schools have been the development of a work team led by Marc Loison (2003 and 2004). This proposal is different from the previous two cycles in primary school education, with a pre-disciplinary focus, from the third cycle, which focuses on discipline. The competences are arranged into two blocks during the first two cycles of primary school teaching:

1. Competences aimed at the learning of:
  - the organisation of free time,
  - acquiring social references,
  - the representation of the near past, and
  - the structure and amount of time and chronology.
2. Competences aimed at:
  - becoming aware of the differences between the past, present and the setting-up of a historic capital, or
  - becoming aware of realities and of past events.

During the third cycle of primary school, it is thought that pupils is can develop actual historical competences which considerably extends the amount of competences to be develop:

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#### **DISCIPLINARY COMPETENCES**

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To be able to compare two different periods and determine some simple transformations and continuances

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Command friezes of long periods of time

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To know some relevant facts and make reference to great periods

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To know how to relate different historic elements (periods, characters, ...)

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To know how to characterise each period with, at least, one general characteristic, a political or military event, an economic and social or cultural event

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To know how to use different historic resources (monuments, iconographic documents, various textbooks, ...)

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To know how to compare and criticise different historic resources

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To know how to use historic knowledge in civic education and other teachings

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To know how to use specific historic vocabulary in an exact and appropriate manner

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To know how to use in an adequate manner past times that appear in historic accounts

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#### **METHODOLOGICAL COMPETENCES**

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To know how to classify documents according to nature, date and origin

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To know how to consult an encyclopaedia and internet websites

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In the first two cycles of primary education the social contents, history and geography, form part of an area called “discovering the world”, destined to teach the first notions and the precise intellectual instruments so that children can locate themselves in time (and in space).

On the other hand, the third cycle is disciplinary and teaches “all” of history, from prehistory through to present times. It is a chronological, factual and national history, based on the history of France with a first approximation to the history of Europe and, in some aspects, to world history. The programme indicates the vocabulary that the children must learn, the main characters they should study and the resources and documents to use. It also includes work on competences related to learning the language (speaking, reading and writing) and some of history’s specific competences (Santisteban/Pagès: 2006).

Another example of the treatment of the powers in history is offered by the Italian teachers Biancardi, Sarti and Rosso (2006) presented in their didactic proposal for competences in the teaching of history. They understand that the school of competences “is a school that is interested in providing pupils with intellectual resources, tools to return operational knowledge learned” (p. 40). For these authors, there exists today a new concept of knowledge that is different from that which gambled on rigid, characteristic knowledge of an education based on encyclopaedism that not only was, and are qualitatively useless, but totally inappropriate to establish oneself before the world. “Today, knowledge changes so extremely quickly and schools must provide the tools to continuously adapt themselves to cultural baggage: not to grow continuously, but rather something more difficult, to reorganise it continuously” (p. 42).

The teaching competences they propose fit into “a school model that thinks and not only remembers, a school that acts and does not simply talk, a school that shapes and not only reports” (p. 43). Hence, it emphasis on a concrete practice that redesigns teaching and learning and leaves transmission as the preferred teaching method. They consider this didactic model should lean on spiral learning, in vertical programming of development competences. Like many other academics, they understand that competences include doing, an ability, understanding of (knowledge) to reach a goal and produce knowledge and a predisposition to choose, use and master the ideal knowledge, abilities and competences, in a certain context, to solve a given problem.

They share this vision with members of the *Forum delle Associazioni disciplinari*. This Forum has asked which competences should be prioritised by schools and has tried to respond to this demand through an analysis that identifies core competences. It also allows an interdisciplinary approach taking from general competences, or macro-competences, that each discipline has different aggregates.

History’s general competences selected are the following:

GENERAL COMPETENCES	DISCIPLINARY SPECIFICS
<b>COMMUNICATE</b>	<ul style="list-style-type: none"> <li>- Acquire lexical and conceptual tools,</li> <li>- Listen</li> <li>- Use the vocabulary intentionally</li> <li>- Choose and carry out the correct communicational tool for a specific situation,</li> <li>- Move from one code to another</li> </ul>
<b>SELECT</b>	<ul style="list-style-type: none"> <li>- Observe, perceive, choose data</li> <li>- Focus on and define the field of research</li> </ul>
<b>READ</b>	<ul style="list-style-type: none"> <li>- Decode</li> <li>- Gather information</li> <li>- Recognise arguments</li> <li>- Recognise intentions</li> </ul>
<b>GENERALISE</b>	<ul style="list-style-type: none"> <li>- Induce (proceed from the specific to the general)</li> <li>- Abstract</li> <li>- Re-elaborate</li> </ul>
<b>STRUCTURE</b>	<ul style="list-style-type: none"> <li>- Compose, bind data and information,</li> <li>- Classify, catalogue and problem-solving</li> <li>- Interpret data and information and build models</li> </ul>
<b>PROJECT</b>	<ul style="list-style-type: none"> <li>- Intention of knowledge</li> <li>- Capacity to organise</li> <li>- Capacity to create/invent relevant solutions</li> <li>- Individualise criteria to evaluate the very project.</li> </ul>

They conclude their proposal stating that, “historical education thus converts itself into both a disciplinary and civic training, and also contributes to the general training of autonomous and conscious pupils, capable of finding the way themselves in the present and in their own life project” (p. 57).

Focusing on the present and developing a life-plan is an essential ability of the civic education projects in Colombia. Chaux (2004) finds that civic competences are “knowledge and abilities that allow citizens to act constructively in a democratic society” (p. 20), and thus guide in the present and help in the development of life-projects. For the Colombian author, “civic competences show, in practice, what people do.” (p. 20). He understands that there are different types of competences: a) knowledge –“the information people need to know and understand so as to exercise citizenship” (p. 21), b) cognitive competences– “capacities to perform various mental processes” (p. 21) such as taking perspective, the interpretation of intentions, creating options, considering consequences, metacognition or critical thinking, c) the emotional competences- capacities necessary to identify and respond constructively to one’s own emotions as well as those of others” (p. 22) such as the identification of one’s own emotions, their management, empathy or identification of the emotions of others, d) the communication competences –to be able to communicate with others in effective ways” (p. 23) requires listening or active listening, assertiveness, arguments, and e) integrating competences– these competences are more extensive and comprehensive that, in practice,

articulate knowledge and cognitive, emotional or communicative competences” (p. 24), such as the ability to handle conflicts peacefully and constructively.

The exemplification of Chau’s proposal in the field of social sciences is done by Ossa Parra (2004) in the same text. For this Colombian teacher the “construction of knowledge in social areas allows pupils to understand human problems from an interdisciplinary perspective and to reflect on ways to contribute to its resolution” (p. 116). He illustrates these ideas through the description of an integrated module on “Citizenship and violence in Colombia” and through examples of more concrete, and a little more classic, activities organised around different areas of competences such as problem-solving, the use of sources and critical analysis, cooperative work, the discussion of moral dilemmas, etc.

In connection with the “Citizenship and violence in Colombia” module, Ossa says, “the pupils approached the problem of human conflict and its degeneration. In this particular approach to the problem on the history of partisan conflict of the 50’s bearing in mind the social, economic and political environment in which it occurred. They also discussed various explanations of the causes that lead to the degeneration of violence and reflected on the extremes of violence experienced at that time. Finally, they established connections between the extremes of violence experienced during that period and the present, and in the country’s history and life of each one of them” (p. 116). To understand this reality, competences derived from the processing and analysis of information such as the taking of perspectives, the consideration of consequences or critical thinking were developed.

In a subsequent work also sponsored by the Colombian Ministry of National Education (2006) specifically the curricular guidelines for social sciences and the standard sequence of basic competences from first to eleventh grade from the next model are made concrete, “a structure based on axle generators, tricky questions, conceptual fields and social competences, thus allowing disciplinary input at a conceptual and methodological level influence the understanding of bigger problems and social situations that students and teachers confront and experience daily” (p. 121). This model is organised around three kinds of relationships: *relationships with the history and culture, spatial relationships and environmental and ethical-political relationships*, “relationships to be taken and developed from a comprehensive, interdisciplinary approach from the proposed field’s guidelines, so allowing the understanding of social phenomena, bearing in mind the conceptual and methodological contributions the variety of disciplines that make up the social sciences offer us” (p. 121). These relationships are complemented by two further aspects: one dedicated to teachers and students adopting methods and techniques of social science – “*I am approaching the knowledge as a social scientific*” – and another that converges on the intervention, from ethical stances by teachers and students in resolving social problems being studied – “*I am developing personal and social commitments*” (p. 121).

As has been proved, the heterogeneity and diversity reside in the proposal of civic competences and Geographic and historic competences. At times, this situation has consequences on the teaching profession due to its own conceptual and theoretic complexity in what is presented as competences that need to be programmed and attained so that the pupil develops. In

this way, there is no doubt that simple and concrete examples are missing that the teaching profession can use on a daily basis. Perhaps examples such as Quebec would help teachers in their work. The Quebec local government (2006) considers that History courses and civic education should develop three types of competences. These are presented from their more general aspects to the more concrete that should preside over the design of learning activities in history.

Question social realities from a historic point of view,	Interpret the social realities with the help of historic methodology,	Build their historic consciousness with the help of history.
<ul style="list-style-type: none"> <li>- Look towards the past for the origin of social realities,</li> <li>- Consider social realities in their complexity,</li> <li>- Consider social realities in the same light</li> </ul>	<ul style="list-style-type: none"> <li>- Establish the events of social realities,</li> <li>- Explain social realities,</li> <li>- to make their interpretation of social realities relative</li> </ul>	<ul style="list-style-type: none"> <li>- Seek the foundation of their social identity,</li> <li>- Establish the contribution of social realities to social democratic life</li> <li>- Qualify participation in community life,</li> <li>- Understand the utility of public institutions</li> </ul>

How should the competences be presented and used in textbooks? Governments and publishers decide how the educational competences should be treated and presented in textbooks and other curricular materials. This, however, is not my intention. Rather it is give the teaching profession some ideas, ways of using textbooks in their classes and ease the pupils' development and then apply civic, social, geographic and historic competences to reality.

**HOW TO USE SOCIAL SCIENCES, GEOGRAPHY AND HISTORY TEXTBOOKS TO PROGRAMME AND DEVELOP CIVIC COMPETENCES**

“Everyone has come across imaginative teachers who have managed to make the most of situations or materials, including textbooks, in which other people see absolutely nothing from a didactic point of view. We have let our imagination, creativity and adaptation run wild to age groups and motivations”.

VANCELLS, Bruna. (2006): “Els teus llibres de text, te'ls pot confitar!”. *Perspectiva Escolar*. Publicació de Rosa Sensat. Monogràfic: Ús i abús dels llibres de text. nº 302, 51-60, p. 53-54

I believe, along with Vancells (2006), that there is a large segment of teachers that do not need many ideas or suggestions to position themselves above the curriculum for competences or the textbooks that they develop and realise. However, some may need to contrast their views with regard to theoretical or practical examples. Given that there are few concerning this matter, and even less related to textbooks, I am going to present, in this last section, some studies that have already suggesttws some ideas that may be useful to those who are convinced of the need to adapt their practice to the competences curriculum.

In a pioneering work on the use of history textbooks, Brusa (1985) suggests going from basic to complicated as a strategy. The suggestion was to look for that which is simple to distinguish it from the complex. This was illustrated the proposals through two examples, a personalised historic narration and an analytical historic text: “let us consider, firstly, the main didactic instrument that the teacher or textbook, has at hand: the adaptation of history to the aural understanding capacity.” (...) “Secondly, bear in mind that history is an account that “the history of something” is, in a certain way, “the least significant unit” of a historiographic transmission. (...) Furthermore, the most likely image a teacher has of his own culture is that of a universe of stories and the shaping of which was brought about through the wide use of stories: those in textbooks, belonging to teachers, those by academic historians”. (pp. 13-14)

This analysis of the learning difficulties of history considered that the textbook, if used in a determined manner, could facilitate the overcoming of learning obstacles.

“Let us reflect on two of the many difficulties that we come across when teaching history. The first is that the language used by the historian or author of the textbook adopts is not “natural”. The second is that rarely is a history textbook monotonous. That is to say, it recounts one object. The objects (happenings, activities, personalities, etc.) are often numerous, even in a paragraph of few lines. (...) In general, this set of difficulties is interpreted as a deficient basis: “difficulties in reading and in understanding a relatively long book.” The strategy that I suggest tends to overcome this problem and, above all, aspires to win certain logic of two times, often implicitly present in teaching. The pupil must learn to read and then, learn to understand history”. (p. 16)

The didactic model was made up of a sequence of three group operations:

- a) A selective reading, taking for granted that the pupil does not use the textbook to “read-understand-tell”, but only to find certain types of information.
- b) Some basic operations to be applied to selected information by the pupils. Classification, cataloguing, establishing relationships, inferring, comparing, controlling simple hypothesis about the text.
- c) Recreating situations so as to test the pupils’ depth of understanding of facts and rules; small games allow you to exercise (and show) their argumentative capacities.

This model was profusely illustrated by examples in which each and every phase and operation that the pupil had to carry out was planned. The proposal was closer to the taxonomies that the current discourse had on educational competences. However, it continues to be a very useful source to consider using as a textbook in the classroom.

Some recent investigations on textbooks have offered ideas and suggestions to the teaching profession on alternative ways of using textbooks as long as they can use their discoveries as mirrors to look over, and re-read as practice. Of the set of existing investigations on geography,

history and social sciences textbooks<sup>2</sup>, I wish to highlight two things in particular; the investigation by De la Caba and López Atxurra (2003) and that of Von Borries et al. (2006).

De la Caba and López Atxurra analysed the participation and development of civic competences activities in “Conocimiento del Medio” textbooks used in primary level education in the Autonomous Basque Community. They analysed the 24 books from 4 publishers (used in 1st to 6th grade). They classified the activities in the following manner:

- psychomotor activities,
- activities that require cognitive habilities,
- activities that emphasise communication on social issues,
- activities aimed at awareness and use of the scientific method,
- activities that require initiative and decision making,
- creative activities,
- activities that require multiple tasks and project development.

The “Conocimiento del Medio” textbooks included in Spain knowledge proceeding from the natural and social sciences, particularly geography and history. The findings of their work, preceded by a detailed and thorough analysis of each group of activities, indicate that on the one hand, there are aspects which are more or less common in the various publishers but that, there are also diversified approaches and, sometimes, clearly so between different publishers. These are some of the conclusions (393-394):

- “(...) Not all the activities that are made to work with others equally facilitate the development of active citizenship competences. (...) It is worth highlighting the small percentage of the most supportive, and especially the decision-making, creativity or the projects as well as its gradual decline or disappearance in the higher grades.”
- “Communicational activities on social issues are prominent in all publishing projects. However, with regard to the shaping of civic competences, not all offer the same opportunities for development. While some publishers only give the signal to comment on a topic, without giving further guidance, others suggest thinking activities that promote more active skills (...) through well-detailed guidelines on how to organise and behave during the debate.
- “(...) in general, more guidelines to promote autonomous and efficiency skills in the working group (...) in activities related to physical sciences than in activities relating to social sciences.”
- etc.

The conclusion with which I identify fully is as follows, “thinking and social and professional competences of teachers can filter when the moment comes to implementing these texts.”

<sup>2</sup> Some of these have been published in the Spanish language investigation journal *Enseñanza de las Ciencias Sociales. Institut de Ciències de l'Educació de la Universitat Autònoma de Barcelona/Institut de Ciències de l'Educació de la Universitat de Barcelona*, an annual journal edited since 2002.



Given that teachers can, indeed, do act as filters, it is worthwhile filtering those books that when choosing, as these authors underline, can ease the task of adapting contents and activities so the pupils can better develop civic competences.

The findings on the reflexive use of textbooks on history by Von Borries (2005) and his team are a little more complex. Their work analyses how an ideal textbook should be. They establish a set of categories between those that highlight, for example, the following: being easily intelligible, containing emotional stories, exposing motives and ways of selecting information, weighing up the positive and negative aspects of the facts, preparing and encouraging readers to shape their own personal opinion, etc. They also ask pupils and teachers their opinion and value on the treatment that history textbooks give these categories.

For Von Borries and others, textbooks are the basic resource for teaching, but they do not sympathise or greatly appreciate them. The pupils are clearly in favour of textbooks, while teachers are against them providing the basis for evaluation, a “clear appreciation” of history and geography, as well as a reflection from the correct perspective. Pupils have an ideal history textbook that clearly goes against self-reflection.

Their work concludes with a set of questions that address the main problems in the teaching of history and that arise from the “disappointing responses from pupils” (p. 17):

“Are the pupils mentally trained for reflecting on the history and historic consciousness as claimed by didactic history and the project “For historic consciousness” theoretically and empirically analyses it or they *are too asked too much emotionally and cognitively* (at least taking into account conventional historical socialisation)? (...) Can and should all citizens reach the top level of taxonomy of historical thought and (self-) reflection?

- Are history textbooks (...) designed for individual reading and the use by the pupils or the laborious collective decoding and studying in class? Why are they difficult and inaccessible? Because of their linguistic characteristics (lexical, syntactic), of the widespread poor reading competences, (...), of the structure of historical logic (...), or of superficial reading habits?

- Does voluntary reflection on history and the search for historical identity really desirable and political-social goals or only a formula of “social desire” without the commitment of “plural” society? (...)

- Is school (...) a suitable place for learning of historical reflection or is it the uniqueness of the institution which already handles the flat and superficial adaptation to social conventions (...)?”

The answers to these questions are not found exclusively in textbooks, but if they were to be used differently, perhaps they could different findings to those put forward by these German researchers since it might cause different learning.

It seems that one of the major problems associated with textbooks used by teachers and pupils is that they are used in a restrictive manner. That is to say, they are used following the logic in that they were written without thinking of other alternatives. I am not familiarised with the systematic alternative proposals for use in the teaching of social science, geography and history beyond the already cited work Brusa. There are examples, however, in other disciplinary fields. For example, Campari (2001) proposes alternative ways of using textbooks in science. In his view, “textbooks are used in a way which we think is somewhat limited. Indeed, the main uses of science textbooks are: a) source of information for pupils and teachers, b) source of class exercises and tasks, c) a source of questions and assessments. We believe that science textbooks allow a more imaginative explanation. Even the negative aspects (for example, errors, gaps in the explanations or distorted visions of science that sometimes convey ...) can still be used to promote learning in pupils” (p. 352). Campanario suggests activities for the teaching, namely the educational, profession and pupils. Among the first are highlighted: finding mistakes and warning pupils of their presence, to assess the taxonomic level of activities and issues, identify inappropriate or traditional views on science, demystify visions of scientists, identify areas that lack explanation or questions, making the questions that justify the conceptual content explicit, introduce cognitive conflicts, identify basic contents that lack, etc. As for the pupils, suggested activities and tasks based on in-depth processing of information such as asking and classifying questions, imagining experiments, assuming that they comply with the scientific laws or that things are not as they are, and activities and tasks based on learning as finding the theory behind each experimental data, to learn why the definitions and statements about events are remembered better, being aware of the constructive nature of learning, identify the rhetorical structure of the text, determine their own understanding and analyse the levels of oversimplification of the explanations and scientific models.

It is clear that these activities can not be mechanically transferred to social sciences, geography and history textbooks, but some can effectively be adapted easily, in particular if you think they serve to develop competences.

As I have been insisting throughout my presentation, ultimately, the teacher, not the textbook, is responsible for programming activities to be performed by the pupils so as to develop competences. It is therefore imperative that textbooks are selected with care. As I said, the curricular approaches that affect the very nature of epistemological school knowledge, but also the design of teaching and learning. Criteria that allow locating practice in a constructivist educational paradigm critical. Criteria related to the type of competences and the challenges presented to pupils.

Among the suggestions for selecting textbooks relates to how competences are treated and their programming in the classroom, the proposal by the Ministry of the Walloon Community of Belgium (2000) for the teaching of history in secondary schools is remarkable. They start from the assumption that it is in class that pupils must learn to acquire competences. And, as a consequence, the teacher staff must come up with various learning situations that motivate pupils to develop them. They propose, for example, the following possibilities:

- Access to the representations: the student draws a personal representation of a medieval town or the pupil describes or imagines the life of prehistoric man (housing, food, ...).
- Entry for the problem: the pupils ask themselves: Are the Celts Barbarians or just different?
- Entry by the enigma: the pupil compares two contradictory documents (for example the status of the peasantry after the Egyptian papyrus of Anastasi and the text of Herodotus on the flooding of the Nile).
- Entry for the project: the pupils produce an exhibition, a photo essay, ...
- Entry by a task: the pupils analyse a picture: a pupil seeks information in a textbook.
- Entry by joining a competence or ability, the pupil compares two documents of the same or of a different nature.
- Entry by an activity in a museum or reservoir: the pupil receives the image of an object without indication; at the museum, the pupil looks for and identifies the mysterious object and has all the information possible. In a reservoir, each pupil chooses an item and collects information on it ... (pp. 5-6)

## CONCLUSION

The textbook is, as we have said and repeated on various occasions, the most important means of disseminating the curriculum. The teacher profession finds in the books the contents of the area to be taught, the objectives, methodology, activities and suggestions for evaluation. And from now on shall find suggestions for developing competences.

Pupils must be able to develop competences and build knowledge through a rational, critical and creative use of textbooks. To do so, teachers have to know how to use them and have to decide what role they play on programming and developing teaching and learning activities.

First, teachers should be questioned if it is necessary that each pupil have his or her own textbook, for personal and non-transferable use, or if there should be a library class in which there are books with different approaches to analyse, test and evaluate different approaches to facts, events or geographical and historical problems. This second measure requires a cooperative effort on behalf of pupils since it is unlikely that there be a copy for each pupil. Second, the teacher has to consider who makes use of the textbook in the classroom, keeps track of as much of their sequences as their content or activities or, rather on the other hand, try a creative use of books as both its sequence of contents and activities, adapting it to their reality in order to achieve higher and better learning in its pupils.

Neither the publishers, nor the government encourage, nor seem to even have much interest, except in the case of honourable exceptions such as this seminar, of discussing, exchanging

and carrying out educational research on how teachers use textbooks or on ways how the pupil copes with its contents. It seems to be betting on a few “teacher-proof” books.

Pupils must also learn to use the textbook in critical and creative ways. To read it according to previously asked questions, to classify, compare, and analyse the contents according to these questions, to interpret the stories, to assess the contents and activities, to develop alternative stories, to relate the content with life, in context. This is gives pupils tools to make them wiser and more autonomous, they can write their own texts and develop the competences that will make them more committed citizens to their world and their future. And probably happier.

In any case, we have to give them the opportunity to be the protagonists of their future in a free and democratic manner:

“History is not only the past, but also, and mainly so, the present and the future. History is projection. It is the building of social human reality. The most important human right consists in respecting the capacity of citizens to produce for themselves the future reality they require. Failure to recognise this right, or to usurp or adulterate this right, is to impose, above all else, not truth, but rather historic lies. It is to empty humanity’s true moral reserves.”

GREZ, S./SALAZAR, G. (comp.) (1999): *Manifiesto de historiadores*. Santiago de Chile. Lom editores, p. 19

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# The Idea of Nation in Argentinean History Textbooks in 20th Century

LUIS ALBERTO ROMERO

## STARTING POINTS

In this text I will examine the contribution of school history textbooks towards the moulding of the common sense of nationalism in Argentina during the 20th century, and the consequences to be expected of the rethinking of these books in the current democratic period.<sup>1</sup>

For a history of ideas and culture, these textbooks serve two purposes. On the one hand, consulted as accounts, they recall a certain state of ideas and knowledge that is vague as regards to ideological profiles, but is widely distributed and naturalised. In this way, the textbooks are an exaggerated expression of common sense. On the other hand, placed in context of production and other related policies, not only stately, they appear as important, but not omnipotent tools that mould this common sense. A third interest refers not to the scholar, but rather the active citizen who, as an intellectual and professional, aspires to influence the building of this common sense through the educational institution and, more specifically, through textbooks.

### 1. Common Sense

For any of these purposes we should highlight and examine our common sense surrounding Argentina, and question what constitutes its essence: naturalisation. I shall call common sense that part of our minds which thinks when we do not know what we are thinking, and which responds automatically before critical judgement, frequently leaving it out. To judge and act in agreement with common sense forms part of our daily lives. However, there are occasions when something alerts us about some aspect of this common sense. This is the case of the

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<sup>1</sup> This text is based on the study into the image of Argentina and Chile presented in textbooks from both countries, finished in 1998. With regard to the section on Argentina that was published in "La Argentina en la escuela. La idea de nación en los libros de texto. Buenos Aires, Siglo XXI Editores, 2004" by Luis Alberto Romero (coord.), Luciano de Privitellio, Silvina Quintero and Hilda Sabato. The study on Chilean textbooks was coordinated by Sofia Correa, Alfredo Riquelme and Gonzalo Cáceres.

image of Argentina that is based on a nationalism that refers to a strong, homogenous nation, convinced of its destiny of grandeur, while also sure of the existence of a plot to stop this from occurring. In my opinion, during the 20th century this very nationalism has generated types of pathological conducts that reach their peak expression during the Malvinas War in 1982.

It is widely known that schools are the biggest builders of common sense, that “forgotten knowledge” that Max Scheler talks of, referring to what remains once one has forgotten everything, once the contents of teaching enter a dark zone, but simple ideas, values and attitudes that they once bore, remain. Certainly schools are not alone in this, since the questioners’ voices in a complex society are numerous, and the references are to be found in several fields. Nevertheless, schools have something basic and natural. For example, any intent to characterise the “Argentineans” always turns out to be polemical. Although it is not the actual intention of defining a heterogeneous group - but rather, that “Argentina” seems to be an obvious object of existence, a subject which people can preach something about, without further clarification.

What is Argentina in common sense? Firstly as an image, characteristic of a scholarly experience: a map, with strongly marked outlines that correspond to a section of territory with defined and categorical boundaries. Then, a certain idea of who inhabits this territory: the Argentine people who, apart from the differences and conflicts, make up a unit that portrays something. If the current experiences contradict this unitary image, the attribution of a mythical origin certifies it: Argentina exists since 25 May 1810. A third basic trait centres on its state, which institutional form was defined by the 1853 constitution. I dare say, from then on, the only strong reference concerning the existence of a united and homogenous Argentina (I am not referring to its proclamation but instead its validity) is to be found in football.

The three basic references are built upon schools and, partly, through textbooks, particularly geography, history and civic textbooks.<sup>2</sup> From here on in, I will mainly refer to history, but will resort to a few complementary references from the two other areas mentioned. It is worth bearing in mind that schools are much more than just textbooks. They are a small part of a wider picture that includes curriculums and other pedagogical prescriptions, professors and their trainings and traditions, and the institutional practices, in particular those referring to the patriotic rituals, etc. At least three different processes converge in the textbook. The curriculum developed by the text; scientific discipline, the results of which the author of this text translates, and the editorial production that defines matters such as the selection of authors or the graphic presentation, of several didactic implications. Concerning the long time frame that we shall firstly study, some small changes were made to two. The curriculums only suffered minor changes concerning a stable, basic design. For decades, the editorial production adapted itself to the proposal of an authored book –first they were recognised

<sup>2</sup> The same academic discipline referred to civic sciences has had several names; amongst others, Civic Education, Civic Formation, Democratic Education, Studies of the Argentinean Social Reality, Moral and Civic Formation. Other contents were added to the constitutional training, in agreement with the ideological tendencies of the successive governments. On the other hand, institutional training has seen social science subjects incorporated into it.



historians, then, teachers with vast experience in teaching– with a basic text and teaching complements or with minimum illustrations.

With regard to the disciplinary aspect, the history books record the influence of what was later called “official history” (less homogenous than the title suggests), founded successively on the Bartolomé Mitre tradition and later on that of the *Nueva Escuela Histórica* [New Historic School] that was the expression of the disciplinary advances in the first decades during the 20th century. Both traditions were adopted by the *Academia Nacional de la Historia* [National History Academy]. This would have nothing remarkable about it, if it had not of been for the vigorous development, since the 1920’s, of the historiographic trend that militantly opposed the “official history”. The “historic revisionism”, without overly renewing the disciplinary focus, reverses the value criterion and restores those characters and processes reviled by the official version, especially by Juan Manuel de Rosas. This version had ample development in public opinion, and came to symbolise a certain common sense rooted in society, and probably mainly influenced teachers, although its impact on textbooks has been minor.<sup>3</sup>

## 2. The Argentine Peculiarity

I have referred to problems that are surely similar to those of many countries in which history plays the part of citizen educationalist. What makes the Argentine version of this patriotic state so particular? When we began to study these matters, a Chilean colleague pointed out that we Argentines had a nation, while Chileans had a state. Without wholly accepting this diagnosis (I dare say that there is as much nationalism in Chile as any other state in the world), I agree in that Argentine nationalism has a traumatic side that is probably absent or less defined in Chile.

My impression is that this has to do with a peculiar Argentine society, built at the end of the 19th century by mass immigration. It was extremely mobile, integral, and socially democratic, at least throughout its modern areas, without social strata, nor deference or paternalism. One of the fruits of this is a wide public opinion, extremely sensitive to questions relating to identity, surely made worse by basic insecurities as regards to who’s who, originating as much from immigration as mobility. In Argentina the issue of defining the “national being” and establishing who is authentically in or out is usually controversial. The controversies between intellectuals are quickly presented to the politicians: two great political movements, Radicalism and Peronism, have successively identified with the nation and the people, stating that their rivals were against the people. A similar operation has been adopted by two significant political actors: the armed forces and the Church, both feeding the military messianism.

It is most likely the same process of social democratisation that has prevented conflicts of interests in republican institutional frameworks from notoriously overflowing during the 20th century. The same national passions can be found in the diverse political experiences that together contributed to the barbarisation of politics to the extreme during the last military

<sup>3</sup> Diana Quatrocchi-Woisson: *Los males de la memoria. Historia y política en la Argentina*. Buenos Aires, Emecé, 1995. Tulio Halperin Donghi: *El revisionismo histórico argentino*. Buenos Aires, Siglo XXI, 1971.

dictatorship. Undoubtedly national exaltation was present during the moment that followed the military occupation of the Malvinas islands by the dictatorial government in 1982. In this way, 1983 is a milestone, and hopefully, the end of an era. I referred mainly to this long period as a means to find the correlation in school textbooks.<sup>4</sup>

## THE TEXTBOOKS AND THE IDEA OF A HOMOGENOUS NATION

I shall now examine the common features of the two history textbooks frequently used between circa 1940 and 1983, in primary and secondary schools, which refer to Argentina's historical process. These texts focus on the political, institutional and military processes. They cover the long colonial period lightly, although they examine at some length the vice-regal era. The focus is on the emancipation and the wars of independence that occurred between 1806 and 1820. Covered more lightly are the conflicts concerning the institutional organisation until the constitutional sanction of 1853. Lastly, the organisation of the state and the process of territorial definition, completed in 1880, are looked at. It is at this stage that history almost comes to an end. I will preoccupy myself with two aspects that define the matter of nationality: the mythical origin of the Argentine community and the issue of the territory.

### 1. The Pre-existent Nation

A famous phrase by General Mitre (a statesman and historian), maintained that the Argentine nation pre-existed the state which moulded it. The idea, typically Romantic, combines the belief in an essential and a-temporal nation and in keeping with its progressive incarnation in a state which shapes it and gives it historicity. Such is the task and the mandate of the Argentine people, defined in a broad and generic way, according to the traditions of romanticism and liberal constitutionalism. The history of the origins ends with the national organisation and the consolidation of its state.<sup>5</sup>

Some profiles of that Argentine people can be glimpsed in the long colonial period; for example, Hernandarias, the first *criollo* ruler at the beginning of the 17th century. But its epiphany is produced in 1806, when as a consequence of the English invasions, the "Argentines" defeat the invaders.<sup>6</sup>

Then begins what is the core of the historical account: the saga of emancipation, which takes place in a time of heroes and national heroes. It is also a period in which the people united against a common enemy, which is Spain. Eluding or contextualising the existing differences, the account privileges unity of intentions in the construction of the nation. When it appears, politics is only of minor interest, of personal ambitions, generally put forward as an argument

<sup>4</sup> With regards to these matters, I referred mainly to two of my own works: *Breve historia contemporánea de la Argentina*, 2da ed. Buenos Aires, Fondo de Cultura Económica, 2000, and *La crisis argentina. Una mirada al siglo XX*, Buenos Aires, Siglo Veintiuno editores, 2003.

<sup>5</sup> José Carlos Chiaramonte: *El mito de los orígenes en la historiografía latinoamericana*. Buenos Aires, UBA, 1993.

<sup>6</sup> At this point, the mythical account presents a distortion that can be easily perceived, as it assimilates the people of Buenos Aires as Argentine, and omits the importance of the participation of many of those, who years later, would be defined as Spaniards, including the most outstanding two figures, Martín de Álzaga and Santiago de Liniers, who were executed by firing squad between 1811 and 1812 for sympathising with realists.

to explain deviant conducts. There is no interest other than the nation, nor the very possibility of legitimate deviations: a concept with which many could identify with in Argentina during the 20th century, where for different reasons, the great political pleas restored unity in the nation above all other political partialities.

These conflicts are, however, the inescapable substance of historic accounts post-1820. They begin with the “anarchy of 1820” and continue with the long cycle of civil wars, between those for unity and the federals. In this case, the differences are permitted in the textbooks, when referring to the debate about the type of government, and legitimated in the measure that the conclusion contemplates the points of view of both parties. With regard to people, the picture changes a little, however. The first great historiographic tradition, arising during the 19th century, perpetuates the confrontational climate during the Rosas era, and points towards him and the federals in general, as those who slowed the process of national unity. Nonetheless in the 20th century, and already under the influence of the *Nueva Escuela Histórica*, the idea that federals, and even Rosas himself, had made their contribution towards the building of a state was accepted which, ultimately, would synthetically express the nation’s spirit.<sup>7</sup>

The point of arrival is the Constitutional sanction in 1853, and, shortly after, the consolidation of the state and end of the civil wars, in 1880. Of those years, the process of controlling Argentine territory is of interest. The last victorious action of this account that intertwines military aspects with institutional ones is that of the “Conquest of the Desert” in its two aspects: the subordination of tribes and aboriginal political organisations, considered foreign or external to the Argentine historic process, and the definition of the most important issue of borders, with the incorporation of Patagonia to the Argentine state. Both processes are integrated into one idea that is developed during that point, and one that is an eloquent national u-turn: the purpose of the Conquest of the Desert was to conquer the Chilean Indians.<sup>8</sup>

## 2. The Nation’s Territory

Argentine nationality is embodied in its territory. This was the result, perhaps inevitable, of an ideological and rhetorical dispute that was intense during the early years of the 20th century. During this phase, coinciding with the fact that the nation had and should have an essential unity, several criterion were discussed and faced in the shape of a lawsuit involving the entire ruling elite.<sup>9</sup>

The linguistic unity criterion failed, not only because it did not adequately differentiate Argentina from other Hispanic American countries, but also because there was a lack of consensus with regard to which was the “national language”: the language that was effectively spoken throughout the country (differences existed according to the region) lacked the prestige that

<sup>7</sup> Although Rosas was not incorporated to the cemetery dedicated to the founding heroes (to which figures associated with Unitarianism were eventually admitted) Artigas, leader of *Banda Oriental* and eminence in the new Uruguayan state, or Estanislao López, vindicated in the Santa Fe province, were.

<sup>8</sup> Raúl Mandrini: *La Argentina aborigen*. Buenos Aires, Siglo Veintiuno editores, 2008.

<sup>9</sup> Lilia Ana Bertoni: *Patriotas, cosmopolitas y nacionalistas*. La construcción de la nacionalidad a fines del siglo XIX. Buenos Aires, Fondo de Cultura Económica, 2001.

“Castilian” enjoyed (this is what the course was called during this period, until the name was replaced by “national language”). This was the language used by Cid and by the race in general. Schools battled and attempted to impose the difficult “vosotros”. Faced with this, *Gauchesca* was used, that of our great literary work, Martín Fierro, and later the more colloquial, “voseo” that acquired literary status over the last fifty years. In sum, there were more lawsuits than a unanimously accepted criteria.

Equally difficult was the criterion of race, on which the classic works fed on during the early 20th century. What race? This was another motive for lawsuits. The Aboriginal, Hispanic, or the *criollo*-*Gauchesca* race? Or the one that was forming, in the “melting pot”, with the help of mass immigration? This solution was plausible, but referred to something under construction, when what was being sought was a sure anchor for the nationality, situated outside of the historic contingency. Other than the proclamation of “*Día de la Raza*” [Columbus Day],<sup>10</sup> little else was achieved.

Finally, the Catholic religion was chosen. From the beginning of the 20th century, and against the spirit of the 1853 Constitution, the Catholic Church maintained, with increasing force, that Argentina was a Catholic nation, and stated that the Church and its men were present during each episode of our history. The weakness of the criterion lies partly in that it does not make distinctions: in a certain way, even Brazil is Catholic. Above all, however, it was fighting talk that achieved political success by coming together with the Army and the upper classes in crisis, but unconvincing in a country that was too modern for religion to be a source of identity.<sup>11</sup>

Territory was the most solid criterion. It was stated that, until it was converted into a natural idea, the Argentine nationality emanates from a territory that precedes everything, and that in a way, was already mapped out prior to the arrival of the Spanish, separating and differentiating the Argentine natives from those of Paraguay, Bolivia and Chile. In this sense, it is commonly said that in 1521 Juan Díaz de Solís discovered Argentina. By incarnating in the state, that ruled the territory, the nationality changed from being a capacity to becoming a reality. The explanation thus combines the two dimensions of the issue: the eternity of the nation and the need for its historic realisation, which is the task of the Argentine people.

Apart from resolving the logical hidden motive, the idea of the nationality’s territory received a strong impulse from the army, one of the great questioners of the nationality in the 20th century. Since the beginning of the 20th century, the army decided to install itself at this level, as the last guardian of the national essence, above not only the parties but the republican institutions themselves. The army’s specific task was precisely the incorporation of territory to the state and later to defend it. To this was added its ideal construction through maps: all maps published, that is to say that existed, must be approved by the *Instituto Geográfico*

10 October 12 commemorates both the “Discovery of America” and the advent of the Hispanic race. The celebration was established in 1917, in the context of reconciliation with the “Motherland”.

11 Loris Zanatta: *Del estado liberal a la nación católica. Iglesia y Ejército en los orígenes del peronismo*. Bernal, Universidad Nacional de Quilmes, 1996. Roberto Di Stefano y Loris Zanatta: *Historia de la Iglesia en Argentina*. Buenos Aires, Grijalbo, 2000. Luis Alberto Romero: “Una nación católica, 1880-1946”, in Carlos Altamirano (ed.), *La Argentina en el siglo XX*. Buenos Aires, Ariel, 1999.

*Militar* [Geographic Military Institute], which watched over in particular the clear definition of matters concerning litigious borders. One in particular, curiously, is the inclusion of the Antarctic territory (which occupies more than half of the area attributed to Argentina) and has created the idea, not shared by the rest of the world, that Argentina has solid rights over that region.<sup>12</sup>

This inclusion is part of a more general cultural process of naturalisation of Argentine rights over the territories that the state attributed itself. Above all, the fusion of ideas of national identity with the territory, placing in it all aspirations, illusions and passions that are implicit in this national idea, to which territoriality adds traits, such as irredentism and fear in the neighbour. This identification goes to the extreme in that even the most minor section that is not specifically controlled is considered to be an unbearable aggression towards the very essence of the nationality. Apart from the matter concerning the Malvinas, to which I shall return shortly, this was manifested during the last discussions with Chile, regarding small territories, absolutely unknown, such as the “fields of ice”, around which the entire nationalist imagination was created.<sup>13</sup>

### 3. The Building of the Territory

Nonetheless, the building of this image was not easy, as is seen in the textbooks, and required a series of discursive artifices. Contrary to other Hispanic American countries, there was no consistent aboriginal base on which an account could be built, as was the case of the Aztecs, Incas, Chibchas (I am not referring to a real account in terms of historiography, but rather of plausibility in cultural terms). The existence of the “Argentine Indians” is surely a challenge to the plausibility for anyone aware of, for example, the case of the Guaraní or the Mapuche people.

Neither did the Spanish conquest occur, fundamentally, in a unitary and punctual manner as was the case of Chile, so as to start with it an account based on territory. According to what can be read in textbooks, the Argentine territory (which obviously already existed), was populated by three colonising trends that penetrated (a key term in this concept) Río de la Plata by Spain, the north by Peru, and by Chile in the west. A lack of unity and foreign presence were a bad start for the national territory, only corrected at the end of the 18th century with the creation of the Vice-royalty of Río de la Plata. According to the textbooks, the act does not refer to geopolitical or general administrative decisions for the American empire, but rather to the recognition of our territorial reality by the Crown: a head in the capital/port and a few territories that, according to some claims, included Argentina, Uruguay, Paraguay and parts of Brazil. The place the Vice-royalty was allocated and its administrative organisation (which precedes the Argentine state) testifies the founding dimensions that it is assigned.

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<sup>12</sup> In 1947, Argentina signed the Antarctica Treaty, in which all those who signed renounced to the claim of sovereignty over the Antarctica.

<sup>13</sup> Carlos Escudé: “Contenido nacionalista de la enseñanza de la Geografía en la República Argentina, 1879-1996”. In: *Ideas en Ciencias Sociales*. 9, Buenos Aires, 1996.

A short time later, however, the hazards of the war, and lack of judgment of political leaders (perhaps Belgrano should have been more forceful in Asuncion), caused the “loss” of the *Banda Oriental*, Paraguay and Bolivia. This is how the idea of a “torn nation”, probably at the hands of foreign powers who wanted to avoid the realisation of their destiny of greatness, is born. The interests of Brazil and of Great Britain to make our territory smaller were discussed and, in the 20th century, from the perspective of anti-imperialism, “Balkanisation” was discussed. A complementary argument, which recognises our neighbour’s national identity (Bolivia, Uruguay and Paraguay) emphasises Argentine generosity, was not always reciprocated in those terms by those who should have been more grateful. In the revisionist accounts, parallel to those of schools, such generosity began to be included in the account by our ruling class’ mistakes, distanced from national interests.

In a theological version, the current map of Argentina presides over the historic account of the definition of borders. According to this account, for example, the Jujuy province was always part of Argentina, despite the fact that until the second half of the 20th century, the people of Jujuy contemplated possibly joining Bolivia. A similar situation can be appreciated on the borders with Uruguay and Bolivia, even though these borders fluctuated until the end of the War of Paraguay (when, in another show of generosity, Argentina maintained that “victory does not grant rights”). Finally, towards the south of the also fluctuating border with the aboriginals, there was a territory that was not really occupied and was of an undefined theoretical belonging, until the military action of 1879 (the “Conquer of the Desert”) decided the issue. The aboriginals now regarded as Chileans were defeated and the Andes mountain range was consolidated as the natural boundary with Chile. Here ends the history of the construction of the territory.<sup>14</sup>

#### 4. “The Other”

Initially built around the idea of a destiny of grandeur, the image of Argentina during the second half of the 20th century gradually incorporated a second aspect: the failure to materialise this grandeur, and worse still, a certain level of decadence, was due to the nation’s enemies constantly conspiring against it. The presence of the hostile “other”, particularly strong in different public political speeches, is on the increase in texts. Perhaps not as much in history textbooks, in which the accounts were more established than those in geography or civic textbooks. In some cases, such as the Malvinas War, the state’s decision to include the matter is noticed, although in a rather forced manner.

The geography of the textbooks, very influenced by the geopolitical focus, is reflected in the idea of boundary: a dense and impenetrable wall separating Argentina from another state that bears no importance, but that is suspected to have malicious intentions. In times when the presence of armed forces was growing stronger in the borders, when there were attempts at populating these areas, so as to avoid “silent penetration”, and there were also attempts

<sup>14</sup> This history which should add, however, that of the other aboriginal border, in the north-east, but this one was considered absolutely as an internal matter since the river bordering with Paraguay was unquestionable.

at hindering frequent interchanges (as prominent in Clorinda as in La Quiaca or Mendoza), geography taught, by omission, that the pupils had nothing else to learn other than carefully drawing boundaries.

The neighbouring countries were, generally, brothers that Argentina had treated with generosity. With Chile there were several outstanding border issues, and some disputes slipped into the textbooks, although the initial image was one of brotherhood. San Martín, the Argentine national hero, liberated Chile (a story that in Chile is told in a subtle, though significantly different manner). Geography textbooks warned of rash Chilean geography that surely resulted in behaviour difficult to predict and pointed out that while Argentine society was “predominantly white”, Chilean society was “predominantly *mestizo* [racially mixed]”.

Another important “other” was Brazil, different for reasons relating to origin, linguistics, race, and eventually, religious issues given the weight of non-Christian creeds. The fundamental Brazilian threat was geopolitical: the size, position and shape of the empire meant it could not wish for anything other than to corner Argentina. This stance, that transcends any historic juncture, is confirmed by another constant: Itamarati’s highly qualified diplomacy managed to maintain a hostile plan during two or three centuries (an option that the Brazilians consider as much surprising as amusing). Thus, the Brazilian hostile plans manifest themselves from the time of the *Bandeirantes* in the 17th century until the Triple Alliance War.

Alongside Brazil was England, the “perfidious Albion”, Protestant, ally to the Portuguese Empire since the 1700’s, interested since then in the South Atlantic, invader in 1806, occupier of the Malvinas in 1833, and present in each political juncture that could impede the realisation of Argentina’s destiny of grandeur. Revisionism added climax to this story. Towards the end of the 19th century, England chose the most perfidious path to harming Argentina: associating its economy with that of Río de la Plata, causing its spectacular growth, but also deforming and condemning it (once Great Britain had retrieved) to irrevocable decadence. These anti-imperialist nationalist accounts, in vogue since the 1930’s, were followed by dependants’ versions during the seventies. This is not as much present in historical accounts, which texts stop recounting in the 1880’s, but rather in the current history versions in geography and civic textbooks.

In civility texts emerges a new version of the other, typical of the political and ideological climate in the second half of the 20th century. It is during this period that the idea of “ideological borders” is developed, which changes the focus of the antinomy from territory to political ideology. Argentina, aligned in the western and the Christian area, suffers an attack by Communism, alien to our traditions and our national idiosyncrasy, and finally from the “stateless subversion”, integrated by those, mainly Argentineans, who were actually foreigners. Thus, the role of the subversive “other” crowns a series of questions concerning what is national.

## 5. The Malvinas

All these ideas converge around the matter of the Malvinas, in which the deep roots of these notions of common sense can be appreciated. The matter appears increasingly in textbooks

from the 1950's onwards, following the arguments set by the state. Textbooks teach that Argentina's rights over the Malvinas (causing much objection in international forums), are based on a combination of historical and geographical arguments. The "submarine platform" and the "Epicontinental Sea" (two criteria on which no unanimous agreement exists) ratify that Malvinas territory naturally belongs to Argentina. The relatively sporadic presence of the Spanish on these islands supports a diplomatic historical argument, based on the inheritance rights of the former metropolis. The intervention of England confirmed its ill will as Argentina's eternal enemy. These were good arguments, undoubtedly (but arguments all the same) that textbooks, along with many other opinions, started naturalising, to the point where half the public opinion blindly accepted them.<sup>15</sup>

It is of significance that this argument does not include the most democratic criterion: the actually existing inhabitants' wish of belonging, used for example, to settle the status of Alsace and Lorraine after the war in 1871.<sup>16</sup> This democratic argument was not as influential in 20th century Argentina, neither in this territory, nor in any other.

In contrast, however, there was an important association between territorial integrity and what was then called, national integrity: if no sovereignty existed over the most minuscule portion of national territory, the entire nationality was in question. It was an argument that was not based on interests; a complementary aspect could eventually be added though, rather in that intangible and eternal national essence, but whose existence was permanently endangered by threats made by others. The unanimous support sparked in 1982 by the military occupation of the Malvinas islands fully expresses the strength of this feature in Argentine political culture which we believe is firmly, if not exclusively, based on, and perhaps not mainly, in schools and in textbooks.

## THE DEMOCRACY TEXTBOOKS

### 1. Curricular and Editorial Renewal

The restoration of democracy in 1983 had some immediate effects on textbooks, including matters concerning democracy and human rights, more as an expression of good democratic will than global reformulation. Major changes began in 1993, when Argentina underwent a comprehensive educational reform, including renewing its curriculum. The slogan was to bring the contents closer to the state of the art of these disciplines. The task, to which the most renowned scholars were called, resulted in the creation of a core of Basic Curricular Contents.

This was the most constructive aspect of the educational institution's profound and catastrophic reform that reproduced and boosted the state's crisis, and that minimised the scope of the curriculum update. The content update was only half accomplished since close to none of the

<sup>15</sup> Rosana Guber: *Por qué las Malvinas*. Buenos Aires, Fondo de Cultura Económica, 2001.

<sup>16</sup> Ernest Renan wrote his famous *¿Qué es una nación?* Cartas a Strauss (Madrid, Alianza, 1987) on this plebiscite.



cases elaborated the curricular designs that should have implemented them. In this juncture, publishers renewed their texts in the spirit of the new curricular contents, and given the existing lack, they actually functioned as school curriculums, guiding teachers. It can be argued that, in terms of content, the importance of textbooks was greater from then onwards.

This change coincided with a profound renewal of the editorial process, for educational reasons, in terms of design and business. The general changes that occurred were certainly similar to those taking place throughout Latin America and Spain. The first is the disappearance of the authored book. In this new stage, a group of specialists prepare the different chapters, and the editor turns them into a book. On the other hand, the books are renewed every three or four years –the “novelty” has become a value and a selling point–, so the identity, which previously was based on the author, now shifts towards the publisher.

On the other hand, there was a profound didactic renewal. The books consists of activities, boxes, complementary texts, computer graphics, concept maps and an abundance of illustrations, so therefore the central text gradually loses importance. It is at this point that ideas converge with regard to the process of building knowledge, the pupil’s ability to read, the importance of putting and to the single discourse by introducing a plurality of voices, and on the attractiveness of a design based on the logic of zapping. Different logics concur on one point: the disappearance of the author and reducing the importance of just one account.

The publishers called for university educated historians, who contributed to textbooks with renewed historiographic criteria, along with the convictions of the new democratic phase. In that sense, the textbooks from the nineties onwards have a significant homogeneity. There is a concern present in all to account for, along with the political history, of other processes, economic, social and cultural rights, facilitated by the more open graphic design. But at the same time, it raised the tricky problem (even in strictly academic fields) of integration, having already renounced to the largely established logic by opting instead for the political account, the different levels and registers in a coherent and meaningful way. The authorial fragmentation contributed to this somewhat anarchic dimension, which is characteristic of textbooks of democratic renewal, in which good intentions are not always reflected in suitable results for teaching.

The other big advance is the inclusion of the 20th century in the historical account, and its organisation around the axis of democracy, understood more as a prescription than as a problem to be explained. With regard to the 19th century, the intention of mitigating the most characteristic features of the old nationalism consisted in ‘problematizing’ its explanatory keys: the myth of the origins and national identity. The route chosen was, generally, that of pluralism: introducing alternative influences, different points of view, critical objections, which weakened the old account but did not replace it with a clear alternative. On the other hand, the complex editorial processes meant that the old conceptions, rooted in the common sense of an editor, a cartographer or a proof reader, unexpectedly emerged.

## 2. Looking for New Certainties

The undoing of nationalism, and the questioning of its more traumatic version, was one of the contributions of history textbooks towards the construction of democracy. The civilian dimension of Argentine history was once again valued and the militarisation of the past diminished. The nomination of essential features was put into question, and the supposed unity and homogeneity of the nation was discussed. Pluralism was valued and the terms “the Argentinean” and “Argentina” were used with great caution. The inclusion of these processes in Latin America and Western contexts contributed to contextualising its uniqueness and to weaken the conspiracy explanations. In agreement with the increase in economic and cultural relations between the member states of Mercosur, a comparative look on the historical processes of neighbouring countries was developed.

The attenuation of this traumatic nationalism occurred in a country considerably different from the one that had permitted its previous expansion. Argentina has enjoyed twenty-five years of institutional normality, an absolutely unique experience. The great speakers of national identity, for various reasons, have lost that very aspiration. The armed forces, during a long and contradictory process, have become subordinate to civilian authority and abandoned the pretence of having a voice of their own. The post-counciliar Church abandoned the pretence of building a homogeneous Christian society, and is concentrating instead on other duties. Political parties intending to unanimously embody the people no longer exist, and on the other hand, there is little room for ideological discourses in today’s democratic politics.

Along with these changes, which could be considered as positive, there are clearly more controversial or negative ones. The economy is globalised and the state no longer has centre stage, however it was not an orderly withdrawal, but rather by default and collapse, which lead to it being left out of society. Throughout the successive crises, it became impoverished and polarised: little is left of the middle classes, the sustained process of democratisation, the mobility that characterised the long period of conflict and prosperous Argentina. The space of previous dramatic conflicts of interests and ideology was then occupied by the squalid hostility of the poor and the excluded. Nationalism, among other ideological discourses, ceased to be of interest. Although at the same time, the idea of a nation built on a political contract and ordered around some of its institutions, typical of democratic building, began to evaporate, partly because the citizens required to sustain it were increasingly scarce.

In this context, the renewed curriculum found an audience –students and teachers– who were less prepared to perceive its subtleties. In the case of the questioning of nationalist assumptions, a certain uneasiness could be perceived because the old beliefs, on which many of the schools were built, were worn down by critics, without being replaced by others. I personally have asked the same question in many meetings with teachers: What do I tell the children? That is to say, what other account replaces the old one about the homeland? Undoubtedly, the undoing of the idea of the nation leaves a vacancy, in which the old version may sooner or later re-emerge. In fact, in the public discourse in which the declaration of faith in democracy is becoming rarer, the recognition of the Malvinas War is gradually reappearing,

and it is common in other forms too, thus indicating the presence and conspiracy by powerful external enemies of our nationality.

The context today is far less hopeful and optimistic than it was twenty years ago, when the youthful democracy was introduced to textbooks. But even in this context, and warning that Argentina's problems certainly are much deeper than a simple ideological issue, it is important to think about how to make textbooks more effectively fulfil a role that, in addition to helping the development of critical thinking, helps to build a democratic political community. I believe there are two issues that deserve reflection.

The first has to do with the recovery, at least partly, of the historical account, which centres on a key explanation of the various dimensions of a complex reality. A version that is open, but also purposeful and coherent. That in addition to deconstructing, builds. That offers an answer to the questions that the historical past opens and which are the ones that make the investigation into this matter interesting and necessary. This is partly to do with the editorial processes, previously mentioned, but also with an effort on behalf of historians and not only the authors of texts – to find and put forward that key explanation. In other words, perhaps it is time to summarise.

The second, more fundamental issue is related to the idea of motherland. The criticism of the traumatic, essentialist and intolerant nationalism cannot signify the elimination of this dimension, which is essential in the construction of a democratic community. Put simply, the idea of the motherland must be republican, plural and inclusive. The historic account should underline the complex plurality of society and recognise the existence of conflicts of interests and ideas. At the same time, it could show that the community was built around a political and institutional contract that contains the mechanisms to process conflicts, to avoid their extreme manifestations and to transform them into dynamic and constructive factors. A common history, made of basic agreements, conflicts and resolutions is essential in validating the existence of a community, and to measure and examine critically other inputs, of a nationalistic traumatic matrix, which are inappropriate for a community that seeks to be democratic and republican.

# National Identity and Teaching of Historic Texts: An Explanatory Hypothesis

MARIO CARRETERO<sup>1</sup>

## INTRODUCTION

**T**his presentation has two differentiated parts. The first is a theoretic introduction, based on our book *Documentos de identidad. La construcción de la memoria histórica en un mundo global* (Buenos Aires: Paidós, 2007) [*Identity Documents. The construction of historic memory in a global world*]. In this introduction, we will go over some problems of history teaching in different countries (USA, Russia, Germany, Spain, Mexico, Argentina, Chile, among others) in order to argue our hypothesis on a current contradiction between the Romantic aims and the Enlightened aims of history teaching. We believe that in order to understand the current problems of history teaching it is necessary to understand that it is at the service of a double end: to try to understand the social and historic reality in a complex and critical way (Enlightened ends) and, on the other hand, to generate conceptions and feelings of loyalty to the nation (Romantic ends). This double end is not explicit in many cases and it generates latent incoherencies and difficulties. For this purpose, examples of teaching from different countries will be used, focusing on some images from different cultural contexts.

On the other hand, we will present an analysis from an empirical work on comprehension and representation of images in students of different ages, which deals with the cognitive and evolutionary aspects of students.

We ask ourselves how people of different ages approach the different meanings of a historic image; what kinds of inferences will be necessary to read and contextualise the information about the past that the image conveys. On the whole, we ask ourselves what kinds of readings of historic images individuals of different ages and cultural backgrounds will generate.

<sup>1</sup> This work has had contributions from investigations SEJ2006-15461 and PICT 2005-34778 of the DGICYT in Spain and the ANPCY Agency in Argentina, respectively, conducted by the author. We wish to give thanks to both institutions. The empirical part is based on the joint works of Carretero and González (2004 and 2006), and it comes from González's doctoral thesis, directed by the author.

## REPRESENTATION AND COMPREHENSION OF HISTORIC IMAGES

Until now, there have been few cognitive investigations which study the readings of historic images (Carretero and González, 2006 y 2008; Fasulo, Girardot and Pontecorvo, 1998; Wineburg, 1991) and empirical studies that seek to compare these strategies in individuals of different ages (children, adolescents and adults) are scarcer still.

Within the studies of the cognitive aspects involved in the readings of historic images, Wineburg (1991) can be mentioned. This author described some of the cognitive strategies that individuals use to read a historic image. For this purpose, he studied the way in which experts and beginners in History (historians and secondary school students, respectively) used paintings and texts as sources to understand a central event in North American history, the battle of Lexington.<sup>2</sup> The results showed that the experts tended to contextualise the information contained in the sources (newspapers, accounts and paintings), taking advantage of the data on their authors, their origin, the year of production, etc. Instead, beginners approached the reading of the written source and the images without considering this contextual information; thus, their readings turned out to be poorer and more naive. Wineburg points out that the experts used several heuristic or inferential processes on images and texts which allowed them to make a more complex reading of them. This differential use of heuristics would be due to the knowledge experts have of the historian's work, especially in relation to the use of sources. These differences were also revealed in the choice of the painting which best represented what happened in the battle of Lexington. While the beginners chose the one which represented the mythicised version of this historic event, the experts questioned it, arguing that it presented several historic mistakes and anachronisms.

On the other hand, some recent investigations in History Didactics (Valls, 2001 a and b) indicate that the increase of images in textbooks where they take up around 50% of the textual space—has not been accompanied by an adequate historiographic and didactic treatment.

These are the reasons why we have developed an interest in studying the cognitive, self-defining and cultural aspects involved in the reading of historic images and in the narratives on the Discovery of America<sup>3</sup>. In this article we will inform only of the cognitive aspects involved in the reading of a historic image. By readings of images we understand the conceptualisations of the image as the representation of a historic event that individuals develop. We have defined theoretically and empirically four types of readings of the image that we will present in more detail in the results of our study: naive realistic readings, realistic, interpretative and contextualised readings of the image.

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<sup>2</sup> This is the battle that took place near Boston, at Lexington, on April 19th, 1775 in the context of the first confrontations for the North American independence. Today, it constitutes a myth in the history of that country, even though it is acknowledged that it was no more than a skirmish between conscripts and farmers who supported the revolutionary cause and a small detachment of British troops.

<sup>3</sup> To know the results of this study, you can consult Carretero and González (2004); Carretero and González (2006) and González (2005)

## EMPIRICAL STUDY

### 1. Objectives

In our study we have set out to investigate the kinds of readings of a historic image that individuals of different ages (12, 14, 16-year-olds and adults) and from different countries (Chile, Spain and Argentina) perform. This is, if they read the image in a realistic way, in a naive way, or if individuals use contextual clues to do more complex readings instead. The comparison between different age groups would allow us to study if the readings of the image change with age and cognitive development. At the same time, the comparison between countries sought to analyse if the cultural meanings that the image conveys interfere and configure different kinds of readings.

### 2. Method

#### Individuals

We interviewed 240 children and adolescents (12, 14, 16 years old) and adults (average age, 35) from Chile, Argentina and Spain. All the children and adolescents were studying in urban middle class schools in the cities of La Plata (Argentina), Santiago (Chile) and Madrid (Spain). The adults had no specialised education in History and had done secondary education studies.

#### Materials

The image chosen for this work was an etching by Theodore de Bry (see picture 1) which represents the arrival of Columbus to the island of Guanahani. This etching is included in book IV of a series called "*Los Grandes Viajes*" [The Great Journeys], an extensive work where T. de Bry and his sons compiled, from 1590 to 1634, travellers' accounts, letters and other documents which report the colonisation of America by Roman Catholic and Protestant countries. This work, due to its importance and diffusion, was published both in Latin and in German and became one of the most important representations of the indigenous people and the American landscape as a kind of "iconographic invention" of America (Bucher, 1990).



## PROCEDURE

We carried out semi-structured interviews in which we presented the photocopied image of Theodore de Bry's etching to the individual.

## RESULTS

We have created the category "readings of the image" based on the hypotheses of the individuals about the context of production of the image, that is, his/her considerations about who could be the author, his/her origin, the historic moment when the etching was done, and how the author knew what had happened in order to do the etching later. Based on these hypotheses and the theoretic contributions that we have examined previously, we created four categories of analysis for the readings of the images:

**a) Naive realistic readings:** the individuals assume a mediate, direct and literal relationship between the event (the "discovery" of America) and its representation as an etching. This is the view of the image as a "windown open to the past" (Aumont, 1990).

**b) Realistic readings:** in this case the individual also believes that the image can show what happened, but there could be some differences in the way in which it shows it; for example, the colours or the positions of the people in the image could change, etc.

**c) Interpretative readings:** individuals use certain keys or hypotheses about the origin of the author and the time when the image was produced in order to introduce mediations between the "past reality" and the image. They no longer rely on the image as a literal copy of the historic event, but they begin to understand it as the production of an author, with a certain intention, etc.

**d) Contextualised readings:** in this type of readings, contextual keys (author, author's intention, time of production, etc.) are interpreted in more general terms and the image is understood as a historic product which at the same time makes history. The individuals perceive the intentions of the author but also the effects of the uses –many of them propagandist– of the image.

### Readings of the image

In the study of the kinds of reading of the image in relation to the age of the individuals, we obtained significant results, as is shown in the table that follows.

TABLE 1: AGES AND READINGS OF THE IMAGE

AGE		NAIVE REALISTIC	REALISTIC	INTERPRETATIVE	CONTEXTUALISED	TOTAL
12	number	40	15	5	0	60
	%	66.7	25	8.3	0	100
14	number	29	18	12	1	60
	%	48.3	30	20	1.7	100
16	number	10	25	21	4	60
	%	16.7	41.7	35	6.7	100
Adults	number	3	21	26	10	60
	%	5	35	43.3	16.7	100
Total	Number	82	79	64	15	240
	%	34.2	32.9	26.7	6.3	100

If we look at the percentage of individuals of each age who are present in each type of reading of the image, we can say as a first approximation that, while the naive realistic reading decreases with age, the interpretative and contextualised readings increase with it.

Analysing the differences between age groups<sup>4</sup>, we find that the 12-year-old individuals are the ones who do more naive realistic readings and less interpretative and contextualised readings. 14 and 16-year-old adolescents stop doing naive realistic readings but maintain the realistic readings. Although the individuals in this last group also do several interpretative readings, the difference is not significant statistically speaking. Adults are the group that differs more from the adolescents and the children, as their readings tend to be interpretative and contextualised and thus, less realistic. Taking these results into account, we can say that children seem to see a “reflexion” or “copy” of Columbus’ landing in the image, whereas 16-year-olds and especially adults make an interpretation of this version of the Discovery basing their inferences on the origin and intentions of the author and the time when it was produced. But the adult group is the one who does more contextualised readings, that is, they manage to articulate the image with the political, cultural and ideological context in which it was produced. In this sense, we could say that they do not care much if the image accurately reflects Columbus’ landing but they ask themselves why Columbus appears disembarking in such a way in this image (Ruffo, 2000).

Another interesting data obtained in this study is that, having conducted the contingency studies per country, we do not observe a clear association between the types of readings and the individuals’ country of origin. No significant differences have been obtained between the readings of the image produced by Argentine, Chilean and Spanish individuals (chi square: 11.374; df: 6;  $p > 0.05$ ). In this sense, the inferences in the readings seem to refer to cognitive-evolutionary aspects; the cultural and ideological meanings that the image can

<sup>4</sup> We have used the “standardised residues” to know the differences between the different age groups. Pearson’s standardised residues make it possible to compare the frequency observed with the one expected, under the hypothesis of non association. This procedure considers that the residues which are located at  $-1.96$  and  $1.96$  indicate a frequency which does not adjust to a model that assumes independence from the variables. Pardo (1998)



have in different cultural contexts do not seem to interfere directly in the types of readings done by the individuals. These aspects are manifested when the individuals of the three countries value the image and the event it represents<sup>5</sup>.

Summing up, the changes that take place in the readings of the image in individuals of different ages could be described as an increasing separation from or rupture with the literal value of the image. They go from seeing a “copy” or reflexion of historic reality in the image to seeing in it a particular construction of the historic event. As we said, this is not about *discovering or seeing* in the image how Columbus disembarked in 1492, but about reading how T. De Bry makes him disembark in his etching, and also to what extent this second image, built and ideologically determined re-creates the other one. In short, how T. de Bry’s Columbus and indians allow us to imagine *real* indians and a *real* Columbus.

## CONCLUSIONS

Our results show that there are qualitative changes in the ways of approaching a historic image in individuals of different ages. The hypothesis we can support regarding those changes is the one which indicates a progression from more to less literality or, put in a different way, from literality to its analysis depending on the context of production which includes the author, his/her origin, the ideological connotations, an epochal analysis, etc. In this way, the recreation of the context of production of the image would allow the individuals to do a more complex iconographic reading. This, in some way, allows them to do the exercise that Burke (2001) recommended to historians in his work with image as a source for investigation in history.

In addition to this, if the contextualised reading of a historic image seems to be an activity that entails considerable difficulties for beginners, at least up to a certain age, and you rely on the image as proof of the reality of the event, what consequences could this have for the conformation of identity? If the image is understood as proof of reality of the event –in such a way that the “discovery” happened as the image shows, the indigenous people *were like that* and behaved like that and the same would happen with Spanish conquerors– couldn’t we say that a kind of “iconographic invention of America” would go on operating in the representations of our individuals? (Bucher, op. cit; López Baralt, 1990).

This activity of reading the image which seems to offer so much difficulty to our interviewees of school age requires specific didactic work, both in the classroom and in history textbooks.

As Prats (2003) and Valls (2001a, 2001b) seem to suggest, for students to reflect on the images as sources for historic knowledge, it will be necessary to offer them different images for them to examine and compare them, as well as comparing them with written documents. For this purpose, it will be useful to have an adequate presentation of the image which includes not only its aesthetic aspects but, especially, those linked to the meanings present in them, as well as

<sup>5</sup> We refer to the assessment that Chilean, Argentine and Spanish subjects do of the image in terms of “violent” or “peaceful”. These results are presented in: González, M. F (2005); Carretero and González (2004) and Carretero and González (2006)

contextual keys that make it possible for students to do more complex readings. Surely these tasks will facilitate a more critical comprehension of the past and its representations.

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## Closing conference. Final comments

PEDRO MILOS HURTADO

Considering the papers presented in each one of the four thematic focuses of the Seminar –namely: new approaches, citizenship education, didactics and content analysis– I will present a number of comments that aim to establish relationships between these focuses and school textbooks. For this purpose, graphically, school textbooks are located at the centre or at the intersection of two axes: a vertical one which represents society and the context where the production and the use of textbooks takes place, and a horizontal one that connects the pedagogic and didactic field with the disciplinary field.<sup>1</sup>

The central position of **school textbooks** regarding the axes mentioned may be defined as one of **mediation** or intermediation. In fact, the discussion revealed their role as ‘mediators’ between the pedagogic and the disciplinary aspects, between didactics and contents. Likewise, the role of textbooks may be analysed in terms of what society expects from education and the results it achieves; in other words, as mediators between the curriculum and learning. Consequently, from this point of view, a vision of textbooks as **objects** which make sense in terms of certain needs and possibilities is proposed, that is to say, as **artefacts** that show their usefulness in a contextualised way.

### **SCHOOL TEXTBOOKS BETWEEN SOCIAL EXPECTATIONS AND EDUCATIONAL RESULTS: THE VERTICAL AXIS**

The starting point to understand the role of textbooks regarding this axis lies in the acknowledgement of a **context** determined by curricular definitions which is adopted by a **society** at a given historic moment. This context expresses the social, political, economic and cultural conditions that society has considered at the moment of formalising its expectations regarding education, which are materialised in a particular **curriculum** or curricular framework

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<sup>1</sup> See outline on page 79

that textbooks must respect. This exact context, historically situated, is nevertheless located in a certain educational and curricular trajectory which that society has gone over throughout time. Thence, it is absolutely relevant to identify these trajectories and reflect on them when discussing school textbooks, as it was done in this Seminar with respect to **short duration** (Pedro Montt, Mario Carretero, for the 90s) as well as **long duration** (Róbinson Lira, Pablo Toro, Pamela Olivares, Renato Gazmuri, for the 19th and 20th centuries).

In their relationship with the curriculum, mediating between it and the classroom, school textbooks allow the resignification of the disciplinary and value purposes and contents, and they can become a democratising resource as they redistribute knowledge (Joan Pagès, Luis Osandón, Helena Copetti). Textbooks, as curricular instruments, are a fundamental aid for the implementation of study plans and programmes, contributing to mutual **understanding**, both within a society and among the groups that make it up, as well as among countries regarding controversial issues derived from conflicting historical experiences, in the case of History textbooks (Simone Lässig). However, it must be said that school textbooks, as study aids, also have **limits** derived precisely from this intermediate place which, in some cases, diminishes their autonomy.

In complying with the role of intermediation, school textbooks summon two main actors: **students** and **teachers**. They are increasingly summoned as **subjects** of the learning and teaching processes, and not as mere receivers or transmitters, becoming **co-responsible** for the use of textbooks. School textbooks have begun to be conceived in terms of those who are going to work with them, trying to facilitate and ensure their pedagogic appropriation. The main agents are students, who wish to be motivated and interpellated as active subjects. On the other hand, teachers are supported through guidance and resources which are specially designed for them, considering their particular needs (Stavroula Philippou). These actors—students and teachers—are the ones who actually contextualise the educational processes and represent ‘society’, this time in a new dimension: as addressees or depositaries of learning.

From the works presented in this Seminar and the discussions they triggered, it can be said that among the **learning** areas that may be favoured by History and Social Studies textbooks, the following stand out: the development and strengthening of citizenship, the promotion and defence of **human rights, democratic coexistence**, the **reconciliation** processes (María Cecilia Alegre, Carmen Arteaga, Marcela Piedra, from the experiences of Argentina, Venezuela and Costa Rica, respectively; the need to build a ‘democratic community’, in Luis Alberto Romero).

Specially noteworthy are the learning outcomes related to the issue of **identity** and the acknowledgement of the ‘other’, associated in this Seminar to subjects like identity processes in Cyprus (S. Philippou), youth identity (M. Piedra), immigration (María Soledad Balsas), the image of Africa in Colombian textbooks (María Isabel Mena) or that of Brazil in Latin America (Juliana Pirola).

The learning that society gradually develops through the younger generations is the finishing point of this vertical axis. This society acknowledges textbooks as a useful and qualified object to fulfil its educational expectations, which are expressed in its curriculum. In the case of this Seminar, these expectations refer to the History and Social Studies curriculum.

### **SCHOOL TEXTBOOKS BETWEEN THE PEDAGOGIC-DIDACTIC FIELD AND THE DISCIPLINARY FIELD: THE HORIZONTAL AXIS**

The second axis, the horizontal one, relates the disciplinary field with the pedagogic-didactic field, placing textbooks, once again, as mediators between both areas. This new graphic representation allows to account for, systematise and, in a way, interpret another dimension of the discussion that took place in the Seminar.

Throughout the presentations, the **disciplinary field** was made up, in the first place, from the disciplines which are typical of the curricular area: History, Geography, Social Studies. They were all encouraged by the first focus addressed in the Seminar: new disciplinary approaches. From **History**, new historiographic trends were questioned, as well as new topics, objects and methods associated with them (Jaeme Luiz Callai): what is called 'New History', which emphasizes processes, interdisciplinary approaches, the interpretation of facts (Alicia Zamorano and Gabriel Villalón); the concern for the transnational, spaces, images (Karl Heinrich Pohl); Regional History approaches (Paola Norambuena and Juan Carlos Yáñez); and Critical Historiography (Lucía Valencia). From **Geography**, the approaches concerned with sustainability were discussed (Fabián Araya), as well as the concepts of nature and environment (Eliana Barbosa de Morais) and the concept of 'place' (H. Copetti).

On the other hand, **Social Studies** were less present as such, but were frequently mentioned when discussing interdisciplinary approaches or analysis (which even made reference to Science and Technology, in a presentation from the 'Sociology of Science' by Mârcia Lopes Reis) or regarding certain thematic contents, as we will see next.

Secondly, the disciplinary area manifested itself through certain **topics or contents**, among which the presence of the political aspect stood out: the French Revolution (Jean-François Dunyach), the idea of Nation-State (L.A. Romero, Tatiana Romero), Nationalism (Carlos Garrido). The indigenous issue was also approached (Andrea Riedemann with the case of the Mapuche people in Chile, Bente Aamotsbakken with the native peoples in Norway and Denmark), as well as the topic of human rights violations (M.C. Alegre). All of them were analysed, either from the concern for their contribution to the educational objectives, from the purposes of the subject, or from the critical reflection on the manner in which they are approached in school textbooks.

The concern for the disciplinary aspect was also expressed in the reflection on the **types of knowledge** which mobilise History and Social Studies, and how they are mirrored in school textbooks and in the teaching of the subject (S. Lässig). A distinction was made between academic and school knowledge (J.L. Callai); there was a reflection on three types of knowledge:

everyday, disciplinary and school knowledge (M. Carretero); and a warning was made about the risk of knowledge which may ‘naturalise’ certain historical reflections (L.A. Romero).

Finally, the discussion about the disciplinary area also touched upon the importance of the contribution of **experts** and **researchers** (Martha Rodríguez and Palmira Dobaño, L. Osandón, Lana de Souza) to the construction of historical conscience (A. Riedemann) and its influence on school textbooks.

On the other end of the axis, the **pedagogic and didactic field** was shaped around a great consensus regarding what could be called a shared ‘**pedagogic paradigm**’. This paradigm, which was referred to, either implicitly or explicitly, in almost every presentation that approached the pedagogic and didactic topics, places individuals at the centre of the learning processes which it conceives as construction of knowledge.

Thus, within this paradigm, **school, teachers** and **students** are once again placed in a central position. The protagonism of teachers is promoted: they are invited to make decisions regarding the use of textbooks, encouraging them to reposition themselves (Liliana Bravo); they are involved in the development of didactic materials (L. de Souza); their disciplinary concepts and knowledge are studied and analysed so as to reinforce them through the textbooks (E. Barbosa de Morais). As to students, it is established that they must become persons beyond the limitations of school textbooks (H. Copetti).

From this common ‘floor’, which we have called ‘shared pedagogic paradigm’, we reflected on the didactic options –present and future, real and ideal– involved in History and Social Studies textbooks.

There was also a high degree of consensus at the moment of identifying the **abilities** that should be potentiated by History textbooks, in the context of teaching and learning processes, particularly, the development of **critical and reflective thinking** among students (F. Araya, Augusta Valle, L. Bravo), work procedures, the use of sources and maps (Augusta Valle, María Victoria Alzate and Miguel Gómez, M. Rodríguez and P. Dobaño), as well as images (M.I. Mena). In different ways, there is reference to the capacity to reflect on historic time, particularly on the relationship between **past, present** and **future** (S. Philippou) and the processes of **memory** (L. Valencia).

From an interest in acknowledging the weaknesses in textbooks, which in the most extreme case was the main subject of one of the presentations (William Mejías), the strengthening of **temporary and spatial abilities** in general (L. Valencia) and of **geographic abilities** in particular, is proposed. (H. Copetti, E. Barbosa de Morais). Likewise, the need to work more systematically on the different kinds of contents, from those called ‘factual’ to the attitudinal (H. Copetti), is expressed.

Summing up, regarding this horizontal axis, it is observed that school textbooks ‘mediate’ between the disciplinary field and the pedagogic and didactic field, integrating contents and development of abilities in concrete didactic proposals which respond –or aim to respond– to

curricular guidelines and expected learning outcomes, which are represented in the vertical axis of the outline proposed.

### **SCHOOL TEXTBOOKS AND THEIR PROCESSES OF PRODUCTION AND USE: THEMATIC CONNECTIONS**

The reflection originated by the Seminar established some related topics, which although not covered in depth, showed the need to discuss the processes of production and use of school textbooks further. Among these topics, it is important to record at least four:

- The relationship between school textbooks and the curricular and pedagogic approaches orientated to the **development of competences** (J. Pagès).
- **The role of authors, publishers and the market** in the production of school textbooks (L. Valencia, M.C. Alegre, Rodríguez and Dobaño).
- The **analysis and research** methods regarding school textbooks (F. Araya, C. Garrido, A. Zamorano and G. Villalón, S. Philippou).
- The **evaluation** strategies and mechanisms regarding school textbooks (W. Mejías).

These thematic connections join the relationships analysed in the outline proposed with respect to the place of textbooks in relation to the two axes presented.

Consequently, this Seminar was extremely rich in information and analysis of the reality of History and Social Studies textbooks, from an international perspective which establishes a reflection that may and must be dealt with in depth in the future. Therefore, the prospects of the discussion started here cannot but be stimulating and encouraging.

CONNECTIONS

- Competences
- Authors, publishers and market
- Analysis – Research
- Assessment

C O N T E X T

SOCIETY

CURRICULUM

TRAJECTORY

- Short duration
- Long duration

DISCIPLINARY FIELD

- History
  - Geography
  - Social Studies
- Topics / Contents:
- Nation-State
  - Nationalism
  - Human rights
  - Memory

SCHOOL TEXTBOOKS  
Object – Artifact  
Intermediation

- Resignification
- Democratiser
- Mutual understanding

STUDENT / TEACHER

- Individuals
- Co-responsibility

LEARNING OUTCOMES

- Citizenship
- Democratic coexistence
- Identity
- “The other”
- Reconciliation

SOCIETY

FOCUSES

- New disciplinary approaches
- Citizenship education
- Didactics
- Content analysis

DIDACTIC PEDAGOGIC FIELD

- Pedagogic paradigm:
- Construction of knowledge
  - School
  - Teachers
  - Students
  - Didactics

C O N T E X T

- Abilities:
- Critical thinking
  - Use of sources
  - Memory





# 1

**NEW DISCIPLINARY  
APPROACHES IN HISTORY, GEOGRAPHY  
AND OTHER SOCIAL SCIENCES, AND ITS  
TREATMENT IN TEXTBOOKS**

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# New approaches for a sustainable geographic education in history and social science textbooks <sup>1</sup>

FABIÁN ARAYA PALACIOS

## INTRODUCTION

**S**tarting from the conference in Rio de Janeiro that took place in 1992, geography as a social science concerned with the study of the relationships between society and nature is addressed by different international scientific organisations, in order to study topics that have deep social connotations (globalisation, climate change, human development, cultural diversity and sustainable development, among others) and that imply not only an individualisation of spatial interrelations, but also a positioning in an ethical and joint dimension with new generations.<sup>2</sup>

The need to study these topics, particularly the changes that take place in the environment due to economic development processes, has made geography widen its field of study and develop approaches that are specific to its study and consolidation. These approaches are: locational, critical, behavioural and ecogeographical. In this context, it is important to examine the presence or absence of these new disciplinary approaches of geography in History and Social Science textbooks for Year 9. According to our opinion, the presence of these approaches in textbooks would allow developing in students an awareness that is appropriate to the socio-environmental sustainability of geographical space.

<sup>1</sup> This work was finished on September 19th, 2008, in the city of La Serena, Chile.

<sup>2</sup> An interesting example of that is a set of projects about regional sustainable development, global climate change and water management in rural communities, currently financed by the Canadian International Development Agency (CIDA) and the Association of Universities and Colleges of Canada (AUCC) in the Chilean semi-arid zone, specifically in the Coquimbo Region. There, different scientists from Universidad de la Serena and Universidad de Regina, including geographers and geography teachers, work in basic and applied investigation regarding the water resource. For more information, refer to the following webpage: [www.uls-ur.cl](http://www.uls-ur.cl).

## THEORETICAL FRAMEWORK

One of the purposes of the History and Social Science Sector, presented through the cross-curricular fundamental objectives, is to achieve sustainability (Fuentealba, 2003). In order to do that, we need deep changes in lifestyles and in mind development, as well as a deeper knowledge that promotes a public environmental awareness, the participation of well-informed citizens and the development of abilities to make decisions on issues regarding human beings and their preservation.

Promoting education for sustainable development means considering an education of human beings who are upright, able to see themselves as part of the natural world and to maintain a harmonious relationship with it. In this frame, UNESCO has decided to establish the 2005-2014 period as the decade of education for sustainability, planning various academic and cultural activities that contribute to an awareness of the importance of the issue for current and future generations. In this period, according to the programme in the UNESCO website, numerous activities will take place around the world for promoting sustainable development from the educational field.<sup>3</sup>

Geography is one of the social sciences that have become more interested in studying the impacts, configurations and spatial unbalances produced by the weak application of sustainable development principles in various areas of the planet. Understood as a social science whose objective is to systemically study variations in the distributions of land surface phenomena and the spatial dimension of the relationships between society and nature (Souto, 1998; Rodríguez, 2000b), it has profited from the sustainable development paradigm, which resulted from the Brundland Report in 1983 and suggests a cultural, ethical and socioeconomic change regarding the whole planet, specially for new generations<sup>4</sup> (Novo, 1998).

From a theoretic perspective, geography has developed several approaches to get closer to its object of study, emphasising some of the dimensions of geographic space. Some of the current geographic approaches that, in my opinion, have a closer relationship with the paradigm of education for sustainability are: ecogeographical, locational, behavioural and critical (Santarelli, 2002; Delgado, 2003). I will now present a brief description of each of them.

### 1. Locational approach

The purpose of locational geography is the search for the order that governs spatial distributions. From this moment on, regionalisation is seen as a classification. Regions are not considered an only case; they are seen as types. It is interesting to point out that in this geographical perspective, emphasis is not put on spatial content, as is the case of the classic perspective, but on spatial dimension. Thus, they try to go beyond the specific in order to achieve a generalisation: laws (Haggett, 1976).

<sup>3</sup> Available at <http://portal.unesco.org/education/ev.php> (last visit: September 17th, 2008).

<sup>4</sup> According to Elsa Amanda Rodríguez de Moreno, it is clear that geography can be classified as a natural science or as a social science, because it is in contact with phenomena of both kinds. That is why some authors define geography as a science of synthesis. However, according to the author, geography goes beyond synthesis, since its objective is to distinguish between contents of land space and analyse space on land surface (Rodríguez, 2000b).

This approach intends to establish theories where man is seen as a rational being seeking to obtain the greatest benefits with a minimum effort and looking for spatial models achieved by rigorous descriptions that lead to a clearer visualisation of problems. Man is a rational being that aims at optimisation. The environment becomes an isotropic space and interaction is given by distance. In the normalisation of components we find the appropriate road toward the formulation of laws.

This approach has considerably influenced geography didactics, since it has questioned localist and regionalist approaches, it has created a methodological interest, it has enriched the subjects, it has provided resources and procedures that are extremely interesting for the study of the immediate environment and it has provided invaluable material for the beginning of spatial understanding (Benejam, 2002).

## 2. Critical approach

It appeared as a response from a group of geographers of the so-called developed countries to the intellectual, political, social and economic crisis that affected the world during the second half of the 20th century. Rooted in the previous geographic movements, they flared up a strong controversy with the various geographic approaches. Their position in science is a critical attitude against a reality that was made problematic due to social inequalities.

For geographers who support this approach, also called radical, geographic space is not a neutral space. On the contrary, geographic space is organised by specific agents, based on interests and values that also have objective criteria, considering the limitations imposed by natural determining factors and available material forces (Méndez, 1995).

The man-environment relationship is dealt with by a man who is absorbed in society and in a minimised environment. It is as if the deterministic vision of this relationship had been taken to an extreme inversion: in the radical approach, the environment is passive and is determined by social structures. The attempts of explanation are based on economic mechanisms and spatial inequalities posed as a game or tensions of social distances for the access to wellbeing. For these geographers, unbalances can only be solved by a radical transformation of the social structure (García, 1997).

The radical or critical approach is particularly useful and enriching for geography didactics, since it provides a global vision of reality, helping students have a first interpretation of the territorial organisation of the world and allowing them to interconnect the different learning contents. It states that the socio-territorial structures could be different than what they are like now, and it adopts a critical attitude toward injustice and inequality in today's society.

## 3. Behavioural approach

The philosophical movements of phenomenology and existentialism provided the foundation for a group of critics of the locational approach. Man's subjective dimension is revalued, and his microcosm and personal world are the elements that allow an understanding of how he collects information from the environment and how he creates an image of reality that will

influence his decisions and behaviours, which are not always guided by optimisation, but that many times are motivated by the satisfaction of his desires. The relationship between man and environment is constituted by perceptive and cognitive links. The analysis is not focused on the resulting action, but on the decision mechanisms that originated it (Ostuni, 1989).

From the perspective of geography didactics, this approach has made various contributions to the teaching-learning process. The transformation of a real event into a mental image or its representation takes place through a process of conceptualisation, which means the production of concepts that cannot be completely objective or neutral. For example, students' mental maps or perceptions of geographic space show the role that distance plays in the cognitive process, which allows distinguishing topologic (physical) distance from psychological distance, linked to people's individual experiences and their differential territorialities (Rodríguez, 2000a).

#### 4. Ecogeographical approach

The concept of ecogeography as an approximation to the study of natural dimensions of geographic space was proposed by French geographer Jean Tricart during the 1970s. Both in his book *La Terre, planète vivante*, edited in Paris in 1973, and in *L'écogéographie et l'aménagement du milieu naturel*, written together with J. Kilian, edited in 1979 and published in Spanish in 1982 (Tricart, 1982), the concept of ecogeography is consolidated (Pérez, 1997).

Tricart sees the natural environment as the result of a dialectics where various factors converge and where human action plays an important role. For Tricart, the concept of system is the best logical instrument available for studying environmental problems. The system is dynamic by nature and therefore appropriate for providing the basic knowledge for an action, which is not the case of an inventory, static by nature.

According to Tricart, it is necessary to consider that in any territory, a wide range of factors is in constant interaction. Given their constant changes in time, they can be seen as variable: land, water, relief forms, vegetation, fauna, anthropic action, etc. "Therefore, the object of study of ecogeography is the mutual relationships between the different variables that converge in any space" (Pérez, 1997: 9).

This approach has been appropriate for geography didactics, because it allows an integral study of the close environment and the active participation of students in the construction of their own learning. It has also been useful for replacing processes of memorisation and encyclopaedic accumulation typical of traditional education by an understanding of the environment, adapting knowledge to students' interests, needs and abilities.

The abovementioned approaches are relevant components for the education of secondary school students in their approximation to geographic studies, from a sustainable perspective. Thus, it is interesting to examine textbooks for Year Nine, in whose level geography has a greater presence, in order to verify the presence or absence of these approaches in the contents, activities or didactic resources of each book. I will now present the methodology, the information analysis and the results of the investigation.

## METHODOLOGY

For this work, eight History and Social Science textbooks for Year Nine were used as samples. The methodology was a content analysis from an interpretative perspective. As stated by Zapico, “the methodology of content analysis is an investigation technique that seeks to discover the nature of the discourse generated in a particular social reality (by means of its documental production), analysing it and formulating a theory until its latent sense is found” (Zapico, 2007: 152).

The analysis was carried out in order to verify the presence or absence of geographic approaches in some of the following textbook components: topics, concepts, strategies, methodologies, techniques or didactic resources (Carbone, 2003). For the analysis of information, a qualitative methodology was used. For that effect, paragraphs and content quotations of each book were interpreted, and examples of the various analysed approaches were selected. I will now present a table with the textbooks used in the investigation process:

**TABLE 1. HISTORY AND SOCIAL SCIENCE TEXTBOOKS USED IN THE INVESTIGATION**

<b>1. HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S BOOK</b>			
<b>AUTHORS</b>	<b>PUBLISHING HOUSE</b>	<b>EDITION</b>	<b>YEAR OF USE</b>
Silvana Jacob, María Elisa Ruiz, Marguerite Le Saux.	Arrayán Editores S.A.	2000 edition	2000
<b>2. HISTORY AND SOCIAL SCIENCES, YEAR NINE</b>			
Rodrigo Carreño Catalán, Sylvia Rosas Rosas.	Editorial Edebé	2001 edition	No specification
<b>3. HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S AND TEACHER’S BOOK</b>			
Pedro Milos, Georgina Giadrosic, Daniel Palma.	Editorial Mare Nostrum	October 2001 edition	2002
<b>4. HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S BOOK</b>			
Ernesto Reyes, Fernando Espinosa, Claudio Castillo, Manuel Llanos.	Editorial Mc Graw-Hill	2nd edition, 2003	No specification
<b>5. HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S BOOK</b>			
Lucía Valencia Castañeda, Jorge Quense Abarzua, Lily Álvarez Correa, Cecilia Fariás Olguín.	Editorial Santillana del Pacífico S.A.	2004 edition	2004
<b>6. HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S BOOK</b>			
Dina Cembrano Perrazo, Luz Cisternas Lara, José Manuel Morales.	Editorial Zig-Zag	1st edition, January 2004	2004-2005



## 7. HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S BOOK

Lucía Valencia Castañeda, Jorge Quinse Abarzua, Lily Álvarez Correa, Cecilia Fariás Olguín.	Editorial Santillana del Pacífico S.A.	2005 edition	2008-2009
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## 8. HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S BOOK

Pedro Milos, Georgina Giadrosic, Daniel Palma.	Editorial Mare Nostrum Ltda.	3rd edition, December 2007	2008-2009
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TABLE 2. APPROACHES, EXAMPLES OF EVIDENCE AND INTERPRETATION OF THE TEXTS’ CONTENTS

## HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S BOOK

Authors: Silvana Jacob, María Elisa Ruiz, Marguerite Le Saux. Arrayán Editores S.A. 2000 edition. Year of use: 2000.

APPROACH	EXAMPLES OF EVIDENCE IN THE TEXT	INTERPRETATION
Locational approach	“ <i>Neighbourhood</i> is a portion of the urban territory that presents a certain homogeneity...” Page 90.	We clearly see the locational approach in the sense of conceiving the neighbourhood as a homogeneous spatial entity.
Locational approach	“Another organisation pattern of the regional territory is given by a purely mining area: the northern region of Antofagasta”. Page 104.	In this chapter of the text, the logic of regional organisation is clearly analysed, stating the characteristics of territorial organisation.
Critical approach	“The sustainability of cities is not exclusively environmental, but also social.” Page 80.	In the text, the topic of urban problems and tension is thoroughly discussed, with a sustainable spatial approach.
Behavioural approach	Self-evaluation. “What benefits and disadvantages do you find in living in a small city, in a medium-sized city and in a metropolis?” Page 100.	The text presents exercises related with perception and behaviour, both in the self-evaluation section and in the section entitled “Let’s evaluate the advance of the project.”
Ecogeographical approach	“It is essential to know our natural and human environment and the characteristics of the region where we live.” Page 12.	In the text, students are encouraged to systemically study the various dimensions of the geographic space in the regional environment, with an emphasis on the society-nature relationship.
Ecogeographical approach	Self-evaluation. “Make a list of different instruments for land use planning and point out their main characteristics.” Page 118.	The text shows an interest (by means of mind maps) in students to integrate different components of geographic space through the concept of land use planning.

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**HISTORY AND SOCIAL SCIENCES, YEAR NINE**


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Authors: Rodrigo Carreño Catalán – Sylvia Rosas Rosas. Editorial Edebé, 2001. Year of use: not specified.

APPROACH	EXAMPLES OF EVIDENCE IN THE TEXT	INTERPRETATION
Locational approach	“The city exerts a strong attraction on the surrounding territory, generating population movements and exchange of products. They are the flows between city and its area of influence...” Page 138.	The conceptualisation matches with a locational or spatialist approach, in the sense of allowing its application on different geographical areas. It looks for spatial regularities or generalisations.
Critical approach	“Unemployment is probably the biggest problem suffered by many cities of the Third World...” Page 123.	The concepts associated to poverty, unemployment, inequality and spatial segregation belong to the spatial approach of geography, with which it demands the ability of transformation of these conditions through organised communities.
Behavioural approach	“All people live in a physical environment with particular features that influence their behaviour, their characteristics and, in short, their culture.” Page 48.	The relationship between geographic space and people’s behaviour is emphasised. Without suggesting a geographic determinism, the topofilic relationship between natural environment and communities is emphasised.
Ecogeographical approach	“The development experienced by the urban space during the 20th century has exceeded the territorial limits of old cities, absorbing nearby rural towns.” Page 138.	The relationship between rural and urban in particular territories allows an integration of several spatial variables. The systemic and integrating vision typical of ecogeography becomes necessary for understanding the phenomenon in its global dimension.

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**HISTORY AND SOCIAL SCIENCES, YEAR NINE – TEACHER’S GUIDE**


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Authors: Pedro Milos, Georgina Giadrosic, Daniel Palma. Editorial Mare Nostrum. Year of use: 2002.

APPROACH	EXAMPLES OF EVIDENCE IN THE TEXT	INTERPRETATION
Locational approach	“When examining a settlement plan, we also discover other elements that give us an idea of spatial distribution, and therefore of the specific characteristics of the habitat.” Page 15. Teacher’s Guide page 33.	This text presents a great richness from a didactic point of view. Therefore, the use of plans and maps for understanding regularities in the geographic space is relevant for the development of the locational approach.
Locational approach	“The connectivity of each Region, that is, its ability to establish connections between different places ... is determined by its location, physical characteristics of the territory, its transportation route network and communication systems.” Page 96. Teacher’s Guide page 148.	The geographic conceptualisation applicable to different territories is relevant to the locational approach, which aims to interpret common patterns of geographic spaces through specific concepts.
Critical approach	Laboratory texts, Unit 5: “What is sustainable development?” Pages 137 and 138.	Through specific activities, students are encouraged to take on a critical role regarding the indiscriminate use of natural resources.
Behavioural approach	“Undoubtedly, the place where grow and develop as people leaves an indelible mark on our personalities...” Page 16. Teacher’s Guide page 34.	The concepts of place and belonging, used in the text, are very important in a behavioural and perceptive approach. They contribute to the development of ties between people and their surroundings, which generates an attitude for raising an awareness that is appropriate to sustainable development.
Ecogeographical approach	“A deep knowledge of our territory and the geographical variables that interact there becomes essential...” Page 126. Teacher’s Guide page 188.	In the conceptual section of the text, the need to make an integral study of the natural and human environment is discussed, in order to systemically study the geographical variables that contribute to a sustainable development of the geographic space.

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**HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S BOOK**


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Authors: Ernesto Reyes, Fernando Espinosa, Claudio Castillo, Manuel Llanos. Editorial Mc Graw-Hill, Second edition, 2003. Year of use: 2003.

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APPROACH	EXAMPLES OF EVIDENCE IN THE TEXT	INTERPRETATION
Locational approach	“The first (activities in a city) are usually located in the outskirts of a city as industrial parks. The second activities which predominate in the city tend to concentrate in its centre.” Page 53.	The use of spatial models (in this urban case) presents a great didactic potential when conceptualising a geographical phenomenon. The locational or spatialist approach makes this type of contribution to geographic education.
Critical approach	“Urban saturation is seen in the overcrowding of people in a reduced space, which is detrimental to physical and mental health.” Page 59.	The issue of life quality, especially in cities, is an important topic for representatives of the critical approach. Geography has the potential to show up problems, but an organised population should demand their collective rights.
Behavioural approach	“... all this makes us see the city as a socioeconomic and cultural phenomenon where we all have our own experience.” Page 47.	An assessment of our own experience and of the perceptions of places each of us has is a very important approximation for the behavioural approach. It is very useful when integrating students’ previous knowledge with the education process.
Ecogeographical approach	“Its essential characteristics are its functionality and adaptation to the physical environment, which together with socioeconomic conditions, traditions and technical abilities of rural inhabitants, give origin to the rural habitat.” Page 65.	The integrating vision that creates a concept such as rural habitat represents an appropriate example of the ecogeographical approach. This approach suggests a systemic view that allows an understanding and characterisation of a specific geographic space.

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**HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S BOOK**


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Authors: Lucía Valencia Castañeda, Jorge Quense Abarzua, Lily Álvarez Correa, Cecilia Farías Olguín.  
 Editorial Santillana del Pacífico S.A. Year of use: 2004.

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<b>APPROACH</b>	<b>EXAMPLES OF EVIDENCE IN THE TEXT</b>	<b>INTERPRETATION</b>
Locational approach	The rural-urban relationship. “There is a relationship of interdependence between them, since raw materials extracted by the rural world allow the development of production processes in city industries.” Page 55.	We see the economic rationality (homo economicus) that characterises the locational economic dimension in the geographic space.
Locational approach	“Nowadays, the main criteria for the definition of the concept of city are the number of inhabitants and the economic activities they carry out.” Page 40.	The definition of spatial criteria of universal validity is an aspiration of the locational approach. In this sense, determining the criteria for conceptualising the urban phenomenon is relevant to this geographical approach.
Critical approach	“Sustainable development postulates a harmonious relationship with nature and the objective of satisfying people’s needs and not the accumulation of money or the satisfaction of particular objectives of companies or governments.” Page 20.	A critical view between economic needs and preservation of natural conditions of the geographic space is suggested. This tension (apart from the social aspect) is part of the concept of sustainable development since the Brundland report was made public.
Behavioural approach	“Compare perceptions of neighbourhood by means of mind maps.” Page 53.	Among the activities of the text, a representation of the elements of geographic space by means of mind maps is suggested, which is appropriate to the behavioural approach.
Ecogeographical approach	“3. Environmental sustainability. Growth or Protection?” Page 325.	A text is presented regarding the importance of an integral study of geographic space and natural resources, in order for students to become aware of the fragility of the environment.

**HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S BOOK**

Authors: Dina Cembrano Perrazo, Luz Cisternas Lara, José Manuel Morales. Editorial Zig-Zag. Years of use: 2004-2005.

APPROACH	EXAMPLES OF EVIDENCE IN THE TEXT	INTERPRETATION
Locational approach	“Geographical factors that affect the formation of natural landscapes in Chile.” Page 50.	The search for explanatory factors and the conceptualisation that can be applied in other geographical contexts are fundamental in this approach.
Critical approach	“From the interaction between man and environment, questionings have arisen regarding the use of resources and of space.” Page 118.	We see a critical view of the relationship between environment and natural resources. Implicitly, the need to participate actively in the preservation of the geographical environment is suggested.

**HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S BOOK**

Authors: Lucía Valencia Castañeda, Jorge Quinse Abarzua, Lily Álvarez Correa, Cecilia Farías Olguín. Editorial Santillana del Pacífico S.A. Years of use: 2008-2009.

APPROACH	EXAMPLES OF EVIDENCE IN THE TEXT	INTERPRETATION
Locational approach	“The possibilities of inversion as bidding or concession of ports and infrastructure works, complemented with special incentives for the location of technological industries.” Page 125.	By means of a text, the economic foundations of the locational approach are presented. Economic rationality related to technological industries represents the locational theory in geography.
Critical approach	“Population and natural environment vary throughout the country in such a way that it has been divided into regions for its administration. In this organisation, the inhabitants of each region are considered a regional community.” Page 30.	Communities’ empowerment is a factor of change and transformation of the regional geographic space. In this sense, the importance of searching for wellbeing and life quality is coherent with the critical approach.
Behavioural approach	“A case of urban segregation”. Page 45.	A case of urban segregation in Peñalolén (Santiago de Chile) is presented. It implies a topophobic conception of the environment inhabited by low-income people.
Ecogeographical approach	“Landscape also experiences changes due to an anthropic human action, transforming the natural landscape into a cultural landscape.” Page 15.	The concept of landscape is presented didactically, as well as the ways in which it experiences changes due to the interrelation of natural and human factors.

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**HISTORY AND SOCIAL SCIENCES, YEAR NINE – STUDENT’S BOOK**


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Authors: Pedro Milos, Georgina Giadrosic, Daniel Palma. Editorial Mare Nostrum Ltda. 3rd edition, December 2007. Years of use: 2008-2009.

APPROACH	EXAMPLES OF EVIDENCE IN THE TEXT	INTERPRETATION
Locational approach	“Production centres and consumption centres are usually located in places that are distant from each other, so it is necessary to transport raw materials and products from one place to another.” Page 87.	Unit 4, “The life that has given me so much”, suggests a vision of the region in which production centres should be linked to consumption centres. Such spatial interaction is fundamental in the locational approach.
Critical approach	“The search for and exploitation of natural resources for satisfying people’s needs necessarily implies an intervention of humans in the physical-natural environment.” Page 111.	In the subunit “The physical-natural environment and its transformation due to human action”, human intervention on the physical-natural environment is clearly presented. This approach intends for this intervention on the geographic space to be beneficial for the preservation of natural resources for the whole population.
Behavioural approach	“By acknowledging diversity, it is possible to understand identity creation processes. As many authors have stated, the identity of a human group is partly shaped by the acknowledgment of its characteristics.” Page 50.	Subunit 5, “Socio-cultural diversity in the region”, discusses the issue of identity and cultural diversity. The geography of perception and behaviour states that these concepts are extremely important and relates them with the ties of belonging that a person creates with the geographical environment.
Ecogeographical approach	“Relief, climate, water, land, subsoil and vegetation are favourable to the production of agricultural, livestock, forestry, fishing and mining products, partly satisfying the needs of the local population.” Page 90.	Tricart’s ecogeographical approach suggests a systemic view of geographic space. In this example, we see how the various components of the geographic space are articulated to the benefit of local communities.

## ANALYSIS OF THE RESULTS

### 1. Regarding publishing houses

- Editorial Arrayán S.A. (2000 edition) presents the topic of sustainable development as cross-curricular axis. After analysing the concept of sustainable development in the preface, it finishes with the following statement: “... the future of the planet lies in your hands and in the hands of your generation.” That implies an explicit decision to consider this axis as fundamental in the production process of the text, which is evident in the topics, concepts,

activities and self-evaluation sections. This situation is very interesting for this investigation, since the editorial proposal is coherent with the principles of geographic sustainability.

- Editorial Edebé presents a very attractive didactic structure, designed for an active learning by students. There are various sections related to electronic newspapers, links, topics for reflection, summaries, etc. Another interesting aspect is that the treatment of topics begins with an approach to the Earth as a living planet. That is, a deductive methodology is applied, starting from a global view of the planet and then developing a process of spatial breakdown until reaching the country, the region and the locality. However, the specific treatment of geographical contents of Chile and its regions presents a traditional format, where the various geographical variables are not included together with the others (relief, climate, vegetation, etc.), without a systemic or integrating treatment. There is no direct relationship with sustainable development at an editorial level.

- Editorial McGraw-Hill presents a clear didactic structure, appropriate to the text's objectives. However, the treatment of geographical contents is not articulated and there is little connection between the various dimensions of geographic space. It is interesting to emphasise the treatment of the topic of sustainable development. The text explicitly states that "it is necessary to bear in mind that the destructive consequences of economic growth on the environment affect development inevitably and negatively, even creating a degree of social instability" (page 41).

- Editorial Santillana gives special attention to incorporating the different curricular elements. In this sense, it is necessary to point out that the didactic activities promote a critical and reflective analysis by students. Regarding its didactic presentation, the textbook is appropriate, clear and precise in its contents. In the organisation of the text for the 2004 edition, the book says that in the monograph section there will be articles about sustainable development, citizen involvement and poverty, all issues of national interest. The topic of sustainable development is conceptually considered on page 20 of the text.

- Editorial Mare Nostrum presents a book that is graphically very attractive. The texts for the different school years stand out because of their great richness from a didactic point of view. Thus, the use of plans, maps and other didactic resources is relevant for developing the various geographical approaches. In this sense, we see that from 2004 until the current 2008-2009 edition, contents are outlined in a motivating way, inviting students to be active subjects of their learning process. Sustainable development is addressed in various sections of the text.

- Editorial Zig-Zag presents an interesting introduction to unit 1, where there is an initial reflection about the concept of geography. It poses the question of what geography is, and includes a comment regarding the method of analysis in geography. For the purposes of this investigation, the following statement is interesting: "the work methodologies used in geography are numerous, and they depend on the investigator's geographic trend" (page 11). This link between geographic trends and methodologies is interesting for verifying the coherence there



should be between both categories. However, the treatment of geographical contents in the text is quite traditional and segmented (relief, hydrography, vegetation, etc.).

## 2. Regarding geographic approaches

The investigation process allows us to affirm that in the introduction or in the suggestions for teachers and students, the analysed texts do not explicitly state the relationship between geographic approaches, geographical contents and didactic activities. However, the implicit presence of the approaches is evident when analysing each textbook in detail. I will now present a summary of the presence of the geographic approaches in the analysed textbooks.

- **Locational approach:** this approach is present in all the analysed textbooks. It is an approach that favours the use of maps, computer graphics, graphic models, topographic profiles, etc., in order to emphasise regularities in the geographic space. Generally, the geographic conceptualisation in the analysed textbooks matches with a locational or spatialist approach, in the sense of allowing the application of concepts in different geographical areas. Thus, the intention is to reach a generalisation of spatial patterns in the search for a “scientific” conception of geography that is appropriate to a current understanding of sustainable development.

- **Critical approach:** this approach is not explicit in the analysed textbooks. It is necessary to interpret their contents and examine the didactic activities in detail to observe the purpose of transforming geographic space in benefit of the societies that inhabit it. Maybe the ideological emphasis of this approach and its conception of geographic space as a social product do not allow it to be made more explicit. However, in general terms, this approach is linked to the topic of urban geography, improvement of life quality in urban centres and the deliberate search for sustainable development by organised communities.

- **Behavioural approach:** in general, this approach is related to activities that have been designed for detecting students’ previous knowledge and the development of spatial thinking by a relative localisation in the close environment. We also find evidence of this approach in students’ mind maps and in their daily movement around their close space. The concepts of place and belonging used in some textbooks are very important for the behavioural approach. These concepts contribute to the creation of ties between people and their environment, which generates a proactive attitude toward sustainable development.

- **Ecogeographical approach:** this approach is very present in the analysed textbooks. The society-nature relationship and the systemic conception of geographic space are important foundations for linking the various components of geographic space. In many of the analysed textbooks, the need to make an integral study of the natural and human environment is suggested, in order to systemically study the geographical variables that contribute to sustainable development.

## CONCLUSIONS

Through this investigation, it was possible to prove that the authors of the different publishing houses do not explicitly state the geographic approaches from which they have organised the topics, concepts, contents and didactic activities of the textbooks. However, the thorough analysis of the textbooks allowed us to detect an implicit presence of the approaches in the contents or didactic activities of each analysed text.

It would be appropriate and necessary to make the geographic approaches related to geographic education explicit for a sustainability in the textbooks, because through them a contribution can be made to epistemologically guide teachers' work and to design didactic activities that promote the development of spatial thinking in students of Year 9, from a responsible perspective toward new generations.

Geography is not a static science; it is dynamic and does not respond to a uniform way of conceiving and interpreting geographic space. Each view of this multidimensional and complex space responds to a part of history and the richness of geographic science, which includes various lines of thought and eminent representatives. Therefore, it is necessary to epistemologically base the contents and geographical concepts in textbooks, in aid of teachers and students that use them.

Textbooks have a great potential for the development and consolidation of the principles of sustainability in geographic space. The spatial perspective that characterises geography as a social science considers an analysis of those aspects that are typical of sustainable development in specific geographic spaces. As didactic resources, textbooks contribute to this purpose from a spatial perspective. However, such complex challenge is not the only answer. It is necessary to gather a group of skills, actions and resources in order to make gradual progress in the realisation of the sustainability paradigm harmoniously with geographic space and territory.

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# The difficult dialogue between history textbooks and advances in historiography

JAIME LUIZ CALLAI

**T**he relationship and difference between historical knowledge produced by experts –particularly in the university field– and history as a school content developed in primary education is known by all. As a rule, this conciliation was made by teachers who had more contact with historiographic production while reading history at university and by the use of textbooks. The fact that teachers come from specific graduate courses –in the case of Brazil, from History teaching courses or bachelor's degrees– does not prevent the effective practice of history teaching in primary education to be far from the most advanced theoretical/methodological propositions that have been produced by experts and that circulate in universities.

The separation between university historical knowledge and school practice is first generated from the specificity of schools as places of transmission/conservation of a particular society's cultural patrimony. Also contributing to that separation are the material and working conditions faced by teachers, as well as the characteristics of the support material available at schools. Although there is an acknowledgment of the influence of facilities, equipment, salary and working conditions offered to teachers for the development of teaching and learning, this investigation focuses on the contribution made by textbooks. Textbooks are the main instrument present in teaching strategies, particularly during the final years of primary education. The predominance of textbooks as the main teaching resource is reinforced, in the case of Brazil, by the development of a powerful textbook national policy through the National Textbook Programme (PNLD), under the patronage the National Fund for the Development of Education.

## **NATIONAL TEXTBOOK PROGRAMME**

The referred Programme was established in 1985, when it gave a new configuration to textbook policies in force until then. As from that year, schools were bound to use one

textbook for three consecutive years. Most importantly, textbooks were chosen directly by schoolteachers, based on the Textbook Guide. Throughout the years, the programme was strengthened, spreading its coverage to all years of primary and secondary education, as well as a distribution of books in Braille, Brazilian literature books, atlases and dictionaries. After three years, the evaluation process of textbooks began together with their selection by teachers, finishing with the free distribution of textbooks for public school students. Each year a new subject is included, so that every one is considered by means of the distribution of different bibliographic materials.

In order to have an idea of the extent of this programme, during the 1997-2007 period the annual average number of distributed books was around 110 million, favouring 31 million students each year.

In parallel with the quantitative evolution of the programme, a systematic effort to evaluate textbooks has been developed, not only from the editorial point of view, but particularly assessing their “pedagogical” characteristics. In the year 2000, the programme’s evaluation recommended the PNLD to adopt another conception of the textbook *“de acordo com a qual o manual escolar é compreendido como aquele material, intencionalmente elaborado a fim de ser utilizado, com vistas a diferentes funções, em um processo de ensino e aprendizagem escolar; esse material se organiza de forma variada e em suportes diversificados com relação a um programa curricular, que se destina a uma disciplina, área de saber ou conjunto de disciplinas ou áreas de saber; a uma série, a um ciclo ou a um nível de ensino.”* (MEC, 2000: 27).

Although specialists and experts have recommended the proposed changes, they have been timidly implemented due to various factors. Primary school teachers lack the necessary conditions to organise curricular and methodological proposals appropriate for the different learning conditions of their students. Arguably, teachers are subjected to such working conditions that they are forced to abandon the necessary autonomy of the teaching job. Consequently, they want a book that organises their work. In addition, the publishing industry is not interested in taking on risks emerging from pedagogical or methodological innovation. These factors stand in the way of the necessary and recommended theoretical and methodological innovation in teaching and in the production of textbooks.

The theoretical and methodological dimensions of history teaching, as well as the whole of primary education in Brazil, have as reference point the National Curricular Parameters, which represent the culmination of the collective effort of society, concerned about assuring an effective citizen education.

## **NATIONAL CURRICULAR PARAMETERS**

The 1980s in Brazil were characterised by a great effort in the fight for democratisation, which developed in different fronts, including the field of education. That period was rich in new curricular and methodological proposals, as well as a reorganisation of teaching in its different levels. Taken together, these experiences contributed with the necessary conditions

for the national state, through the Ministry of Education, to promote an extensive discussion process that resulted in the creation of the National Curricular Parameters - PCNs. These refer to the whole of primary education, including the different fields of knowledge and subjects and dividing primary education in initial years (Years 1 to 4) and final years (Years 5 to 8) in 1998, and secondary education in 1999.

As for the National Curricular Parameters – History, specifically for the final years of primary education, the document presents a first part composed of the Characterisation of the History area, General Objectives and History Contents: selection and organisation criteria. The second part includes objectives, contents and evaluation criteria. Finally, the document offers orientations and teaching methodologies (BRASIL, 1998).

Although we can think of a closed curricular and methodological proposal with prescriptive characteristics, created by the Ministry for the whole of Brazilian society, the purpose of the document is different. History PCNs are concerned with respecting the existing regional, cultural and political diversities in the country, and they support discussions and the development of an educational project, as well as reflections on the teaching practice.

When characterising the area of History, the document refuses the traditional positivist history with a political-administrative content, and adds the most contemporary tendencies and problems of historical knowledge and History teaching. It also indicates an emergence of new social and cultural issues –the daily life of workers and women and practices and values regarding celebrations, health and illnesses and sexuality. Apart from the traditional written and institutional documentation, the document base also adds documents in different languages– images, oral tales, objects, visual and audio records and writings of everyday life (LeGOFF, 1976). These changes result from different theoretical/methodological approaches and from the use of new analytical and conceptual models. *“A proposta sugere que o professor problematize o mundo social onde ele e o estudante estão imersos e construa relações entre as problemáticas identificadas e questões sociais, políticas, econômicas e culturais de outros tempos e de outros espaços a ela pertinentes, prevalecendo a História do Brasil e suas relações com a História da América, com diferentes sociedades e culturas do mundo”* (BRASIL, 1998: 46).

With this perspective, two strategies for the organisation of curricular contents are outlined, namely, the so-called “Integrated History”, characterised by orientating the study of historical events without a previous spatial graduation or temporal arrangement but which articulates the history of Brazil and America in one only process, explained by reasons of causality, contiguity and simultaneousness in time; and “Thematic History”, which seeks to structure the contents around particular questions that, due to their significance, articulate different social processes identified in different times and multiple spaces.

Any of those strategies preserves teachers’ autonomy in the organisation and selection of contents and teaching methods, under the known influence of a teaching system that places students in an active role, even in the field of know-how, i.e. of skills and abilities.

## **HISTORY TEXTBOOKS – YEARS 5 TO 8**

Every three years, for the same areas and years, the PNLD makes a new selection and distribution of teaching material, thus assuring the possibility for updating and renewing textbooks available for public school students. In the case of History, the last delivery for primary education corresponds to the 2008-2010 triennium. According to the Textbook Guide – History, the textbooks were classified and made available to teachers, so that in schools the selection of 18 collections could be made for their use in Years 5 to 8. The PNLD states that textbooks must be produced and presented in collections for the different segments in which the national educational system is organised.

Without deepening in the merits of the different textbooks, it is surprising that in such a big country as Brazil and with such disparities, the catalogue of available textbooks is so little diversified. This concentration makes the presentation of innovative works very difficult in order to account for different sociocultural interests and characteristics, considering that schools in large cities such as Sao Paulo, or in settlements of the Landless Workers' Movement, in small towns in the country, or even in indigenous areas have the same kind of material available. As well as the criticisms and suggestions to the Programme, this situation has worsened throughout the years. The intense process of fusions and incorporations that moves the Brazilian publishing market, even with the penetration of foreign publishing groups, decisively contributes to a homogenisation that is by all means inconvenient.

The Textbook Guide results from a previous evaluation work carried out by university professors specially hired for that task, and it includes not only a description of the books and their positive aspects and weaknesses, but also a critical evaluation of the teaching possibilities offered by each book. This analysis considers both the student's book and the teacher's guide, where the historiographic and pedagogical perspectives adopted by the authors must be included, as well as suggestions for the use of the material, of activities and of complementary resources that can be used for a better educational process.

According to the opinion of the referred experts, the eighteen collections can be classified in three categories: "Thematic History", with four collections; "Integrated History" and "Alternated History", with seven collections each.

*Thematic History* is one of the propositions that are part of the History National Curricular Parameters, and the recommended thematic axes are: a) History of social relations, culture and work, and b) History of representations and relations of power. In a thematic perspective, it is possible to organise the study in order to understand how a particular topic or historical issue is presented in different times and spaces, by means of an exercise that links both the diachronic and the synchronic dimensions. The focus of the organisation of historical narrative is no longer a temporal arrangement or spatial criteria to the benefit of the adopted subject matter, which is now the organisation criterion of contents and activities.

*Integrated History* is an effort to articulate different spatial dimensions –Brazil, America, World– following or not the chronological order of the establishment/emergence of different

societies. More than chronology, what matters is considering the simultaneousness of facts in time, in different spaces. It is about understanding what happens at one time in different countries, regions or societies.

The third perspective is *Alternated History*, characterised by an effort to arrange the History of Brazil, of America and of the World in the chronological order of occurrence of a same issue, in one society or another. This tactic allows seeing how different societies present their own historical force.

What is the result of these evaluations from experts? Regarding “Thematic History”, “*nas quatro coleções aqui agrupadas os autores não explicitam com clareza a corrente histórica a qual estão vinculados, e nem justificam as suas escolhas, muito embora haja referências completas de textos sobre teoria, história e metodologia do ensino.*” (BRASIL, 2007: 26). With respect to the seven works classified as “Integrated History, they say: “*A explicação histórica supera a visão heróica, factual e simplista. As propostas se pautam pela concepção das temporalidades múltiplas e pela compreensão das periodizações como construções sociais. Os pressupostos teórico/metodológicos apontam a existência de distintas interpretações dos mesmos fenômenos históricos.*” (BRASIL, 2007: 46). The collections grouped under the so-called “Alternated History” are more heterogeneous in their formulation, becoming closer to more traditional conceptions of history, with a more chronological approach that is many times factual (BRASIL, 2007: 78).

Considering the more innovative character of the proposition of Thematic History, I present considerations regarding the collection for Years 5 to 8, belonging to “*CABRINI, Conceição e Outros. História Temática. São Paulo: Scipione, 2004.*” In this collection, the historical contents are presented in four large thematic axes: times and cultures (Year 5), cultural diversity and conflicts (Year 6), land and property (Year 7) and the world of citizens (Year 8).

In accordance with the theoretical proposition of Thematic History, it is expected that authors develop the different topics considering different times and spaces. Unfortunately, that is not what we see when doing a deeper reading of the text. For example the first volume, “Times and Cultures”, is presented in four parts. The first two, “History and memory” and “What is time?”, have a more methodological/historiographic nature. The third part, “The appearance of man” refers to the generic man and the American man, but always as the prehistoric man. The fourth part, “The human experience”, includes the following chapters: “The way of life of the first men”, “Cities then and now” and “The role of writing”. It is surprising that the chapter “Cities then and now”, in spite of its title, deals only with the appearance of cities in the classical era and of city-states of the Golden Age of Greece. In spite of the abundance of illustrations and the proposals of organisation of the teaching process, it is clearly difficult to solve the challenge posed by Thematic History.

We find the same difficulty, to a lesser or greater extent, in the other volumes. For Year 6, they propose the study of “Cultural diversity and conflicts”, but the text is limited to an explanation of the culture clash during the discovery of the New World, indigenous societies, African



slavery, racism and slave work nowadays. The predominance of the Atlantic world –Europe, America and Africa– is evident, and there is an effort to mark the rupture or permanence of those elements during the 16th and 21st centuries. When reducing the scope of the topic, the selections end up weakening its understanding. The situation improves in the book for Year 7, whose axis is “Land and property”, although chapters 6, 7 and 8 seem rather weird with *State, nation and politics*; *Capitalism: religion and politics* and *The English Civil War: bourgeois political conquests*, respectively. The thematic axis of the book for Year 8 is “The world of citizens”, and it is divided into three parts: *Citizens and the excluded*, *The world of work* and *Authoritarianism and democracy*. What catches our attention is the discussion of citizenship in one part and “the world of work” in another, making workers seem excluded from citizenship. In addition, in the development of *The world of work* there are two chapters that deal with the Industrial Revolution and the Industrialisation of Brazil, respectively. Is the world of work only the world of industry?

These difficulties reveal a repetition of certain explanatory schemes that are hard to overcome. Decades of historical investigation with a strong positivist tradition that began in the 19th century, under the auspices of the Brazilian Historical and Geographical Institute, will only very slowly be surpassed by the academic production developed at universities. This renewal process had a late start, in the second half of the 20th century, and at first it suffered the effects of censorship and control of universities imposed by the military regime from the 1960s to the 1980s (MOTA, 1994). It will thus be necessary to wait for a re-democratisation and the downfall of the hegemony of a mercantilist Marxism that dominates universities for historical investigation in Brazil to effectively open up to the historiographic renewal now present in the world.

We all know that school history and textbooks are always behind the times with respect to the renewal that may be occurring in investigation centres, and the case in Brazil is no different. Schools and school geography are still struggling to inform students about a legacy that is sanctioned by society. It is a sort of “official history” that needs to be taught to new generations. Under these conditions, there is still a concern with contents that students must “necessarily” learn, and that teachers must transmit. The activity of transmitting is incompatible with investigation, and it does not recommend activities other than those that should be memorised. Many times teachers, parents and students themselves demand special attention to this official history, a narrative that organises a discourse, which justifies a particular status quo.

We can thus evidence a gap between what is most advisable from the point of view of professional historians and what is desirable from the point of view of primary school teachers. It is under these conditions that an evaluation of textbooks is interesting: on the one hand, an evaluation of to what extent their authors and editors are effectively incorporating the advances in historiography and in teaching/learning theories, and on the other, what the evaluation and uses that primary school teachers and students make regarding the material and proposals available to them. Consequently, there still is a long way ahead.

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# New history and its application on textbooks

**ALICIA ZAMORANO V.  
GABRIEL VILLALÓN G.**

## INTRODUCTION

**T**he progress of historical science over the last century has been outstanding. We can say that today history is made of everything and everyone. However, the development of what Burke has called New History, has tended to be relegated to academic areas. Consequently, there has been a distance between History as a discipline and School History.

From our point of view, the distance between the historiographic and School History has resulted in the latter not being able to develop all the competences that the curriculum proposes based on the contents .

For this reason, we have investigated the presence of New History in textbooks through the analysis of the Year 10 History and Social Science textbook published by Editorial Santillana, specifically the sub-unit on the Social Issue in Chile. The choice of this text for the analysis is based on the fact that this is the book that the Ministry of Education distributes to every public and private subsidized school in Chile.

## CHARACTERISTICS OF NEW HISTORY AND ITS RELATION WITH THE SCHOOL CURRICULUM

During the 20th century, historical science suffered important transformations in terms of the subjects, topics and practices studied. The rise of New History signified a revolution in the way of doing, understanding and analysing the function of History. New History was born in response to the traditional History that Julián Casanova describes as a political history at the service of legitimised powers, that rejected theory and had narrative as its thread.<sup>1</sup>

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<sup>1</sup> Julián Casanova, *La historia social y los historiadores. Cenicienta o princesa?* (Barcelona, 2002) p. 45

In opposition to this, a view that has different aims from the previous one begins to take shape. Peter Burke summarises what we could call the aims of New History. First, history goes beyond politics and great characters, which is why it is based on the principle that “Everything has a history”. Second, this discipline goes beyond the narration of events and concentrates its attention on the analysis of structures. In addition to this, one of its purposes is to write the history of nameless people, of ordinary people. It proposes that historical sources go beyond written sources and official documents, which is why it sets forward the renewal of sources, specially images and oral sources. Finally, New History is known for upholding the idea that a development or a historical process has multiple explanations, and is not afraid to add that objectivity is an illusion.<sup>2</sup>

As regards School History, within the Chilean curricular framework we can find the purposes of its teaching clearly defined. In the area of History and Social Science, the curriculum establishes that students must develop knowledge, abilities and dispositions that will allow them to structure an understanding of the social environment and guide them towards a critical and responsible behaviour in society. To correspond with the latter, the aim is for students to realise that History and Social Science are not the kind of distant knowledge that has no relation to reality. The objective is for them to realise that these disciplines provide them with a set of conceptual approaches and relevant abilities that can help them understand their lives better and, at the same time, help them understand their social context and the contemporary world. Thus, there is an emphasis on the fact that an understanding of the present is possible only if the past and the historical processes that have shaped the present reality are examined.<sup>3</sup>

When revising the purposes of the teaching of History in Chile, we can establish that they relate to the aims of New History, as can be seen in the following comparative chart:

<sup>2</sup> Peter Burke, *Formas de Hacer Historia*, (España, 2003), pp. 13-19

<sup>3</sup> MINEDUC, *Marco Curricular de Educación Media. Objetivos Fundamentales y Contenidos Mínimos Obligatorios de la Educación Media*, (MINEDUC, 2005) p. 96

### RELATIONSHIP BETWEEN THE AIMS OF SCHOOL HISTORY AND NEW HISTORY

AIMS OF THE TEACHING OF HISTORY IN CHILE	AIMS OF NEW HISTORY
To structure an understanding of the social environment and guide students towards a critical and responsible behaviour.	History has other sources besides written sources and official documents. The aim of history is to record the history of those without a name: ordinary people. A development or historical process has multiple explanations: objectivity is an illusion.
To understand History as a close knowledge related to reality, which will allow students to understand concepts, develop abilities that may help them understand their lives better, understand their social context and the contemporary world.	History goes beyond politics and great characters: everything has a history. History is more than a narration of events; it concentrates on the analysis of (economic, social, cultural, political) structures.
To understand the present through the analysis of historical processes that have shaped the present reality.	History understands that an event or historical process has multiple explanations: objectivity is an illusion.

From the chart, we can conclude that the incorporation of New History in the teaching of History in Chile contributes to a better achievement of the purposes proposed by the curriculum. For example, students should be able to see History as a close knowledge that is related to reality, which will allow them to understand concepts and develop abilities that they can apply in their lives, to understand their social context and the contemporary world. Therefore, from this perspective the incorporation of New History allows us to get closer to the knowledge of students' environment.

### THE CURRICULUM IN YEAR 10

New History, as we have seen, approaches the issue of the social world and of the political roaming of workers, among others. These aspects are dealt with mainly in Year 10.

At this level, the curriculum is organised into five units: Introduction: knowing the history of Chile; Construction of a mixed ancestry identity; Creation of a nation; End of century society and the crisis of liberalism; 20th century: the search for development and social justice. According to professor Osandón, the curricular structure of the Year 10 programme is characterised by an initial unit with a very clear didactic purpose, which functions as a previous organiser. The rest of the units are organised according to an approach to national history which goes from past to present. In addition to this, he points out that even the names of the units reveal original approaches to the history of the country, abandoning traditional organisations into periods (discovery, conquest, colony...), promoting a conceptual renovation in keeping with the most recent historiographic debate.<sup>4</sup>

<sup>4</sup> Luis Osandón "La enseñanza de la Historia en la sociedad del conocimiento" en Mario Carretero, *Enseñanza de la Historia y Memoria Colectiva*, (Buenos Aires, 2006) p. 335

Our study concentrates the analysis on unit 4: “End of century society: peak and crisis of liberalism”. In the study program which follows from the curricular framework, this unit is divided into three sub-units: Peak of the liberal order: economic and political aspects; The cultural boom of the beginning of the 20th century; The crisis of the parliamentary regime and the social issue. Regarding the contents, we can distinguish five major themes: The saltpetre economy; The political crisis: the 1891 Civil War; Cultural transformations; The social issue; and finally an in-depth study unit where students have to write an essay, strengthening their relationship with the historical discipline<sup>5</sup>. In this case, what concerns us is the third sub-unit: “The social issue”, and the contents related to the social issue, the workers’ movement and popular movements.

“The crisis of the parliamentary regime and the social issue” is a sub-unit that brings forth a series of contents related to the political crisis at the end of the century and the social problematic which rose in that period. For our study we focus on the content marked as:

- The “social issue”. Men and women’s living conditions in saltpetre mining communities, ports, cities and countryside. New workers’ organisations. Concern among scholars, university students, ecclesiastics and politicians regarding the living conditions of popular sectors. Solutions proposed.

The selected content allows us to work on the following Vertical Fundamental Objectives (OFV: *Objetivos Fundamentales Verticales*):

- To recognise the various forms of political and economic organisation, social evolution and cultural expressions that have taken place in national history.
- To recognise themselves as heirs and participants of a common historical experience that is expressed in cultural, institutional, economic, social and religious terms.
- To understand that historical knowledge is built upon information from primary sources and their interpretation, and that historiographic interpretations differ, recognising and contrasting different points of views regarding a particular problem.<sup>6</sup>

These objectives will be a central part of our analysis, as we will see later on.

### **ANALYSIS OF THE SUB-UNIT**

In order to analyse the sub-unit “The crisis of the parliamentary regime and the social issue”, we will take elements from the historical discipline, from the curricular aspect and from the didactic objectives that the teaching of History seeks to achieve.

On the other hand, we cannot forget that the function of textbooks is determined by the Textbook Policy that considers that “The Textbook has a central function in the educational task, since it is a universal resource that contributes to the enrichment of the pedagogical

<sup>5</sup> *Historia y Ciencias Sociales, Programa de estudio, Segundo año medio...* op. cit., p. 57

<sup>6</sup> *Ibid...*, p. 12

process. In this sense, the Ministry of Education's Textbook Policy aims at supporting and promoting quality learning and, at the same time, at attaining equity in the social distribution of learning, offering all students the same opportunities".<sup>7</sup>

Because of this, it is necessary to perform the analysis starting from indicators that allow the achievement of the previously quoted objectives. The categories that arise from the study were grouped in a checklist that includes three components which must be present: the disciplinary component, the curricular component and the didactic component.

By disciplinary component, we mean those characteristics that make it possible to secure the relevant definition of the concepts involved, as well as showing the historiographic perspective of the discourse and the presence of the characteristics of New History.

In the curricular component, we expect to find the attainment of the Vertical Fundamental Objectives (OFV: *Objetivos Fundamentales Verticales*) and of the Minimum Obligatory Contents (CMO: *Contenidos Mínimos Obligatorios*) established by the 220 decree.

And finally, there is the didactic component, which is based on the objectives of history teaching, according to Joaquín Prats.<sup>8</sup>

## **RESULT OF THE ANALYSIS OF THE TEXTBOOK**

### **1. Disciplinary component**

With regard to the disciplinary component, our analysis shows that the text has major deficiencies in conceptual terms and that this may evidently confuse students. One of the most important deficiencies is related to the definition of the concept of Social Issue, because in the heading of the sub-unit there is a definition which deviates from the most frequently used by recent historiography. This is shown when the text establishes that the social issue is a consequence of the problems of migration from the countryside to the city. However, in a second part, they use a definition of social issue that is closer to the one used by historiography, which relates the Social Issue to the problems of modernisation, according to James O. Morris.

There are other conceptual mistakes made in the same terms. For example, the book proposes the study of new political parties, including anarchism and resistance societies in this analysis. However, since anarchism and resistance societies cannot be defined as political parties, this would again cause confusion among students.

On the other hand, the treatment of school contents in the textbook includes the aims of New History, because the description of the textbook does not correspond to that of the political leaders of the period studied, but to the processes in which ordinary people were involved. However, this inclusion is still superficial, because the point of view of the analysis is restricted to the initial forms of New History, which have to do with making a history of workers and

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<sup>7</sup> Catálogo 2008, *Textos Escolares*, Gobierno de Chile, Ministerio de Educación.

<sup>8</sup> *Enseñar Historia: notas para una didáctica renovadora*, Mérida 2001.

their politics. Thus, the text reflects a treatment of the period from a political perspective and does not go deeper into the social aspects and workers' living conditions.

As regards the treatment of content, we must point out that in large parts of the text, this is still an analysis from the point of view of the elite. Thus, when approaching the topic of visions of the social issue and possible solutions, the textbook does not describe proposals from popular parties or workers' organisations.

The creation of the discourse of the textbook does not include various sources, as is proposed by New History. Considering the latter, it may be interesting to problematise the text around the arguments of different historians who study the period.

## 2. Curricular component

From the content analysis of "The social issue", we can conclude that in this sub-unit of the text the OFV (Vertical Fundamental Objective) that allows students to recognise the various forms of political and economic organisation, social evolution and the expressions arisen from national history is accomplished. How this is dealt with accounts for the evolution of the political and social situation of the popular sectors between the end of the 19th century and the beginning of the 20th century.

A second OFV (Vertical Fundamental Objective) which is dealt with in the subunit of the text –though not fully– has to do with understanding that "historical knowledge is built upon information from primary sources and their interpretation, and that historiographic interpretations differ, recognising and contrasting different points of views regarding a particular problem". Likewise, the textbook proposes activities that make it possible to contrast visions about the problem of the social issue and which also include work from different sources, such as the novel.

As to the treatment of content, it must be said that the textbook deals fully with the living conditions of popular sectors, but it lacks depth regarding the differences between life in cities and saltpetre mining communities, which is not reinforced in the development of activities either. Within the analysis, the contents show deficiencies when defining some concepts like the social issue or the political party, since the textbook does not specify that anarchism did not take shape as a political party.

## 3. Didactic Component

According to the didactic objectives established for our analysis, we have been able to determine the following: the main objective achieved is that which relates to understanding "the facts that took place in the past and knowing how to put them in their context", because the textbook describes the period and the evolution of the process of the social issue in a satisfactory way.

The second objective, which refers to understanding that "there are various points of view in the analysis of the past" is also dealt with, although not fully, since the activities in the



text include the vision of different actors on the social issue. The inclusion of the analysis of Manuel Rojas' novel *Hijo de Ladrón* stands out in particular.

As regards the other objectives –“to understand that there are very different ways of acquiring, obtaining and evaluating information about the past”, and “to be able to convey in an organised way what has been studied or obtained about the past”– these are attained in a mediocre or definitely unsatisfactory manner. This is because the textbook does not reinforce the knowledge of the period from different sectors, but only from the elite's point of view. In order to achieve these objectives, it would be interesting to include a major analysis of primary and secondary sources.

## CONCLUSIONS

After analysing the sub-unit “The crisis of the parliamentary regime and the social issue”, we can conclude that New History is scarcely included in the pedagogic curricular work. This is shown by the fact that the aims of New History are not achieved, as the textbook presents a history that considers only the big characters, forgetting that everyone and everything has a history, the working class, in this particular case. Furthermore, the textbook insists on presenting history as a narration of events, leaving out the analysis of the economic, social and cultural structures of the period. The analysis only includes traditional sources, omitting oral sources or images that portray the events of the period. Likewise, there are absolute definitions of historical processes that aim at giving a sense of objectivity, when New History sustains that this is an illusion.

Finally, if the aims of New History were included, the purposes of school history could be achieved, in their conceptual accuracy as well as in the treatment of the OFV (Vertical Fundamental Objectives) and CMO (Minimum Obligatory Contents), as the learning and teaching objectives of this sector of the curriculum.

In closing, we would like to justify the joint work that historians and textbook writers do. Historians, as representatives of New History, are called in to incorporate in their work proposals that may be developed at school level and taken by publishers to be translated in their textbooks, because as they themselves say, everything has a history and history is for everyone.

# How do history school textbooks reflect historical research? Some findings from Germany

KARL HEINRICH POHL

**E**ver since the introduction of compulsory school attendance for all children, school textbooks have enjoyed considerable significance, particularly for state representatives, as instruments of socialization. Even if, now as ever, we know only little about the ways in which textbook contents are processed and learnt, textbooks are without a doubt a medium that has influenced large groups of people during a phase of their lives considered to be important in shaping their ideas. Textbook knowledge is held to be socially and culturally recognized as well as institutionalized and understood as the result of social discourse and thus a reflection of the *zeitgeist*.

This presentation aims at concerning itself closer with one aspect of this complex netting, namely with the question as to how current social challenges that have changed and continue to change academic approaches to history have also influenced the concepts and portrayals in German history textbooks. New tendencies in historical scholarship should surely affect—in the long term at least—history textbooks, which, after all, derive their knowledge from academia. How do these recent trends in historical scholarship, such as transnational perspectives and a growing interest in concepts of space, images, symbols or performance, find their way into schoolbooks? And what about the consequences of immigration and multiethnic societies? Are those trends transposed into the condensed and highly politicized space of school textbooks? The lecture seeks to answer these questions through an analysis of a sample of recent German history textbooks and using the categories of the transnational perspective and the representation of minorities as examples. Aspects related to the representation of Gender and Postcolonial Studies are further interesting approaches which will not be treated here only due to the lack of time.

First of all I would like to provide you with a concise introduction to the German textbook system: There are three aspects that create a large number of difficulties when providing an overview of the aims and contents of history textbooks: the federal diversity –German

education policy is controlled by sixteen individual federal states—, the various political influences on the education systems in the German states that it brings about, and the different types of schools. The more academically gifted pupils are ‘streamed’ from the less gifted by the time they are as young as ten years of age. The number of trouble-causing aspects is multiplied yet further by the existence of various competing publishing houses (who in turn issue various book series). As far as contemporary history textbooks are concerned, there are currently almost 150 new volumes in existence. We have restricted ourselves to a sample of about twenty, bearing in mind important criteria of representation. In the following, I will briefly present some of our provisional results, structured according to the topic areas under examination. The presentation can only provide a condensed overview, analyzing the most recent tendencies.

### **TRANSCENDING THE NATIONAL PERSPECTIVE: EUROPEAN AND GLOBAL DIMENSIONS OF HISTORY**

In almost all countries of the world, history lessons play a significant part in national identity construction. By selecting or omitting, emphasizing or neglecting certain aspects, textbooks indicate particular paths that are to be followed when interpreting and remembering the past. They do so primarily in relation to their own nation’s past. This is hardly surprising because the school as well as history research and teaching were involved in the nation-building process that defined the nineteenth and twentieth centuries. Even societies of the twenty-first century are defined in terms of the nation state or strive towards constructing and legitimizing their national identities. At the same time, however, our societies are increasingly marked by global transformation processes and transnational relations. While in some areas of the world ‘the nation’ is still being invented, at the same time, the cacophony of national, religious or ethnic cultures is giving rise to the concept of an ‘emerging world society’.

Nevertheless the textbooks for all school types in all German states clearly attach much more importance to ‘Europe’, and particularly to the political process of European integration, than they did in the 1970s and 1980s. This makes up considerable progress in itself. However we do find ourselves confronted by the pressing question as to *how* German textbooks represent this topic.

As far as the period from the eighteenth to the twentieth century is concerned, the primary subject of interest is the implementation of the ‘European Project’ after 1945. This holds true despite the fact that this period is also frequently dealt with in detail by social studies and geography textbooks. The majority of textbooks however does only rarely discuss the European project critically. The generally dominant viewpoint is a teleological one. It is focused on progress, and rarely allowing for a heightened awareness of alternative options and contradictory development. Europe is hardly portrayed as an area of converging as well as competing memories.

In the textbooks it is only seldom discussed or even suggested that concepts of Europe and its boundaries are historically changeable constructs, based on complex processes of negotiation and understanding. Those concepts pass images of the European Self off as representations drafted by 'The World' about Europe. It is extremely rare for textbooks to include views of Europe from outside, simultaneously taking Europe as the starting point for a general analysis of world history. In many textbooks, the 'European question', including Western European issues, is dealt with in the context of general post-war history. Both the changing meaning and varying definition of Europe as well as the transnational or (pan-)European view for history writing and its critical analysis remain for the most part unexplored.

Here as well as in many other respects, textbook authors abandon the chance to discuss different interpretations and tend to provide just one specific interpretation. That way, they miss the opportunity to reinforce the pupils' abilities to exercise criticism towards manipulation and affirmative master narratives. In this respect, German history textbooks do not tap the full potential they have for a problem-oriented approach that provokes controversial discussions and lends the individual more competencies in casting one's own judgement. In other words: texts are presented as facts rather than as interpretations, neglecting the orientation towards history understood as a process, thus transforming narrative texts into descriptions of an assumed current state of affairs.

In relation to *national* narratives and traditional representations of national identity, the "verdict" on the textbooks' critical stance is more positive: Almost all books examined illuminate German history from a critical distance, avoiding national myths or giving the pupils a methodological tool with which to de-construct such myths. Carried by an almost pacifistic and decidedly unpatriotic undertone, German textbooks attempt to define clearly the difference between historical burdens and trustworthiness in the present. This basic tendency essentially results from a national history that has been repeatedly obliged to confront National Socialism and the Holocaust. The term 'nation' is, therefore, seldom used in a positive light, and is frequently associated with the dangers of nationalism. Even the 'event of the century', German re-unification, is for the most part portrayed in a refined manner and mostly free of exaggerated patriotism. If we analyze books for underlying assumptions, we now only rarely encounter (intended) concepts of enemies, sharply defined patterns of exclusion or distancing strategies. Mostly, we find a system of values which, similar to Scandinavian textbooks, are oriented towards a general education on human rights, democracy and peace. This corresponds to a great extent with the principles formulated by international organizations such as UNESCO or the Council of Europe.

Critical distance when interpreting one's own national history, qualifying national identity, and orientation towards (politically intended) European traditions and ideals does not, however, by any means signify that history is primarily derived or recounted from *transnational* perspectives: in a particularly large number of history textbooks, the world and Europe are considered foremost from a *German* perspective; only a handful deal with European or even non-European developments in their own right. In other words: perspectives of world history

and international aspects are of particular significance only when they are of relevance to the continuity or contextualization of *German* history. In this aspect however, we have to keep in mind that textbooks do not differ significantly from a lot of academic publications that still exhibit a similar perspective.

Most books downplay non-European history and do not follow a global or world-history approach. They thus underestimate the impact of transnational processes and interaction and trans-regional transfers of ideas, goods and people. In view of the fact that there are no specialist lessons on 'world history' in Germany, while classrooms are certainly subjected to the effects of globalization and a multinational student body, this is a significant deficiency.

### **REPRESENTATIONS OF MINORITIES**

It was only at a relatively late stage in comparison to many of its European neighbours that Germany accepted its status as a country of immigration, which is almost certainly due to its low level of postcolonial migration. The issue of 'migration and education' was suppressed for a long time in the assumption that there was a strong interest in cultural homogeneity. It was not until the notable accumulation of problems at the end of the 1990s, and especially the 2003 PISA Test, which produced disastrous results for Germany, particularly with regard to immigrant children, that a wider debate in the public sphere was sparked. This is now gradually becoming an issue for history teaching: Whose history is relevant and who should enjoy authority and agency in a historical perspective, and who should not?

As a general rule, it can be said that all recent textbooks accept the increasing diversity of cultural patterns and the presence of immigrants in numerous facets of society as a productive challenge. They make efforts to dedicate more space to minority issues. Frequently this is only achieved by including new chapters on such topics as migration over the course of history, or on questions pertaining to the co-existence of minorities and majorities. Some new textbooks explicitly point out that Germany and Europe have always been characterized by migration, cultural contacts and by the fact that different social, religious or ethnical groups have lived together here, both in peace and in conflict with one another. Generally, however, hardly any history textbooks use the constant shifts between minority and majority perspectives and the tension between perceptions of the self and the 'other' as the basic concept for the description of cultural diversity and transfer visible as a fundamental historical mobility principle over numerous historical periods.

Immigrants and other minorities always somehow remain the 'others' and thus a point of friction, both positively and negatively, for the majority. They appear as either the victims or the culprits of unfortunate developments, and even in places of seemingly absolute political correctness, where tolerance and understanding for ruptures in identity systems are supposed to be promoted, minorities still retain their image of somehow being 'a problem'. Furthermore, pictures of immigrants in almost all textbooks tend to equip them with the typical features associated with 'otherness', such as skin and hair colour or a certain type of clothing. As a

result, they remain labelled as the ‘others’, and stereotypes are thus re-enforced rather than dissolved. However, the balancing act of bringing up the immigrants’ special situation and at the same time not excluding them from the majority society is truly a difficult one to solve.

Just how immensely difficult the challenge of implementing an integration concept proves to be for the respective authors is demonstrated by the manner in which Jewish history is integrated –or perhaps we should say not integrated– into general or German history. The detailed study of the Shoah is no longer a topic of debate and solidly established. Holocaust education too, as a detailed confrontation with this horrific chapter of German history, has served as an important instrument of general human rights education and of gradually teaching pupils to think beyond national perspectives. This is without a doubt a welcome development. It does, however, still make it difficult for textbook authors to convey Jewish history ‘beyond tragedy’ and set aside from the perspective of the victims. Indeed, the space allocated to aspects of Jewish history in German textbooks has dramatically increased since the mid-1990s. Textbooks are also making efforts to work with multiple perspectives in the chapters on National Socialism, and to give a voice to the persecuted, the humiliated and the resistance (e.g. in the Warsaw ghetto) alongside the sources from the pens or speech of the culprits, which still tend to dominate.

The everyday life of German Jews –or should we better say Jewish Germans– living happily and by all means successfully in the country in the nineteenth and early twentieth centuries is still only seldom available or overshadowed by the cloud of anti-Semitism. Jewish history is either dealt with in special chapters, thus already encouraging a sense of ‘otherness’, or the Jews are presented as opposed to the majority, primarily in the role of the excluded. These depictions distort not only the pupils’ views of Jewish aspects of German national history, but also their understanding of significant inner-Jewish developments such as the *Haskalah*, the Jewish Enlightenment. The consequence is obvious: Jews only appear highly seldom as *active players* – even a search for such prominent personalities as Moses Mendelssohn will be in vain in most textbooks. This rather encourages the impression that historical agency was only enjoyed by the (non-Jewish) majority, while the minority was shifted further into a subaltern situation. The fact that hardly any textbooks mention the re-founding of Jewish communities in post-war Germany only serves to support this impression. Jews, so claims the –doubtless unintended– message, only have a *history* in Germany, and a tragic one at that; their present and future are barely touched upon.

The case is somewhat different as far as representations of Muslims are concerned: they are to be found in textbooks with particular frequency in chapters dealing with the crusades and violent advancements of Islam towards Europe. The hidden messages –including those inherent in pictures– are often problematic, both for contemporary and the most recent history: Muslims either appear as immigrants with or causing problems, or as terrorists. Textbook readers almost never encounter Muslims as people who have been living in Europe as Europeans for centuries, such as in the Balkans or in Russian Tatarstan. It appears especially problematic

that Islam is either discussed in the context of global security issues or is depicted as a purely religious phenomenon; that is, in an essentialized form – Christianity, on the other hand, is depicted as a phenomenon embedded in history. Although Islam has been a component of European history for centuries, it is portrayed in most textbooks as an ‘other’ that is somehow foreign and ‘oriental’. Some textbooks though are making efforts in their depiction of Islam towards giving a voice to both sides. They provide pupils with the opportunity to learn about the various viewpoints on the matter, and to make their own judgements. Additionally, a linear analysis of the Islam narrative in German textbooks does reveal some changes, such as the new frequent portrayal of the crusades as a multicultural experience. Their social and cultural dimension comes more frequently into focus alongside their military character.

The Europeanization of minority histories can place historic phenomena such as emancipation and anti-Semitism into a larger context, thus helping to historicize them. At the same time, however, it appears that the non-Christian minorities have become the ‘victims’ of a stronger focus on Europe and its history: the more defined the search for common European traditions, the stronger the focus on the ‘justification’ of Europe in the roots of Latin Christianity and from the religious Enlightenment on towards the secularization of the state.

## **CONCLUSION**

Despite all the critical comments in my lecture I would like to conclude with a predominantly positive –a little more conciliatory– outlook. This is not all that difficult if one compares today’s textbooks with those published twenty years ago. Moreover it has to be considered, that it is rather easy to criticize textbooks since they have to meet a great number of expectations. So to speak, they have to solve the quadrature of the circle. This holds also true for the implantation of recent historical methods into textbooks. Considering the difficulty of uniting the national, the European and the global perspective on the one hand and representing minorities on the other hand, it cannot be expected that textbooks give answers to questions that have not been fully discussed by historical scholarship.

Although all textbooks are in some aspects in need of updating, most of them try to stay up to date and to adopt at least main ideas of modern historical scholarship and history didactics, albeit not always to an equal extent. In short: a lot of textbooks are better than their reputation. It is not primarily and even less exclusively their responsibility when everywhere in Germany scholars or adults in general are complaining about a sparsely reflected historical consciousness in young people!

# 2

## **HISTORY AND SOCIAL SCIENCES DIDACTICS IN TEXTBOOKS**



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# Working with sources and the development of critical thinking

AUGUSTA VALLE TAIMAN

**T**his presentation centres on the capacity of History to stimulate the development of critical thinking in secondary education students. For this purpose, we analyse the extent to which textbooks contribute to this. Our main objective is to examine how and to what extent the work with sources proposal in textbooks for 3rd, 4th and 5th year secondary school from the Innova series published by Editorial Santillana, and from the Escenarios series by Norma, encourage critical thinking. We have chosen these publishers because they are the ones that have the greatest presence in the private education textbook market in Lima.

Although we focus on textbooks for the last years of secondary education that cover the 18th, 19th and 20th centuries, we must point out that the trend in the area of Social Science is to propose the use of sources from primary education on, presenting activities according to the different stages of development of students.<sup>1</sup>

The group of students that these textbooks address is between 14 and 17 years old. At this stage, adolescents' capacity of abstraction begins to increase. This allows them to:

*"... compare different versions of historical events, deduce ideas from documents or objects from the past, elaborate hypotheses starting from some data, understand historical and abstract concepts in a more dynamic and integral way (...), analyse and understand situations and people from the past "empathically", explain phenomena, question testimonies from the past, etc."*<sup>2</sup>

<sup>1</sup> See: UNITED KINGDOM. History. Programme of study for key stage 3 and attainment target. The National Curriculum 2007. United Kingdom. [www.qca.org.uk/curriculum](http://www.qca.org.uk/curriculum).

UNITED KINGDOM Planning across the key stage in history. 09 May 2008.

[http://curriculum.qca.org.uk/key-stages-3-and-4/subjects/history/Planning\\_across\\_the\\_key\\_stage\\_in\\_history.aspx](http://curriculum.qca.org.uk/key-stages-3-and-4/subjects/history/Planning_across_the_key_stage_in_history.aspx)

DEPARTMENT OF EDUCATION OF CALIFORNIA. History–Social Science Framework for California Public Schools Kindergarten Through Grade Twelve. California: Department of Education of California, 2005 p.25

DEPARTMENT OF EDUCATION OF MICHIGAN. Michigan Curriculum. Framework. Michigan: Department of Education of Michigan, 1996 p.22

<sup>2</sup> LERNER, Victoria. Los adolescentes y la enseñanza de la Historia. Historia Agenda. <http://www.cch.unam.mx/historiagenda/2/contenido/sea1.htm>

In addition to this, according to Hernández, Cardona, C. Trepát, Carbonell, between the ages of 14 and 16, students should be able to work with primary and secondary sources performing a complex analysis which is not reduced to understanding the information given in them, but implies an evaluation of their informative potential and their usefulness as evidence for historical knowledge.<sup>3</sup>

What is expected in Peru of the teaching of History in secondary education?

According to the Ministry of Education of Peru (MINEDU), History contributes with knowledge that is fundamental for the area of Social Science.<sup>4</sup> For this reason, it is one of the three components of the area presented as History of Peru in its World Context.<sup>5</sup> The Ministry points out that the area is oriented towards the development of three main abilities:

- Dealing with information<sup>6</sup>
- Space-time understanding<sup>7</sup>
- Critical judgement<sup>8</sup>

### ROTE OR REFLEXIVE HISTORY

The teaching of history does not encourage judgement or critical thinking when it turns into a complete kind of knowledge, with established and indisputable truths, whose study is limited to the rote reproduction of information. Unfortunately, reality shows that History as a school subject is directly associated with rote learning or memorisation.<sup>9</sup>

3 HERNÁNDEZ F. X., CARDONA, TREPAT C. y CARBONELL. Procedimientos en Historia. Historia Agenda. <http://www.cch.unam.mx/historiagenda/2/contenido/seaz.htm>

4 The main objectives of this area are: "... the construction of socio-cultural identity and the civic education of adolescents and young people" MINISTERIO DE EDUCACION DE PERU. Diseño curricular nacional de educación básica regular. Lima 2005, p.188

5 The other two components are: Citizenship and Geographic space, society and economy. This division into components constitutes the organising axis of textbooks by both publishers. The textbooks are divided into three groups of units, explicitly established in Santillana, and implicitly in the case of Norma.

6 "Evaluate and communicate reliable and carefully considered information regarding historical processes and geographic space in coherent, rigorous and original texts, respecting ethical principles". MINISTERIO DE EDUCACIÓN DEL PERÚ. Área de Ciencias Sociales. Lima: Minedu, 2007 p. 188

7 "Understand and evaluate changes and permanencies in temporary, historical (economic, social, cultural, technological) and geopolitical processes, and in geographic space processes of their region, country, Latin America and the world, and communicate their conclusions in a coherent, rigorous and original way, appreciating them as elements of their cultural patrimony, national identity and humankind". MINISTERIO DE EDUCACIÓN DEL PERÚ. Área de Ciencias Sociales. op. cit. p. 188 – p.189

8 "Judges and argues his/her personal points of views with respect, coherence, rigor and originality about social aspects and aspects of the geographic space of their region, country, Latin America and the world, valuing and taking a stand based on ethical principles for the construction of a democratic culture". MINISTERIO DE EDUCACIÓN DEL PERÚ. Área de Ciencias Sociales. op.cit. p. 188 – p.189

9 Milton points out that students invest more time in memorising information than in summarising, evaluating or analysing it. (Milton, 1993) The investigations conducted by Savich determine that: "There is no "enduring understanding", no analytical or critical reflection or evaluation and long-term synthesis..."

SAVICH, Carl. Improving Critical Thinking. Oakland, 2008

"Learning history is reduced, in the mentality of the most students, to reproducing in detail a content they memorise and easily forget". TREPAT, Cristofol. Procedimientos en historia. In: Aula de innovación educativa N° 56 Barcelona (diciembre 1996) p. 25

Hernández acknowledges that the teaching of History went through a serious crisis in Spain in the 1980's, as it was limited to the conceptual, and the need to memorise so much information was questioned. HERNÁNDEZ, Xavier. Didáctica de las ciencias sociales, geografía e historia. Barcelona: GRA, 2002 p. 28-29

The Peruvian Ministry of Education, MINEDU, considers that this difficulty is solved by changing the Social Science curriculum from subjects to “teaching areas”. It is said that when what was offered was the subject of History, it showed deficiencies such as:

- “An emphasis on the memorisation of dates, characters and facts.
- Universal History, History of Latin America and Peru separately, not integrated..
- History of the past only.
- Based solely on the textbook.
- Broken up in time into stages with no context.
- Not updated with the new investigations”.<sup>10</sup>

In contrast, when it is changed into the History of Peru in the World Context, you achieve the following:

- “Reflexion and understanding of historical processes
- Local and regional History that contributes to building the nation
- History of Peru, Latin America and World History connected and with sense
- Notion of time built when relating past, present and future.
- Motivation in the student to work with and elaborate sources, as well as working with textbooks and books from the library.
- With a vision of continuity in the processes and an analysis of changes and permanencies.
- History that has built bridges with the academic world and investigation”.<sup>11</sup>

Actually, the problems mentioned in the teaching of History are not exclusive of this discipline, or of the subject itself. They are drawbacks of the perspective with which History is approached and they are not going to change because we propose a teaching by areas where the name “History” is changed for “History of Peru in the World Context”. Change really depends on transforming the tendency of rote History, which considers only conceptual contents, into a teaching-learning process that incorporates procedures.<sup>12</sup>

The image of History as a closed and concluded kind of knowledge whose learning is based on the memorisation of data should be discarded. In order to do this, it is necessary to go into the nature itself of historical knowledge and into the process of investigation that this discipline implies. In this way, we open multiple possibilities for the development of critical

<sup>10</sup> The following aspects are also included as disadvantages:

*Foreign and distant. Historical facts appear disconnected from everyday reality. National, basically a national history and a history of rulers. Disconnected from its space.*

MINISTERIO DE EDUCACIÓN DEL PERÚ. Diseño curricular nacional de educación básica regular. Lima 2005 p.11

<sup>11</sup> “Connected with personal and social everyday life. It develops the feeling of belonging. Linked to its environment”. *Ibid loc cit.*

<sup>12</sup> “... faced with the idea that historical understanding is only produced analysing its contents in the same chronological order in which they happened, we could say that understanding is produced through the underlying mechanisms in the structure of historical knowledge. (...) The general implications for teaching (...) should be (...) the specific forms of this kind of knowledge (...). Teaching science is teaching what science is”.

SÁNCHEZ PRIETO, Saturnino. La historia es una forma específica de conocimiento: Enseñar Historia es enseñar lo que la Historia es. *Historia Agenda*.

<http://www.cch.unam.mx/historiagenda/2/contenido/sea3.htm>

thinking. Furthermore, if the intention is to teach History from a constructivist perspective, it cannot be learning by heart education. Why History is taught and how it is built would be taken into consideration, thus critical thinking would have a fundamental role.<sup>13</sup> Actually, when you reflect on these topics, knowledge is more lasting and gives the student "... a mental tool (...) that potentially generates new knowledge"<sup>14</sup> and facilitates the understanding of the present.

We do not intend to abandon conceptual contents or the knowledge of facts, which are fundamental in the articulation of any curricular planning, but to include a methodological approach where both types of knowledge "... interact during the processes of learning as well as during the practical performance of a task".<sup>15</sup> As E. Carr used to say about the relationship between facts and their interpretation by historians, facts are like fish in the fish market, and the historian is the one who cooks and presents them to the guest. Thus, the knowledge of facts is as indispensable as knowing what to do with them.

However, putting the know how into practice seems simpler when it has to do with biology, physics or chemistry, because you experiment and expect a predicted result. But, what happens when we try to bring this framework that includes theory and practice into the field of History teaching? It is here that we encounter a true challenge which is sometimes solved by proposing that the student should make a model, a drawing, a bulletin board, etc. as a procedure or practice. But, actually, when referring to procedures, this applies to:

*"... interdisciplinary or disciplinary content, characterised by a know how that is expressed or made real through a series of actions or ordered steps which lead to the achievement of an objective or end that is pursued.."*<sup>16</sup>

In other words, this is about activities which are typical of historical science itself, similar to those of a historian, without pretending to turn students into such. This brings school students closer to the investigation methodology of historical science.<sup>17</sup> In this sense, Trepát considers the identification, use and processing of primary and secondary historical sources

<sup>13</sup> *"History should be taught using the constructivist approach that emphasizes why and how we study history. Critical thinking skills and the importance of individual perspectives are central in these approaches to history".* (Savich p. 9)

<sup>14</sup> TREPAT, Cristófol. *Procedimientos en historia*. In: Aula de innovación educativa Nº 56 Barcelona (diciembre 1996) p. 24

<sup>15</sup> TREPAT, Cristófol. *Procedimientos en Historia*. Un punto de vista didáctico 3era ed. Barcelona: Editorial Grao, 2000. p.25

<sup>16</sup> TREPAT, Cristófol. *Procedimientos en historia*.op.cti.p.23

<sup>17</sup> This implies a set of ordered actions that allow the solution of historical problems:

1. Formulation of the problem, an object of study located in the past.
  2. formulation of hypothesis
  3. observation and collection of data based on sources
  4. organisation, analysis and contrast of said data, which makes it possible to "revive" the past according to various points of view as well as the feelings of people of the period studied; locates facts in time putting them in order, uses historical concepts in explanations
  5. communication of results
- ibid loc. cit.

so as to obtain relevant information of historical nature<sup>18</sup> as one of the main procedures in the teaching-learning of History. In addition to this, working with sources provides evidence to support interpretations and statements made in historical studies.<sup>19</sup> Just as you cannot talk about a theorem without demonstrating it, we should not allow the presentation of historical facts without an adequate justification.

## CRITICAL THINKING AND SOURCES

The capacity of Critical Judgement coincides partly with the definition of Critical Thinking that we have considered for this investigation. That is to say: “... *the capacity to reason, judge and discriminate, discern and analyse information with the aim of performing an accurate evaluation*”.<sup>20</sup> If we apply this definition to exercises with sources, we could say that the final result would be that the student is able to evaluate sources, primary as well as secondary, use them and summarise their content to argue a position regarding an investigation problem. In order to achieve this, the student should previously:

- Distinguish primary and secondary sources.
- Evaluate their information possibilities according to their particularities, author and context
- Distinguish facts and opinions.
- Recognise misleading or incomplete arguments, characteristic of a social, national and political vision, including stereotypes.

## TYPES OF SOURCES USED IN INNOVA AND ESCENARIOS

The textbooks by both publishers present the thematic development<sup>21</sup>, and include graphics (photos of the time, paintings, maps, infographics, and present-day photos), figures, and a selection of written sources.<sup>22</sup> In this investigation, we will focus on written sources, primary as well as secondary.

<sup>18</sup> According to the Trepát's classification of procedures, procedures in History are specific (typical of the discipline), of cognitive (mental) and investigative (despite following the steps, they do not assure the achievement of the objective pursued) nature. TREPAT, Cristófol. *Procedimientos en Historia. Un punto de vista didáctico* 3era ed. Barcelona: Editorial Grao, 2000. p. 25 -p. 30

<sup>19</sup> For Hernández, procedures are important because: “... they should provide students with a method to face the critical analysis of various situations in time and space. The command of the method is as or more important than memorisation and acceptance, by act of faith, of long lists of completed concepts. (...) *they are disciplines in construction, they are not finished, and therefore they should not be offered in a closed way. Method and investigation allow a permanent redefinition of human development (...) consequently, the methodological or practical dimension is absolutely inalienable, unless you renounce beforehand to a critical discipline*”. HERNÁNDEZ, Xavier. *Didáctica de las ciencias sociales, geografía e historia*. Barcelona: GRA, 2002 p.52

<sup>20</sup> NARVAEZ, Miryam, Falú PADILLA y Manuel SOTOMAYOR. *Metodologías para el desarrollo del pensamiento crítico. Nuevas Tendencias y Metodologías Aplicadas a la Educación*. Congreso Nacional de Educadores 23, 24 y 25 de julio 2002 P. 2.

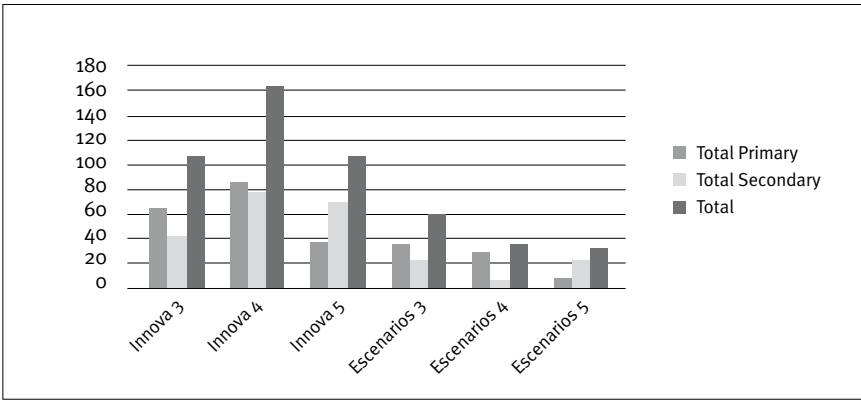
<sup>21</sup> They explain the processes, causes or consequences of specific events and a series of relevant data for the understanding of the subjects presented is given.

<sup>22</sup> In the case of *Innova*, most of this material is limited to odd pages such as documents which are required for some activity at the end of each even page. On the other hand, *Escenarios* presents this material in every page in relation to a sub-topic.

In the textbooks examined, none of the publishers includes a definition of sources and their categories, nor methodological guidelines to distinguish primary and secondary sources. Although Norma presents a unit called *Historic Understanding* in book 5, it does not include a definition or an explanation that may allow students to distinguish primary and secondary sources. Moreover, none of the activities proposed asks the students to identify the kind of source. Neither do they present a scheme to analyse and evaluate the informative possibilities of written sources within the construction of historical knowledge.

In Graph 1 you can compare the proportion between the primary and secondary sources quoted in the corresponding books.

GRAPH 1. PRIMARY AND SECONDARY SOURCES QUOTED

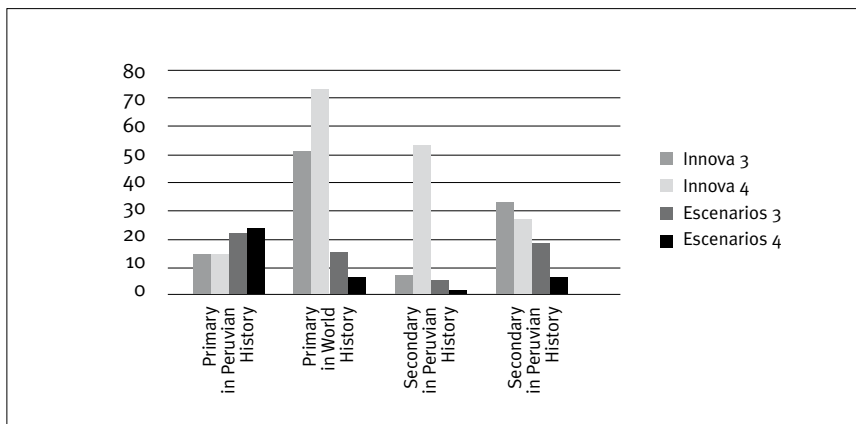


From this information, we observe that the Innova series textbooks by Editorial Santillana present a greater number of sources, both primary and secondary, most of which are brief quotes.

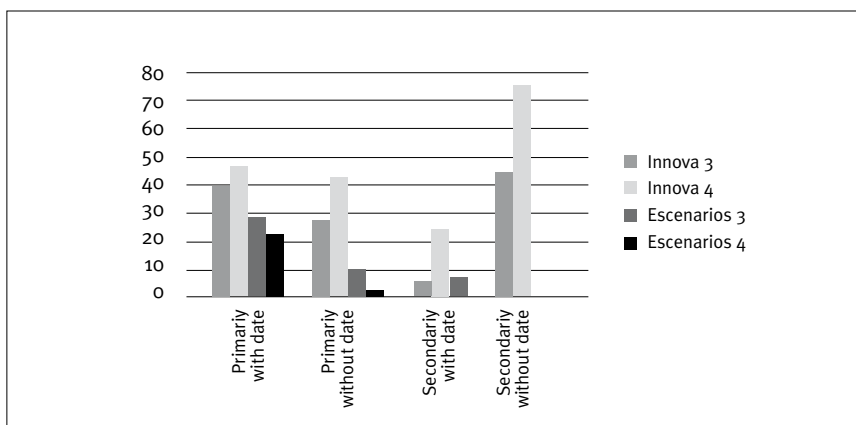
Likewise, when contrasting the quantity of primary and secondary sources in texts 3 and 4, (18th, 19th and 20th centuries) by both publishers, *Innova* includes a greater number of primary sources on Universal History topics, as shown in Graph 2. In the case of Santillana, this predominance of primary sources in universal topics as compared to national history, could be explained by two reasons. First, because there is a greater number of primary source data collection work published in the case of Universal History, which makes it easier to access these sources. Second, because publishers like Santillana share information from other texts published by themselves in other countries.

In the *Escenarios* series there is a predominance of primary sources in the History of Peru.

GRAPH 2: PRIMARY SOURCES ON UNIVERSAL HISTORY TOPICS AND ON HISTORY OF PERU TOPICS



GRAPH 3: SOURCES WITH A DATE



When working with sources, it is essential to indicate the years when they were written or published. Regarding dates, the year is not always recorded. On the one hand, Escenarios usually gives this information, but when this is not done it is either because they are primary sources taken from history handbooks, and they give the date when these were published instead, or because they refer to web pages.<sup>23</sup>

The date of production is important for every source. In the case of primary sources, they have to be located within their historic context in such a way that the author's outlook about the events narrated or mentioned may be understood. Likewise, if it is a historian, the publishing

<sup>23</sup> An example of a primary source where a secondary source is used as a bibliographic reference is the case of a text by Bartolomé Herrera. The quote is taken from a text originally published in "Escritos y Discursos", whose publication date is omitted. Instead, the year 2000 – which corresponds to the publishing of the book *Historia del Perú Contemporáneo* from which the text is taken – is included. In this case, the names of the historians who wrote the book are not mentioned. NORMA. *Escenarios. Ciencias Sociales para secundaria 3*. Lima: Norma, 2005. p.233



date may enlighten us about his historiographic inclination and even about the possibilities of access to the information that he had. If it were a historian investigating the subject of Russian communism after 1990, he or she would have access to a different material to the one that was known in the 1970's. Knowing the date always makes it easier to locate the source in its historic context.

¿What do school textbooks propose to do with written sources?

The kinds of activities related to sources which are presented in the textbooks examined have been summarised in graphs 4 to 11 in Appendix 2. From this, we can observe that there is a tendency to propose reading comprehension activities, specially about explicitly mentioned information. As to implicit information, working with primary sources is more common than working with secondary sources. Second in importance is "Reflexion", which implies thinking about the implications of past events and establishing relationships with the present.

In the case of *Escenarios*, apparently the analysis of sources is confused with understanding the information they contain. Thus, for example, at the beginning of every unit, they announce the mode of work. We observe that the terminology used to refer to activities with sources is confusing, as terms such as "primary" and "secondary sources" are used in one case, while in another, "historic sources" and even "text" are used to indicate the work with primary as well as secondary sources (see Chart 1). Likewise, we notice that what is announced at the beginning of the unit is not always fulfilled. For example, Unit 7: Society and everyday life 20th century in *Escenarios 4* points out that they will work "Analysing primary and secondary sources."<sup>24</sup> This unit presents only five primary sources and no secondary sources at all. In addition to this, activities are more of the reading comprehension and comparison-contrast kind than analytical (See Chart 2).

**CHART 1: METHODOLOGY OF WORK WITH SOURCES ANNOUNCED AT THE BEGINNING OF UNITS**

HOW WILL THEY WORK?	ESCENARIOS 4	ESCENARIOS 3
Analyse sources from the period	6	3
Analyse secondary sources	4	2
Analyse historic sources		2
Analyse and comment texts		1
Total units	6	6

<sup>24</sup> Norma *Escenarios. Ciencias Sociales para secundaria 4*. Lima: Norma, 2005. p.165

CHART 2: SOURCES AND ACTIVITIES PROPOSED

UNIT 7: SOCIETY AND EVERYDAY LIFE 20TH CENTURY IN ESCENARIOS 4	
PRIMARY SOURCES	ACTIVITY
Quotation from Acción newspaper (1934)	Reading comprehension
Salvador Dalí (1964)	Compare and contrast with another quotation by the same author
Salvador Dalí (without a date)	Compare and contrast with another quotation by the same author
Luis E. Valcárcel (1927)	Reading comprehension
Orwell (1949)	Reading comprehension, historical context in which the author writes, identification of the historical period related to the theme
Darío	Identify a characteristic of Modernism

The case which is closest to analysis is Orwell's, a literary source, but there are no methodological guidelines to allow its use from a historic perspective. There is really nothing of the analysis announced.

Let us have a look at *Unit 2: The world between wars* in *Innova 4*. In this case, there are twenty primary sources and one secondary source, just as we summarised in Chart 3. The activities proposed are mostly of the reading comprehension kind, either explicit or implicit information. There are only two cases where students have to analyse the author's point of view. Two other cases require a comparative chart and one requests the complementary use of sources to go into detail.

CHART 3: SOURCES AND ACTIVITIES PROPOSED

UNIT 2: THE WORLD BETWEEN WARS, INNOVA 4	
PRIMARY SOURCES	ACTIVITY
Speeches by Mussolini (1936)	Reading comprehension
Francois-Poncet: on the Munich Conference	Reading comprehension - relate to content
Radio speech by Pétain (1940)	Compare and contrast –Analyse– Analyse standpoints of an event
Radio speech by De Gaulle (1940)	Compare and contrast –Analyse– Analyse standpoints of an event
German soldier's diary	Reading comprehension - relate to content
Hiroito (1945)	No activity
Höss, concentration camp commander (1946)	Reading comprehension
UN Letter (1945)	Reading comprehension

Speech by Marshall (1947)	Comparative chart
Jdánov Report (1947)	Comparative chart
Speech by Churchill (1946)	Reading comprehension
Jdánov Report (1947)	Reading comprehension
Truman's Memories (without a date)	Reading comprehension
Balfour, Foreign Affairs Secretary, Great Britain (1917)	Importance of the document
Speech by David Ben Gurion (1948)	Reading comprehension
Mao	No activity
Speech by Churchill (1940)	Reading comprehension, reflexion on the impact of the speech
Goering (1945)	Reading comprehension, reflexion on the impact of the speech
Truman's Diary (1945)	Reading comprehension, complementary use of sources
Radio message from Truman (1945)	Reading comprehension, complementary use of sources
<b>SECONDARY</b>	
Fernández, Antonio (without a date)	Reading comprehension

There are two additional examples that may allow us to see the coincidences between both publishers in the treatment of sources. Norma quotes an article from *Diario Acción*, February 10th 1934, on the subject of Asian migration to Peru, and it questions:

- “According to this article, why is immigration bad for Peru?”
- What is the solution proposed for these problems?
- Why do you think this attitude toward Asians was adopted?<sup>25</sup>

In the first two questions there is an appeal to the reading comprehension, while the third one demands a reflexion which in many senses does not contain enough substance to be sustained. There is a similar case in *Innova* related to Marcelo Caetano's statements about Portuguese possessions and the decolonisation process of Africa. It asks directly: “... *explain the attitude adopted by Portugal towards decolonisation. What do you think about it?*”<sup>26</sup> Once again, the “procedure” consists of understanding the reading and giving an opinion that is not born of a reflexion under the methodology of historic investigation, but of empathy.

<sup>25</sup> *Norma Escenarios. Ciencias Sociales para secundaria 4*. Lima: Norma, 2005. p. 175

<sup>26</sup> “Portugal cannot give in, it cannot compromise in the war waged in foreign parts. We must be open to everything that can be done pacifically, in the manner of the natural evolution of our great African provinces. But we have to be unyielding as regards a retreat that would endanger us for many years, considering all that we have done and prepared over centuries, in Europe and the world, at the expense of innumerable efforts, of much suffering and blood shed from our veins”. SANTILLANA. *Ciencias Sociales 4. Serie Innova*. Lima: Santillana, 2007. p.77

In general, we can conclude that in both textbook series, sources are more used to evaluate comprehension of information than to analyse the informative potential of the source from the historic point of view.

On the other hand, regarding comparison and contrast, we have distinguished when this refers to the subject presented and when it refers to the point of view of the sources' authors. In this sense, the Innova series proposes more activities that deal with comparison and contrast at the level of primary sources' authors than *Escenarios*.

As regards the authors' point of view, the possibilities of reflexion are greater. This is the case of the activity about social problems in Peru and the solutions proposed by Víctor Raúl Haya de la Torre and José Carlos Mariátegui, which are presented in *Innova*.<sup>27</sup> We could also mention a similar proposal regarding José Carlos Mariátegui and Víctor Andrés Belaúnde's viewpoints of the indigenous problem, in *Escenarios*. In this particular case, the book explains who Mariátegui is, but this is not done with V.A. Belaúnde. Consequently, students approach these proposals without information about one of the authors, which limits the possibilities to analyse them.<sup>28</sup>

One of the cases which does present an activity that allows students to reflect upon opposite positions, is one with two fragments from newspaper articles about the 1962 elections, *Escenarios 4*. The texts are taken from *La Tribuna*, associated to APRA, and *El Comercio*, which was against APRA in those years. Students are asked to give the texts a title, to identify the historical context, the position that each newspaper represents and their arguments. They

<sup>27</sup> "1. *The international character of contemporary economy, which does not allow any country to evade the transformation trends born out of the current production conditions [ ... ].*  
*The international character of the revolutionary movement of the working class. The Socialist Party adapts its practice to the actual circumstances of the country, but obeys to a broader vision of class, and the national circumstances themselves are subordinated to the rhythm of world history [ ... ].*  
*Capitalism is in its imperialist stage. It is the capitalism of monopolies, of financial capital, of imperialist wars for the hoarding of markets and of raw material sources [ ... ].*  
*The pre-capitalist economy of republican Peru which, because of the absence of a vigorous middle class and the national and international conditions that have determined the slow progress of the country through capitalism, cannot free itself, under the bourgeois regime, feudalised by capitalist interests, in collusion with "bossist" (gamonalista) and clerical feudalism, of the defects and backwardness of colonial feudality [ ... ].*  
*Socialism can solve the problem of an effectively democratic and egalitarian education, by virtue of which each member of society receives all the instruction that his/her capacity gives him/her a right to get. [ ... ]".*  
 JOSÉ CARLOS MARIATEGUI, *Peruvian Socialist Party Programme (1928)*.  
*"APRA's international programme is made up of five general points, which will serve as base for the programmes of the national sections of each Latin American country.*  
*The five general points the following:*  
*Action against Yankee imperialism.*  
*For the political unity of Latin America.*  
*For the nationalisation of lands and factories.*  
*For the internationalisation of the Panama Canal.*  
*For the solidarity of every oppressed people and class in the world.*  
*[ ... ] APRA represents, consequently, a political organisation in war against Imperialism and Latin American governing classes, who are the assistants and accomplices of the former [ ... ].*  
*[ ... ] Within the capitalist system, and according to the dialectics of its historic process, Latin America will surely turn into a Yankee colony. The United States are now the economic owners of the world. [.] The nationalisation of land and factories, the organisation of our economy on the socialist basis of production is our only option. On the other side is the road to political and of brutal economic slavery".*  
 Víctor Raúl Haya de la Torre *¿What is APRA?(1926)*.

SANTILLANA. *Ciencias Sociales 4*. Serie Innova. Lima: Santillana, p. 117

<sup>28</sup> NORMA *Escenarios*. *Ciencias Sociales para secundaria 4* Lima: Norma, 2005.p. 131

are even asked to say which article they think is more persuasive. Although the students are not given guidelines to analyse the origin of the source, just as *La Tribuna* newspaper was in favour of APRA while *El Comercio* was opposed to that party, they are motivated to contrast and compare two different visions of a controversial election period.<sup>29</sup>

In general, it is seen that controversial topics are not used to their full to contrast and compare sources and opinions. These issues are more frequently used in terms of critical judgement in the attitudinal sense –what refers to “... *valuing and taking a stand based on ethical principles for the construction of a democratic culture*”<sup>30</sup>–, than from the point of view of the historic analysis of different views of a problem, regarding the actors as well as the historians who deal with it. For example, the issue of the hardship of child labour in the Industrial Revolution is approached from the value and attitudinal point of view, without confronting the various contemporary or historiographic perspectives of the subject.<sup>31</sup>

Investigation proves to be a more frequent activity in the *Norma* series than in the Santillana series. On the other hand, *Innova* presents more activities such as imagining you are a character or essay writing. In the case of essay writing activities, there are no methodological guidelines at all related to the inclusion of evidence from sources to support the proposal they support.

It is necessary to clarify that although *Innova* includes a greater number of sources, these are not always properly used, as in many cases there are no activities related to them. An example of this is a speech by A. Lincoln from 1859.<sup>32</sup> The source is only left as an expansion of the subject of various American political projects that led to the Civil War. It would have been interesting to go deeper into the time and context of the speech, the intention behind the words, Lincoln's role in the historic events, his point of view and the value of the source for the study of the American Civil War and its causes.

Another relevant aspect would be that *Innova* tends to present only one activity per source. Whereas *Norma* includes more activities per source, although they present less sources.

How could written sources be dealt with in order to develop Critical Thinking?

It would be worthwhile then, in view of the aforementioned, to ask oneself what analysing a source from the point of view of historic methodology implies. Analysing does not mean understanding information. Analysing implies identifying and breaking up the essential elements in the source, as regards content and informative potential. In this way, analysis is a step that is previous to the evaluation of source reliability, and finally to using the source

<sup>29</sup> NORMA Escenarios. Ciencias Sociales para secundaria 4 Lima: Norma, 2005. p. p. 215

<sup>30</sup> MINISTERIO DE EDUCACIÓN DEL PERÚ. Área de Ciencias Sociales. op.cit. p. 188 – p.189

<sup>31</sup> NORMA Escenarios. Ciencias Sociales para secundaria 3 Lima: Norma, 2005. p. 216

<sup>32</sup> “Una casa dividida y enfrentada no puede sobrevivir. No creo que esta nación pueda permanecer siempre dividida en estados libres y estados esclavistas. No quiero significar con ello que la Unión se deshaga, ni que la casa se derrumbe, sino que la nación deje de estar dividida. No hay más de dos posibilidades: o los adversarios de la esclavitud detienen su expansión futura, o los partidarios de ella imponen su reconocimiento legal para todos los estados, tanto en el norte como en el sur.” Discurso de A. Lincoln (1859). SANTILLANA. Ciencias Sociales 4. Serie Innova. Lima: Santillana, 2007. p. 91

itself as historic evidence. In this process, comparing and contrasting evidence prove to be fundamental.

Regarding primary sources, there is no evidence of activities where students have to identify whether they are memories, autobiographies, editorials, newspaper articles, speeches, stories, letter, etc. Neither do they consider the kind of information that each source could contribute to the investigation of a topic.

Likewise, most activities are not oriented to locating the fact accurately in its historic moment and there is no reflexion about who the author may be, with the exception of the case of the *Cuaderno de Queja de la Revolución Francesa* [French Revolution Complaint Notebook]. In this case, the role of the source's author in the historic process is emphasised, as well as the view of a problem that can be had. What is asked is the following: summarise the request, identify the social group who writes the report and the means which have allowed to identify it, and finally, relate its content to three aspects of the old regime present in the text.<sup>33</sup>

Furthermore, considerations about the origin of the source should favour a reflexion regarding the author: whether he or she was a witness, had a political standpoint, what his or her social role was, his or her perception of the event, or simply if he or she had any interest in exaggerating, manipulating or lying about the situation he or she refers to. Moreover, neither of the series include additional information about the authors which may facilitate the students' analysis of the material's informative potential.

Analysing sources also implies identifying if what is conveyed is an opinion, a story or a reflexion. Without the methodology of source analysis, the need to identify the purpose of the source should be emphasised, that is, what for and why something is said. When the intention of a source is clear, there are more chances of understanding its value and limits, as well as the different visions they convey of the same subject.

The students require ordered steps in the texts in order to locate the source in time and space and understand the authors' intention, to finally evaluate its reliability in relation to its origin and purpose. From this analysis, the informative potential can be determined and, in the case of an investigation, the search for complementary sources to complete the "image" of the past is proposed.

Under no circumstances is working with sources reduced to only one source. Basically, this is about working with multiple sources. According to Shanahan, there are two different ways of reading that apply to History: one is when you look for a specific piece of information and the other one is when we want to understand a period or a problem going over several texts. In this last case critical thinking is activated, as we face opinions that must be compared and contrasted, and then evaluated to conclude what we think. That is to say that the skills of analysing, summarising and evaluating come in.<sup>34</sup> As Hernández points out:

<sup>33</sup> NORMA Cuaderno de Trabajo. Escenarios Ciencias Sociales para secundaria 3 Lima: Norma, 2005. p.28

<sup>34</sup> SHAHAN, Cynthia. Using multiple texts to teach content. North Central Regional Educational Laboratory. Learning Point. Naperville, 2003 p.2

*“Contrasting points of views from sources and documents teaches us how to reason and formulate our own judgement and position. The student has to check that points of view may be different and must always act critically when faced with information”.*<sup>35</sup>

In our revision, we found only one case in which a topic is dealt with using more than two sources: *Visions about Imperialism*. Two testimonies from colonists are presented, as well as a quotation from an article in *The Times* (1877), the vision of the colonised, represented by Rabindranah Tagore (1916) and a pamphlet from a secret society published in Guangzhou (1856). In this case, students have to identify the arguments and the criticism from the colonised; then a question is proposed: whether they consider that dialogue is possible between the colonists and the colonised.<sup>36</sup> Actually the sources themselves, whose quotations could have been enlarged, and the great variety of sources available on the topic, would have allowed students to write an essay supported on evidence as well as considering some historiographic approach.

### **HISTORIOGRAPHY, A WASTED OPPORTUNITY**

The advantage of working with opposite versions and with historiography lies in the fact that students are the ones who decide which historian interprets the facts studied in a better way. This decisions evidently starts from a reflexion based on a set of sources and not from the mere repetition of a theory expressed in the textbook. This exercise is undoubtedly an activity that stimulates Critical Thinking.<sup>37</sup>

Historiography may seem to be too much for young students, but the comparison of proposals by different authors is not considered an ability that is not adequate for the students' age. They would be able to: identify opposite and convergent positions about the same historical event and evaluate secondary sources.<sup>38</sup>

What happens with historiography in the texts examined? It is broached, in a way, in the practice and incipiently when the factors of independence are dealt with, since the positions of two historians are presented; students have to compare and finally investigate other factors of independence.<sup>39</sup>

*Escenarios 5* deals with the different historiographic schools such as Positivism, the Annales, the Marxist approach, and trends towards economic, social and mentalities history. Nevertheless, there is no analysis scheme to help the student understand how historiographic debate is essential to historic investigation. Although the topic is not developed, there is an

<sup>35</sup> HERNÁNDEZ, Xavier. *Didáctica de las ciencias sociales, geografía e historia*. Barcelona: GRA, 2002 p. 163-164

<sup>36</sup> SANTILLANA. *Ciencias Sociales 3. Serie I Innova*. Lima: Santillana, p. 95

<sup>37</sup> *“Presented with conflicting historical interpretations, students can critically analyze and evaluate the passages they read, attempting to determine for themselves which interpretation better reflects the facts”*. GREEN, Robert *Reconstruction Historiography: A Source of Teaching Ideas*. *The Social Studies*, July/August 1991, pp. 153-157. [http://www.alaskool.org/resources/teaching/socialstudies/Reconstruct\\_historiography.htm](http://www.alaskool.org/resources/teaching/socialstudies/Reconstruct_historiography.htm)

<sup>38</sup> HERNÁNDEZ, CARDONA, C. TREPAT y CARBONELL *Procedimientos en Historia*. *Historia Agenda*. <http://www.cch.unam.mx/historiagenda/2/contenido/sea2.htm>

<sup>39</sup> NORMA. *Escenarios. Ciencias Sociales para secundaria 3*. Lima: Norma, 2005. p. 127.

exercise as part of Unit 13: *Historic Understanding, in the Escenarios 5 Activity Book*. This is a historiographic comparison exercise which is the only one proposed in those terms in both series. Students have to analyse the opinions of three prominent Peruvian historians: F. Pease about what is proposed jointly by M. Burga and A. Flores Galindo. Following both quotations, the student is asked to identify the difference of opinion between both tendencies, and to investigate the authors' biography so that this may help understand their position regarding the topic at issue. Finally the student must comment "... *how the historical context, personal history and ideologies influence historians' interpretations*".<sup>40</sup>

This proposal of contrasting secondary sources and understanding how the author –in this case a historian– brings with him or her an experience which determines the analysis perspective and how they broach a topic, is fundamental in History teaching. It is a pity that it is only scarcely used.

It should be brought to attention that the beginning of a historic investigation starts from the reading of secondary sources, texts and articles by other historians. This allows us to know what has been said up to the moment and what has been investigated.

Secondary sources are also assessed and analysed, since it is necessary to revise the body of primary sources or the evidence that supports the investigation, the argumentation, the position and informative potential of the historian. Therefore, if we want History teaching to bring the student near the scientific methods used by historians, the approximation to historiography and its evaluation is of utmost importance.

## CONCLUSIONS

As we have seen throughout this presentation, school History needs to part with excessive memorisation and turn into a reflexive and stimulating discipline that allows Critical Thinking to develop, among other skills. In order to do this, the use of primary and secondary sources is fundamental, as the evidence that holds up the argumentation is in them. Consequently, from this point of view, the teaching-learning process of History implies a practical knowledge applied to sources.

Source analysis compels students to distinguish between primary and secondary sources, to evaluate the informative potential, understand the need to use several sources and value the arguments brandished.

Textbooks from Innova and Escenarios series tend to use written historic sources to develop reading comprehension more than to analyse, evaluate and use them from the historic point of view. These textbooks could incorporate the "how to" which is proper of the historic discipline as a model to work with different sources.

<sup>40</sup> NORMA. Cuadernos de Trabajo. Escenarios. Ciencias Sociales para secundaria 5. Lima: Norma, 2005. p. 40



We believe that textbooks are an essential didactic material, which not only compiles multiple sources, these also have to be well-chosen. Textbooks must establish a source analysis and evaluation methodology which, when used periodically, strengthens the teaching-learning process and the development of the abilities proposed for the area.

We maintain that the constant practice of analysis and contrast will make it easier for students to work out their own solutions and answers to different issues in the teaching-learning process of History. Thus, “making students think historically” is really achieved. This involves practising critical judgement, just as different studies about the subject have shown. But there is another advantage in making students think historically: it shows them that there is a diversity of visions regarding human and social events, not only in the past, but in the present and even in their everyday life.

## **APPENDIX 1**

### **Description of Innova series Textbooks by Editorial Santillana and Escenarios series Textbooks by Editorial Norma**

First, it is important to distinguish the content of each book in the History of Peru in the World Context section. Both publishers present a similar chronological framework in texts 3 and 4. In the case of books 3, they deal mainly with the 18th and 19th centuries. *Escenarios* covers from the Enlightenment until Imperialism at world level and the stage called National Reconstruction which came after the Pacific War. On the other hand, *Innova* includes a chapter which reviews the absolutism of the 17th century and the peculiarities of the viceroy structure in those years, closing with the consequences of the Pacific War without going into the National Reconstruction period. Books 4 centre on the 20th century. *Escenarios* begins its units directly in 1900, just as *Innova* does in the case of Universal History. Nevertheless, when dealing with national history, the latter takes up the end of the 19th century again, the Reconstruction period which had been left aside in number 3.

An important difference is noticeable in the case of book 5, as publishers opt for proposals which are more open and different. The *Innova* series by Santillana proposes a text which in the area of History is based on different topics per unit that are analysed from remote times, such as prehispanic cultures in some cases, until the present. The treatment not only considers Peru, but some Latin American cases as well. So we find topics such as: Gender and society in Latin America, From Governments by One Strong Leader (*Caudillismo*) to Democracy, Religion in Latin America, or Revolutions and Social Movements, among others.

On the other hand, *Escenarios* presents a more open thematic, since it includes themes from Philosophy. In what would be considered History, it includes a unit on Historic Understanding, which deals with theoretic problems such as historic time, approaches to History, recurrence, change and continuity, the human being as a social being, and the historian before the historic phenomenon. Other units from the aforementioned text are: The technological Heritage of

Pre-hispanic Peru, Mixing of Races (*mestizaje*), Migration and Culture in Peru, and Why the Democratic Way? where they deal with the issue of totalitarianism, governments by one strong leader (*caudillismo*) and militarism, among others. Nevertheless, it must be said that in other chapters, History is drawn upon to explain problems from different points of view, such as geopolitics or economy.

The *Innova* series by Santillana proposes “Learning based on problem solving” as a method. For this reason, every unit begins formulating a problem or challenge in a couple of opening pages. This is contextualised in terms of space through a map, in terms of time using a timeline and in terms of society making a brief reference to the characteristics of the time when it happened. Likewise, they present three alternatives to solve the problem, and they include a point that aims at giving meaning to the topic for the student, relating it to current themes, taking them from the global to the local and from the social to the personal, mainly through questions which invite to reflexion. The units include a set of Final Activities in which the skills of the area are practised, a Past and Present section where different themes are debated, another on Patrimony which focuses on cultural and natural patrimony problems in Peru, and finally a Values and Citizenship section centred on attitudes.

*Escenarios* by Editorial Norma begins its units with an opening which seeks to draw attention to the topic with large photos and interesting quotations on the topics they are going to deal with. They include three key questions: What will you do?, where they present in a way the expected achievements relating them to the conceptual concepts to be worked on; How?, which explains the capacities or procedures which will be applied in the unit as part of the teaching-learning process; and What for?, which contains the attitudes that they intend to develop.

The formulation of A Problem Situation follows, proposing an imaginary case related to the topics of the unit that the students have to discuss in groups in order to come up with alternative solutions. Another page is included which presents a concept map that locates the contents of the units in the historic scene. Then, this continues with the sub-units which are actually the topics themselves. They begin with an opening of the specific topic that is always accompanied by analysis questions. The thematic development goes together with a Workshop, which includes activities that aim to consolidate the specific skills of the area. Almost at the end of the unit there is a Values and Integration Activities section, which aims to evaluate achievements. Some units include a sub-heading called Regional View, which expands the topic as a problem more related to the location of the student, proposing the development of some kind of investigation, which is usually about oral history. There is also a Thematic Appendix that goes deeper into certain topics, such as art. Norma presents an Activity Book that complements the textbook as well.

In the case of *Innova* the thematic development is organised in double page spreads –an even page and an odd page– each of which deals with a very specific topic. The even page develops the topic and the odd page includes information and material organised as Documents. On

the other hand, Norma arranges the information into sub-topics; there is one per page, with a title in the upper section that functions as an idea organiser.

Regarding the skills of the area established by MINEDU, the *Innova* series states them explicitly in the presentation of every textbook.<sup>41</sup> On the other hand, the *Escenarios* series specifies these abilities in the presentation of every textbook as part of the Workshop<sup>42</sup>, in the activities that complement the development of each unit and in the Activity Book that is organised starting from the basic area skills mentioned (Comprehension – Dealing with Information, Critical Judgement and Space-Time Orientation).

In the *Innova* series textbooks, it is stated that critical thinking<sup>43</sup> will be developed through the units, specially in four occasions when its presence is made explicit:

- The **Past and Present** section presents issues for debating, “... *starting from controversies, alternative approaches or points of view. Important aspects of the past are related to current social phenomena. It allows the comprehension of social events through the study of long lasting processes*”.<sup>44</sup>
- The **Patrimony** section deals with cultural patrimony cases and states that “*It seeks the appreciation of the historic-cultural legacy of human societies and of the natural wealth that the geographic environment offers. It promotes an attitude of commitment with the defence of the cultural and natural*”.<sup>45</sup>
- The Values and Citizenship section reinforces what could be considered attitudinal contents under other theoretical schemes. “*It promotes the identification of the student with human and citizenship values that prevailed in different times and places. It encourages the development of a critical citizenship culture, responsible, autonomous and open-minded*”.<sup>46</sup>
- Finally as part of the **Final Activities** which always include a section titled Critical Judgement, it is stated that: “*Final activities that favour the development of specific abilities: understand, interpret, argue, transfer. Application of critical analysis strategies that promote adopting a position and the ability to judge. Self-evaluation questions which aim to achieve metacognition*”.<sup>47</sup>

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<sup>41</sup> SANTILLANA. Ciencias Sociales 3. Serie Innova. Lima: Santillana, 2007. p.3-p.5

SANTILLANA. Ciencias Sociales 4. Serie Innova. Lima: Santillana, 2007. p.3-p.5

SANTILLANA. Ciencias Sociales 5. Serie Innova. Lima: Santillana, 2007. p.3-p.5

<sup>42</sup> “*Of a set of activities that will allow to strengthen the learning of capacities and skills from the area: comprehension, dealing with information, space-time orientation and critical judgement*”.

NORMA. Escenarios. Ciencias Sociales para secundaria 2. Lima: Norma, 2005. p.3

NORMA. Escenarios. Ciencias Sociales para secundaria 4. Lima: Norma, 2005. p.3

NORMA. Escenarios. Ciencias Sociales para secundaria 5. Lima: Norma, 2005. p.3

<sup>43</sup> “*This capacity favours the training of citizens who understand, evaluate and participate in the transformation of their reality formulating proposals and taking concrete actions for the solution of problems. It implies defending a point of view through a critical and carefully considered argumentation*”. SANTILLANA. Ciencias Sociales 3. Serie Innova. Lima: Santillana, 2007. p.5 (valid for all the textbooks from the series)

<sup>44</sup> Ibid. loc. cit.

<sup>45</sup> Ibid. loc. cit.

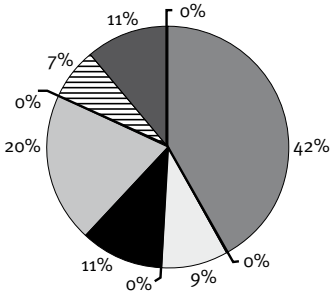
<sup>46</sup> Ibid. loc. cit.

<sup>47</sup> Ibid. loc. cit.

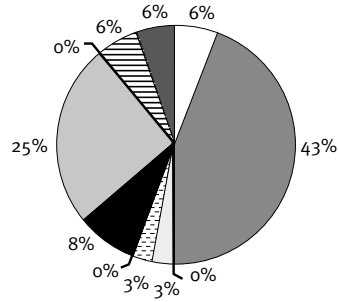
**APPENDIX 2**

Activities with Sources proposed in Innova and Escenarios

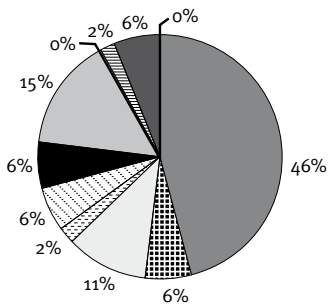
**GRAPH 4. ESCENARIOS 3:  
ACTIVITIES WITH PRIMARY SOURCES**



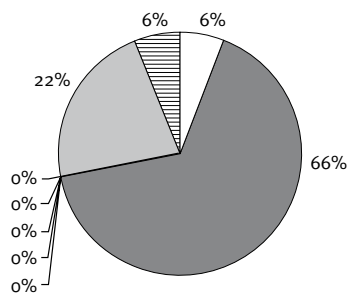
**GRAPH 5. ESCENARIOS 3:  
ACTIVITIES WITH SECONDARY SOURCES**



**GRAPH 6. ESCENARIOS 4:  
ACTIVITIES WITH PRIMARY SOURCES**

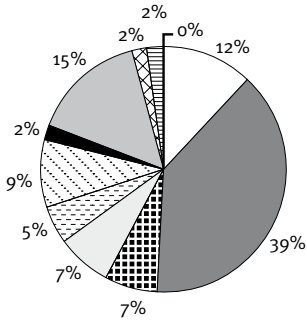


**GRAPH 7. ESCENARIOS 4:  
ACTIVITIES WITH SECONDARY SOURCES**

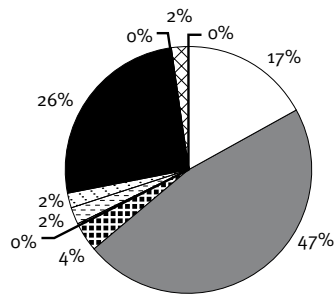


- Without Activity
- Reading comprehension: explicit information identification
- Relate with content
- Reading comprehension: implicit information identification
- Compare and contrast a topic
- Compare and contrast authors' point of view
- Identify author's opinion
- Reflection
- Imagine a situation
- Investigate
- Unit opening

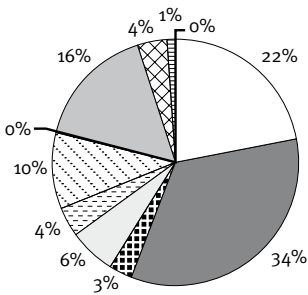
**GRAPH 8. INNOVA 3:  
ACTIVITIES WITH PRIMARY SOURCES**



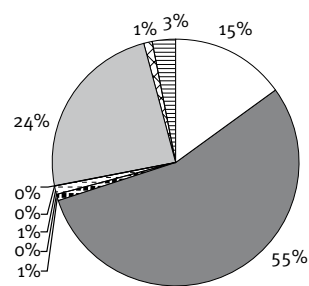
**GRAPH 9. INNOVA 3:  
ACTIVITIES WITH SECONDARY SOURCES**



**GRAPH 10. INNOVA 4:  
ACTIVITIES WITH PRIMARY SOURCES**



**GRAPH 11. INNOVA 4:  
ACTIVITIES WITH SECONDARY SOURCES**



- Without Activity
- Reading comprehension: explicit information identification
- Relate with content
- Reading comprehension: implicit information identification
- Compare and contrast a topic
- Compare and contrast authors' point of view
- Identify author's opinion
- Reflection
- Imagine a situation
- Investigate
- Unit opening

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# Textbooks: their use in history teaching

LILIANA ISABEL BRAVO PEMJEAN

## INTRODUCTION

Since the presentation of the sector in the current Chilean Curricular Framework, a gap has been made explicit from a conception of historical and social knowledge understood as objective, universal and valid, and of a transmissive type of teaching where students' learning is done by means of retaining and memorising information. When stating that the history and social science sector *“has the purpose of developing in students knowledge, skills and aptitudes that will allow them to structure an understanding of the social environment and will guide them for acting critically and responsibly in society (...) and that (...) it seeks that students perceive that history and social sciences do not constitute a distant knowledge that is dissociated from the world; but on the contrary, these disciplines offer them a set of conceptual approximations and relevant skills that can help them understand their lives, discern between their options and trace plans for the future, as well as helping them understand their social context and the contemporary world, reflect on the course of events and feel motivated to actively participate in various levels in solving problems of society”*<sup>1</sup>; there is evidence of a disciplinary orientation where subjects' perception of reality is a variable that can explain and interpret the world.

From this confirmation, teachers' and students' roles in the teaching-learning process acquire a new meaning. Teachers are no longer expected to describe, recount or explain past or present social reality like something that is completed and finished, but to design and implement proposals considering knowledge of reality as a possibility of an interpretation based on valid arguments and thus integrate the historical and social experience of their students in the construction of an understanding of reality. Students are expected to (re)define their social

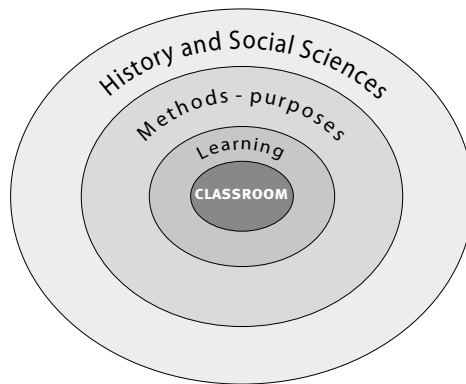
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<sup>1</sup> MINEDUC, Curricular Framework pp. 95-96.

and historical experiences from the procedures and categories of social analysis learned and debated in history and social science lessons. Regarding the teaching-learning process, didactic discourses should emphasise the complexity of social knowledge.

### **DIDACTIC DISCOURSES**

Behind every class proposal there is an implicit or explicit didactic discourse that founds it. It is a discourse built from the ideas we have about history and social sciences, about the ways in which scientific knowledge is built and the ways in which subjects incorporate what they have learned into the analysis of past and present social reality, and it guides our practices.



A didactic discourse is the conscious or unconscious statement of our ideas and of the dialogue between the scientific discourse that supports the teaching of history and social sciences, from where we consider in the classroom the objectives of such teaching and the ways in which we expect our students to learn. While ideas about scientific knowledge and its objectives change, didactic discourses in use become tense. For example, if the conception of historical and social knowledge is understood from an objective, universal and valid disciplinary discourse, a didactic discourse whose emphasis is description, a single explanation seems pertinent and at the same time coherent with a transmissive form of teaching. However, this discourse and teaching form does not seem pertinent nor coherent with an idea of historical and social knowledge that introduces the possibility of an existence of more or various “valid” interpretations of historical and social processes, and it abandons the search for objectivity and universality of disciplinary knowledge. In this case, an explanatory/argumentative discourse would be more appropriate, accounting for the current rationality of social disciplines.

A teacher may not be conscious of the didactic discourse from which he/she designs action in the classroom, but that does not make the implementation casual, because it responds to a way of understanding historical and social knowledge and its value in the educational field. In short, selecting a content and not another, choosing a methodology and rejecting others, designing strategies and activities according to certain teaching criteria and applying certain evaluation instruments are decisions that account for a didactic discourse. A lack



of consciousness about the didactic discourse in use that guides practice in the classroom can explain changes in approaches or perspectives in history and social science teaching, not only at a classroom level, but mainly at an institutional level. It is not surprising that in one educational institution, history and social science teaching may be developed from very different didactic perspectives, hindering students' understanding of the construction logics of this reality explanation and analysis field, and therefore hindering the achievement of objectives linked to the development of critical and reflective thinking.

### **DIDACTIC DISCOURSES IN THE CLASSROOM**

If the classroom is the place of realisation of didactics, then it is also the place where the discourse that a teacher implements when teaching history and social sciences becomes evident. It is only in the classroom where the coherence between the declared didactic discourse in the design of a proposal and the didactic discourse in use can be evaluated. It is in the encounter between the teacher's teaching proposal and students' disposition and cognitive, emotional and social progression regarding their own learning, where the pertinence of the teacher's decisions is evaluated, with respect to what is taught and learnt, how and what for.

If, as stated by Pilar Benejam<sup>2</sup>, *the teaching of social sciences and humanities intends to bring students closer to scientific knowledge*, it is necessary to investigate the type of historical and social knowledge that is promoted in the classroom, and to analyse whether there is room in the classroom for what is discussed and produced from history and social sciences. If the study of history and social sciences has transformed its discourses and objectives, then changes should also occur in the ways of teaching and learning history and social sciences at school. According to this author, *“when scientific discourse and its objectives change, the teaching of social sciences is also modified; in each case, didactics aims to develop the abilities that are considered most relevant for students to build a rigorous interpretation of the world and of society.”*

Therefore, it is worth asking the question of what is happening in Chilean classrooms and from which didactic resources history and social sciences is being taught and learnt. This question is equally valid for the resources used for teaching and learning history and social sciences, specially for school textbooks, because, as stated by Borries, Bodo von; Körber, Andreas and Meyer-Hamme, Johannes (2006) in an investigation about this support material, they are the basic teaching resource in this learning sector.<sup>3</sup>

<sup>2</sup> Benejam, Pilar (coordinator) “Psicopedagogía de les ciències socials y de les humanitats”. Universitat Oberta de Catalunya. Edició experimental.

<sup>3</sup> Borries, Bodo von; Körber, Andreas and Meyer-Hamme, Johannes (collaborators) “Uso reflexivo de los manuales escolares de Historia: resultados de una encuesta realizada a docentes, alumnos y universitarios” in *Enseñanza de las Ciencias Sociales. Revista de Investigación N° 5, March 2006*. ICE Universidad Autónoma de Barcelona, ICE Universidad de Barcelona. Pp. 3-19.

## DIDACTIC DISCOURSES IN SCHOOL TEXTBOOKS

While history teaching was anchored in a positivistic view of knowledge, the discussion of what a textbook should include and transmit was mainly focused on the coherence and pertinence of official historical and didactic discourses. In this sense, a text was pertinent if it transmitted knowledge of societies of other times from the “objectivity” of the facts and the chronological sequence of the narrated events.

Today and since quite a long time, the situation is more complex, because when the scientific discourse of history and social sciences is transformed from a single analysis perspective whose educational purpose is the acquisition of knowledge into an interpretation perspective whose purpose is understanding, argument and critical reflection of social reality, the demands and references for evaluating the pertinence of historical and didactic discourses in textbooks are no longer unique and unequivocal.

In this new scenario, where the relativity of knowledge is acknowledged, as well as the value of a subjective perception of reality and the possibility of becoming closer to the past and the present from different perspectives, there is no single discourse from which we can create a checklist for analysing the pertinence of didactic discourses in textbooks. This produces tension at all levels; otherwise, we would not be gathered here today to talk about school textbooks.

By way of example, I will present some of the tensions that I believe are relevant in a context of study and analysis of value of school textbooks.

- First tension: The production and edition of a textbook. “Reading” and (re)defining the past and present from an acceptance of what some social science investigators call multi-interpretation is undoubtedly a challenge for the authors and publishing houses that produce and edit textbooks that will support teaching. Despite the fact that in our context, as well as in most school systems, topics and objectives of history and social science teaching are predefined in a regulatory framework, the decision of how to materialise what this framework states that students in our country should learn means making decisions about contents, procedures, activities and resources. The tension is then focused on the definition or acknowledgement of the didactic discourse which is not always explicit and on which the conceptual and procedural proposal of the textbook is produced.
- Second tension: The selection of the textbook by the school and the teacher. Deciding which textbook is the most appropriate for history and social science teaching is not always linked to a disciplinary project defined by specialists who teach in each school. The selection usually responds to economic or market criteria more than to academic criteria.
- Third tension: The use of the textbook in the classroom. The idea of a textbook as a support resource for teaching contradicts what actually happens. As stated by Paula

González,<sup>4</sup> textbooks are the teaching resource that are most used by teachers and students, acting as “*true mediators of the curriculum*”. From my experience in teacher training, I have proved that teachers usually know more about the content of the textbook than of the curriculum and the programmes proposed by the Ministry. This is not surprising, since the familiarisation with the text is a result of its regular use; what really is worrying is that the teacher accepts what the text says or suggests as what “should” be said and done.

Each of these tensions shows the need to have a critical evaluation system for textbooks in each of the decision levels involved: production, selection and use.

### PROPOSAL FOR THE ANALYSIS OF SCHOOL TEXTBOOKS

The methodological proposal for the analysis of explicit and implicit didactic resources of textbooks has been designed based on the construction of matrices<sup>5</sup> intended to focus on three key aspects for determining the pertinence of a textbook’s didactic orientation: disciplinary approach, conceptual framework and methodological framework. From the ways of realisation of these three dimensions, it is possible to determine the pertinence of this support resource regarding narrative and methodological languages that are raised today from history and social sciences.

Disciplinary approach: every textbook should define its style (narrative, explanatory or argumentative) and design activities according to a conception of knowledge on which it intends to develop learning. This approach is not always explicit; therefore, the following analysis matrix for the disciplinary approach of textbooks is proposed.

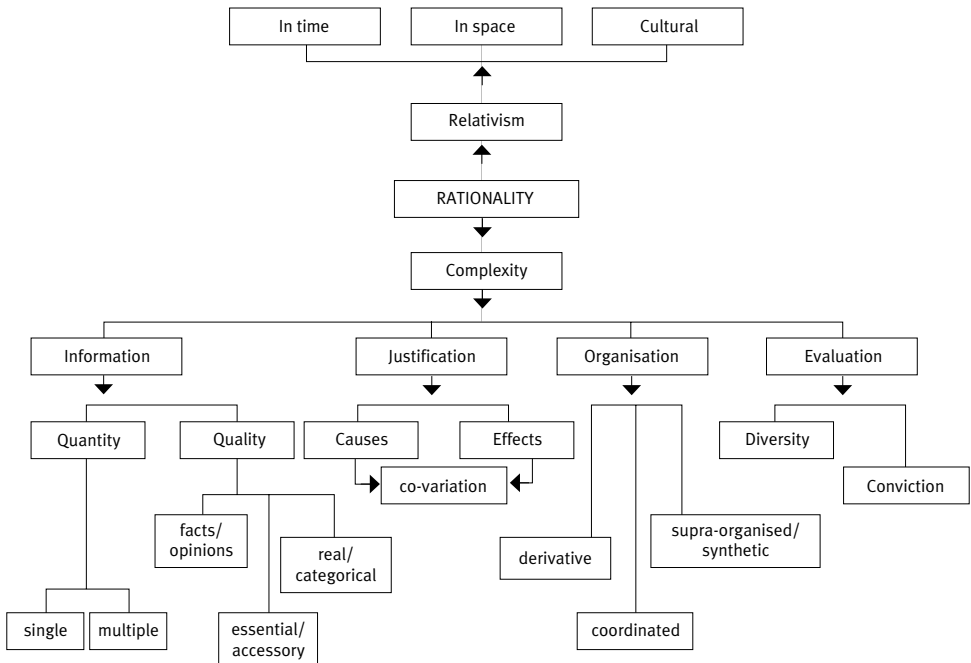
DIMENSION	VARIABLE	INDICATORS
Conception of historical knowledge	Disciplinary approach	The text explicitly states the disciplinary approach from which the proposed narrations and activities are developed
	Interpretability of historical and social reality	The text’s narrations and activities account for different interpretations of historical and social reality
		The text includes material that allows a contextualisation of the different interpretations selected for the treatment of the different topics
		The activities allow students to describe the understanding of the society of the past and present as an interpretable reality

<sup>4</sup> González, Paula “Conciencia histórica y enseñanza de la historia: una mirada desde los libros de texto” in *Enseñanza de las Ciencias Sociales. Revista de Investigación N° 5, March 2006*. ICE Universidad Autónoma de Barcelona, ICE Universidad de Barcelona. Pp. 21 -30.

<sup>5</sup> The following analysis matrices for textbooks have been designed considering the structure of those presented by Paula González in the aforementioned article. The matrices presented by this investigator have been designed to evaluate the usefulness of textbooks for stimulating a) historical perception, b) historical interpretation and c) historical orientation in the context of an investigation about the development of historical conscience.

- Conceptual framework of historical and social knowledge. The evaluation of the internal coherence of a didactic resource is defined by the relationships of pertinence between the disciplinary approach, the nature of the contents and the teaching suggestions of the proposed learning strategies and activities.

The referential theoretical framework from which the matrix is created for evaluating the nature of the contents is defined based on the analysis developed and summarised by Joan Pagès<sup>6</sup> in the following diagram.



Pagès states that one of the first requirements for the implementation of new ways of understanding the teaching and learning of history and social sciences and of the development of social thinking is the analysis of social contents. According to this author, the current rationality of social contents is defined by a double confirmation: relativism and complexity of knowledge. Social knowledge is relative when each historical process that describes a specific social reality is only understandable when analysed from its context. In Pagès' words, social knowledge *must be contextualised in time, in space and in the heart of a culture from which it emerges and on which it is built* (p. 158) in order to analyse it and understand it. In turn, the complexity of social knowledge is explained by the diversity of ways of presentation, conceptualisation and interpretation of historical and social information.

<sup>6</sup> Pagès, Joan (1997) "La formación del pensamiento social" in *Enseñar y aprender ciencias sociales, geografía e historia en la educación secundaria*. Editorial Horsori, Barcelona. Pp. 151-168.

If we apply this author's analysis as reference for the evaluation of the complexity of contents addressed in textbooks, we should first try to establish in the textbooks the presence or absence of key information for contextualising that reality temporarily, spatially and culturally. We should then analyse the presentation and analysis of social knowledge in textbooks, considering the available information in terms of quantity (single or multiple) and quality (facts/ opinions, essential/ accessory or real and categorical), the justification of social processes in terms of causal or multi-causal analysis<sup>7</sup>, the organisation of knowledge based on its internal relationships and finally the assessment of social knowledge from the conviction or acceptance of the diversity of perceptions. Following this logic, the matrix for content analysis could be presented as follows:

<b>DIMENSION</b>	<b>VARIABLE</b>	<b>INDICATORS</b>
Relativism of historical-social knowledge	Temporal contextualisation	The text considers information and/or activities that allow a temporal contextualisation of the proposed historical-social process
		The text includes information and/or activities that allow a temporal contextualisation of historical processes and social reality, considering temporal categories different than chronology (change and permanence, succession, parallelism)
		The text includes information and/or activities that allow a temporal contextualisation of historical processes and social reality, considering different levels of temporality (long – medium – short time)
	Spatial contextualisation	The text considers information and/or activities that allow a spatial contextualisation of the proposed historical-social process
		The text includes information and/or activities that allow a spatial contextualisation of historical processes and social reality, considering spatial categories different than localisation (conceptualisation, orientation, representation)
		The text includes information and/or activities that allow a description of the effects of spatial contextualisation of historical processes and social reality, based on identifiable spatial analysis categories (place, region, territory, environment)

<sup>7</sup> At this point, it is decided to incorporate the notion of multicausality, since both at a content and at an objective level it is recurrent in our curricular framework.

DIMENSION	VARIABLE	INDICATORS
	Cultural contextualisation	The text considers information and/or activities that allow a cultural contextualisation of the proposed historical-social process
		The text includes information and/or activities that allow a cultural contextualisation of historical processes and social reality, considering different dimensions of cultural construction (economic, social, political)
		The text includes information and/or activities that allow a description of the cultural contextualisation in the analysis of historical processes and social reality
Complexity of historical-social knowledge	Presentation of information	The text includes different types of information (facts, opinions) for analysing and understanding the complexity of historical processes
		The information presented in the text is essential for understanding the complexity of historical-social processes
	Justification of historical-social processes	The justification of historical-social processes considers multicausality as analysis category
	Organisation of historical-social processes	The organisation of information promotes an interrelation of social variables in the content analysis
	Assessment of historical-social knowledge	The text and/or activities value the diversity of views of historical and social knowledge

Methodological approach. This dimension describes how to teach history and social sciences and refers to pedagogical conceptions about history and social science teaching and learning and therefore to the ways of bringing disciplinary construction languages and procedures closer to students.

DIMENSION	VARIABLE	INDICATORS
Knowledge building strategies	Posing of problems	The text presents questions that serve as guiding theme in the treatment of the different units
		The text includes activities that allow students to pose problems/questions about the social reality of the past and/or present
	Work with information sources	The text includes different types of sources for the treatment of the different units
		The text's activities develop the ability to search for historical and social information about a specific topic or problem
		The text's activities develop the ability to select and establish a hierarchy of historical and social information about a specific topic or problem
		The text's activities develop the ability to analyse historical and social information about a specific topic or problem
	Knowledge analysis and communication strategies	Interpretation of historical and social information
The text's activities develop the ability to interpret historical and social information		
Expression of justified opinions about the social reality of the past and present		The text proposes activities that allow the defence of interpretations about historical-social topics
		The text proposes activities that allow the defence of own opinions giving reasons, examples and evidences in favour of the defended idea

## DIDACTIC PERSPECTIVES

The matrix proposal presented for the analysis of implicit and explicit didactic discourses that guide the production of textbooks is a proposal that results from an acknowledgment of the importance of this material in the history and social science teaching-learning process and the importance of the development of the class in many schools in our country. The choice of designing them from a perspective of historical and social knowledge conceptions described by the designed narrations, materials and activities is based on the disciplinary specificity of didactics. Didactics is built from the ways of construction of historical and social knowledge and from the debates regarding their meanings and perspectives. Therefore, the decision has been to analyse the text from the first problem that needs to be solved when designing a class proposal: what history and what social sciences to teach. Once this has been solved, we can focus on the analysis of the pertinence of strategies and activities from a more instructional approach.

The result of the application of this type of matrices only makes sense if their use is understood, as well as the process of understanding social reality, from the relativism and complexity of their approaches. Relativism, because the determination of dimensions depends on what each teacher expects and demands in a textbook. Consequently, the dimensions presented here may not be appropriate for an analysis posed from another conception of history and social sciences or from another type of needs. Complexity, because it has the primary requirement of updating the dialogue between the discipline and its teaching.

Finally, this proposal seeks to inform about how a particular textbook can contribute to the development of history and social science teaching from a critical approach of social reality. On the one hand, knowing about the discursive and procedural limitations of a text can help seeing this resource as one more type of support material, as a didactic component that supports the achievement of our students' learning and not as the source of which what is taught and learnt depends. On the other, as professional imperative, it should be the basis for the design and implementation of strategies and activities that guarantee an analysis of reality that is consistent with the relativism and complexity of social knowledge.



# Geography textbooks in the learning context

HELENA COPETTI CALLAI

**T**he present text starts from the belief that textbooks are a possibility for democratising the access to knowledge and that as such, they are powerful tools for the construction of citizenship. Thus, it presents an analysis of certain issues regarding Geographic Education in a book selected among those that are most widely used in primary education.

We begin our analysis based on the debate of what is understood by Geographic Education and what its function is in the geography of primary education. We then pose the challenge of making geographic education at school. We also try to understand challenges from a textbook that was selected to analyse the meaning of textbook in the teaching-learning process. These problems are presented considering the following: the didactic sequence, the concept of Place and the study of school Geography, the concept of Place as a unit's structuring element in a textbook and the types of content.

These problems are analysed based on studies from didactic investigations and geography teaching investigations, which have resorted to scientific investigation in order to discover the current state of teaching-learning of Geography and the way in which curricular knowledge of the subject is treated at school.

Finally, in the closing considerations we present possible observations in terms of finding possibilities for creating textbooks that drive the development of Geography learning and that consider the importance of Didactics in teaching.

## **GEOGRAPHIC EDUCATION IN PRIMARY SCHOOLS**

I believe that Geographic Education is now presented as a possibility of making the teaching of a curricular subject significant, always present in primary education. In that sense, the importance of teaching geography must be given by the possibility of discussing life issues through the content of the subject. In order to go beyond mere teaching, Geographic Education

believes it is important to get to know the world in order to transform it according to the needs of society in general, looking to overcome the various ways of exclusion.

The geographical analysis through the confirmation of how society's actions are materialised in space leads us to discuss our reality. Through their life in society, people produce their own history, which in turn is materialised in space. We thus understand that space is also constructed in our daily lives.

The *geographical analysis* allows us to observe, analyse and understand that space which is built as a physical foundation of society, but at the same time, as an active subject in the setting of limits and possibilities for the realisation of social life. In order to carry out a geographical analysis, we need to develop a *spatial reasoning*, through which students can learn to think and create the conditions to build their knowledge. That knowledge results from the processes of contact with information and the mental organisation of data and information that are delivered to students.

In textbooks we find various available data, so the challenge is to translate them into information and build the basis for the construction of knowledge. In this sense, it is essential to problematise and contextualise the content that will be addressed.

School Geography works with the teaching of a product, and one way to present it is by means of a textbook, which is based on the one hand, on the academic production of Geography (that deals with solving problems posed by humanity through investigation). On the other, it is based on countless data that are not necessarily scientific, but which have various origins such as almanacs, literary works, news, newspapers and magazines, among others.

Textbooks are presented to students as being complete, so teachers must raise questions that will allow them to acknowledge the instability and bettering of knowledge. When questioning, it is possible to pave the way for unveiling what is new, going beyond what is already settled. Is it possible for a textbook to be open for its contents to be problematised and contextualised?

The activities presented in a textbook can be the strategies to account for those questions that are fundamental in the process of building of knowledge. It is important to question whether a textbook presents a didactic sequence or if teachers must do that. The didactic sequence aims to create a meaningful learning that allows students to build an autonomous thinking, being the creators of their own learning, able to articulate different contents in the search for an understanding of the reality in which they live. When analysing textbooks, it is possible to prove whether or not they present the possibility of making a didactic sequence. Another important matter is discovering if textbooks allow teachers to carry out the didactic strategy of making the sequences that open the way for the building of knowledge.

For teachers it is interesting to follow a didactic sequence in geography teaching-learning so that they can be in control of the teaching process. For students, it can be the way that will allow them to learn more and better. It depends on what the didactic sequence is. We thus

question whether we can discover the sequence adopted in a textbook through its texts and activities.

## CHALLENGES

### 1. The didactic sequence

We can consider that an interesting didactic sequence is that which objectifies a meaningful learning and which articulates various contents and strategies for that effect.

I will now present an attempt to define the didactic sequence based on one chapter of a textbook selected for analysis.

**Title of the chapter:** Social Movements and Citizenship

**1. Social Movements in the country:** a) epigraph by D. Helder Câmara; b) text; c) Now it's your turn. **2. Social Movements in the country in Brazil:** a) text with engraving and three maps: – Remaining Communities from Quilombos – Situation of Indigenous Lands in Brazil – 2003; Occupation of Lands in Brazil – 1988-1998; one text; How a MST camp works. **3. Social Movements in the City:** a) text subdivided in: labour movement in Brazil; urban social movements; the new social movements. It presents three photographs but with no comments and without showing interconnections with the text; b) Box with brief explanatory texts; c) Now it's your turn; d) connections; e) Now it's your turn.

The epigraph under the title shows the political line presented by the text that begins with a commentary of that line and presents social movements as an organisation form of society, with examples from the past in Europe and then in Brazil. It is a lot of information presented in a very simplified way and as if it were the only possible interpretation of the phenomenon and not a version of it. It then presents examples from the 20th century in the world. In the “Now it's your turn” section, the text requests a summary of a short text by a French writer. It is the old, traditional activity of reading and summarising that characterises geography activities at school, still present in the 21st century.

The text and engravings in section 2 are related to what is being presented; however, that relationship is only an indication of figures throughout the text. There is no reflection or analysis of what is presented, which would enrich the text and make students establish the connections and thus become more interested in the subject. The text inside the box has no comments.

The text in item 3 presents information about the topics discussed in each sub-item. The “Now it's your turn” section includes information about unemployment and asks students to highlight its causes. At the end, it requests strategies to solve the problem. It invites students to think about the issue and gives them the right to be creative. Again, in the same chapter, the “Now it's your turn” section asks students to write a text based on a cartoon and defines

the expressions that should be used. The “Point of view” section presents a short text and requests a summary.

The proposed didactic sequence can be analysed based on the following observations:

The treated issues are related to the main topic, but the texts are mostly informative and the exercises are simple and demand no reflection or articulated thinking to solve problems. There are no interrelations among the various propositions in terms of highlighting the articulating concept proposed at the beginning of the unit. There is no interrelation that articulates information in terms of a deeper reflection of the treated topics.

Continuing with this analysis, we can investigate whether it is possible to find the following aspects in the presented texts, because I believe they are essential for the learning of geography: 1- the book challenges students to become involved in an autonomous learning; 2- students’ previous knowledge is considered; 3- the book seeks to generate interest and motivation; 4- there is problematisation and contextualisation.

The following extract, taken from the teacher’s guide, suggests:

“The objective to prepare students for *autonomy* for the countless situations imposed by social life. That preparation involves the problematisation and deepening of the fundamental contents of Geography, as the creation of opportunities for students to develop their ability to evaluate issues based on their own values, manipulating information methodically and dynamically, with a prospective vision.” And it continues with an explanation of the activities: “*Cartography lesson* proposes the interpretation or creation of engravings that stimulate students’ imagination and complements the senses of the written text; *Connections* proposes an analysis of the topics in an integrated and interdisciplinary way and learning about the languages that represent geographic topics, widening their perception and relating them with daily life. *Now it’s your turn* involves making decisions, when possible, in real-life situations. *Point of view* presents texts with different positions regarding the studied issue. Students are asked to confront the learnt contents with the ideas of various authors. *Complementary exercises* aim to test knowledge.” (Teacher’s guide, page 5)

We see that the intention is most advanced compared to the debates that take place today in Geography teaching. The suggestion made to teachers indicates the authors’ objectives when making the book and the suggested activities for each topic. However, when comparing the presented texts with the proposed activities, we notice that there is sometimes a disarticulation between the suggestion in the teacher’s guide and the development in the context of the student’s book.

Regarding the *question of autonomy*, it appears in the suggested activities when stating that students should present their own opinions in relation to the texts.

With respect to *students' previous knowledge*, the text includes music and literature from the past and relates them with the present – the engravings and photographs are modern and so are the magazine texts. This gives students the chance to link the topics to be studied with other aspects of daily life. However, the texts are mostly informative and present one version of the facts and phenomena, and they do not state so clearly. So there is an idea that this is the only way to address the phenomenon. If there were a call to interrelate it with issues that students know about either by themselves or by the mass media and that were current, a connection could be established with their own knowledge and work with it in the sense of making it more scientific. In a chapter that deals with “Youth culture and conflict”, the propositions deal directly with students' lives, either by asking them to write about a typical day in their lives, showing they are “plugged” to the world, or by asking them to interview someone who is more than 50 years old in order to compare their musical tastes and types of music. However, the possibility for that interrelation is more present in the topics that are more linked to students' lives. Moreover, there is no effort to interrelate problems of economics, politics or international relations. Is it more difficult? The activities are limited to looking for answers in the texts. There is no challenge of working with the *scale of analysis*, which would allow an articulation of students' previous knowledge, based on the problems faced by their families and communities regarding the issue.

An exercise proposed in page 286 could be the ideal moment for interrelating students' knowledge with what is being presented, yet the activities are reduced to five questions whose answers can be found in the texts, i.e. they are activities for reading and answering in order to know what is more important. Later on in the page there is an example of that possibility: a text about communism as a ghost that hangs around Europe and a request for students to check whether in their communities they can find an example of it.

Regarding the *generation of interest*, I believe that the texts can stimulate students' interest because they deal with issues that are very present in today's world. However, what is presented in the texts could be better interrelated. One possibility for motivation could be to clarify that any text will always be a version of a certain fact of phenomenon, and then a discussion and problematisation can be established. Thus, the generated tension can drive the search for satisfactory explanations. But that is not clearly stated; on the contrary, there is no such problematisation in the texts. In that sense, we can consider that if the concept of Place were treated as an articulator of the chapter and the search for interpretations of the phenomena considering the scale of analysis, students could become more involved with knowledge and more interested in going forward.

With respect to *motivation, problematisation* and *contextualisation*, we can see that there is lack of motivation for students in the texts that could make them see that what the text presents are problems that they have in their lives and in the places where they live. The books show concrete problems but which are alien to students' lives. They are informative and unchallenging. The information is not problematised, neither in the texts, in the use of other languages, nor in the proposed activities. If a problematisation were presented, it

would lead the way for contextualisation, which is necessary for justifying or criticising the issue, because the facts that occur in the world are “situated and dated”, and arguments are necessary in order to explain them.

## 2. The concept of Place and the study of school Geography

In order to analyse the didactic issue in textbooks, I shall take this work (which is part of a wider study that involves various concepts) as starting point for a concept that I believe is critical in the study of school geography. It is the concept of *Place* that interests us because it expresses the possibility of understanding the world.

Before going forward with that proposition, it is interesting to see how that concept is treated in geography, and for that purpose I base my analysis on Cavalcanti (1998: p. 89-90), who presents a systematisation of the concept. She states that:

in the humanistic expectation, space becomes familiar for the individual. It is the space of what is lived, what is experienced (Cavalcanti, p. 89) in the historical-dialectical conception, which can be considered in the context of the globalisation process... The understanding of globalisation requires an analysis of the distinctive features of the places that remain, but which cannot be understood by themselves (Cavalcanti, p. 90) In the point of view of postmodern thinking we find the notion of entirety as an explanation of place. The place will not be explained in terms of its relation with entirety, because everything would disappear and give place to fragments, to the micro, to the individual empiric. (Loose translation)

Working in the perspective of “studying the place in order to understand the world” (Callai, 2008: p. 84), I understand that the concept of place is important for the study of geography. In order to study the place, it is critical to reflect upon the meaning of space in people’s lives and in society in general. I believe that space is constructed and it is the result of all the life that exists therein, whether it be life resulting solely from nature or life resulting from the organisation and distribution forms of people and the relationships they have with nature. It is the appropriate territory that shows, by means of signs, the history of the lives that once existed and still exist. Thus, as an appropriate territory, it is the result but it also generates needs, demands definitions, imposes limits and presents possibilities. Space acquires/ incorporates a power that is political and which can give the outlines for human action. It is even possible to talk about the power of space (Callai: 1986). Therefore, everyone is responsible for the construction of space; everyone can leave a mark.

That is why it is important to think about the place where we live. Understanding the place based on that concept of space, we can discover the capacities originated from endogenous principles and the participation of the various social actors in the life-building processes, producing a space while they make their history. The knowledge of the place’s potentials and the possibilities of action from people who live there are fundamental conditions for making a place something that interests those who live there.

Acknowledging the fact that there are potentials in the place and that people have capacities that many times go beyond what is expected of them and even allowed to them is already a step toward the search for the construction of a place that is supportive to the life of everyone who lives there. Above all, it is important to understand what is happening, either in the place or in the world. That search necessarily generates a learning process that is meaningful for each individual life and for the life of society in general. Thus, not only should schools comply with the required curricular contents, but they should also create activities that transform subjects who are able to know in order to change. Most importantly, they must find the ways to change, because we are living in a world that needs to be known and understood not for the place itself, but in the group in which each place is contextualised. In the words of Milton Santos:

Para ter eficácia, o processo de aprendizagem deve, em primeiro lugar, partir da consciência da época em que vivemos. Isto significa saber que o mundo é e como ele se define e funciona, de modo a reconhecer o lugar de cada país no conjunto do planeta e o de cada pessoa no conjunto da sociedade humana. É desse modo que se podem formar cidadão conscientes, capazes de atuar no presente e de ajudar a construir o futuro. (Santos, 1994: p. 121)

Based on that understanding, the challenge is for each individual to be the protagonist in the construction of their space, their history and their society. This role of authors of their own lives is an alternative for facing the process of globalisation that is imposed upon every place across the world. The ability to perceive what the place is like, what its connection with the world is and what the possibilities are of dealing with external pressure is critical for making choices and defining the ways of organisation and planning of inferences in development.

What the place is and what the “strength of the place” is (Santos, 1996) can be the challenge for teachers and students of all levels to become involved in the investigation, knowledge and understanding of the place. It is in the place where the real dimension of the universal can be obtained, because it is the place that we know, where we live, that we can feel and where we can experience all that affects us.

### **3. The concept of Place as structuring element in a textbook unit**

In the sense of what has already been stated, it is interesting to discover how textbooks address the concept of Place. The analysed book presents a structure that is divided in Units that cover chapters. These have as indicators: the *structuring concept*, the *conceptual contents* and the *attitudinal contents*. The structuring concept “is the most general idea that organises the unit.” In the analysis of a unit in the selected text, this structuring concept is the Place; however, it does not appear as a structuring element throughout the textbook. The concept is not present anywhere, neither by means of a definition nor in the explanation of how it structures the unit. There is no reference to the concept in the activities, and only very seldom do situations appear where it is considered. For example, in page 270 it says: “Finally, depending on the place where you live, you have more or less access to school and

health posts, and your social prestige is higher or lower in the scale of current values.” At other times, there is reference to places, but the meaning of the concept is not specified and it is not considered as a category of analysis that would allow working with the scale of analysis, even discussing issues presented by the text, such as globalisation. Considering the interpretation of the concept of place as meaningful, according to what has been stated, we would have expected the structuring concept of the unit to have been addressed in its two dimensions: as space that supports a particular society and as category of analysis. However, it does not appear in either of those two dimensions, which leads us to believe that as structuring concept there is nothing explicit in the analysed textbook.

#### 4. Types of content

Another aspect to be considered is the type of contents in the textbook.

In page 4 of the Teacher’s Guide, Unit V is presented, which is subject to the deepest analysis because it discusses the chosen concept - Place, and because it is presented as the structuring concept in the book.

UNIT V – GEOGRAPHY AND SOCIAL CHANGE

CHAPTERS	STRUCTURING CONCEPT *	CONCEPTUAL CONTENTS **	ATTITUDINAL CONTENTS ***
27. Geography of the excluded 28. Health and public policies 29. Social movements and citizenship 30. Geography of crime 31. Youth culture and conflict 32. Brazil and 21st century challenges	Place	State of social wellbeing. Social exclusion. Public policies. Human development. Public health. Urban politics. Social movement. Land reform. Urban tribes.	Political positions with respect to differences and others’ opinions. Appreciation of artistic expressions. Disposition to manage, interpret and produce information.

\* most general idea that organises the unit.

\*\* nuclear ideas that allow a dynamic understanding (relational and gradual) of geographical facts.

\*\*\* contents that involve knowledge and beliefs (ethical values), feelings and preferences (attitudes) and actions and declarations (norms or rules of conduct).

Considering that a classification of contents can be made according to their characteristics, in factual, procedural, attitudinal and conceptual, I will define each one and then analyse their presence in the textbook.

Factual contents (not explicit in the textbook): contents that deal with particular facts and address concrete phenomena. They are data that, when available, can have various uses. For example, students can memorise the data and when repeating them, create associations that can assist them in the “protection of data”, especially to account for the realisation of learning.



I believe that they are basically the contents presented by the textbook. They inform about phenomena, facts or topics. They are lists of topics with information gathered from various sources and written by the author according to his/her understanding.

Procedural contents (not explicit in the textbook): creating the ability to know how to “do”. This allows students to adopt appropriate procedures in order to take on particular tasks. It means that they have learned how to do and know how to do. When being presented with information, students know how to work, how to articulate and confront ideas, how to reorganise their learning and their knowledge, raising them to a higher level of complexity. Learning these procedural contents requires teachers’ mediation, because there will always be a debate, a conflict between the various ways of seeing the issue. This can happen in the context of group work, in concrete observations of reality and in the interaction with the text. When working with maps, graphs, tables and field work – observations and interviews with spatial orientations, students’ ability to work with various sources can be assessed, and they can have the instruments to make the particular analysis.

In a teaching that promotes autonomy, that type of content is basic and non-transferable. The text assumes that this can be done, but it does not present challenges or propositions to account for that task. It is the teacher’s job to do the mediation – coordinating actions so that students can advance. However, in the Teacher’s Guide there is no suggestion for this type of pedagogical positioning.

**Attitudinal contents:** those that deal with values, attitudes and behaviour. They are strongly based on the relationship between the various groups and individuals at school and they thus cover emotional aspects.

According to the book, they are the “*contents that involve knowledge and beliefs (ethical values), feelings and preferences (attitudes) and actions and declarations (norms or rules of social coexistence)*”.

Those concepts appear in the analysed material only very vaguely. There is no discussion of the chosen concepts; they are simply treated in the text as information or as activities. They are not considered explicitly.

**Conceptual contents:** those that students can reproduce and repeat, as well as use as an instrument to interpret and go forward in their understanding of the reality in which they live or simply the subject matter that is being studied. The idea of concept building assumes that their complexity is increasingly higher as the learning process progresses. It implies being able to problematise and contextualise what is being studied, contextualising the topic in a wider scope.

This type of “conceptual content” is not indicated in the book or in the teacher’s guide. If it were contemplated, it could be made explicit in the book, making the learning process more consistent.

## FINAL CONSIDERATIONS

The concept of Place, considered to be the structuring element, is not even discussed, and it could represent the possibility of being interrelated with students' lives. It appears as articulating concept in the Teacher's Guide, but it is not a formal articulator in the texts, nor is it discussed as a concept. What is interesting is that the concept is present in the teaching suggestions, but it is not considered in the orientations for activities.

It sometimes appears vaguely in the activities, interrelating some issues. There is no articulation, nor is there a specification throughout the text to consider it as a structuring concept or in the treatment of information, and even less in the proposed activities.

If the conceptual contents were considered in the planning, there could be progress in the learning process, because they would structure the complexity process by transforming information into knowledge.

All teaching activities require mediation from teachers. It is the paving of paths where students can walk; they are the challenges presented to them. Thus, any textbook can be applied in the classroom, given it is not the essential element for the teaching-learning process.

In the book there is no suggestion for treating procedural or conceptual contents. They could make the difference, making the propositions more explicit and considering the channels necessary for articulating contents, in the sense of triggering problematisation and contextualisation. These two procedures are critical for making knowledge evolve and transform, and for making knowledge be considered in its dimensions of space and temporality. Data are momentary and quickly replaced by others, given the speed of information in today's world.

Textbooks can and should be considered as a tool for teachers. Consideration must be given to their use, and teachers must conduct their activity by means of pedagogical mediations. Didactics considers the use of textbooks as auxiliaries of the process, but with the theoretical references that support school Geography. That is how Geographic Education can be made.

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# Critical historiographic method: a textbook learning strategy in the classroom

**SOCIAL AND EDUCATIONAL STUDIES LA CHIMBA**

## **WHAT CAN WE CONTRIBUTE TO THE TEXTBOOK DISCUSSION?**

**T**he purpose of this article is to systematise the learning obtained along almost a decade of authorial production and textbook publications for the subject matter of Social Science. As a result of this work and the possibility to generate a discussion between pedagogical theory and practice – a dynamic which is possible due to the complementarity of our professional insertions, from school to university classrooms, – as well as the investigation and integration of other approaches to the pedagogical work, as social intervention instances, we have been able to consolidate a reflexive work team which is summoned around the potentialities of the textbook and the teaching of History and Social Sciences in general.

As in all historical reflection, the historiographic position that supports our texts is the result of the team members' education, experiences and convictions: the education received in the universities where we studied; the influence of teachers that educated us; the tendencies in contemporary historiography; the socio-political conditions in which our experience as students and teachers have developed; our ideological convictions and, evidently, the time in which we wrote our texts, a society in an adaptation process between the new political and socio-cultural conditions that the emergent democracy brought with it and the trauma of remembering the wounds caused by recent history.

It is with this, epochally situated, interdisciplinary work experience as its basis that it has been possible for us to construct a transposition proposal of the historiographic method to the classroom, and express that work in a didactical strategy that is possible to apply and repeat in different learning contexts.

## WHAT THEORETICAL POSITIONS GUIDE THE ELABORATION OF TEXTBOOKS WITH A CRITICAL HISTORIOGRAPHIC METHOD?

The elaboration of Social Science textbooks in the contemporary world has as a challenge the incorporation to school knowledge of the advances made by academy investigations and new teaching methods, which set up what the new generation of citizens know about history. In this section we will try to describe the positions that, in both dimensions, have guided our production as textbook authors.

### 1. Historiographic position

Our vision of history can be identified with the European and American 20th Century historiographic and methodological contributions, which take distance from positivist historiography, adopting the name of new history. In this perspective, the notion of politics as the essential object in history is left behind in order to ascribe to the idea of a “total history” proclaimed by the *Annales*’ historians, which includes the diversity of life dimensions in society’s interrelation: culture, economy and politics. This vision is present in our texts in the interest for economic and social processes, and for the history of mentalities and ideas, as well as that of great collective actors.

New history is dedicated to the analysis of structures, it emphasises the processes and not the events—which are no more than the expression of the first,— and, from that point of view, it rescues Braudel’s historic temporal categories to turn them into structuring concepts of historical analysis and explanation.

Thus, the proposal we have been constructing for textbooks gives importance to the diversity of historical individuals beyond men who have achieved great feats, incorporating the genre perspective, ethnohistory, individuals that were not socially visible during the last decades and who now have a leading role in social history investigations; “the history of common people,” as stated by Eric Hobsbawm (1998).

From this point of view, the use of diverse primary sources, which overcome the restrictive vision of the “document” or chronicle—understood as an official written source coming from governments and preserved in archives— should didactically articulate textbooks. As long as historians have been interested in a greater diversity of social activities and individuals, they have had to expand the category of investigation sources, and with it, turn to the consultation of methods and theories from other social sciences, widening the possibilities of investigation infinitely. One of the objectives of the textbook is, thence, to show the diversity of sources from which information can be obtained, validate them as such and, in this way, legitimise this form of knowledge more than making academic investigation known to the school world.

According to the traditional paradigm, history is objective. The historian’s task is to offer facts to the reader just as they really happened, as Ranke said. However, this historical vision considers the reconstruction of the past as a linear and finished process. Then, why should it be necessary to go back to the primary sources and look at the past again from different

perspectives? In coherence with the visions of new historiography and the didactical model that we implemented, historical knowledge is considered a process that is highly influenced by the historian's subjectivity and whose purpose is not to tell the past, but to explain it. To reopen history is, then, the challenge that is tried to be achieved with a critical historiography proposal in the classroom.

We are heirs to the *new social history* that since the end of the 70's and in precarious conditions –often of secrecy– started to renew national historiography with thematic and methodological innovations which guided its investigatory work towards unions, juvenile groups and demographic entities. This experience served as a basis for an interesting development of local histories and participatory investigations that would have a relevant methodological impact during the 90's (Pinto, 2006).

The new social history incorporated the study of historical individuals that had been ignored until then by local historiography, such as the urban and rural labour force, craftsmen from Santiago and Valparaíso, the urban popular movement, ethnohistory, or the Pampean workers<sup>1</sup>. This process frequently received important influences from other social disciplines like sociology and anthropology. All these historians have been widely consulted in the elaboration of our History of Chile textbooks.

## 2. Didactic position

The textbooks that we have produced are based on a history didactics that takes historians' methods and strategies into the classroom to turn them into history teaching and learning mechanisms. The introduction of the historical method, the development of inquiry and interpretation abilities as articulating axes of the didactic activities, is based on the idea that, when facing students with different evidences from the past, historical empathy is stimulated, something which allows students to understand the construction of historical knowledge. All of this is within a perspective which conveys a group of ordering and explanatory concepts

<sup>1</sup> Some examples are: Sergio Grez, *De la "regeneración del pueblo" a la huelga general. Génesis y evolución histórica del movimiento popular en Chile (1810-1890)*, Santiago, DIBAM, 1997; Maximiliano Salinas, *Historia del pueblo de Dios en Chile*, Santiago, 1987; Mario Garcés, *Crisis social y motines populares en el 1900*, Santiago, Documentas, 1991; Jorge Pinto and others, *Misioneros en la Araucanía, 1600-1900*, Temuco, Ediciones Universidad de la Frontera, 1988; Julio Pinto, *Expansión minera y desarrollo industrial: un caso de crecimiento asociado*, Chile, 1850-1914, (co-author, Luis Ortega), Santiago, USACH, 1990; Julio Pinto, *Trabajos y rebeldías en la pampa salitrera*, Santiago, USACH, 1998; Luis Alberto Romero, *¿Qué hacer con los pobres? Elite y sectores populares en Santiago de Chile, 1840-1895, 1997* Buenos Aires (Sudamericana); Ediciones SUR also published *Para una historia de los pobres de la ciudad*, de Vicente Espinoza, 1988; and the works of José Bengoa *Historia del pueblo mapuche (1985)*, and *El poder y la subordinación (1988)*, first volume from his *Historia social de la agricultura chilena*, of which the second volume appeared in the 90's; During the 80's the Iquique Regional Studies Workshop published the *Camanchaca* magazine, an important tribune for the diffusion of historical, sociological and anthropological studies in relation to the north of Chile. Sergio Gonzalez's work *Hombres y mujeres de la pampa*, edited in Iquique by the same Workshop in 1991, and which would have a deserved influence over later studies about saltpeter history, also dates from those years; The most important publications in this initial stage of María Angélica Illanes' career were her article "Disciplinamiento de la mano de obra en una formación social en transición, 1840-1850", *Nueva Historia* Nº 12, London, 1984; republished in an extended and much more read version by the name of "Azote, salario y ley. Disciplinamiento de la mano de obra en la minería de Atacama (1817-1850)", *Proposiciones* Nº 19, Santiago, SUR, 1990; and the books *La revolución solidaria*, Santiago, 1990; and *La dominación silenciosa. Productores y prestamistas en la minería de Atacama. Chile 1830-1860*, Santiago, Universidad Blas Cañas, 1992; coming to an end, the influential work by Gabriel Salazar, *Labradores, peones y proletarios* Ediciones SUR, 1985.

from the discipline, such as causality, continuity / change, conflict or diversity, which make the historical processes intelligible.

In this vision, procedures become vertebral contents in texts, just as the use and processing of history sources become the articulating axis in their didactic proposal. This includes the most elementary steps in the procedure, which begins with the identification and classification of sources, then continues with the characterisation of the type of information they give, and finally ends with the contrast of sources of diverse nature and the criticism made about them.

In this way, the need to learn to turn information into knowledge starting from primary sources and the understanding of secondary sources is fulfilled. This promotes the acquisition of superior cognitive abilities that develop creative thinking and intellectual autonomy by making them relate the semantic part of the discipline with its syntax and by presenting them with the challenge of learning to construct historical knowledge.

The teaching of History needs to be supported by a diversity of methods, where discovery, oral and written communication, direct observation and investigation have their place. They are all processes in which the guidance of the teacher is still important. The marked presence of documentary sources and problematising questions in the text collaborates, precisely, with the implementation of these aspects, supporting the teacher's work in the challenge of developing student's capacities of historic reasoning social reality analysis. For this reason, in this perspective, one of the most relevant educational dimensions in the teaching of Social Science is that the student can be progressively more aware of his/her own value system, is able to reflect critically on what he/she thinks and wants, and may visualise possible alternatives.

This proposal corresponds to what we understand as a critical conception of History and Social Science, "to which it seems insufficient to know what things are like, how they are distributed in space, how they occurred through time or why they are like that; there is also a proposal to discover the intention of facts and suggest possible alternatives, which implies accepting the conflict and bringing about the argumentation between diverse options" (Benejam and Pagès, 1997). Once this conception is assumed, it seems evident that our proposal is oriented towards the development of an inquisitive attitude towards Social Science contents, which would prevent us from accepting the mythical and demagogical explanations of history and social reality.

Thence, we think it is appropriate to explicitly state that we understand the teaching of History as a constituent of historical memory. It is this memory which makes it possible to understand the present and to develop perspectives of the future, starting from the representations of the shared past. From the ethical component that accepting the interaction between present and past implies, in school history this means teaching students and future citizens to think historically with the aim of recovering memory and enabling the understanding of the historical dimension of problems in the present time.

## HOW IS THE HISTORIOGRAPHIC METHOD PROPOSED IN OUR TEXTBOOKS APPLIED IN THE CLASSROOM?

*I hear and I forget*

*I see and I remember*

*I do and I understand*

*Confucius, 4th century B.C.*

The use of the textbook in the classroom may be analysed from different dimensions. A preliminary and basic consideration is that the text, considered as an autonomous unit, has a restricted or limited utility for students, who do not necessarily know its potentialities or the theoretical / methodological structure which supports it to achieve the construction of learning. It is most probable that the closeness they may have with textbooks mainly depends on the attractiveness of the graphics presented. In addition to this, students have not consolidated their reading habits; it is most probable that their greatest approximation will be a superficial glance through the text, going through its pages in a random way, in a fragmentary reading, typical of the Internet world (Pedró, 2006, quoted by García Huidobro, 2008); or they will turn to the text as support material to study and prepare for an evaluation with a mark.

The *Study on the use of textbooks in primary and secondary education (Estudio sobre uso de Textos Escolares en el Primer y Segundo Ciclo Básico)* developed by MINEDUC (Ministerio de Educación de Chile; in English, Ministry of Education of Chile) between 2002 and 2003, presents some results that point to that direction. It is stated that the textbook constitutes support for teaching and for students' work at all levels and in all subsectors, fundamentally to do homework and to work with the contents in class. Among those students who used the textbook for personal purposes, 93% used it at home. On the other hand, teachers use concepts and definitions as well as *illustrations* in textbooks in the specific area of Social Science (Comprensión de la Sociedad).

In this sense, the potentiality of a textbook and the exploitation of all of its richness will depend, mostly on the interrelationship produced between teachers and students. In the didactic context of the classroom, the textbook is an element which functions as a mediation tool between both actors –each of which fulfils a role,– that reinforces the teleology of the class in such a way that every action or behaviour is oriented towards the acquisition of quality learning, an objective for which the adequate use of the textbook may be crucial.

If the textbook is used sporadically, probably neither the potentiality of its use nor the value of the resources it contains will be understood. Therefore, and for the application of the critical historiographic method as a learning procedure, it is of vital importance for a pedagogical routine to be established where the textbook is a fundamental element. This pedagogical routine<sup>2</sup> must not be understood with the negative connotation that is usually associated to the routine,

<sup>2</sup> The pedagogical routine is a substantial part of learning strategies, understood as integrated sequences in procedures or mental activities which are activated with the purpose of enabling the acquisition, storage and/or use of information (Massone and González 2003), and which responds to the needs of an educational structure and to the instrumental basis of critical pedagogy Bourdieu and Passeron refer to (1973).

repetitive, tedious, and monotonous, but as a procedure that repeats itself on a daily basis as a work methodology. Routine is an element that favours learning in students, because it allows them to manage situations and codes which are known to them, distinguishing the moments of the class (beginning, development, closing), as well as specific procedures in each activity they carry out. It also contributes to the interweaving of educational actors, actions and pedagogical materials in a didactic context which can give meaning to students and contribute to generate learning (Monereo, 1994; 1997; Zabala, 1995).

In this approach, each teacher can develop a certain pedagogical routine: begin the class with a motivation, make the class objectives known, introduce work with the text, direct the development of the activities proposed, evaluate learning and finish the class with a conclusion. It can well be a pedagogical routine that students recognise and are familiar with. In this context, the use of the critical historiographic method may perfectly be incorporated as part of the pedagogical routine. This may be done for different reasons, since the method constitutes a routine in itself and, on the other hand, its proper application grants autonomy conditions for students' learning, which acquires special relevance in the constructivist perspective of learning. Also, the management of sources materialises a series of cognitive processes that involve logical reasoning, an ability that tends to be made invisible in this subject matter:

*At present there is a broad agreement about students considering the learning of Social Science and History as a merely repetitive activity where reasoning is very infrequent (...) in fact, any teacher knows that the vision students have of the subject is limited to "learning by heart", "copying from the book", "making summaries" and similar things. On the contrary, the problem solving and reasoning activities are supposed to be reserved for subjects such as Mathematics or Natural Sciences (Carretero, 2007: 25).*

Incorporating historical reasoning starting from work with sources in the classroom as part of a certain pedagogical routine, may contribute to generating an interest for knowledge in students, making possible an approximation to history topics from a much more active perspective, which minimises, as well, the effect of feeling that these topics are completely foreign to reality. The already quoted MINEDUC study indicates that one of the less valued areas in Social Science (Comprensión de la Sociedad) textbooks is the proximity to interests. In this sense, the teacher's ability is fundamental to create that nexus between contents and historical documents with the students' reality, while the notion that Social Science is a discipline where there is a need to reason, to constantly interrogate the past, and to express well founded opinions from the present. All of this is achieved through the application of particular techniques that, as such, require certain perseverance in order to be effectively applied.

### **1. The historiographic method as a pedagogical routine**

The design of a pedagogical routine based on the historiographic method as of the handling of the textbook, presents a potential which enables that each student may know what to do,



following which sequence and according to what procedure. In this way, thematic units will be covered following a same work logic, in which the application of the historiographic method should contribute to the acquisition of quality learning and significance for students. Here, the teacher and the textbook constitute a nuclear structure, a framework over which students will apply the knowledge and abilities inherent to the discipline, drawing near to sources as central elements for the construction of History and Social Science knowledge.

Textbooks conceived from this logic are based on a pedagogical routine that is applicable to a class and makes its preparation and development easier for the teacher. In this way, it is possible to distinguish the following moments:

**a) Beginning:** it is understood that the historical reconstruction and comprehension of the past is a complex task, which requires certain guidance and perspective that will make it possible, for example, to focus on particular elements of a process. To approach the past it is necessary to problematise aspects of reality that can define the field of knowledge to which particular actions are oriented to. This field that will widen with successive and, ideally, systematic approaches (this explains the relevance of the historiographic method as part of a pedagogical routine). As a way to problematise the reality we want to know, a question that leads to the historical reconstruction is proposed, a question which addresses a specific and precise field of reality.

The set of problems is defined upon the basis of that which we want to emphasise in the textbook, taking into consideration the Curricular Framework guidelines, the publishing context in which the production of the text is framed and the historical vision of those who are in charge of the authorship of the text, among other elements. Once the textbook is in the classroom, it will be the teacher the one who has the possibility to present his/her own set of problems and make students learn to formulate others, according to the school level in which the teaching is developed.

From this point of view, the textbook is not a static element, as it can be used with certain elasticity by teachers, without necessarily following the page numbers or the totality of contents present in it. In turn, it can be linked to topics belonging to national contingency, which may be complementary to the problems that are set forth as initial questions. There, the teachers' creativity and view of the pedagogical process is fundamental.

**b) Development:** after presenting the problem set forth at the beginning, it will be the role of the teacher to take the elements which are present in the text, to develop and study in depth the contents that will allow the solution of the specific problem guided by a particular section of the text. For this purpose, we can turn to the information exposed in certain pages, working through it with different methodologies.

Subsequently, it will be each student's responsibility of the student to work through the source-analysis activities presented in the text. These sources will face him/her with the reconstruction of the past, and place him/her as an actor who decodes information and

constructs knowledge. At this stage, the teacher takes the role of process director, helping to locate the source in the historical context where it belongs, guiding the analysis of the source in those elements that may seem difficult to understand, extracting the information that implicitly or explicitly is present ed in the document.

The collection of documentary sources included in textbooks are of the greatest possible variety, as a way to incorporate the notion that all the marks humans have left in the past are legitimate for historical reconstruction. Simultaneously, the questioning about the reliability of sources is incorporated: this way, students are impelled to recognise and weigh the value these have for the reconstruction of the past. For students to achieve the development of these abilities, the teacher has to teach them the particularities of the work and analysis of each documentary source in particular. For example, in the case of iconographic documents, a different decoding method from written texts is required; even among these last ones, it is necessary that they know how to differentiate the validity of a colloquial written document from a legal one or from a written text issued by the media.

**Doc. 2**

**Diario de a bordo de Cristóbal Colón**

**Viernes, 3 de agosto 1492**  
*"Partimos viernes 3 de agosto de 1492 años, de la barra de Saltes (en el puerto de Palos), a las ocho horas. Anduvimos con fuerte virazón (viento) hasta poner del Sol hacia sesenta millas".*

**Miércoles, 10 de octubre 1492**  
*"Aquí la gente ya no lo podía sufrir: quejábase del largo viaje. Pero el almirante los esforzó lo mejor que pudo dándoles buena esperanza de los provechos que podrían haber. Y añadía que por demás era quejarse, pues él había venido a las Indias, y que así lo había de proseguir hasta hallarlas con la ayuda de Nuestro Señor".*

**Jueves, 11 de octubre 1492**  
*"A las dos horas después de media noche apareció la tierra, de la cual estarían dos leguas. Amainaron todas las velas (...) hasta el día. Viernes, que llegaron a una isleta (...) que se llamaba en lengua de indios Guanahani".*

**Domingo, 16 de diciembre 1492**  
*"Crean Vuestras Altezas que estas tierras son en tanta cantidad buenas y fértiles y en especial estas de esta isla Española, que no hay persona que lo sepa decir, y nadie lo puede creer si no lo viese. (...) Ellos (los indios) no tienen armas, y son todos desnudos y de ningún ingenio en las armas (...) y así son buenos para les mandar y les hacer trabajar y sembrar, (...) y que hagan villas y se enseñen a andar vestidos y a nuestras costumbres".*

Cristóbal Colón, Diario de a bordo. Edición de Luik Arranz, Ediciones Historia 16, España.

PRIMARY SOURCE  
 Logbook

**Doc. 3**

Antonio Herrera, "El almirante Cristóbal Colón descubre la isla Española y hace poner una cruz", grabado del libro *Historia general de los hechos de los castellanos en las islas y tierra firme del mar oceano*, 1615.



PRIMARY ICONOGRAPHIC SOURCE,  
 engraving that recreates Columbus' arrival in America

With the analysis specificity required for each type of source, the following procedures can be stated in general terms as part of the historiographic technique: 1) classification and identification of sources; 2) analysis of the information it conveys (critical judgement); 3) contrast of sources; 4) interpretation of the source (Hernández, 2007: 106).

Various procedures may be used when working with sources, including field work and the design of investigation projects, which require a greater level of organisation level than the implementation of a pedagogical routine of textbook use. The latter presents an advantage over the other techniques or approximations, because, by being available to students and being a familiar element in the classroom didactics, it can have great effectiveness with the teachers' mediation required.

On the other hand, beyond the historiographic knowledge, the incorporation of an analysis method that can be applied to diverse situations a citizen faces in daily life is intended through source work, i.e. giving tools for the decoding of news, articles, publicity, political messages, and photographs, among others. Cross-curricularly, through this methodology a series of students' cognitive abilities are reinforced: reading comprehension, description and observation, the selection of information, the establishment of relationships, analysis and interpretation of written texts as well as of images and audiovisual aids, which are so important nowadays.

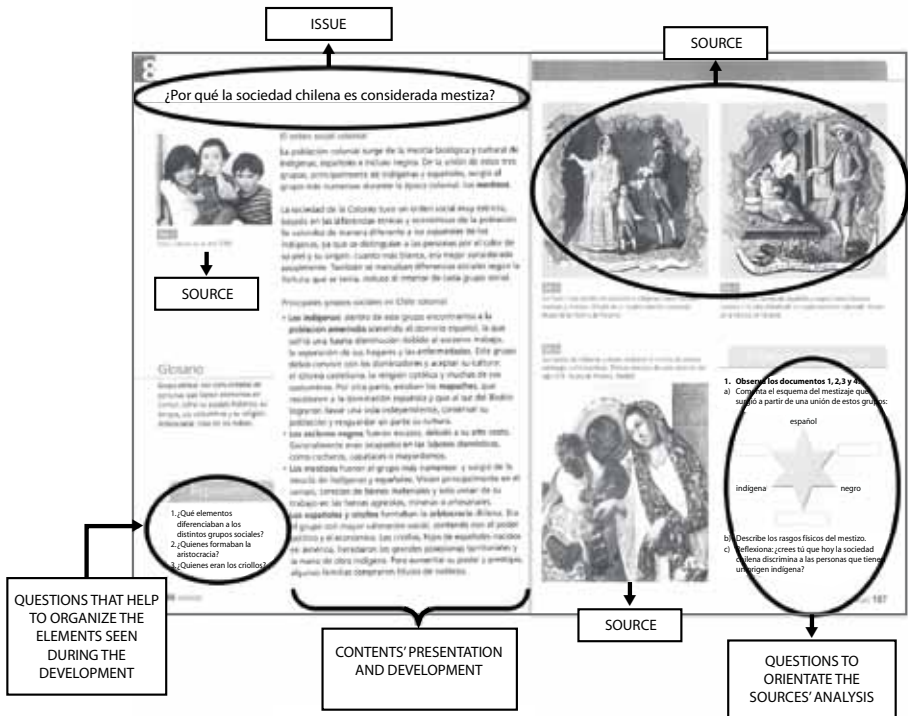
**c) The closing as a response to the initial set of problems:** After locating the specific historiographic problem in the corresponding temporal-spatial context, and following the analysis of documents that complement this contextualisation with central elements of the process, different actors' visions or relevant information concerning the characteristics of a particular phenomenon, we can proceed to the closing of the initial problem, answering the problematising question indicated as the origin of a particular issue.

To answer the problem, the elements contributed by the informative body or development of the text will be used, as well as those aspects that emerged from the analysis of the worked sources. Ideally, each student should reach the answer to the question, get closer to the solution of the problem through the application of the historiographic method and the approximation of a correct answer.

If, in fact, the historiographic method is included as a pedagogical routine, every student should be able to reach these answers and construct their own knowledge. Certainly, this process may not have immediate results or be easy for every student; and there, the mediating role of the teacher will be fundamental to profit as much as possible from a didactic proposal where text/student/teacher must interact in an articulated way for the attainment of the learning objectives which guide every educational process, an interaction where doing is an essential part of *understanding*.

Another component that may contribute to the development of the pedagogical routine is the layout of textbooks, which must be organised according to the stages of the critical

historiographic method. This layout structure reinforces the pedagogical routine so that teachers and students recognise its components as they get acquainted with the textbook. The following pedagogical structure was designed in the Year 5 textbook:



To conclude, it is possible to harmonise the textbook based on the historiographic method and its application in the classroom. The main thing is to reach a rapport in teachers and students with a method that, based on a pedagogical routine, may be internalised by students with the guidance of the mediator-teacher and supported by the informative elements and the abilities to be developed in the analysis of a variety of sources proposed.

### WHAT HAPPENS BACKSTAGE IN TEXTBOOK CONSTRUCTION?

The elaboration of a textbook is always a collective work where a multiplicity of actors participates. Many of them are absolutely invisible to the reader/user, but they have great impact on the final product that he/she gets (Textbook Advising Council, 2000).

#### a) The authorial team

The most recognised actors are, clearly, the authors, who are made responsible for the work, i.e., the selection of content and its treatment. In the case of a textbook guided by a critical historiographic method, a great challenge is imposed on it, because in order to teach how to reconstruct and decode History, there is a need to be aware of how one elaborates it, of the

biases imposed by one's visions, experiences and tolerance in order to generate a discourse that is open enough to allow someone else –specially the student, but also the teacher– may analyse, extend and even disagree with what is proposed. Because of this, the first condition is the formation of an authorial team with a diverse and open-minded profile, which makes it possible to do professional self-observation exercises that facilitate the identification of different visions about what is believed to be historically settled, and of complementarity in the definition of the central structure needed to propitiate autonomous learning in students.

This is not always easy. Historiography has been permanently marked by the existence of trends to which us, who work in the field, adhere with more or less strength or awareness of it. To go from an activist support to the critical and open-minded affiliation is already a tensional step in the authorial work, which may be easily solved in the editing process (presentation of different historiographic visions of a problem or historical process), although it cannot always be achieved with enough openness to allow the other to actually be the one who weighs the arguments and reconstructs the events.

#### **b) The publishing team and the principles of the industry**

Beyond the author's or the authorial team's decisions, as proposed here, it is necessary to consider the strong role the publishing industry in Chile plays in the construction of the historiographic proposal and in the didactics with which it is addressed. Social Science, with greater clarity than any other learning area, strains society in its options, visions and cohesion. It is impossible to create and educate in a neutral history and, with more or less awareness of it, different interests groups dispute the field of teaching, as it is there where great part of the historical reproduction and construction of the collective memory is at stake (Carretero, et al., 2006). Publishers that work in the field of education are not on the sidelines of this tension, but, on the contrary, they actively participate in this "negotiation of interests" over the historical past, as its management is closely connected to economic and political groups<sup>3</sup>. On the other hand, demand also plays a big role in this negotiation, as the industry needs to hold itself up as such, being the State the main buyer, followed by the reduced private sector (8% of the textbook market, which refers to the highest income group in the country, at least in Chile), so publishers try to satisfy these clients and their requirements.

More than a decade ago, Fernando Lolas (1996) pointed out that textbooks systematise and diffuse "what is not controversial in disciplines, what has been defined as accepted and complete knowledge, what can be conveyed without erosion of authority." According to this image of the textbook, an open proposal that invites precisely to look at the certainties given by the principle of authority has detractors both among the textbook supply generators (publishers) as well as among those who demand it (State and individuals).

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<sup>3</sup> In relation to this, we can consider the strong debates Libertad y Desarrollo (Freedom and Development) and the Centre for Public Studies activate periodically in reference to the "hidden curricula" that textbooks supposedly show (Fontaine y Eyzaguirre 1997; Domper 2005; Domper y Delaveau 2005; Domper 2007)

### c) The official curriculum and the bidden text: how critical can it be?

It was already suggested in the preceding section that the State also develops actions and generates a framework that can be compatible or rival with the implementation of the critical historiographic method expressed in the textbook. Even though in Chile there are no official textbooks, in the understanding that their elaboration is not directly done by Ministry of Education agents or others under its office, but from offers constructed in the private publishing world, these offers go through a strict analysis of their adjustment to the curriculum and, at times, to the plans and programmes that this Ministry has generated as one of the curricular framework concretion alternatives. In this way, enclosed fields are generated in the practice for the editorial and authorial creation. In turn, the concern for technical disciplinary accuracy is combined with other State needs, such as the communication of a country image that reinforces certain citizenship or national/regional identity construction features, or facing issues that even society as a whole has not been able to solve – a demand that often falls on education and by extension on the textbook.

In this double context (of internal creation and of response to the external client), the viability of proposal that is completely open to revision, which brings closer and updates the disciplinary and societal discussion about the past, is not only unthinkable, but also naive. For the same reason, authors and publishers try to develop the product that they think will serve the most to their ends –some pedagogical, others commercial– in a game of proposal, censorship and self-censoring which makes it possible to structure a text that presents itself as commercially viable and that, at the same time, tries to respond to the epistemological assumptions of the didactics we have presented. Therefore, one is critical in that context of restrictions, trying to generate some fissures in the certainties that the interest groups hope to communicate, opening spaces for historical revision, but not managing to establish a more consistent critical method in the whole proposal. Clearly, because of the issues that currently concern us, there are some areas which are more inclined to openness than others. Then, it is crucial for the authorial team and teachers to visualise and incorporate these areas to the teaching-learning processes that they hope to guide.

### WHO DOES TEXTBOOK USABILITY DEPEND FROM?

The textbook constitutes, then, a proposal and an invitation to dialogue, arranged in a structure that is inclined to support teaching and the formative work of students. However, in order to accept this invitation and turn it into a pedagogical dynamic, this constructive learning and critical revision process has to be carried out in tune with the objectives proposed, which mainly requires required the teacher's disposition and guidance.

Unfortunately, the scarce evidence about the use of textbooks teachers promote, emphasises an inclination towards the tradition of a linear reading, a reinforcement for rote learning and a scarce recognition of the diversity of resources this kind of materials makes available for school work (MINEDUC, n.d.). The implementation of the historiographic method in the

classroom requires the positioning of the source in a central place, to interrogate, contrast and relate it with our current concerns. Summing up, an active mediation and an interest in discovery is required: without this combination, the participation in historical reconstruction is not possible.

Initial teacher training is just starting to explore these fields and their consolidation as daily practice in the classroom is still a process in the making. The repeated structure in texts expects to support this task with the presentation of a method as well as with its modelled expression, which guides the implementation in the classroom. In this way, articulated textbooks actually constitute an updating opportunity for teachers and support in their demanding job, but more training in its use is needed to promote resources and the articulation with the developing practice in the classroom (Fontaine and Eyzaguirre, 1997; Aamotsbakken, 2007).

### CODA

History and Social Science texts may be articulated according to the pedagogical model of active reconstruction of the past, transferring the critical historiographic method from an endodisciplinary practice to a didactical strategy. The implementation of the method is not utopia; what is utopian is the installation of a systematic practice of reflexive thinking in students, which must be decoding and enabling for a world of multiple texts, visions and versions that need to be integrated in a personal and citizen-maker experience (in the sense of leaving decision-making to students). Teaching History is an excuse; the textbook, is a support and an invitation that we hope teachers and students will want to accept.

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# Uses of Colombian primary education social science textbooks (1991-2006): functions of activities

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## INTRODUCTION

**A**t a time when there is a real explosion of teaching mediums, computerised, audiovisual or other kinds, the school textbook is still, by far, the most extended and effective, undoubtedly.

Although the textbook as an object is still virtually the same, with the form of a bound work, its function and place in pedagogic processes has evolved a lot. Traditionally, the school textbook was mainly used to transmit knowledge and constitute a deposit or reserve of exercises. It also had the implicit function of conveying social and cultural values.

Nowadays, these functions are still valid. But school textbooks have to respond to new needs yet: develop work habits in students, propose learning methods, integrate the knowledge acquired to daily life, among others.

The functions performed by the school textbook make it possible to conceive it as an *action tool and reflexion tool*, but it is also a *printed tool* destined to its potential “users”.

*It is a reflexion tool* because we need a conceptual framework to talk about it, for its conception, its elaboration and use. This framework in itself is common to the problematics of conception and evaluation. Most of it goes beyond the strict problematic of textbooks and develops a series of concepts adapted to all the teaching-learning processes.

*It is an action tool* because it is directly used in the educational processes, especially in classrooms and, as it has been said, it has a direct effect on the efficiency and quality of learning. The action of the text user is closely associated to the processes of evaluation and of access to school knowledge that the textbook contains and wishes to contribute to their appropriation and diffusion by the student and the teacher, respectively.

A school textbook can be defined as a *printed tool, intentionally structured to form part of a learning process*, with a view to improving efficiency.

A school textbook has several characteristics: (a) it can perform different *functions* associated to learning; (b) it can suggest different *types of activities* which may favour learning; and (c) it can be concerned with different *objects* of learning.

A textbook has different functions. These vary according to the user, the discipline and the context in which the text is elaborated. In relation to this, a strict distinction between the student's school textbook and the teacher's school textbook is obsolete. A student's school textbook has certain functions when it is in the hands of the student (for example, conveying knowledge), but it has others when it is in the hands of the teacher (for example, helping to make his/her teaching practice evolve). Likewise, a school textbook meant for the teacher will allow him/her to manage his/her classes better and, at the same time, present the work clues that will allow the student to integrate his/her knowledge.

It is then more correct to take a look at the functions of the school textbook depending on whether they relate to the student or the teacher, whoever the first target of the text is. Some functions are specifically oriented to school learning and daily life and even to (future) professional life.

### **SCHOOL TEXTBOOK CORPUS AND STUDY METHODOLOGY**

When we talk about Social Science textbooks for Years 1, 2, 3, 4 and 5, it must be noted that there is a coexistence of different "programmes" in the market which are reflected in the books. This is due to factors such as: (a) textbooks that follow the "integrated" curricular approach proposed by the curriculum from 1989/1990 onwards; (b) textbooks that go back to the subjects of history and geography separately, sponsored by the curricular autonomy of the general Education law of 1994; (c) textbooks that chose to create or take advantage of the multiplicity of "programmes" to teach social science (some follow the curricular change which took place in 1976; others, the thinned out history of the 1989/1990 programme, leaving geography aside; others, which are versions created by publishers faced with the void of an "official programme" for the teaching of history and the diversity of interests manifested by teachers in the country.

The corpus of school textbooks reflects different approaches and contents in the teaching of social sciences that cover those that continue studying history and geography separately, others that "integrate" them, and finally those which consider the recent curricular developments of the Colombian Ministry of Education. In this sense, as the investigation includes the year 2005 as well, some textbooks took the basic standards of competences in social sciences and the civic competences that this entity has diffused in the country as referents (Men, 2006: 96-122 and 148-186).

The methodology which was designed and applied identifies with those textbook investigations oriented to the study of the product itself, that is, “*product-oriented researches*”, based on the analysis of their content.<sup>1</sup> The objects of analysis were Colombian social science school textbooks used in primary school in Colombia as a scientific and didactic vector, and as a teaching tool with the aim of offering intelligibility, objectivity and efficiency criteria from the point of view of the use that they propose through the activities they present (Choppin, 1992, 2000 ; Weinbrenner, 1992 ; Deslauriers, 1991; Poupart et al, 1997 ; Rober and Bouillart, 1997 Pinard, Potvin, Rousseau, 2004).

**TABLE 1**  
**SCHOOL TEXTBOOK CORPUS**

Nº	TITLE	LEVEL	PUBLISHER	YEAR	CITY
1	Social Science 1	1	Educar Editores	2003	Bogotá
2	Natural and social tools 1	1	Santillana	2003	Bogotá
3	Social Science 1 (Activity Book)	1	Educar Editores	2005	Bogotá
4	School Guide 1 (Social Science)	1	Santillana	2005	Bogotá
5	Friends of Social Science 1	1	Santillana	2006	Bogotá
6	Environment and Community 2	2	Rei Andes Ltda	1994	Bogotá
7	Millenium 2 (Social Science)	2	Norma	1999	Bogotá
8	Multiareas 2 (Social)	2	Norma	2000	Bogotá
9	Natural and social tools 2	2	Santillana	2003	Bogotá
10	Relationships 2 (Social Science)	2	Libros & Libros	2004	Bogotá
11	School Guide 2 (Social Science)	2	Santillana	2005	Bogotá
12	Multiknowledge 2 (Social)	2	Norma	2005	Bogotá
13	Friends of Social Science 2	2	Santillana	2006	Bogotá
14	Let's coexist 3	3	Susaeta	1991	Bogotá
15	Active society 3	3	Educar Editores	1992	Bogotá
16	Social Science 3	3	Santillana Siglo XXI	1999	Bogotá
17	Millenium 3 (Social Science)	3	Norma	2000	Bogotá

<sup>1</sup> This methodology has been applied with different variations in the following studies: Gómez Mendoza, Miguel Ángel; Alzate Piedrahita, María Victoria; Arbelaez Gómez, Martha Cecilia; Romero Loaiza, Fernando. *El texto escolar y las mediaciones didácticas y cognitivas*. Pereira-Colombia: Editorial Papiro-Colciencias. 2005. 251 Págs. Gómez Mendoza, Miguel Ángel; Alzate Piedrahita, María Victoria; Romero Loaiza, Fernando. *Representaciones sociales de la familia en los textos escolares colombianos de ciencias sociales para la escuela básica primaria colombiana (1960-1999)*. Pereira-Colombia: Editorial Cargraphics-Colciencias. 1999. 3 volumes. Gómez Mendoza, Miguel Angel. *La révolution française dans les manuels scolaires d'histoire et de sciences sociales en Colombie : (1960-1999): évolution, contenu et image*. [The French Revolution in history and social science school textbooks in Colombia: (1960-1999): evolution, content and image] Doctoral thesis Université Paris III- Sorbonne Nouvelle. Paris. 2001. Thesis director: Professor Bernard Lavallé. Alzate Piedrahita, María Victoria. *Concepciones de la infancia en los textos escolares de ciencias sociales de la educación básica primaria colombiana (1960-1999)*. Doctoral thesis Universidad de Valladolid-España. 2003. Thesis director: Professor Agustín Escolano Benito.

18	Multiareas 3 (Social)	3	Norma	2000	Bogotá
19	Social Tools 3	3	Santillana	2003	Bogotá
20	Social Tools 3 (Activity Book)	3	Santillana	2003	Bogotá
21	School Guide 3 (Social Science)	3	Santillana	2005	Bogotá
22	Friends of Social Science 3	3	Santillana	2006	Bogotá
23	Friends of Social Science 3 (Activity Book)	3	Santillana	2006	Bogotá
24	Active society 4	4	Educar Editores	1992	Bogotá
25	Environment and Community 4	4	Rei Andes Ltda	1994	Bogotá
26	Social Science 4	4	Santillana	1999	Bogotá
27	Ambits 4	4	Escuelas del Futuro	2002	Bogotá
28	Social Tools 4	4	Santillana	2003	Bogotá
29	Social Tools 4 (Activity Book)	4	Santillana	2003	Bogotá
30	School Guide 4 (Social Science)	4	Santillana	2005	Bogotá
31	Friends of Social Science 4	4	Santillana	2006	Bogotá
32	Friends of Social Science 4 (Activity Book)	4	Santillana	2006	Bogotá
33	Civilisation 5	5	Norma	1997	Bogotá
34	Environment and Community 5	5	Rei Andes Ltda	1997	Bogotá
35	Active society 5	5	Educar Editores	1996	Bogotá
36	Multiareas 5 (Social)	5	Norma	2000	Bogotá
37	Village 5 (Integrated Social Science, History and Geography)	5	Voluntad	2001	Bogotá
38	Ambits 5	5	Escuelas del Futuro	2002	Bogotá
39	Social Tools 5	5	Santillana	2003	Bogotá
40	Social Science 5 (Integrated Curricular Proposal)	5	Educar Editores	2003	Bogotá
41	Social Tools (Activity Book)	5	Santillana	2003	Bogotá
42	New Identities 5 (Social)	5	Norma	2004	Bogotá
43	New Identities 5 (Activity Book)	5	Norma	2004	Bogotá
44	School Guide 5 (Social Science)	5	Santillana	2005	Bogotá
45	Friends of Social Science 5	5	Santillana	2006	Bogotá
46	Friends of Social Science 5 (Activity Book)	5	Santillana	2006	Bogotá

## FUNCTIONS RELATED TO LEARNING






### 1. Knowledge transmission function

This traditional function is the cause of many criticisms towards school textbooks: they would be no more than instruments of knowledge transmission with a directive and closed function, without considering students' evolution and real interests. However, school textbooks have other functions as well. There are several attempts that point to not limiting this transmission of knowledge to a particular learning process. In addition to this, investigations have shown that an improvement in the provision of good quality textbooks to schools has a positive influence on school results (Seguin, 1989; Braibant and Gerard, 1996; Van der Rest, 1996; Mignat and Suchaut, 2000). The textbook makes it possible to convey knowledge when the student acquires specific data, concepts, rules, formulas, facts, terminology, conventions. The student must be able not only to repeat this knowledge but, in some cases, to apply a cognitive know-how on it, using it in a learning context (especially a school context). Thus, to acquire knowledge is to be able to put it into practise, mainly in the cognitive field, as is shown in the following examples:

(a) a know-how to repeat about the matter: "Who were the political leaders that represented liberal and conservative principles in the middle of the 19th century?"<sup>2</sup>

(b) a know-how to repeat about the lessons: Complete the following chart<sup>3</sup>

2/ Completa el siguiente cuadro:

Situación	Derecho que se está violando	Clasificación (fundamentales, sociales, económicos y culturales, colectivos y del ambiente)
<p>• El cartero está leyendo las cartas que le llegan a Margarita.</p> 	<p>• Derecho a la intimidad.</p>	<p>• Derechos fundamentales.</p>
<p>• A Teresa la echaron del colegio porque practicaba la religión musulmana.</p> 	<p>• derecho a la libertad de cultos</p>	<p>• Derechos fundamentales</p>
<p>• A Martín le prohibieron hablar con todos sus compañeros de clase; también le prohibieron expresar sus opiniones en los debates del curso.</p> 	<p>• derecho a la expresión y información</p>	<p>• Derechos fundamentales</p>
<p>• La familia López amplió su casa y ocupó parte de los andenes de la carrera séptima.</p> 	<p>• Derecho al espacio público</p>	<p>• Derecho Colectivo y sociales</p>
<p>• Arnulfo, el dueño de la fábrica de galletas decidió ponerle a las cajas de galletas vencidas una etiqueta que tapara la fecha de vencimiento para poderlas vender.</p> 	<p>• Derecho a la buena calidad de servicios prestados</p>	<p>• Derechos Sociales</p>

<sup>2</sup> Active society 5. Educar editores. 1995. p. 75.

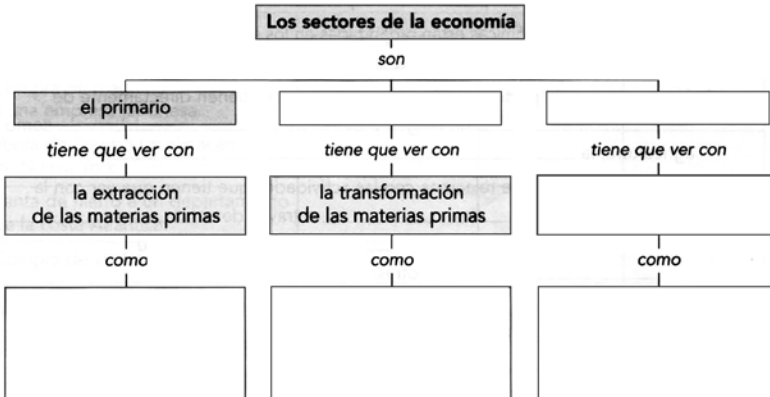
<sup>3</sup> Social Science 5. Editorial Santillana. 1999. p. 114.

(c) a know-how about relationships: Match each word with its meaning:<sup>4</sup>

Relaciona cada palabra con su significado.

Productor	Utilizar una cosa como fuente de energía, materia prima, alimento, o para satisfacer alguna necesidad.
Distribuidor	Quien vende o tiene por oficio vender.
Consumir	Persona o entidad que realiza la comercialización de uno o varios productos.
Vendedor	Persona que emplea su fuerza de trabajo en la fabricación de bienes o en la prestación de servicios.

(d) a know-how about structure: complete the diagram<sup>5</sup>



(e) a cognitive know-how about the matter: order a series of events chronologically<sup>6</sup>

1. Completa un cuadro como el siguiente sobre el Frente Nacional:

	Presidentes	Partido	Logros	Dificultades
1958-1962				
1962-1966				
1966-1970				
1970-1974				

<sup>4</sup> School Guide 4, Editorial Santillana, 2005, p. 28.

<sup>5</sup> Friends of Social Science 5, Editorial Santillana, 2006, p. 17.

<sup>6</sup> Social Science 5, Editorial Santillana, 1999, p. 85.

For school textbooks that seek this function, the problematic of didactic change is particularly important: how to go from a wise knowledge to a learnt knowledge, without betraying the first one and without distorting the second one?

In short, most school textbooks are works that present “a systematic progression”, taking up Richadeau’s (1981) terminology again. They point to two main functions: transmission of knowledge; development of capacities and competences.

In order to fulfill these functions, school textbooks present an order for learning, because of the general organisation of content (in chapters, learning sequences, lessons, paragraphs) as well as the organisation of learning (presentation of information, comments, applications, summaries, quizzes, etc.). In addition to this, they have to satisfy a certain number of criteria, such as:

(a) pedagogic coherence, which is an *inner coherence* (order of unit division, balance in contributions, exercises, etc.), but also a more *general coherence* with the pedagogic models promoted by the school authorities and teachers, and considering the students’ and the teachers’ level; (b) the value of information (quality, selection, specific value); (c) the *adaptation* of this information to the environment and the social and cultural situation; and (d) availability.

The function of knowledge transmission or of scientific information implies that the school textbook contains information about complex knowledge. It is the function which is traditionally more known, but as the study shows, the textbook has other functions as well.

**TABLE 2**  
**KNOWLEDGE TRANSMISSION FUNCTION**

LEVEL OF THE TEXTBOOKS	FUNCTIONS OF ACTIVITIES	NUMBER OF KNOWLEDGE TRANSMISSION ACTIVITIES	PERCENTAGE OF KNOWLEDGE TRANSMISSION ACTIVITIES
Year 1	560	109	19.46%
Year 2	1,127	264	23.43%
Year 3	1,712	530	30.96%
Year 4	1,790	599	33.46%
Year 5	2,701	654	24.21%

Textbooks have been traditionally criticised for transmitting contents in a direct and closed manner, without considering the interests and learning process of students. The data in Table 2 shows that this criticism has generated the presence of other functions. Thus, the percentage of knowledge transmission activities is between 19.46% and 33.43% from Years 1 to 5. Then, the remaining percentage must correspond to other kinds of functions, as we will examine in the sections that follow.

## 2. Function of development of capacities and competences

A textbook makes it possible not only to assimilate a knowledge; it also allows the acquisition of methods and attitudes, even habits for work and life. This is the case of school textbooks which develop the learning of language, for example, or the awakening or initiation of scientific activity, learning to summarise, organising knowledge, looking for information, etc.

Whereas in the acquisition of knowledge, *the emphasis is mostly on the learning object*, in the acquisition of capacities and competences, *the emphasis is on the activity*: the student has to apply this activity to different learning objects.

For example, the school textbook can ask the student to compare cultures and periods and explain the similarities and differences between them, using the knowledge of the cultures and characteristics of the periods to consolidate the knowledge and characteristics which define those cultures (acquisition of knowledge), but also to teach him/her to compare epochs and their relationship with cultures. Then, the emphasis is on the process of comparing (acquisition of a capacity). In this case, the acquisition of knowledge makes it possible to characterise and define, while the acquisition of a capacity is founded on comparing and establishing relationships.

It is not easy to establish a clear distinction between the concepts of capacity and competence, and authors use these terms with different meanings. This is not the place for an in-depth discussion on this topic.

This is what we understand by *competence* here: it is the possibility an individual has to mobilise in an interiorised way a set integrated by resources, especially of capacities, abilities, skills and knowledge, with the objective of solving a group of problem situations. A *capacity* is the power, the aptitude to do something. It is an activity that is exercised. Identifying, comparing, memorising, analysing, summarising, classifying, ordering in a series, making abstractions, observing... are capacities. A capacity is not manifested until it is applied to contents. The capacity to classify does not mean much in itself. You can classify pencils in different sizes and colours as you can classify a set of bibliographic references. In the same way, the capacity to analyse can be exercised on an infinite number of contents: a phrase, a restaurant menu, a literary text, a problem to be solved, the political situation of a country, a project, etc.

To complement what has been said, we can say that if a great number of capacities developed in teaching are cognitive capacities, we must not forget sensory-psychomotor capacities and socio-affective capacities.

A capacity can always be developed in some way or another, except in the case of an irreversible physical disability or sensorial deprivation. The best way to develop a capacity is to learn to apply it on the different contents (they may be conceptual, procedural or attitudinal), and in particular in the different disciplines. For example, in order to develop the capacity to summarise, with the rigor and intuition it involves, the student must be made to mobilise it in different directions, as in Spanish, History, Mathematics or Sciences. Aiming at a finished



capacity in only one category of contents cannot lead but to limited know-hows, which are narrow and not possible to transfer. The different capacities will be developed in the same way after facing specific problem-situations, because their mobilisation for the exercise of the competence will allow their development. In this sense, it may be interesting, at a conceptual level, to distinguish capacities from competences, and we must be aware of the fact that in pedagogic practice, this has less important: by developing one, the other will be developed, and vice versa.

Some capacities are essential if it is absolutely indispensable to acquire several other capacities. In this way, De Ketele (1993), determined a list of *basic cognitive capacities* whose command determines learning.

Among these basic cognitive capacities, we can mention the following: (a) saying the same thing in other words; (b) illustrating a point by giving different examples and counter examples (but correct ones); (c) in the problem question, once justified, distinguishing essential, accessory or parasite information and relationships in the situation; (d) summarising a message in a brief and accurate way; (e) presenting a structured oral summary.

Stievenart and Tourneur (1986) place themselves in the perspective of an instrumental education as a basis, which implies the cognitive, socio-affective and sensory-psycho-motor aspects. They identify *key competences* which they distribute in four dimensions: (a) *learn to know and transform oneself*: listen to one's needs, set life goals: manage time, practise life hygiene (food, body, ...); (b) *learn to live in a group and in an institution*: establish a socio-affective relationship with someone; negotiate, conduct a debate or an interview, locate oneself in relation to the main institutions, etc.; (c) *learn to learn*: take the information and deal with it; elaborate a plan; organise an education plan, concentrate, etc.; (d) *learn to enterprise*: define an individual or collective project; do basic things for your home yourself rather than paying someone else to do it for you; elaborate a foresight activity.

In order to consolidate the concept of competence, it is also convenient to consider the *situations* in which one needs to use the knowledge and capacities. Actually, exercising a competence is being able to mobilise adequately the knowledge and capacities to solve a problem situation. A competence is more than a juxtaposition of knowledge, it is the relationship between knowledge and know-how which are mobilised to solve a situation. For example, elaborating an itinerary for a trip in a given particular context (competence) is much more than the juxtaposition of knowledge related to the itinerary (knowledge), it also requires the capacity and the aptitude to read a road map (know-how) and adding up the number of kilometres to cover (know-how).

Here there is no competence but in the presence of a *particular situation*, through the integration of *different knowledge and know-how*. These three elements are indispensable to define the competence.

As to the functions of textbooks, it must be said that they aim to the function of development of capacities and competences, at least implicitly, for the simple reason that a textbook

cannot satisfy itself with transmitting knowledge in a theoretic way. This is the way in which this function will be explicitly presented in the school textbook.

There are, for example, introductory social science school textbooks which do not contribute any knowledge in a direct manner, but they present some activities oriented to awakening exploratory and testing activities in students. These are what is frequently called *social science activity textbooks*.<sup>7</sup> They suggest the clues or search guidelines which will encourage the student to organise his/her knowledge (capacity) more than giving it to them (knowledge).

There are also school textbooks which explicitly propose complex problem-situations to realise a set of learnings. These texts are mostly oriented to the development of competences. Let us have a look at some examples now:

a) *Cognitive know-how*. Example: the student carries out a documentary investigation on the topic of “The Colombian woman and the conquest of her rights.”<sup>8</sup>

b) *Psychomotor know-how*. Example: Make<sup>9</sup> relief with modelling clay, making elevated, sunken and flat forms; draw a world map and locate the most important mountain ranges of the world with their names; take note of the weather in the place where you live during a week and describe the changes presented.

c) *Socio-affective know-how*. Be able to question, imagine and identify. Negotiation know-how, conduct a debate, do an interview. Example: «Think about and answer the following questions with four classmates: (...) 3. Is violence over? What do you think? What does the media say about it? What can we as Colombians do to achieve peace?»<sup>10</sup>

TABLE 3  
CAPACITY AND COMPETENCE DEVELOPMENT FUNCTION

LEVEL OF TEXTBOOKS	FUNCTIONS OF ACTIVITIES	NUMBER OF CAPACITY AND COMPETENCE DEVELOPMENT FUNCTION ACTIVITIES	PERCENTAGE OF CAPACITY AND COMPETENCE DEVELOPMENT FUNCTION ACTIVITIES
Year 1	560	161	28.75%
Year 2	1,127	412	36.56%
Year 3	1,712	520	30.37%
Year 4	1,790	591	33.02%
Year 5	2,701	786	29.10%

<sup>7</sup> An example of this kind of school textbook is “Friends of social science 3. Activity book”, by Editorial Santillana, 006. This textbook is structured by thematic activities, reading comprehension associated to an activity and then comes an evaluation of the unit; these are activities to confirm what has been learnt. Finally, there is a competence evaluation (interpretative, argumentative and propositive competence).

<sup>8</sup> Friends of Social Science 5. Editorial Santillana. 2006. p. 68-69.

<sup>9</sup> New Identities 5. Editorial Norma. 2004. p. 18.

<sup>10</sup> Environment and Community 5. Editorial Rei Andes Limitada. 1996. p. 141.

Table 3 shows that the activities to develop capacities and competences in Year 1 to Year 5 school textbooks have a certain regularity (between 28% and 37%), which indicates that the importance of this function is acknowledged in the study corpus. Moreover, this would show that the school textbook diversifies its functions in the social science learning process, and responds to the contemporary discussion about the so-called competence approach.

### 3. Acquisition and/or consolidation of achievement function

After acquiring knowledge or a know-how, it is convenient to exercise it in different situations so as to ensure certain stability. It is the role of applications and exercises. This function is equally traditional, and it is the main objective for some school textbooks.

Example: starting from topic 15, “History”<sup>11</sup>, the book presents progressive consolidation activities of the concept of history: 1. Make a frieze about the history of the student’s personal life using photographs and drawings and writing what happened in each scene. 2. Make a comic strip about the life of a family indicating important events that separate one stage from the other. 3. Look in the map of Colombia for a department that calls their attention and make a drawing of its history in the indigenous, Hispanic and republican periods.

Finally, the student is asked to make a timeline of Colombia’s historic periods, following some instructions related to the way of doing it and the data that must be taken into account (duration of historic periods and important events).

This is about exercising knowledge or a know-how that has been learnt, in different situations with the aim of ensuring certain stability. It is the role of applications, exercises... this function is equally traditional, and it is even the only one in certain textbooks. It is about repeating and knowing how to redo and and do things all over again. Example: repeat the know-how in different contexts. Knowing concepts, rules, events, relationship of dates in historic time, geographic or historic relationships, among others, and knowing how to apply them in different contexts.

**TABLE 4**  
**CONSOLIDATION OF ACHIEVEMENT OR ACQUISITION FUNCTION**

LEVEL OF THE TEXTBOOKS	FUNCTIONS OF ACTIVITIES	NUMBER OF CONSOLIDATION OF ACHIEVEMENT OR ACQUISITION FUNCTION ACTIVITIES	PERCENTAGE OF CONSOLIDATION OF ACHIEVEMENT OR ACQUISITION FUNCTION ACTIVITIES
Year 1	560	90	16.07%
Year 2	1,127	134	11.89%
Year 3	1,712	141	8.24%
Year 4	1,790	73	4.08%
Year 5	2,701	140	5.18%

<sup>11</sup> Millenium 3. Social Science. Editorial Norma. 1999. Pp. 99, 103, 109, 119.

The data on Table 4 indicates that in the corpus of textbooks examined, the consolidation of achievement or acquisition function concentrates in Years 1 and 2 and, from Year 3 onwards, it goes down, staying at a percentage that goes between 5.18% and 8.24%. If we compare it with the transmission of knowledge function and the capacity and competence development function activities, this learning function has a lesser presence in the corpus.

#### 4. Evaluation function

This function is essential in all kinds of learning. It is not so much about a certifying kind of evaluation, that is, that one which aims to determine if the level each student has achieved is sufficient. This has to do with the institution through its representatives (teachers). The school textbook may give clues to certify evaluation, or for a self-evaluation to prepare social certification, but it cannot carry out the certifying evaluation function *in itself*.

Evaluation within a school textbook should be of the formative kind especially. It should, for example, determine the most appropriate remedial work according to the student's difficulties with the objective of making him/her progress, or simply to improve his/her progress identifying the origin of his/her difficulties as accurately as possible through error analysis. Just like the development of capacity and competence function, the evaluation function –which could present itself implicitly in the school textbook– is assumed as explicit and integrated to the activities presented in school textbooks.

Thus, the function of evaluation of what has been acquired aims to determine the level of individual acquisition of knowledge from the formative point of view. This function is essential. Actually, the most noticeable inefficiency of school learning, especially for underprivileged populations, is frequently manifested in a learner's capacity to use the school acquisitions in a situation which is not so different from the one found at school. Pursuing the objectives of acquisition integration should then be one of the first concerns of every teacher and, consequently, of every textbook designer. This is about locating acquisition again in a double process: vertical integration: connecting knowledge and know-how's which are above and below at the core of the discipline itself.

For example, in the topic, "Protection of natural resources"<sup>12</sup>, the student's competences are evaluated.

The example quoted corresponds then to a horizontal integration: a combination of capacities and competences acquired through different disciplines (social science, biology and information science). This activity allows the integration of capacities and competences which are characteristic of social science in primary education with activities such as making charts to present the results of the activities (manual activities). This double process is carried out for the development of integration situations, that is, the complex situations made up of information that is essential for their resolution, but also information which may be appropriate or inappropriate and which places previous learning at risk.

<sup>12</sup> New Identities 5. Editorial Norma. 2004. Pp. 54-55.

From this point of view, textbooks can also develop educational projects (know-how to become level of activity). This is interesting as an integration process which gives meaning to learning without falling into the juxtaposition of knowledges.

**TABLE 5**  
**EVALUATION FUNCTION**

LEVEL OF THE TEXTBOOKS	FUNCTIONS OF ACTIVITIES	NUMBER OF EVALUATION FUNCTION ACTIVITIES	PERCENTAGE OF EVALUATION FUNCTION ACTIVITIES
Year 1	560	102	18.21%
Year 2	1,127	121	10.74%
Year 3	1,712	276	16.12%
Year 4	1,790	264	14.75%
Year 5	2,701	564	20.88%

The activities associated to evaluation in the textbook corpus, as shown in Table 5, are in the third place, after the development of competence and knowledge transmission. The presence of this function in school textbooks is important because it contributes to determine the student's difficulties and offers elements to determine and approach the student's activities.

## **INTEGRATION WITH DAILY AND PROFESSIONAL LIFE FUNCTIONS**

### **1. Knowledge integration function**

This function is essential and it complements the one that develops capacities and competences. Actually, the most evident inefficiency of school learning, especially for more underprivileged populations, is frequently manifested in a learner's incapacity to use school achievements in a situation which is a little bit different from the one found at school. Then, pursuing the achievement integration objectives should be one of the first concerns of every teacher and, consequently, of every school textbook designer.

This is about using achievements in a double process:

(a) *Disciplinary integration*: connecting the knowledge and know-how which are in the initial phase and in the final phase at the core of a discipline. For example, in the topic "Historic maps"<sup>13</sup> the activities demand a disciplinary knowledge of history and geography in order to carry out a disciplinary integration that is characteristic of social sciences.

<sup>13</sup> Ambits 4. Editorial Escuelas del Futuro. 2001. P. 116.



(b) *Interdisciplinary integration*: a combination of the capacities and competences acquired through different disciplines. In relation to this, we can mention the activity presented in unit 8 “Colombia, from the 20th century to the present”.<sup>14</sup> It is a project where students have to produce a “historic newspaper”. This activity expresses an interdisciplinary integration between Spanish, History and Craftwork associated to the design of the newspaper within the frame of Social Science. The project presents an explanation about the newspaper, then suggests the materials and procedures to make it. It offers students a general structure (pages that make up a newspaper and its sections) of a newspaper as orientation to do their work.

Likewise, textbooks within a social science course that includes Civic Education, can ask students to make a search of the transport code. They look for the meaning of different signs on the road based on their shape (danger, prohibition, obligation...), then they make posters (real or imaginary) to translate the school rules. Such an activity makes it possible to integrate the capacities and competences which are characteristic of Mathematics (geometric forms), Craftwork, road safety and Civic Education.

However, attention must be paid to the trap of filling textbooks with activities. A real interdisciplinary integration is not achieved by juxtaposing different disciplines in a more or less artificial way at the core of an activity.

This double process can be achieved through the development of integration situations, that is, complex situations made up of information that is essential for its resolution, but also

<sup>14</sup> Social Tools 5. Editorial Santillana. 2003. Pages 90-95.

of inappropriate information which places previous learning at risk. In this perspective, the development of projects (level of activity, know-how to be) is interesting as an integration process which gives sense to learning.

**TABLE 6**  
**INTEGRATION FUNCTION**

LEVEL OF THE TEXTBOOKS	TOTAL FUNCTIONS OF ACTIVITIES	INTEGRATION FUNCTION ACTIVITIES	PERCENTAGE OF INTEGRATION FUNCTION ACTIVITIES
YEAR 1	560	32	5.71%
YEAR 2	1,127	44	3.90%
YEAR 3	1,712	96	5.61%
YEAR 4	1,790	48	2.68%
YEAR 5	2,701	88	3.26%

Table 6 shows that this function gets less attention in the content of the school textbook corpus. Its percentages per level do not vary considerably and could indicate that the textbooks studied do not achieve a level of interdisciplinary integration which would highlight and give sense to learning.

## 2. Reference function

A school textbook can be considered as a tool which the student uses to find specific and accurate information about historic events, data about developments (consulting documents or pictures of the period), parameters to write requests that imply the practice of citizenship (consult the Constitution), the explanation of a climatic phenomenon (consult maps, tables, graphs, atlases, specific reports).

This function, according to Gerard (1996), is more consolidated by textbook designers, not only in secondary education, where some textbooks are exclusively made up of different documents, but also in the last levels of primary education.

For countries where the access to scientific information is difficult, this function is very important: the school textbook is often the only written source of information. In other countries, where information is invasive and there is sometimes an excess of school textbooks, the reference function remains essential, but it can have a different status. The school textbook may be no more one work of reference among others and lose its position as an only book. In this context of “library teaching”, the school textbook –far from losing interest– can play a role as a *reference framework* which, interacting with other frameworks, allows the student to construct stable and well-anchored points of reference.

According to Frydman and Jambe (1983), school textbooks that aim at the reference function should also be education tools in the formation of something that can be used as a reference.

These textbooks include three parts:

- a) a way to use that includes a description of the organisation of the textbook, indications about the nature of the content, recommendations for a quick and efficient search, considerations about the presentation of the content, explanations of the abbreviations and signs used, a chart with the different subject matters and an index;
- b) the matter itself or the information, in the shape of a continuous text, tables, graphs, information classified in alphabetical order, reference to other works;
- c) questionnaires that allow the student to develop search skills and process the information. These questionnaires would start with the questions meant to familiarise the student with his/her tools: questions about the presentation and content of the work, about the use of the table of contents, about the abbreviation signs, etc. Different levels of search difficulty would then be suggested, whether the question contains the search trigger explicitly or not, whether it needs one or more inquiries, whether it demands a more or less complex treatment of the information.

Two examples of the reference function in the textbooks analysed can be offered here. Starting from the topic “The Independence”, the student is asked to analyse the title of a fragment from a decree signed by Simón Bolívar in 1813 called “Decree of a war to the bitter end”. Then some questions are added for the student to develop literal and critical comprehension as well as inference skills. Also, starting from the topic “National Front”<sup>15</sup> the student, with the teacher’s help, is asked to look for updated information on institutions such as the ICBF (Colombian Family Welfare Institute), SENA (National Learning Service), ICFES (Colombian Institute for the Promotion of Higher Education), and Colculture. It also asks the student to write to international Latin American integration organisms to request written information: OAS (Organisation of American States), the Andean Group, Latin American Economic System (SELA), Economic Commission for Latin America & the Caribbean (ECLAC) and Latin American Integration Association (ALADI). The textbook provides the addresses where the student has to write to ask for the information.

The future of the school textbook probably lies in the conception of works that would make the student take command of his/her own learning and would trust the teacher with a role as a guide more than an expert. Every day there are more of this kind of books; for example, there is a Geography textbook for primary education which presents a set of documents and information and the didactic work consists in the student –with the teacher’s help– taking the elements which are necessary to apprehend a situation, according to his/her own needs and level (Bekaert, Bosson, Evrard, Gobert, Jacques, Lothar, 2001). These school textbooks are as open as possible, that is, they are conceived as a medium to complete or use in different ways according to the specific contexts. Such school textbooks present situations which demand from the student or the teacher a certain number of elements to solve them. They give rise

<sup>15</sup> Active Society 5. Educar Editores. 1995. P. 148.



to the search and use of references. This kind of school textbook is not used in a lineal way, from the first to the last page. Its conception makes it possible to go to one or another of its sections according to the needs. These textbooks are starting points more than points of arrival (Gerard, 1996).

The massive emergence of NICT (“New Information and Communication Technologies”) in the educational world goes in the same direction. Whether it is from multimedia, like CD-Roms for example, or from the Internet, a new way of learning consists in using the mass of information available as well as the possibilities of dealing with its analysis in order to solve certain situations and in the same way learn in turn from the contents and methods. Information search activities evolve quickly in a multimedia universe. For example, when you look for a geographic place, you do not always do it starting from an index of places which gives the page of the geographic map in the atlas as well as the horizontal and vertical coordinates. Nowadays, you only need to write the name of a place, even an approximation of it, to reach a screen where the place you are looking for blinks, and where the “zoom” alone is enough to vary the scale of the map.

We can see that reference information is presented more and more under another shape: to find the time of departure of a bus or a flight to board, you check the name of the places of departure and arrival as well as the time desired on the Internet, and the computer immediately presents the different possibilities, matches, prices, delay risks, etc.

In this context, school textbooks that pursue a reference function have to be aware of the fact that they have to evolve and consider NICT (“New Information and Communication Technologies”), but textbooks remain essential to teach students how to search, deal with and evaluate information. More so when we must not deceive ourselves: the universal access to Internet –even in industrialised countries- is not for tomorrow, maybe for the day after tomorrow, but for now the school textbook is still an irreplaceable education and reference tool.

**TABLE 7**  
**REFERENCE FUNCTION**

<b>LEVEL OF THE TEXTBOOKS</b>	<b>FUNCTIONS OF ACTIVITIES</b>	<b>REFERENCE FUNCTION ACTIVITIES</b>	<b>PERCENTAGE OF REFERENCE FUNCTION ACTIVITIES</b>
Year 1	560	25	4.46%
Year 2	1,127	85	7.54%
Year 3	1,712	106	6.19%
Year 4	1,790	110	6.15%
Year 5	2,701	327	2.11%

If we analyse the data on Table 7, this function does not deserve much attention in the textbooks analysed. Its percentages vary from 2.11% to 6.19% and this could lead us to ask ourselves about a possible backwardness in Colombian school textbooks in the light of what has been said about the importance and topicality of this function in the current processes of circulation, storage and consultation of information that has meaning for school education.

### 3. Social and cultural education function

This function implies all the achievements related to behaviour, to relationships with the other, with life in society in general, that is, with the learning objectives of the socio-affective area (in the broad sense) that allow the student to progressively find his/her place in the school, family, cultural and national context.

It is in this context where we find all the aspects related to health and hygiene equally. These aspects can be approached systematically in a science textbook, in a social and family education textbook, etc., with the aim of developing specific behaviours and habits. This function is appreciated as a priority in school textbooks with an emphasis on civic education or citizenship education. Here, it is necessary for the teacher to use the school textbook as a medium to develop the know-hows, and not so much as a medium in the restitution of prescribed behaviours (know-how to repeat). In the same way, these aspects can be approached occasionally in other primary education reading textbooks or in a natural science textbook, mainly to sensibilise before developing behaviours. This function is alluded to in a secondary way in textbooks from these areas, but social science textbooks, including in a broad sense civic education textbooks, should potentially be concerned with this function explicitly. In fact, virtually all school textbooks aim to this function in a secondary way, because all of them contain a certain number of values, sometimes unconsciously. Here we have, for example, the problematic of stereotypes and cultural identities.

In this context, an example can be offered from unit 4, “Colombia, my country”<sup>16</sup>, which presents a “Social investigation project”: “Customs of my land”.

This function, as is shown in Table 8, just as the reference function, is of little importance within the set of functions found in the investigation corpus. Its number and percentage is not very significant from the point of view of global function analysis.

<sup>16</sup> Friends of Social Science 2. Editorial Santillana. 2006. Pages 62-63.

**TABLE 8**  
**SOCIAL AND CULTURAL EDUCATION FUNCTION**

LEVEL OF THE TEXTBOOKS	FUNCTIONS OF ACTIVITIES	NUMBER OF SOCIAL AND CULTURAL EDUCATION FUNCTION ACTIVITIES	PERCENTAGE OF SOCIAL AND CULTURAL EDUCATION FUNCTION ACTIVITIES
Year 1	560	41	7.32%
Year 2	1,127	67	5.94%
Year 3	1,712	43	2.51%
Year 4	1,790	22	1.23%
Year 5	2,701	142	5.26%

### **TYPES OF FUNCTIONS IN THE CORPUS OF SCHOOL TEXTBOOKS:**

#### **GENERAL EVALUATION**

Chart 1 is like an X-ray of the way how the corpus of school textbooks analysed represents the functions of the activities. It is worth noting that functions such as competence development, evaluation, knowledge integration and reference are more explicit if the textbooks present specific activities for the learning processes suggested in them.

**CHART 1**  
**TYPES OF FUNCTIONS OF ACTIVITIES IN SCHOOL TEXTBOOKS**

KNOWLEDGE TRANSMISSION FUNCTION	SOCIAL AND CULTURAL EDUCATION FUNCTION
CONSOLIDATION OF ACQUISITIONS FUNCTION	COMPETENCE DEVELOPMENT FUNCTION
KNOWLEDGE INTEGRATION FUNCTION	Cognitive know-how
Artistic areas	Psychomotor know-how
Natural science	Socio-affective know-how
Physical education	Procedimental competences
Language	<b>EVALUATION FUNCTION</b>
Mathematics	Transmission of explicit knowledge
<b>REFERENCE FUNCTION</b>	Formative assessment
Technical language	Procedimental competences
Referral to other works	

Which is the predominant factor in the corpus of school textbooks? If we look at the data on Table 9, the presence of the competence development function (31.31%) would indicate that textbooks are on the same wavelength as the approaches on the objectives of education currently promoted by official and academic agents in national and international contexts.

Nonetheless, the knowledge transmission function (27.33%) still has a remarkable weight in the structuring of social science primary school textbooks in Colombia. This is the most traditional function of school textbooks in different disciplines. The attention the evaluation function gets in school textbooks stands out, with a percentage of 16.82%, in the third place. Also, the functions of reference, acquisition consolidation, social and cultural education and knowledge integration are beginning to be included in the school textbooks studied, thus reflecting the new trends of the didactic discourses on school learning.

**TABLE 9**  
**TOTAL FUNCTIONS OF ACTIVITIES IN SCHOOL TEXTBOOKS**

TYPES OF ACTIVITIES ASSOCIATED	TOTAL ACTIVITY		KNOWLEDGE TRANSMISSION FUNCTION		COMPETENCE DEVELOPMENT FUNCTION		CONSOLIDATION OF ACQUISITION FUNCTION		EVALUATION FUNCTION		KNOWLEDGE INTEGRATION FUNCTION		REFERENCE FUNCTION		SOCIAL AND CULTURAL EDUCATION FUNCTION	
	NUMBER	%	NUMBER	%	NUMBER	%	NUMBER	%	NUMBER	%	NUMBER	%	NUMBER	%	NUMBER	%
School textbook																
Year 1 total	560		109	19.46	161	28.75	90	16.07	102	18.21	32	5.71	25	4.46	41	7.32
Year 2 total	1,127		264	23.43	412	36.56	134	11.89	121	10.74	44	3.90	85	7.54	67	5.94
Year 3 total	1,712		530	30.96	520	30.37	141	8.24	276	16.12	96	5.61	106	6.19	43	2.51
Year 4 total	1,790		599	33.46	591	33.02	73	4.08	264	14.75	48	2.68	110	6.15	22	1.23
Year 5 total	2,701		654	24.21	786	29.10	140	5.18	564	20.88	88	3.26	327	12.11	142	5.26
All years total	7,890		2156	27.33	2470	31.31	578	7.33	1327	16.82	308	3.90	653	8.28	315	3.99

Therefore it can be concluded that the functions carried out by textbooks have expanded and diversified. In this context, the following can be stated: (a) the competence approach is evident, however, an in-depth study of the content of competences in the textbooks studied could determine if we are in front of a school textbook that fully complies with the consequences of this approach; (b) the conception of evaluation is not limited to summative or final assessment or knowledge certification, but it has expanded towards a formative assessment, continuous and of processes, associated to different current approaches to learning evaluation; (c) the function of knowledge integration in relation to other disciplines is focused on the artistic areas more than in others like language, mathematics or physical education; (d) the textbooks analysed partially develop functions which the current education trends consider fundamental: integration, reference, social and cultural education. This situation would indicate a modernisation or updating of school textbooks with respect to their functions; (e) it is acknowledged that there is an evolution of the functions of activities in school textbooks that tries to incorporate and articulate recent considerations on teaching and learning: meaningful contextualisation of knowledge, use of other reference documents, preparation for social and community life,

individual and group participation in the construction of school knowledge, integration of knowledge as the basis for the competence approach.

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## An approximation to the didactic approach of emblematic textbooks in History of Chile teaching during the second half of the 20th century

RENATO GAZMURI STEIN

In the last two decades, a group of investigations have emerged, aiming to study History of Chile textbooks. Broadly, these investigations have analysed the contents of these textbooks, going deeper into topics such as the treatment of national identity, the burden of nationalism, authoritarianism and racism, and the kind of citizenship they promote. A less studied perspective has been the didactic dimension of textbooks, which is relevant if we consider that this type of text involves an exercise of didactic transposition, i.e. they answer to a process through which a certain knowledge is transformed to be taught at schools.

Following this reasoning, the analysis of elements such as the structure that articulates a textbook, or the use given to didactic resources—such as chronologies, boxes, iconographies and other sources, questionnaires and suggested activities—should contribute some interesting information when problematising the social function and the educational objectives that different authors, at different times, have attributed to the teaching of national history.

The objective of this investigation is to make a contribution in this sense, aiming to characterise, from a preferably didactic perspective, some textbooks which are emblematic of the line of thought of three extremely influential authors in the teaching of History of Chile during the second half of the 20th century: the first edition of *“Manual de Historia de Chile”* [History of Chile Textbook] (1950) by Francisco Frías Valenzuela; *“La naturaleza y el Hombre Americano. 1° Año de Educación Media”* [Nature and the American Man. Year 9 Textbook] (1969) and *“Evolución de Chile e Iberoamérica. 2° Año de Educación Media”* [Evolution of Chile and Latin America. Year 10 Textbook] (1973), together with the didactic material folder that complemented them, called *“El hombre y el mundo”* [Man and the World] from 1969. This folder included publications by several authors; Sergio Villalobos dealt with the History of Chile. The last book included in this investigation is *“Historia y Geografía de Chile”* [History and Geography of Chile] for Years 11 and 12, by Gonzalo Vial, first published in 1985.

Francisco Frías Valenzuela was a History and Geography teacher in some of the most prestigious public secondary schools in the country, and from 1933 onwards he began a prolific career as an author of History and Geography books which was crowned by the publication of his “*Manual de Historia de Chile*” in 1950. This textbook was immediately welcomed by a large group of historians and teachers in the country, who saw in it “an adequate and updated synthesis of the historiographic material produced in Chile and abroad”, celebrating its “expositive clarity and approach” (Lira, 2004: 116-117). According to Rafael Sagredo and Sol Serrano, due to the influence and projection of his work, Frías Valenzuela became the “main divulgator of national and general history at school level for the second half of the century” (Sagredo and Serrano, 1996: 232).<sup>1</sup>

In the case of Sergio Villalobos and Gonzalo Vial, their influence is not limited to the spreading the idea of an essential nation pre-existing to its historic configuration, and permanence of their textbooks; to a great extent, it answers to the fact that they are two historians who are relevant in the development of Chilean historiography. According to Sofía Correa and Eduardo López, who have studied both authors’ main textbooks, “The influence of Villalobos and Vial in the educational system is immeasurable; they have both been university teachers who have educated numerous generations of high school teachers, who, supposedly, do not only socialise the ideas of those who educated them, but also use their texts.” It should be added to the aforementioned that both Villalobos and Vial had positions in the Ministry of Education and were involved in curricular definitions of a national character (Villalobos in the 1965 reform and Vial in the curricular changes at the beginning of the 80’s), after which they were hired by diverse publishers for the production of the respective textbooks (Correa and López, 1999: 172).

The texts analysed, in the case of Villalobos and Vial, share a series of characteristics. After the 1965 reform, publishers who specialised in the production of textbooks for specific courses appeared. These texts, were produced according to the lineaments of valid programmes, and as such, subject to their transformations, are characterised by having less data, but more iconography and other types of sources, boxes, questionnaires and suggested activities. Both authors’ texts answer to this logic, and were published by *Editorial Universitaria* in the case of Villalobos and by *Editorial Santillana* in the case of Vial. Together with this, the texts analysed have subsequent editions which suffered modifications in order to adequate themselves to changes in the national curriculum. In the case of “*La naturaleza y el Hombre Americano. 1º Año de Educación Media*” and “*Evolución de Chile e Iberoamérica. 2º Año de Educación Media*”, where Sergio Villalobos dealt with the history of Chile as we already mentioned, they were later adapted to the 1980 curricular reform and labelled as “*Historia y Geografía de Chile*” [History and Geography of Chile], according to the new name the subject had been

<sup>1</sup> Francisco Frías Valenzuela’s “*Manual de Historia de Chile*” [History of Chile Textbook] has 24 editions. The last one is from 2006.

given, and they were reassigned to Year 11 and Year 12.<sup>2</sup> On the other hand, Vial's textbooks, originally called "*Historia y Geografía de Chile*", one for Year 11 and another for Year 12, at the beginning of the 90's became only one text titled "*Historia de Chile. Educación Media*" [History of Chile. Secondary Education] to be used in both school years.

In order to shed some light on the didactic dimension of these textbooks, and on the continuities and transformations they reveal, the historiographic trend that they belong to and that they have intended to disseminate, has been chosen to be characterised in a general manner, going deeper into the subjects and themes they emphasise, as well as into the main values and teachings that they seek to instil in students through the study of national history.

In a second moment, we intend to describe the main didactic characteristics present in the different texts, going deeper into their structure as well as into the use given to different types of didactic resources. The aim is to verify how the exercise of didactic transposition that every textbook entails is translated into specific ways to structure the account and in a certain way of using the pedagogic resources available, which should be functional to the image of history and to the educational objectives suggested by the different authors studied.<sup>3</sup>

### THE IMAGE OF THE HISTORY OF CHILE TO BE TAUGHT

According to Rafael Sagredo and Sol Serrano, Frías Valenzuela would be an outstanding member of a generation of historians and textbook authors that would have helped to disseminate the "idea of national decadence in the 20th century," a decadence that would have started with the rise of the middle class to power during the 1920's, and that would have manifested itself in "the alterations of political and social order and in the economic difficulties the country went through in the first decades of the century." In this line of reason, conservative historiography, whose consular figures would be Francisco Encina and Alberto Edwards, and whose main divulgator would have been Frías Valenzuela himself, highlighted, in contrast, "the work of the conservative and aristocratic governments of the 19th century, a time of great material advances, international successes, cultural and intellectual progress and national expansion in general." In that sense, the spirit that would have driven Frías Valenzuela in the elaboration of his textbook, as well as in other of his works, was to avoid the advance of such decadence through the "teaching of a history whose paradigm turned out to be the authoritarian-progressive regime established by Don Diego Portales in 1830" (Sagredo and Serrano, 1996: 231).

From the point of view of the actors and topics that occupy history, Frías Valenzuela's "*Manual de Historia de Chile*" focuses exclusively on political and military events, describing in a clear

<sup>2</sup> According to data contributed by Sofía Correa and Eduardo López, these new versions of the textbooks in which Villalobos had participated were declared auxiliary didactic material by the Ministry of Education in 1984 and distributed free of charge in the country's public secondary schools. Together with this, they also indicate that, according to information from *Editorial Universitaria*, the book for Year 11 had 128,000 circulating copies for its 1985 edition (Correa and López, 1999: 172).

<sup>3</sup> In this paper "didactic transposition" is understood, in general terms, as the process through which an "erudite" knowledge is transformed for its teaching at school.



chronological arrangement, a succession of “political events, constitutions, revolutions, wars, changes of government and ministries.” It would be a history of the ruling classes, eminently “governmental”, based on the action of “characters and heroes” (Sagredo and Serrano, 1996: 233).

For investigator Róbinson Lira, Frías Valenzuela’s account, as a communicator of a conservative and nationalist view of history, appealed to the appreciation of order and authority, which was reflected in the weight and recurrence “of those topics that represented constituted power and those responsible for guaranteeing social order”, who exceeded by far “those terms that pointed at the counterbalance of public powers and civic freedoms”.<sup>4</sup> Together with this, Lira highlights a key factor when contextualising Frías Valenzuela’s work, by pointing out that in his textbook the author aimed to project an “image of objectivity and impartiality”, while he conceived history as “what really happened”, a truth susceptible to be reached through the adequate use of the scientific method, and that had to be exposed in a supposedly objective manner, free of commitments and passions. Set forth in a different manner, it would be a true history, scientifically supported (Lira, 2004: 117-120).

In the case of Sergio Villalobos, he is part of a generation of historians trained in the Pedagógico [the current Universidad Metropolitana de Ciencias de la Educación; in English, Metropolitan University of Education Sciences] in the 30’s and 40’s, who “had opened themselves to economic and social issues, incorporating them as the object of investigation, influenced by the structuralist school and stimulated by the problems the country faced in its process of democratisation and economic development” (Sagredo and Serrano, 1996: 234-235).

In the words of Villalobos himself, the textbooks analysed in this work, assume a conception of history that emphasised “the general aspects that explain the long term changes, instead of chronological accounts packed with data. Within this line, economic, social, cultural and political history fits in, giving importance to subjects that in the past were only aggregates of a basically political and governmental trajectory that accentuated the events.” Within that logic, the treatment of history had to avoid the excess of data “which talk to memory”, focusing instead on “the concepts that talk to intelligence.” Thus, for Villalobos, the social function of national history and the objectives that had to guide its treatment, would not appeal to the acquisition of a “varnish” of culture; instead, history should be “a discipline that helps to think and shape judgement” (in Cunill, 1983: 11).

For Sofía Correa and Eduardo López, who have gone deeper into the nature of the nationalism and authoritarianism present in the textbooks by Villalobos that were analysed for this study, although the author “is not inserted in the nationalist trends of Chilean historiography,” he “does not disregard a nationalist discourse to explain Chilean identity and to create in students a sense of belonging to it”. This nationalism would be discursively organised around a view of Chile as “pre-existent to the historical process that constitutes the nation,” an “ontological view of Chile.” On the other hand, Villalobos’ historiographic discourse would

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<sup>4</sup> Lira bases his statements in a previous work done by Julio Valdés.

manifest a clear aversion to authoritarian governments, which would be brought to light in “his rejection towards the figures of Portales and Carlos Ibañez” or in the treatment of the years that followed the national Independence, to which he refers as “the national organisation”, which contrasts with the label of “anarchy” coined by conservative historiography. However, he would evidence another kind of authoritarianism “based on the idea of the need for an effective power –authoritarian but legalist– centred on the nation, on the positive view of the Armed Forces taking up a repressive role to impose order in society, and in his rejection of liberalism” (Correa and López, 1999: 173-181).

To contextualise Gonzalo Vial’s textbooks, it is fundamental to specify that they answer to the 1980 curricular changes, whose general lineaments were defined when the author held unlawfully the position of Minister of Education under the military dictatorship. Following once again Sagredo and Serrano, Vial would be a protagonist in the repositioning of “the more conservative and traditionalist interpretations of the history of Chile, reviving the view of national decadence in the 20th century –whose utmost expression would be Salvador Allende’s government– and valuing the action of 19th century conservative and authoritarian governments; once again, here arises the figure of Diego Portales as the paradigm to be followed by the men of the new regime.” In its essence, Vial’s proposal coincides with the historical interpretations spread by Frías Valenzuela, but it would incorporate a renewed emphasis on “the action of the military throughout our history,” thus satisfying “the orientations of the new educational programmes, among whose objectives was presenting the armed forces as one of the fundamental institutions of the nation” (Sagredo and Serrano, 1996: 238).

According to Correa and López, Gonzalo Vial’s textbooks show a “fundamentalist Catholicism, with corporatist traces”, turning this author into one of the most influential divulgators of conservative nationalism. In this sense, in Vial’s texts a “national being” would be defined, being characterised in his attributes, which would allow the “justification of any reprehensible action in order to make prevail this essential being, already configured since the conquest period, the Chilean nation,” (Correa and López, 1999: 181-190).

After having described the main characteristics of the historiographic trends and some of the main features of the history of Chile that the different authors analysed in this work intend to communicate, it is fundamental to point out that all of their textbooks are presented to students as an account of what really happened –in an explicit manner in the case of Frías Valenzuela, while in a more hidden way in the case of Villalobos and Vial– without leaving room for different interpretations and legitimising their own as a result of the development of historiography.

## HOW TO TEACH IT?

### THE ORGANISATION OF TEXTBOOKS AND THE USE OF DIDACTIC RESOURCES

In the introduction to the first edition of Frías Valenzuela’s *Manual de Historia de Chile*, the author indicates that: “This work aims to provide students from the second cycle of humanities

[Years 10-11-12] and to the baccalaureate candidates, a full synthesis of the current state of the knowledge of national history.” In this fragment, Frías Valenzuela defines the target audience of his work: students in their last years at school, as well as those who plan on going on into higher education and need to prepare the corresponding exams. For this purpose, the author put at their disposal a “synthesis”, a summary, presented as disciplinarily updated and legitimised by the historiographic production available .

From a didactic point of view, the most striking aspects of Frías Valenzuela’s textbook are in its own organisation. It is an extensive summary whose articulation was conceived to facilitate the structuring of a class, individual study and the memorisation of contents by students.<sup>5</sup>

The text is divided into seven parts and these, in turn, in chapters. Each chapter ends referencing some consolidating readings, and the text as a whole ends with an extensive chronological chart and a series of examples of baccalaureate questions (in later editions, the chronological chart was divided into chapters).

It is in the titles of its parts and chapters where the eminently political and governmental character of Frías Valenzuela’s work is ratified. Five of the seven parts are titled with political references (for example, “The Independence”, “The Authoritarian Republic” or “From Oligarchy to Democracy”) and the other two appeal to temporal references (“The Origins” and “The 18th Century”). In turn, the titles of the chapters are in accordance to a common criterion: the name of the governing authority accompanied by some adjectival structure (for example, “Bulnes’ Decade: material and intellectual progress”, “Errázuriz and the Reforms”, “Balmaceda and the Revolution” or “Alessandri and the social legislation”). In this way, rulers and the political evolution are not only the main actors of history, but they also become the criteria through which the account is arranged and its memorisation is favoured.

In this same logic, the internal organisation of each chapter answers, in its turn, to a clear pattern: first “the causes of a specific process or event were presented, then its development and finally its consequences.” In this way, the logic according to which Frías Valenzuela articulates each chapter is easy to follow: he marks periods according to political criteria; organises the different sections according to the ruler, his main advances, preferably material, and the main events that happened under their administration; finally, he distributes the contents in relation to causes, development and consequences. An additional aspect highlighted by Frías Valenzuela’s contemporaries would be the use of a simple “pleasant to the eye” style, achieving a fluid presentation based on “real prosed outlines” (Lira, 2004: 116).<sup>6</sup>

Regarding the additional resources considered in the textbook, these aimed at collaborating with the memorisation of its postulates, while the chronological chart showed the developed events in a summarised manner, the examples of baccalaureate questions did not appeal to

<sup>5</sup> The first edition of the “Manual de Historia de Chile” [History of Chile Textbook] had 550 pages.

<sup>6</sup> Robinson Lira emphasises the advantage taken by the author and the publisher of the positive comments on the work, through personal letters as well as newspaper and specialised magazines extracts, as in later editions a selection of these were printed in the back cover of the book.

the shaping of a synthesis, opinions and conclusions, but aimed at reaffirming the account and the causal relationships it described.

To go deeper into the didactic dimension of Sergio Villalobos' proposals, it is necessary to contextualise them in the framework of the 1965 Educational Reform, and particularly, within its implications for the teaching of History and Social Science. The 1965 Reform, which had great ambitions and important consequences, was based on the principles of "education for all; integral education and social responsibility." In this context, "new methods, techniques and educational contents were introduced, which in the sphere of the history teaching came to coincide with the renovation experimented by historiography" (Sagredo and Serrano, 1996: 235).

According to Róbinson Lira, the 1965 Reform became the "most ambitious educational reform project of the century." As regards the teaching of history, "the subjects of *History, Geography and Civic Education* were fused into only one curricular area called Social and Historical Sciences," for which extremely prescriptive programmes were designed, including general and specific objectives that limited with precision the times to work on each unit, and also considered suggestions of activities that "showed the concern for generating learning experiences where students were the protagonists" (Lira, 2004: 167-171).

Villalobos, who was an influential member of the team in charge of the new curricular definitions in the recently created subject of *Social and Historical Sciences*, imprinted the same spirit to the textbooks in which he participated. Later on, when referring to the purposes of the texts published by the end of the 60's and the beginning of the 70's, he would point out that these were to "modify completely the kind of textbook used for teaching. The last results of modern investigation and interpretations were incorporated, activities and exercises were added, certain emphasis was given to concepts over data, and novel images were selected (not only as illustrations, but as an integral part of the content and the basis of the activities). The material aspect was tended with ease. Almost all these element were new in the country and then they were imitated by other authors" (in Cunill, 1983: 11). He expressed himself in a similar way when presenting the didactic material folder, "*El hombre y el mundo*" published in 1969, indicating that "the new demands of the study programme which, according to the modern educational trends and the spirit of the Educational Reform emphasise active learning methods, urgently require the access to material of the kind that is included in this series" (Silva and Villalobos, 1969: 2).

To characterise the textbooks in which Villalobos participated, framed in the spirit of the reform, we will refer to "*La naturaleza y el Hombre Americano, 1º Año de Educación Media*" and "*Evolución de Chile e Iberoamérica. 2º Año de Educación Media*" from 1969 and 1973, which together complete the account of the national history, and then we will go through the didactic material folder, "*El hombre y el mundo*" from 1969.

These textbooks intend to deal with national history in the American context, thus responding to the current curricular definitions of the time, but when analysing the proposal we verify

that what is presented is a history of Chile with only some allusions to this context, which are concentrated mainly in the study of the conquest and the colonial period. Textbooks are organised in units, abandoning the nomenclature of “chapters”, which divide the history of Chile into periods in accordance to new categories coined by the structuralist views. Thus, for example, not only the constitutional experimentation periods are called “The national organisation in Chile and Latin America” instead of “Anarchy”, but the 19th century, traditionally divided into the study of the authoritarian and liberal republics, is also characterised as “The expansion period in Chile”, and the old “Parliamentarian Regime” is replaced by “The critical beginning of the 20th century”, revealing the search for more comprehensive and understandable approximations.

Each unit, corresponding to each of the defined periods, considers a brief introduction that guides its treatment and covers economic processes, social and cultural transformations (understanding culture as linked to education and to the development of the media, humanities and intellectuality in general) and the political development, accompanied by illustrations and photographs with brief descriptions, as well as historical maps and documents, which are elements that constitute part of the account. Even though many of these resources make reference to the political sphere, there are also many that aim to illustrate the rest of the dimensions of social life, proposing a variety of sources as legitimate for the study and illustration of history. An interesting particularity is the incorporation of boxes with fragments from historic works, which incorporates historiography as an object of study in history teaching. However, there are no proposals, implicitly or explicitly, of comparison exercises between historiographic interpretations.

At the end of each unit there is an activity section that includes work with historic maps, analysis of documents and statistic series, as well as questionnaires and reading comprehensions. These exercises appeal to the memorisation of data, but also to descriptions, explanations, elaboration of conclusions and syntheses, as well as the emission of founded opinions.

Now, the most adequate textbook to analyse the methodological proposals that Villalobos maintain for the study of history, is the didactic material folder which has already been mentioned. This material, whose purpose was to contribute with examples of activities that would respond to the methodological proposals of the reform, with a special emphasis on active learning, considers nineteen tasks in its national history section. Two of them deal with social issues and two with cultural or intellectual ones (for example, “Society in the National Organisation Period” or “The Cultural Renovation”), three of them refer to military topics (for example, “The War of the Pacific”), again three to economic subjects (for example, “Colonial Commerce”) and, finally, nine to political events or phenomena (for example, “Portales’ Political Thinking” or “Alessandri’s Government Programme”). The pre-eminence of military topics, and particularly of political issues, is striking, considering the author’s proposals.

These tasks included documents of different nature, such as official sources, speeches, letters collections, biographies, memoirs, statistic series or travel journals, as well as fragments of

historical interpretations about specific processes or events, accompanied by some questions oriented towards the comprehension and analysis of documents, the formulation of syntheses and conclusions, the interpretation of graphs and statistic series, and the formulation of impressions and judgements, together with the development of inquiries and investigation works. All of this was under the premise that it was the teacher who had to guide, indicate procedures or complement the textbook with the data necessary to develop the activity or adapt it to the conditions in which the class would develop.

Not long after the textbooks in which Villalobos had participated were published, the 1973 coup d'état was produced, which "did not contribute to its dissemination". The coup d'état, according to Sagredo and Serrano, "seemed to refute the view of history presented in Villalobos' texts; and the path taken by Chilean education from then on did not make their understanding easier. On the contrary, the new circumstances confirmed historic conceptions and traditional educational methods" (Sagredo and Serrano, 1996: 237).

According to Róbinson Lira, "the new authorities who took charge of the Ministry of Education (and who came from the Navy) promoted actions tending to instil national unity principles." At a curricular prescription level, the first modifications were produced in 1975 with the elimination of definitions regarding Latin American integration and the approaches related to social and economic structures (Lira, 2004:190-193). The nationalist impulse would be verified with the promulgation of the *Presidential Board of Directors on National Education* on March, 1979, where it was indicated that the history of Chile "should occupy a central place in the study plan" so students would know and value "the 'great war, economic, cultural and civic feats of our country and people', highlighting individual values, especially of those who had 'sacrificed their lives and interest serving the country'" (Lira, 2004: 201).

These principles would guide the 1981 curricular modifications, in which the subject comes to be called *Historia y Geografía de Chile* [History and Geography of Chile]. From the methodological perspective, the programmes kept the pedagogical criteria of the 1965 reform. However, "they dispensed with specific methodological orientations, with examples for the development of learning activities and with temporal references to give the contents" (Lira, 2004: 203).

It is in this curricular scene that Gonzalo Vial publishes, in 1985, his textbooks on "*Historia y Geografía de Chile*" for Years 11 and 12. As it was already indicated, they showed a view of the history of Chile that is not only political and militarist, but markedly nationalistic. But at the same time, Vial's textbooks included didactic resources similar to those used in Villalobos' texts, evidencing the continuity of the pedagogic criteria established by the 1965 Reform, and their corroboration, even though reduced, in the curricular definitions of the military dictatorship.

Vial's textbooks abandon the organisation into units, which supposed a certain pedagogic criterion, taking up again the logic of chapters. Similarly to Frías Valenzuela's proposal, the chapters that divide history into periods are defined according to political events and processes, mainly in the treatment of republican history. In this way, titles such as "The Anarchy and

Portales' Political Creation", "The Authoritarian Republic" and "The Liberal Republic", or "Alessandri's Second Administration and the Radical Governments" reappear. They reveal a profile of governments and rulers, which generally consider judgements on their capacities, virtues and defects, valuing those who represent authority and order, and underestimating and disqualifying those who personify opposing values (as an example, he refers to Ramón Freire in these terms: "he had no governmental or administrative talents, and his political ingenuity reached true extremes"). Together with this, the valuing of rulers and governments is determined by economic and material advances, especially by public works realised in each administration. In some chapters the political and military account ends with a section related to the economic, social and cultural evolution of the period, a cultural dimension that, just as in Villalobos, is conceived as educational development and high culture.

The historic account was complemented with illustrations and photographs, with informative inserts, chronologies, historical maps and biographies. At the end of each chapter, there was a with activities, which included study questionnaires destined to check the understanding and memorisation of the account, together with the analysis of documents, work with maps, definitions of concepts, data interpretation and construction of chronologies.

Now, even though the text considered this type of pedagogic resources both as part of the account and in the proposal of activities, when comparing them with the ones used in Villalobos' texts, some interesting elements arise. First of all, the sources used to illustrate history are reduced to official sources, speeches, biographies and in some cases to chronicles and travellers' accounts. Put in a different way, Vial only uses traditional sources that appeal to political, military and sometimes economic dimensions. Second, the activities are reduced, in most cases, to verifying the memorisation of the account and the understanding of certain concepts, cutting down those that appeal to the development of interpretation abilities, to working with data and numbers, to reading and working with historical maps and to the construction of chronologies.

In conclusion, while Frías Valenzuela's textbook, as well as its didactic organisation, reveal a textbook that did not aspire to the acquisition of reflexive abilities, least of all critical ones, but to an easy understanding of a certain view of national history, a view of history that appealed to the generation of a national feeling and that established the respect for order and authority as fundamental values, it can be asserted that in Villalobos' proposal, historiographic and pedagogic innovations actually converge, with a deep impact on the conceptions about the social function and the educational objectives of history. The contributions of a structuralist view of history, and the emphasis on active methods centred on the students' learning process, would make the role of history teaching go from the generation of national belonging and the celebration of order and authority to a discipline whose study and teaching would make the development of reflexive and analytic abilities possible. However, this statement must be qualified considering that in this author's textbooks, even though they cannot be catalogued as nationalist, the idea of an essential nation pre-existing to its historic configuration can still be perceived.

In this sense, even though Vial's textbooks mark a sort of continuity with the pedagogic resources of the 1965 reform, their use is not inscribed in the logic of an active learning oriented towards the development in the student of a historical, critical or reflexive conscience. On the contrary, these resources are used for the understanding and memorisation of an account that is presented as what actually happened, in a similar way to what has been pointed out in the case of Frías Valenzuela.

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# 3

## **CITIZENSHIP IN HISTORY AND SOCIAL SCIENCES TEXTBOOKS**

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# Democracy and citizenship represented in Venezuelan primary school textbooks

CARMEN ARTEAGA

## SCHOOL AND TEXTBOOKS AS CONTRIBUTORS TO THE SHAPING OF ETHICAL PATTERNS

**V**arious authors (Althusser, 1974; Bernstein, 1985; Bourdieu and Passeron, 1977; Durkheim, 1990; Tedesco, 1996) agree that school, as well as giving instruction and knowledge, conveys ethical and moral patterns, just as the political principles that shape the image of the ideal citizen for society, an image that is usually considered desirable by social groups who enjoy the ability to influence the design and implementation of educational policies. Ideological contents immersed in the discourse given to students, when drawing the ideal image of the citizen, also give patterns of identity and belonging of the individuals to their nation, which constitutes one of the main functions of school in national states, just as Tedesco (1996) says:

Universal incorporation to education was the instrument through which political integration operated and, as the historic analyses of the process of national construction show, the shaping of citizenship implied an adhesion to the nation over any other bond, be it religious, cultural or ethnic. (p. 77)

School is then the quintessential socialising institution which integrates individuals to the national community. As such, it has a fundamental political role and in this sense it is worth quoting Tedesco again:

...school, specially the obligatory public school as the social institution responsible for socialising the population within certain cultural codes, was designed and expanded as an institution which replaced the traditional agencies of socialisation: family, the Church, ... Public school represented universal values and knowledge, values which were above the particular cultural guidelines of the various groups that made up society. (p. 78)

For the realisation of the teaching-learning process that takes place within school, several strategies and resources are used. These comprise, teachers, official curricula and educational material, which includes textbooks, the object of study of the present article.

### **TEXTBOOKS AT SCHOOL**

Actually, a fundamental tool in the educational process is the textbook, which usually assembles the programme contents defined from principles emanated from official educational authorities. According to Ramírez (2004), the textbook is established as an essential resource for education from the middle of the 19th century on, and today it is a typical tool within the teaching-learning dynamics. For methodological reasons, it is convenient to define what is understood by textbook. It is a written work whose content adjusts to the official dictums of the country's educational authorities about the school curriculum, in terms of objectives as well as in terms of the themes presented. It is designed to be used in the teacher's everyday work, in the teaching and reinforcement of knowledge for the student.

The definition expressed in the above paragraph can be considered a synonym of that offered by Choppin (1992) for "school handbook", so in this case the expressions "textbook" and "handbook" can be used indistinctly. About the function of textbooks as ideological vehicles, Ramírez says:

... school permanently forges in students particular modes of rationality and thinking. In this process textbooks play an important role, as through their meanings they convey, as well as information about knowledge produced by science, ideological, religious, moral, political, ethical, psychological, anthropological and philosophical concepts that make thinking of them as a neutral pedagogical instrument appear ingenuous. (pp. 38-39)

Consequently, textbooks' programme contents usually adjust to the vision of reality managed from institutional spheres related to the educational process, or from social groups that are embedded in some of the phases of elaboration of educational policies and material.

In the case of Venezuela, during the first half of the 20th century, the state managed a policy of educational freedom through which it left the design and implementation of primary and secondary education programmes to the will of particular sectors. From the second half of the 20th, century on, the State adopted a leading role in the design, development and establishment of the national educational system and of all the processes and activities related to it (Portillo and Bustamante, 1999; Albornoz, 1986), including, of course, the elaboration of lineaments for the creation of textbooks and other school material. Nevertheless, towards the end of the century, in the 1990s, there was a reorientation of this policy and, in fact, from the middle of that decade, the State abandons all supervision of textbooks produced for Venezuelan education. This situation continues at present, even though President Hugo Chávez maintains a discourse which gives strong pre-eminence to the policy of the educational State, and

emphatically proposes that every aspect of the educational system, including the contents of school textbooks, must follow the lineaments emanated from the State.

Nonetheless, it should be said that publishers that produce educational material usually state in their textbooks that they adjust to the official curriculum of the country. This being the situation, it would be fitting to analyse the social representation of democracy and of citizenship that is proposed discursively in a selection of primary school textbooks, with the objective of identifying the ethical and moral parameters which are dealt with in them as a model of behaviour that is desirable in society.

### CONCEPTUAL AND METHODOLOGICAL PREMISES

The methodological structure of this article is sustained in the perspective of critical discourse analysis (ACD, Análisis crítico del discurso), according to which discourse, in its oral and written meanings (understanding conversations, public allocutions, poetry, literature, textbooks, etc.) is a social creation. The latter implies that discourse is a reproducer and transmitter of systems of rules, values, beliefs and traditions closely related to the groups which make up different human societies. For this reason, it is possible to establish ideological patterns that sustain certain kinds of social relationships from the analysis of formal linguistic elements of the discourse.

Thus, discourse can be considered a subject of study for the social sciences, where this investigation is framed. It is specifically about the discourse expressed in primary school textbooks, as it is presumed here that the latter convey ideological elements elaborated in the heart of sectors of society who have the power necessary to influence decision-taking, or else to insert themselves in some of the aspects of the educational process, such as the one which corresponds to the development of educational material.

#### 1. Basic concepts

In the theoretical aspects, we work with the concepts of discourse, of social representations and ideology. Discourse is understood, following Van Dijk (2003), as a «*communicative happening*», which includes conversational interaction, written texts and also the actions associated, the cover design, the typographic layout, images and any other «*semiotic*» or *multimedia dimension or meaning* (p.147). Discourse, as well as being a manifestation of language, constitutes a large cognitive structure that integrates all the factors of social life.

The concept of ideology is also based on the work of Van Dijk, who defines it as an organisation of «*fundamental beliefs of a group and of its members*» (Van Dijk, 2003:14). This concept is used in this work as it is considered that ideologies, acquired through the socialisation process, have a decisive influence on the way that individuals conceive the world. Likewise, ideologies have a function as an element of identity, guiding individual, group and institutional actions so as to define membership and belonging with respect to a community.

As regards the concept of social representations, it is approached from the point of view of discourse analysis, as models that present social reality through a type of argumentation. In this context, we consider it necessary to quote the classic definition of social representations developed by Moscovici (1979):

Social representation is an organised corpus of knowledge and one of the psychic activities thanks to which men make physical and social reality intelligible, integrate a group or a daily relationship of interchange. (p.18)

As can be seen in the quoted definition, social representation is a collective phenomenon through which societies elaborate a concept of reality, social as well as material, which is essential for the development of individuals' performance expectations. Social representations are transmitted through different ways, everyday home life, means of communication and social institutions like school.

Social representations elaborated in the different social spaces are confronted and transformed among them and together they contribute to shaping the worldview used by society. In this sense, materials such as textbooks participate in this dynamics of building reality, reflecting in some cases the pattern of civic and moral values which are considered adequate from the State, or else from social groups who are able to influence the elaboration of State policies.

## 2. Analytic approach

Now we move on to establish the analytic approach used in this article. It is a qualitative analysis conducted from a selection of five Year 5 Venezuelan textbooks and five Year 6 textbooks, where the Social Science section (where the topics associated to society, history, political system and national identity are presented) was examined. The content of the material examined was taken as a complete and unique enunciation, contemplated as a macro act of speech made up of minor acts of speech which are studied through the clauses as a micro unit of analysis. Likewise, in this article we worked specifically with the written aspect of the works analysed, leaving aside images, format and other textual elements. The criteria used to choose the books we worked with were the following:

- a) Encyclopaedias where it is stated that they have been produced according to the official educational programme valid in Venezuela.
- b) First editions, or else well revised editions, published after 1998.
- c) They are the most requested editions in school lists, according to the information obtained after a survey of ten bookshops specialised in educational material in downtown Caracas. The books are the following: *Enciclopedia Actualidad Escolar for Year 5 and Year 6*, *Enciclopedia Girasol 5 and 6*, *Enciclopedia Popular Deiba for Year 5 and Year 6*, *Enciclopedia 5 and 6*, *Serie Santillana*, *Flor de Araguaney*, and finally *Enciclopedia Arco Iris Venezolano for Year 5 and Year 6*.

As in every work of semiotic nature, you must be warned that the interpretation of the discourse of the material examined is not considered univocal. Of course it is accepted that there may be

different readings, and in this sense texts will always be works open to various interpretations. The approach to the structures and functions of the books focused on the grammatical and lexical analysis, which were considered as fundamental for the orientation of the work.

## ANALYSIS OF THE SAMPLE

### 1. On Democracy as an ideal political system

The democratic system, understood as that where rulers are chosen by the people, enjoys widespread sovereignty as the ideal political system, at least as to what concerns its formalities and institutions (see chart nº 1).

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#### CHART Nº 1. DEMOCRATIC SYSTEM

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##### TEXTUAL REFERENCES

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“Democracy is the form of government where power resides in the people, as it is the community who chooses its representatives through suffrage for them to exercise the responsibilities of government.” *Enciclopedia Arco Iris Venezolano Year 6.*

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“When we live in democracy, we can choose our authorities. But democracy is not only that. Living in democracy also means being able to enjoy our rights and fulfil the duties towards the country.” *Enciclopedia Girasol Year 6.*

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The ethical superiority of this system is sustained on the expressed fact that rulers are chosen by the people. Discursively, democracy constitutes a system under which the “people” governs, the “community”, who become active agents through verbal expressions such as “the power resides in”, “we can choose”, “being able to enjoy”. In this sense, the universal right to vote directly and secretly, is expressed as the fundamental democratic institution, the medium of action of the agent “people”.

Dictatorship of any kind is considered as the opposing political system to democracy, and in the particular case of Venezuela, it is stated discursively that democracy was established in 1958, after the overthrow of dictator Marcos Pérez Jiménez (see chart nº 2).



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**CHART N° 2. ESTABLISHMENT OF DEMOCRACY IN VENEZUELA**


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**TEXTUAL REFERENCES**


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“After the fall of Pérez Jiménez’s dictatorship, a shared motto of fighting to restore the democratic ideals of Venezuela is made possible among political parties, students, entrepreneurs, workers and some sectors of the armed forces.”

*Enciclopedia Popular Deiba Year 6*

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“On January 23rd 1958, after Marcos Pérez Jiménez left the country, a ruling executive body was constituted... On December 7th 1958, presidential elections were carried out where the candidate for AD: Rómulo Betancourt was the winner; thus started representative democracy in Venezuela.”

*Enciclopedia Girasol Year 6*

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“With the fall of Pérez Jiménez’s dictatorship... political parties take the forefront, Venezuelans choose their rulers... the country enters the phase of representative democracy.” *Enciclopedia Arco Iris Venezolano Year 6*

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“Well into the 20th century, Latin America starts processes of incipient industrialisation; but, at the political level, these countries were marked by dictatorships as a form of government until the consolidation of democratic processes that break with autocratic models of government.”

*Enciclopedia Arco Iris Venezolano Year 6*

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The democratic system does not occur as a homogeneous entity, but it is manifested in two ways: representative democracy and participatory democracy. According to the discourse in the material examined, representative democracy in Venezuela corresponds to that established from January 23rd 1958 until 1998, the year when Hugo Chávez Frías gains access to power. Chávez’s presidency will mark the beginning of participatory democracy in the country. According to the material studied, this implies a transcendence as the rebirth of the Republic (chart n°3) which, as is stated, constitutes a pacific revolution.

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**CHART N° 3. REPLACEMENT OF REPRESENTATIVE DEMOCRACY FOR PARTICIPATORY DEMOCRACY**


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**TEXTUAL REFERENCES**


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“In the December 1998 elections President Hugo Chávez Frías was elected president (who)... insisted on the need to issue a new national Constitution... on which the new Republic can be relaunched.”

*Enciclopedia Girasol Year 6*

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“...article 6 (of the 2000 Constitution) defines that “The government of the Bolivarian Republic of Venezuela and the political entities that constitute it, is and will always be democratic, participatory, elective, decentralised, alternative, responsible, pluralistic and of revocable mandates.”

*Enciclopedia Arco Iris Venezolano Year 6*

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According to the discursive scheme presented, representative democracy was ethically inferior to participatory democracy, as the “people” did not exercise power, but power would have in some way been kidnapped by a political class expressed through the main parties, the ones who signed the so-called “Fixed Point Agreement” (“*Pacto de Punto Fijo*”) (see chart n° 4).

Representative democracy would have been degraded, when falling into corruption and forgetting the people’s interests, turning into a “partyocracy” which, in its final phase, represented the obsolescence of this way of democracy, giving way to participatory democracy.

**CHART N° 4. PARTICIPATORY DEMOCRACY****TEXTUAL REFERENCES**


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“True participatory democracy is that in which the citizen feels part of the goals achieved in the community and, at the same time, gets directly involved in the solution of small or big problems that affect the community in some way or another.” *Enciclopedia Deiba Year 6*

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“The people felt dissatisfied with the proceeding of the government on duty and with the so-called sympathisers of the status who signed the Fixed Point Agreement and were influenced by the old policy of leadership bureaucracy (“cogollocracia”) and the bureaucracy of political parties. This is the way in which Hugo Chávez Frías’ figure arises in the national political sphere,...” *Enciclopedia Deiba Year 6*

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It must be said that the so-called “vices” of representative democracy are shown, discursively, as factors that explain the situation of poverty in which not only Venezuela finds itself, but also Latin America (see chart n° 2). As long as the mentioned vices are overcome, it would be easier for the region to improve as regards the standard of living and the exercise of democracy

Of course, every political system defines a kind of citizen according to the nature of the system, and it is because of this that we approach the second part of this analysis related to citizenship that is presented now.

## **2. Citizenship and its framework of values**

The classic definition of citizenship indicated the condition of member of a political community, together with the possession of a series of rights and duties for those who are citizens. Among the fundamental rights citizenship grants, are the right to political participation (in general through the vote) and a series of personal liberties. As regards duties, they imply the obedience to national laws and a behaviour according to the values and moral patterns considered appropriate in society. Currently, most democracies assign the condition of citizens to men and women older than 18. The particularities of the condition of citizen in each country are commonly defined in their corresponding Constitutions, which are a subject of study as part of the civic education offered to students in primary as well as in secondary school and, of course, it is about themes usually included in textbooks.

Approaching the material examined for this article specifically, we can see that the representation of citizenship is oriented towards the instilment in students of the notion of belonging to a national state, Venezuela, to which individuals are politically related through institutions of the central and local government, as can be seen in chart n° 5.

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**CHART N° 5. CITIZENSHIP AND NATION**


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**TEXTUAL REFERENCES**


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“The 1999 National Constitution, which is the most important law in our country, established three levels of Public Power practice, according to the territorial scale... Municipal, State... National...”  
*Enciclopedia Girasol Year 5*

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“According to what is established in article 168 of our national Constitution, municipalities constitute the primary unit of national organisation.”  
*Enciclopedia Santillana Year 5*

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**“Venezuela speaks by singing. (Music by Conny Méndez)**

...Those who are born in Venezuela are prepared: when you say “Venezuelan” you already say it by singing. The secret, comrade, is something very personal: we lull children to sleep with the National Hymn”

*Enciclopedia Popular Deiba Year 6*

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In the examples given, the possessive pronoun “our” functions as an inclusion factor, in such a way that the reader (the primary school student) is fully assumed as a member of the national community, which is acquired when one is born in Venezuelan territory. In turn, this belonging places the reader under the shadow of institutions of the State; in the first place, the National Constitution that is presented as the main pillar of the social organisation and of the terms of coexistence within the nation.

Thus, a link between the representation of citizenship and the existence of the Magna Carta is noted, which sets the parameters of the Venezuelan’s social contract. Throughout the text, passages from the Magna Carta are presented, together with activities that focus on reflecting on its aspects (chart n°6). In this way the cognitive and pragmatic levels in the discourse operate, promoting the internalisation of the values conveyed in the Magna Carta by inviting the student to be an active part in the study of the topic:

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**CHART N° 6. CITIZENSHIP AND NATIONAL CONSTITUTION**


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**TEXTUAL REFERENCES**


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“1. Read and comment on the following articles of the Constitution.

Article 1. The Bolivarian Republic of Venezuela is irrevocably free and independent and bases its moral patrimony and its values of freedom, equality, justice and international peace on the doctrine of Simón Bolívar, the Liberator...”

*Enciclopedia Popular Deiba Year 6*

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“Analyse

¿What historic-political importance does the 1999 National Constitution have?

¿What do you interpret from the content of the constitutional text?

¿What current events are related to the 1999 Constitution?

¿What are the main aims of this Constitution?

¿What guarantee of human rights and civic duties is safeguarded in the Constitution of the Bolivarian Republic of Venezuela?”

*Actualidad Escolar Year 5*

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“...Living in democracy also means being able to enjoy our rights, which are the same for everyone. Those rights are expressed in the most important law of our country: the National Constitution”.

*Enciclopedia Girasol Year 5*

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These strategies derive in a construction of the notion of citizenship that is mainly sustained by the formalities of the Magna Carta. Nevertheless, in order to be real, citizenship must be practised daily, in the everyday life of individuals, in their relationship with social institutions, governmental institutions as well as those that emerge from the heart of civil society. From this point of view, each Venezuelan could be a leading actor/actress in the construction of the civic state.

However, in the analysed discourse, this perspective is omitted (obscured), due to absences or silences, such as for example, that the contents of the Constitution are not monolithic and that they could change starting from some citizens’ initiative precisely, or from sectors at the base of society.

Within the context thus presented, the ordinary man, incarnated in the expression “the people” appears only at the end of the process, depending on the approval of a finished work, which in this way builds a citizen who has a passive attitude towards the work of the State or political leadership, just as it is seen in chart nº 7:

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#### CHART Nº 7. CITIZENSHIP AND NATIONAL CONSTITUTION

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##### TEXTUAL REFERENCES

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“This Constitution was approved by the Venezuelan people ...for it to govern the destiny of the Republic under the presidency of Commander Hugo Chávez Frías, who is the propeller of ANC and seeks to re-establish the Fifth Republic”.

*Actualidad Escolar Year 5*

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“As soon as the government (of President Hugo Chávez) assumed, it announced the foundations for the establishment of the National Constituent Assembly through a decree ... The National Constituent Assembly, with determination, elaborated the new Constitution for the country that was approved by popular referendum in December 1999. Hugo Chávez’s government, elected by the majority, has begun a pacific and democratic revolution.

*Enciclopedia Popular Deiba Year 6*

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This situation is reinforced by the fact that in some of the texts it is established that the authorship of the contents of the Constitution comes from, in a manner of speaking, the institutional heights of society, as is the National Constituent Assembly, under the leadership of a figure to whom epic virtues are attributed (chart nº 7).

Beyond this situation, the sense of belonging to Venezuela as a national State is established, in the legal and political aspects, instructing the reader about central, regional and local government institutions, whose characteristics are abundant throughout the discourse (chart nº 8):

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**CHART N° 8. GOVERNMENT INSTITUTIONS**


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**TEXTUAL REFERENCES**


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“The institution in charge of discussing and passing the laws that rule the coexistence of citizens at national level is the National Assembly”.

*Enciclopedia Girasol Year 5*

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“Public power is exercised and executed at national, state and municipal level...”

*Enciclopedia Actualidad Escolar Year 5*

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“The one who governs must render account of his/her management before the Treasury Inspector’s Office of the State, or the Legislative Council and the Planning and Coordination of Public Policies Council”.

*Enciclopedia Santillana Year 5*

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“At the end of the Second World War, and after the cruel slaughter of innocent people in several concentration camps lead by the Nazis, the United Nations General Assembly approves and proclaims the Universal Declaration of Human Rights on December 1st 1948. In Venezuela this Declaration was enacted on January 3rd 1963.”

*Enciclopedia Popular Deiba Year 6*

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Likewise, as the chart above shows, the Venezuelan citizen, as well as knowing the national institutions and laws, holds on to the international community’s organisms and agreements, such as the UN, the Río Group, CARICOM (Caribbean Community), the Human Rights Charter and specific laws of childhood protection.

Going on to consider the actions that are typical of civil society, the discourse establishes the possibility of carrying out civic organisation initiatives, alternatives to State institutions, particularly in the form of community associations, for the search of solutions to problems which are germane to the neighbours (chart n° 9).

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**CHART N° 9. SOCIAL ORGANISATION OF COMMUNITIES**


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**TEXTUAL REFERENCES**


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“Associations of neighbours are groups of adults who belong to families that live in a neighbourhood, urbanisation, group of houses, small village, etc. which constitute legally organised associations whose aim is to pursue the well-being of all and each one of their members”.

*Enciclopedia Popular Deiba Year 5*

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“In communities there are organisations such as: Neighbours’ Associations... Condominium Councils.... Collectives ...Non-Governmental Organisations (NGO)...”

*Enciclopedia Santillana Year 5*

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“Communal organisations are devoted to different activities, which may be cultural, sports or conservationist (to protect the environment), among others. You can form or be part of some of them ...”

*Enciclopedia Santillana Year 5*

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As the third example in chart n° 9 shows, in this case, as opposed to what happens with State institutions, a direct connection with the ordinary citizen is built, and this is operationalised in the invitation (“you can form or be part of...”) to integrate some community organisation

that is issued to the student. In the discourse it is stated that the kind of activities that these organisations can legitimately approach are the ones that have to do with actual community problems (water, rubbish, electricity, public services in general) or the ones that are of the economic, cultural, or sports kind, which tend to strengthen bonds in communities.

In this sense, the scarce attention given to the political aspect of civic performance is remarkable, that is, the possibility that citizens may form or belong to political parties so as to have an influence on governmental decisions, or to recognise the existence in society of various groups with frequently different interests or even mutually exclusive.

The parties born in the 19th and 20th centuries and contemporarily, present themselves through a historic recount which reveals a degree of questioning towards themselves (see chart nº 10), and an attribution of the responsibility for political and economic problems that Venezuelan society must overcome today. On the other hand, despite the historic references about political parties, it is not recorded that they consist discursively of a positive action to channel the political concerns of ordinary people, thus mitigating their role as means of civic manifestation and as fundamental actors/actresses within a political system that values itself as democratic.

This mitigation does not make it possible to highlight an undeniable reality, especially tangible in the period we currently live in Venezuela. Within the national community there are coexisting sectors who have different visions of the country and that compete organised as parties to rule the destiny of the nation. We believe that dealing with this information properly would facilitate a larger comprehension in students of the social and political processes that our society is going through.

#### CHART Nº 10. SOCIAL ORGANISATION OF COMMUNITIES

##### TEXTUAL REFERENCES

“From President Pérez’s first period, which is very recent history yet, the action of parties begins to extinguish, some for distorting the specific social function and others for coexisting in the infinite sea of social corruption which, as Balthazar’s banquet, could go on for 20 years...”

*Enciclopedia Popular Deiba Year 6*

“The steps needed to approve or reprobate a law in the National Assembly are: Acceptance of the project introduced in the National Assembly at the initiative of the National Executive Power, of political parties or organisations created by civil society.”

*Enciclopedia Santillana Year 5*

The reference to partisan organisations regarding their performance is presented briefly, measured with the mention of other social groups, as is seen in the second extract shown in chart nº 10.

However, despite the precarious representation of political parties, the discourse conveys an ideological position that is favourable to democracy as a political system within which citizenship is realised through institutions and practices which are characteristic of democracy, as we can see in chart nº 11:

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**CHART N° 11. CITIZENSHIP AND POLITICAL SYSTEM**


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**TEXTUAL REFERENCES**


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“In Venezuela, every citizen has the right to vote, which will be practised through free, universal, direct and secret voting.”

*Enciclopedia Girasol Year 5*

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“Value:

Participatory democracy over representative democracy... Participatory democracy is understood as when we ourselves defend and represent our own interests.”

*Enciclopedia Actualidad Escolar Year 5*

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“ In any democratic society, the ideal is for civil society and the elected authorities to agree on a solution to problems which benefits everyone”

*Enciclopedia Santillana Year 5*

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Just as the excerpts used as examples above show, universal suffrage, direct and secret voting, the principle of choosing government authorities and the existence of a civil society that is independent from the State are all asserted. At the same time, flowing with the contemporary political scene, the distinction between representative and participatory democracy is introduced, establishing the superiority of the latter. Democracy is thus conceived as the quintessential political system, where citizenship can be realised and individuals can have opportunities to develop fully. At the same time, in the texts examined, there is no evidence of references to political systems different to democracy which, with its representative and participatory nuances, turns out to be the only possible scene for the exercise of citizenship.

On the other hand, the values of democratic citizenship practice are not limited to the political aspect, but they extend to the cultural and social, with a series of civic values that should regulate coexistence within the parameters of democracy and which are expected to be adopted by the ideal reader of the discursive material, that is to say, young students, and that they give life to them through their daily behaviour. The typical references to these values are shown in chart n° 12:

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**CHART N° 12. CIVIC VALUES**


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**TEXTUAL REFERENCES**


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“Some factors of local coexistence are: solidarity, understanding, cooperation and respect”.

*Enciclopedia Girasol Year 5*

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“Community rules are built on the basis of some values and affective relationships, among which the following stand out: respect and tolerance... good communication... solidarity... spontaneous participation”

*Enciclopedia Flor de Araguaney, Serie Santillana Year 5*

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“Respect, tolerance, equality, justice, coexistence, understanding, responsibility and participation identify a good citizen, who knows how to live with his/her neighbours and practises union, common effort and shares his/her experiences with the rest.”

*Actualidad Escolar Year 5*

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“...We must not forget that the rights of a citizen end where the rights of the rest begin. If every one of us does it like this, society will work democratically, since the rules established in the Constitution and Laws will be followed. Duties refer to obligations that everyone of us has to fulfill. Our rights and duties are expressed in the Constitution of the Republic. “

*Enciclopedia Popular Deiba Year 6*

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A constant observed is the high importance given, in the first place, to achieving what in textbooks is called harmonic “local coexistence” or “community coexistence” and, within this context, solidarity stands out as the preeminent value. In this way, discourse is oriented to building a representation within which each individual considers the well-being of the community that surrounds them as key to their own well-being and personal fulfilment, through the promotion of values relating to social interaction. There is no record of values associated to an individualistic vital position standing out discursively through values that stimulate personal ambition, competitiveness or personal achievement. What stands out then, together with solidarity, are values such as tolerance, respect and mutual assistance, which when put into practice would theoretically contribute to achieving a society that is aware of common well-being, as well as being peaceful and plural.

Cohesion and social harmony are also stimulated from the cultural aspect through the importance given to national symbols and days, as well as the heroes of the Independence War period, who function as unifying axes of Venezuelan society. Simón Bolívar’s figure deserves special mention, as it is shown virtually deified and as an absolute model of citizenship and national identity. In chart nº 13 there are examples of the use of national symbols and days, as well as of the use of Bolívar’s figure, as discursive mechanisms to strengthen national identity.

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#### CHART Nº 13. CITIZENSHIP AND NATIONAL SYMBOLS

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##### TEXTUAL REFERENCES

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“What is being Venezuelan for you? What do you think when you hear someone proudly say ‘I am Venezuelan’ and when they sing the national anthem they talk to their neighbour?”

*Enciclopedia Popular Deiba Year 5*

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“Our national flag was finally made up of three colours: yellow, blue and red, which represent wealth, the sea and the blood of the heroes who made us free...”

*Enciclopedia Actualidad Escolar Year 5*

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“In all the educational units of the country there should be Bolivarian student societies. These societies aim at the diffusion of Simón Bolívar’s thinking... and the rescue of the Venezuelan citizen’s civic and moral values.

*Enciclopedia Girasol Year 5*

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“Simón Bolívar was a man who had a family, although he may seem to have fallen from heaven or to be out of this world.”

*Enciclopedia Santillana Year 5*

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The best exercise of Venezuelan citizenship, in the terms proposed in the discourse analysed, implies, first, an unconditional attachment to the thought and work of the Liberator, who is



presented as a model to be followed by Venezuelans of all times. Second, the model citizen has to identify with the independence feat of the 19th century, and finally pay homage to the actors and their pro-independence task through the manifestation of civic values and behaviour consistent with those proposed by the protagonists of the epic period of national history.

## **CONCLUSIONS**

1. The representation of citizenship proposed in the discourse of the analysed textbooks is a condition that covers men and women born in Venezuelan territory, over 18 years old. In this sense, it is considered wide and universal, without discriminations associated to sex, individuals' social or economic condition, or associated to race or religion.
2. It is a citizenship that contemplates the presence of civil society organisations, such as neighbourhood associations and others of the local kind, which can be understood as State institutions for the search of solutions to problems characteristic of communities.
3. Ideologically, it is about a citizenship dedicated to democracy as a political system, so that it elevates some of its institutions, such as universal, direct and secret suffrage, rendering accounts on the part of government employees, etc.
4. Political parties, as natural phenomena of democratic systems, are represented under a remarkable ethical questioning, therefore they do not discursively constitute a legitimate alternative for the citizen, as regards the channelling of his/her civic concerns.
5. As regards the relationship between citizens and political/State institutions, an asymmetric balance is drawn, characterised by the passivity of the common citizen before the action and initiative of political leadership. This is emphasised by the description of political leaders and national heroes such as Simón Bolívar, who are attributed superhuman and even divine qualities in some cases. The result of this discursive action is that the common man is placed at an almost insurmountable distance from meaningful political actors from the national scene, and at an inferiority level before them.
6. Transcendent actions at the historic and social level in the discursive scheme presented do not necessarily arise from a collective action, as the result of a mobilisation depending on specific needs or interests, but as a result of a decision taken at the heart of leadership that grants citizenship to the people when endowing them with political, social and economic rights, among others.
7. The Venezuelan citizen is Bolivarian. In this sense, as part of an appropriate exercise of citizenship, he/she should exalt and try to equal or excel the life and work of the Liberator Simón Bolívar. Although the textbooks may invite students to reflect on

his life and work, the discursive proposal implies that this “duty” has to fulfill in a dogmatic and uncritical way.

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# From Revolution to citizenship: theory and practice of the teaching of the french revolution

**JEAN-FRANÇOIS DUNYACH**

**T**his paper is based on my personal experience as both a French historian working on the French Revolution, a writer involved in various historical publications including both academic and scholar books, and a teacher who gave and still gives courses on the French Revolution. The audiences I taught were very different, from the secondary schools (in France) in the 1990's to the Sorbonne nowadays.

The Revolution, with a big “R” as it is commonly written in France, is definitely a major topic in the teaching of history and in the teaching –whatever “teaching” means in that precise matter– of citizenship.

The purpose of this paper is to give a few historical information in the history of this particular link between History of the Revolution and citizenship in France and to show nowadays’ aims in the teaching of the French revolution dealing with an apprenticeship of citizenship. I will eventually show how both book-writing and teaching cope nowadays with these official purposes and obvious social difficulties through a series of examples.

## **HOW TO TEACH THE REVOLUTION IN FRANCE, THE LONG WAY OF AN OFFICIAL REPUBLICAN HISTORY**

The history of the French Revolution, i.e. the academic history of the French revolution, is deeply rooted within the history of the republican regime itself in France which leads us back in the 1880's. Indeed, the official teaching of the history of the French revolution has been more than a real political issue for over a century after 1789. There were several reasons for this late upbringing of an official republican history of the revolution:

- First, after 1799 and Napoleon's coup, France was no longer a republic for more than a century, despite the short second republic (1848-1851) which also ended in a coup and another empire. The republican heritages, the republican ideals, the very idea of

republic itself were then more than suspicious for decades. In many respects, no one really knew (in France as anywhere else) if a republic was simply possible.

- Furthermore, if Republicans were a minority in political terms, they were also harshly criticized in the intellectual field by those who defended monarchy, social and political hierarchy, limited rights and more of all, the Church.
- The intellectual heritage of the French revolution was also more than ambiguous : after a century of debates, a real gap existed in the 1860's between those who celebrated the Revolution as the Rights of Man and civil liberties, to those who supported later attempts to establish equality under Robespierre. 1789 against 1793, liberty against equality, constitutional monarchy against republic (another strong issue: 1789 led to a constitutional monarchy not the republic which was to arise only in 1789), civil rights against social justice... those were the main issues.

This explains why teaching the French Revolution has been such a great and a late issue. Indeed, after France's defeat against Germany in 1871, the new Third Republic was considered as a transitory, temporary regime, preparing the ways to a monarchical restoration. Thus, until 1879 onwards, the Third Republic was in fact governed by supporters of the monarchy. No wonder why the first official academic teaching on the French revolution at the Sorbonne was only given well after the victory of the Republicans: the first course was given in 1886 and the Chair in History of the French revolution only created in 1891.

The other issue, i.e. the split heritage of the revolution between “liberals” and “radicals”, was also partly healed after quite a moment and many debates: as Clemenceau could presumptuously assert in 1891: “Revolution is a block”. None was then entitled to pick and choose in the republican heritage: it all had to be accepted and, more of all, defended. The history of the revolution was then a major element in the shaping of the “new” republican citizen who was bound to definitely establish the republic in France. The republic needed (and in a way still needs) republicans, and these republicans had to be shaped, bred and fed by the teaching of the republican values through the revolution.

This short insight into history explains why the teaching of the French Revolution has been such an issue in France: with the creation of the republican “free” and compulsory school in the 1880's, the history of “the” Revolution became a major topic in the teaching, the promotion and the defence of republican values. Mass popular teaching and education to republican citizenship through the history of the revolution thus shaped and still partly shape both the official aims and the practical methods of education in France.

### **WHAT TO TEACH AND HOW: THE OFFICIAL EDUCATIONAL PROGRAMS**

It is definitely clear that we are here dealing with the interpretation, through textbook writing and practical teaching, of the official texts. So one has to start with the official texts. One could have an idea of this in Lionel Jospin's 1989 presentation of the official textbook for

the bicentenary of the Revolution. As he put it, by celebrating the revolution, School was commemorating its own origins. He also refers to basic principles such as the Declaration of Rights and Condorcet's statement that "ignorance was the source of all public evils". So, teaching the revolution is still considered in France as the education to the principles of the Republic and a republican citizenship.

The official programmes of the French ministry of Education are regularly updated but there's been quite a consensus on the aims of the teaching of the French revolution since the 1980's. The last update dates 2002 but it resumes the official 1996 program. The general content is thus presented, in a series of three items:

The general title is "The Revolution and the political experiences in France until 1851". The three items are:

- Breach with the Ancien Regime
- Undertaking of revolutionary principles
- Maintained heritage, contested heritage

A very important thing to say here is that the Revolution is the first chapter in the teaching of history that opens a continuous chronological teaching of the history of France and Europe. In the previous years, history teaching is thematic (i. e., "Athens in the 5th century B.C.", "The Roman Empire", "The Mediterranean in the 12th Century", "Renaissance"...), with the Revolution, chronology becomes continuous.

Another thing is that Revolution is now embedded in a more general theme dealing with the revolutions and political upheavals in France: 1789, but also 1799 (Napoleon), 1815 (restoration), 1830 (liberal revolution), 1848 (birth of the Second republic), 1851 (Louis-Napoleon Bonaparte's coup and the birth of the Second Empire).

One can notice here that a major change has been made since the original republican catechism: academic works such as François Furet's or Patrice Gueniffey's have been lately endorsed by the "official history".

The official texts clearly state that the question of the revolution is definitely focused on France with a triple goal:

- To show the major breach (both political, social, symbolical) of revolutionary France with the Ancien regime
- To give the main chronological landmarks, the epic moments and the main figures of the period
- To assess the various innovations, particularly in politics and society.

This program, as it is stated, has to be cross-linked with other courses on the education to citizenship that are given since the beginning of secondary schools now, and has to focus on a series of main themes:

- First, a reflection on the causes of the French Revolution through the depiction of the Ancien regime as a time of hierarchical social orders and legal inequality. The intellectual origins are to found in the Enlightenment, understood as a Franco-British movement, and especially in the new liberal ideas as expressed by the Anglo-Saxon philosophers (Locke, Smith). Two preceding upheavals are to be studied thus: the revolutions of England in the Seventeenth century and the American Revolution.

One can see what underlying conception of the revolutionary phenomenon is thus asserted : that of a secular struggle for liberties in the Atlantic World. Another point is the importance of ideas and the notion of “intellectual origins” in the outbreak of the Revolution: as if ideas and their propagation had been absolutely transparent in all parts of society.

- The second point deals with the founding principles of the Revolution that are to be “highlighted”: Rights of Man, civil equality, liberty, the idea of nation. The basic texts for this are the Declaration of the Rights of Man, the Constitutions, the Civil Code and a “chronology showing how and by what social forces these principles were enacted.” The aim is to define the basic words of our contemporary vocabulary through the study of who votes and governs: “limited suffrage”, “censual suffrage”, “universal suffrage”, “national sovereignty”, “separation between powers”, “assembly”, “citizenship”... the idea is to put these notions in context for they have been studied before but in different periods: especially with the former courses on democracy in Athens.

- The third aim is to show what was kept and what was contested or simply abandoned from the principles of the Revolution in the following half-century. The aim is, even if not obviously professed, to show continuity in the making of revolutionary principles and the idea of republic. Thus, Napoleon’s regime is often considered as the true heir to these principles and the epitome of the conservation and propagation of them through major institutions, codes, laws etc.

- More recently, once again under the pressure of the new history of the French revolution, a focus is now almost compulsory on the exclusion of women from the political society under the revolution, as well as the limited and short-lived abolition of slavery from 1794 to 1802.

**TEXTBOOKS AND PRACTICE: HOW TO “MAKE” CITIZENS  
THROUGH THE HISTORY OF THE REVOLUTION**

This part will be based on factual examples and actual documents to be presented in the paper.

- a) The question of the origins: the revolution as a social and political demand for democracy.
- b) Education to citizenship through “commemorative” and “memorial” texts
- c) Practice of Republican principles and nowadays citizenship
- d) Education to political symbolism through the republican iconology
- e) Limits of the republican principles and education to nowadays rights and issues (sexual, social and ethnical minorities)

# Teaching ethical and civic education in Argentina as of the comeback of democracy: the case of the inclusion of human rights in ethical and civic education books

MARÍA CECILIA ALEGRE

## INTRODUCTION

**T**hroughout the 20th century, Argentina lived a series of political events, which were no strangers to those happening in the Latin American sphere. It went through a succession of coup d'états intending to include the country in the predominant world model, where a sad raw material producer role was assigned to it almost without any possibility to seriously industrialise itself in order to elevate the inhabitants' quality of life. This was a model in which few had the control and enriched themselves, while many others, the majority of the population, were excluded from formal economy and had to content themselves with surviving. In that context, Argentina became poorer with each passing day and some of its attempts to change its fate –for example, both of Juan Domingo Perón's presidential periods (1946-1955), president Arturo Frondizi's (1958-1962) developmentalist attempt, and even Perón's return to the government (1973-1976),– ended up in complete failure in hand with even bloodier coup d'états. In that political framework, education also changed in quality, quantity and in the contents to be transmitted.

## THE DIVISION OF PERIODS IN THE TEACHING OF “CIVICS”

If between 1952 and 1955 the contents were transmitted through the Civic Culture course that included the topics of governability, representation and social inclusion, this changed substantially since the self-named Liberating Revolution established a government (1956-1972), which extended to the end of the Argentinean Revolution. In this second stage, the subject comes to be called Democratic Education (12/30/55, Decree 7625, Democratic Education). In its contents the demands made through the intervention of unions are cut, and the social State has a more liberal bias, which is also more bureaucratic and authoritarian. People start to speak of facto governments. All of this happens in the context of the ban of the majority



party (Peronism), the intervention of unions, the repression and recognition of social and economic rights (art. 14 bis), and the reduction of political rights. With the arrival of the new popular government in the year 1973, and with Perón for the third time in the government, the subject changes once again its name and contents.

Between the years 1973 and 1976, the subject comes to be called ERSA (Estudio de la Realidad Social Argentina; in English, Studies of the Argentinean Social Reality) (1973, Decree 384/73). In this period the State is unable to take care of demands in the context of an economic crisis, there is a virtual “tie” situation which impedes making its dominion effective, and there is an existing free functioning of the party system (two-party system) or mass parties as well. With this there is also a growing division in Peronism and a violent armed struggle for inclusion.

After the coup d’état took place, the subject changed its name once again to Civic Education – Moral and Civic Education (7/8/76, Decree 1259, Civic Education, and 9/8/80, Ministerial resolution 1614, Moral and Civic Education), for the period between 1976 and 1983. The context is of a repressive dictatorial State, with the suppression of the political parties, the control over unions, the elimination of every kind of social participation, censorship, and political and social exclusion. It is the beginning of the social and economic rights reduction period (for example, unemployment).

With the comeback of democracy (1984-1992), the subject is named Civic Education (3/8/84, Ministerial resolution 536, Civic education). The context is of economic crisis: hyperinflation, the State’s incapacity to take care of the population’s needs, free partisan electoral game, unionism, and more. There was also high participation, wide rights recognition, and an impossibility to completely include the citizens’ demands, resulting in an economic crisis.

Finally, we reach the 1993-2003 period, where the subject takes the name of Ethical and Civic Education (1993, Federal Law of Education – CBC, Ciclo Básico Común, Formación Ética y Ciudadana [Basic Common Course, Ethical and Civic Education]). In those years, the governability situation varied according to the presence or absence of control over the economic crisis. The neo-assistentialist neo-liberal State takes the centre stage, the two-party system is fractured, people move away from politics, and the process of exclusion is accentuated. The social and economic rights principle is replaced by market logic.

Nowadays, and following the 1994 constitutional reform that gave Argentina entrance to the international context, with its adhesion to the idea of the importance of including human rights as a subject matter –and within it, the rights of the child,– the course, which in Buenos Aires is called Ethical and Civic Education, but that with the last reform for the Buenos Aires province, which is still in process, got to be called Construction of citizenship, took new and very interesting curricular paths. However, it is still commonly called Civic Education.

## THE EDUCATION OF ARGENTINEAN CITIZENS AS OF THE COMEBACK OF DEMOCRACY

I will focus on the changes that were produced as of the comeback of democracy in 1983: the modifications and/or arrangements since then and up to the present time. The return of democracy caused the subject to change its name to Civic Education. This changed again, first, with the sanction imposed by the Federal Law of Education nº 24,195 from April 1993, which reorganised the educational cycles widening the compulsory condition of education to ten years, and then, with the 1994 National Constitution Reform.

The teaching of Ethical and Civic Education or Construction of Citizenship is an updated way of educating citizens, but as we saw, the characteristic avatars in the country's development history also affected over time the way in which the education of citizens for the nation's proper functioning was thought.

If we go through the Argentinean history, we can observe that with the changes in government or rather, the "government modalities", the way of educating citizens and transmitting ethic and moral values that served for the exercise of duties and rights of men living in society, also changed.

Without much details that are beside the point, each time this paper tries to see the value that teaching human rights in current Ethical and Civic Education books has, it is important to have in mind that the 1976 coup d'état marked a before and after in the Argentinean education, and what the comeback to democracy in 1983 meant.

Bourdieu thought that the school system is a field in which agents and institutions struggle, in different strength degrees, according to their constitutive rules, and develop strategies that depend on the positions they hold in it. Every field has a relative autonomy, and in the education field, its link with the State and with the field of power cannot be avoided, i.e. the interior of the game space in which those who hold different kinds of capital struggle for the dominion of State capital and for its reproduction through schools. Even though those who dominate the field are in the position to make it work for their own benefit, they need to consider the endurance and the vindications of those who have a subordinate position. However, under certain circumstances, the situation Bourdieu calls *pathological state of fields* can arise. This happens when those who dominate the field have the wealth and the means to nullify possible resistances and reactions. The effects of domination make the struggles tend to disappear.

The attempts to finish with the reactions of those who occupy subordinate positions in the field are, according to Bourdieu, typical of dictatorships and must be empirically studied. It must be taken into consideration that all curricular changes are, up to certain point, ways of State control, that in the case of authoritarian States come to be ways of abusing and coercing citizens.

Since the preceding year to the coup d'état, the government implemented actions that tended to control the education field. We are referring to unemployment, teachers' arrests and trade union discount in favour of the Argentinean Teachers' Union. The issue that started to take shape in 1975 worsened after March 24th, 1976. The first measures taken by the military intervention were the intervention of the Education General Council, a measure that was justified in the need of an administrative reorganisation.

At present, as we already said, the subject in question is called Ethical and Civic Education and/or Construction of Citizenship. It needs to be differentiated from the so called Civic Education, because in the first one, the axis of the contents is centred in the knowledge of a law-based social order, showing laws and regulations to students so they can learn and memorise them without questioning the basis of the regulation, how they were conceived or the reach of their application.

The Civic Education course appears in 1984 when it replaced Ethical and Civic Education, which, during the last military dictatorship, had been the government's instrument to transmit their ideology to teenagers. After democracy returns, Civic Education is incorporated to the curricular design, formed by contents that could be derived into a scientific genealogy of Sociology, Anthropology, Law and Ethics, among other disciplines.

On the other hand, in the Ethical and Civic Education course that replaces Civic Education as of 1993, the subject intends to investigate the nature and development of political life focusing on the democratic practice. This way, the education of citizens transcends the transmission of knowledge to cultivate virtues that serve Argentinean men and women to commit with democratic life, having the capacity to discern when faced with practical situations. The idea is for the school to be the place in which future citizens learn notions and acquire elements that will make it possible for them to consolidate and deepen democratic life. Because of this, they are trained through the acquisition of knowledge to avoid institutional crises, accept and incorporate new participation models, and are therefore prepared to practice it.

The education of democratic citizens in schools is impossible if democracy is not practised in the classroom as much as in the different levels of management and organisation. The search for ways to talk and deliberate in which a free and open communication can be possible, even though in an ordered manner, is an essential component in the democratic practice. Therein lies the importance of schools giving its students the possibility of knowing a solid line of reasoning rules and practising dialogue according to such rules. This way they can comprehend that regulations are rational agreements, which consider the participants' different points of view and thereby allow a pacific resolution of conflicts.

Finally, the development of solidarity practices in schools and in the community of belonging, favours the recognition of equal opportunities as a necessary condition for the democratic political practice. Being aware of it constitutes an important basis for a sense of solidarity towards the most disadvantaged and the starting point for a change-oriented practice. Along history, there have been different ways of understanding moral, ethics and the fundamentals

of legal regulations that have determined different teaching and learning models of these contents. Sometimes, these have not been properly made explicit or systematised. On the other hand, others have reached an important level of development, especially, due to the contribution of sciences that study learning processes.

It is important that teachers in charge of teaching Ethical and Civic Education contents may know and integrate to their practices other models nowadays promoted, which generally receive contributions from two important traditions in the history of ethics. In relation to the teaching of Ethical and Civic Education contents, there is a first didactical difficulty that has to do with the need for equilibrium: on the one hand, they are specific contents; on the other, they go through the rest of the areas (cross-curricularity). The school needs to teach what is needed to achieve a democratic coexistence in a pluralist society, where a person's dignity is simultaneously recognised and respected, and a space is given for commitment and for the coherence between each person and his/her options. It is necessary for the teacher to reflect on the situations in which such demands may provoke some kind of conflict.

To teach contents that compromise different life choices is only possible on the basis of being able to share rationality and dialogue principles that give place to respect over differences and that also allow recognising a common foundation of ethical principles.

The National Constitution, the international human rights statements there ratified and the Argentinean legal system regulations, offer that common appraisive foundation that allows combining the recognition of universal values with the due respect to convictions and personal life options. It is for this same reason that the human rights inclusion that was made in the National Constitution during the 1994 reform is so important, especially that of the rights of the child. According to Hayden White, the written production is important historical evidence, because texts are saturated with ideological elements that reflect the “mental atmosphere” of the time in which they were produced. The same occurs with social praxis, which reflects ideas, emotions and actions through actors' collective behaviours.

### **THE SO CALLED “CIVICS”: ITS TEACHING AS OF THE COMEBACK OF DEMOCRACY**

*One of the characteristics of traditional civic education has had as an objective that students “know” the constitutional regulations. In some cases, the memorisation of such regulations has been attempted without any connection to a social and historical context. Civic Education, in its diverse variants, was reduced to be just transference of information, a role that was even carried out during dictatorial periods.*

This fragment which belongs to a publication by the Ministry of Education's National Programme for Educational Innovations (2000), states that “civic education was held during non-democratic periods”. This is true, but the rest of the statements in the paragraph are not. It is important to emphasize this, because as María Gabriela Quiñonez well states in her paper “*La formación integral y permanente del hombre argentino. Los contenidos nacionalistas en la escuela pública santafesina durante la última dictadura militar (1976-1983)*” [The

Argentinean man's comprehensive and permanent education. The last dictatorship (1976-1983) nationalist contents in the Santa Fe public schools], carried out as part of her master's thesis at Universidad Nacional del Litoral, these elements are part of a paradox that has accompanied those subjects with specific political contents since its introduction to the study plan: the on duty governments and educational authorities have focused their attention on these subjects so that they constitute the major curricular transformations that have been in the Ministry of Education designed policy.

Paradoxically, those courses are seen as of less importance in the educational process by the actors of the school system themselves, so much so that there is no specific teacher training in the state sphere for the teaching of its contents, there is a reduced amount of total contact hours in the study plans, publishers are reluctant to invest in special publications and, what is worse, nobody knows completely what they are about. That is why Quiñonez maintains that, in the above transcribed text, Civic Education is confused with Civic Training, two different curricular spaces that coexist in the secondary planning since 1953, failing to recognise that Civic Education (or its equivalents) was more than an exercise of memorisation of the National Constitution's articles.

The return of democracy with Raul Alfonsín's presidency in 1983 meant the installation of a representative government and the progressive breakdown of the military power. The really interesting part of it was the wide citizens' participation and the great expectation atmosphere in relation to the political and economical changes despite the military government legacy, the domestic and external debt, the deindustrialisation and the school transference to resource-lacking provincial areas. This stage was of full representation, but the social exclusion process, which began in the military period, was maintained. In the end, this showed governability issues, which determined that the government ended its term of office months before the corresponding National Constitution date.

In 1984, Alfonsín summoned a national pedagogical congress which was held during three years through debates. Even though it was a space for democratisation, it did not produce the expected educational reform. But we need to remember that, during this government, the workers' rights were respected, especially those of the teachers. In this context, a subject was introduced in middle school: Civic Education, which was supposed to replace the former dictatorship-period Moral and Civic Education, and that had as its objective to take to that school level the new government political orientation. The important differences between both subjects arise from the 1984 Ministry of Education resolution that established the content and objectives. In that context, textbooks are adapted on broad lines to the new valid curricular designs.

By the end of the '80s, there was a change of direction in Argentina which had serious consequences in the educational sphere and aggravated the situation of the area. In this period, there is a change from the concept of educational democratisation to that of "educational quality", a concept which conceals the idea of an education for minorities, impairing a

democratising education for all. This new Argentinean reality will be partly reflected in the 2001 census results, where the effects of such a policy can be seen: there is a noteworthy increase of non-literate people, resulting from the Menemism implemented policies and the international creditors.

The Menemist period contributed the conception of education as another market product subject to the supply and demand game. As a direct consequence, the features of the neo-liberal model for educational policies were:

1. The educational system's decentralisation.
2. Massive transferences of schools to provinces.
3. The preponderance of the private sector.
4. The defunding of public education.
5. A tendency to more flexible contracts for teachers.
6. An efficiency criteria (quality).
7. The intervention of the World Bank in the technical and financial matters (this feature that came from a previous period was deepened) through which Argentina is inserted in the international educational policy.
8. It was a copy of the Spanish reform, which had already failed in its country of origin.
9. The Higher Education Act (24521/95) was approved.
10. The Education Federal Act (24195/94) was approved.
11. The Education Federal Council approved the 39/94 resolution (in compliance with the federal act) which established CBCs that "will serve as a basis for the curricular design that each jurisdiction will construct as of 1995" (Ministry of Education, resol. 39/94, art. 2).

CBCs are divided into chapters according to different scientific and social fields. The last of these eight chapters is the one that refers to Ethical and Civic Education, and gives cross-curricularity to the course, stipulating that its content has "philosophy, psychology, health science, social science and law as its object of reflexion and specific systematisation." It does not clarify what social science it refers to, and it never mentions political science as a primary source of the contents despite its denomination of "and civic". It will discuss the person, the groups, health, values, social and legal regulations, the National Constitution, but there is no mention of notions of power, State, legitimacy, political parties, suffrage, democracy or human rights.

Thus, neither the contents of the different sections nor its achievement expectations consider expressly the citizens' rights or conceive them as a central political subject in a democratic regime. This notion is then covered up in a series of universal and, at first sight, indisputable values, such as peace, love, tolerance, the right to a healthy life, and more. This presentation of values as universal is in perfect tune with the neo-liberal pretension of inserting itself as a unique speech, at least in the West.

In this scenario, textbooks and publishers will develop tolerance, as one of the main values. Different cultural values, divergent thinking or social differences must be always tolerated (not respected), and are outside the field of social science. Publishers interpreted the ministry's established guidelines quite freely, even though conditioned by the market's expectations. The textbooks leader groups summoned specialised writers for their projects in the different disciplines proposed by the CBCs. This resulted in texts that were often too difficult for teachers, with a confusing selection of topics and with an approach that was difficult to apply in the classroom. The approach and the thematic reduction were uneven, even though they had two common features: a favourable perspective towards the democracy that tried to be objective and which included the historical reflexion, and an attempt to favour the participation of students in the formation of their own position in the world.

The last editorial productions tend to increase the emphasis on the ethical above the political. This movement from civic to ethical and from public to private, however, begins to arise since the Education Federal Act sanction and it is reflected in the contents.

### **THE TEACHING OF HUMAN RIGHTS AS PART OF ETHICAL AND CIVIC EDUCATION AT SCHOOLS**

All of the changes seen up to this point in relation to the education of school students as citizens and social actors have not meant, as of 1983, the inclusion of democratic values and solidarity practices, and the recognition of the other and their differences. Fortunately, changes continued and continue.

Even though different rights were included in the National Constitution throughout different moments of the Argentinean history, and they were integrated to the "civics" curricular designs in their diverse versions, only since 1994 human rights were given their real dimension and started to be taught, communicated and incorporated in the classroom's day-to-day life.

A right is understood as a collection of positive (the State intervenes) and non-positive (the State does not intervene) obligations the State has with its citizens and that were recognised at different times in the National Constitution. Nowadays, when referring to rights, we speak of human rights in accordance to the 1948 Universal Declaration of Human Rights, and the international pacts and treaties that jointly form the International Bill of Human Rights, which universally recognises these rights. We also need to add American pacts, such as the American Convention on Human Rights or Pact of San José. Even though all of these treaties and pacts are international organisms' resolutions, States are the ones that in the end have full sovereignty to internally implement mechanisms to recognise these rights. This is why the 1994 constitutional reform, through which Argentina included human rights in its National Constitution as inalienable rights to all people living in its territory, is so important. And within them, the rights of the child were also included, adhering to international treaties, which mention them.

This provoked a new turning point in the teaching of the “civics”, because it was from this moment that Ethical and Civic Education books started to include human rights as an important topic in the development of their contents, and which in turn became a central axis in the education of citizens.

This tendency was carried one step further and, already in the 21st Century in Argentina, the sampling of textbooks for secondary education about the topic, marks a tendency to teach human rights as a way of exercising memory, so the country’s traumatic past as of the 1976 coup d’état is not forgotten, and to know what the reorganisation and the learning of life in democracy cost and still do.

In Latin America, the transition towards democracy was produced when the elites accepted that democratic rules could be useful to defend their interests and when faced with a lack of other viable alternatives, as other domination experiences failed. There was not a return to democracy because of the belief in its values, which makes it fragile, so it is important to elaborate State policies to consolidate it. To strengthen a democratic culture and the democratic system, there is nothing better than school to develop the democratic game rules through its own dynamics and the communication of the different contents to be taught.

It is for this reason that the Ethical and Civic Education course, dedicated to citizenship education as well as to the values of the men and women in the Argentinean nation, is of vital importance. And the place to develop it and expose its contents must be the school.

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# Conceptions of citizenship in Chile through history and social science textbooks (c.1880-c.1930)\*

PABLO TORO BLANCO

## PRESENTATION

In the first pages of his *Cartilla Cívica para los niños* [Civic Primer for children], published in 1902, Hermógenes Pérez de Arce requested from the government a benevolent welcome to his brief work, so that, with the help of fiscal funds, he would be allowed, at a later time, to write a complete course of civic instruction that would attempt to satisfy important voids in areas in which, according to his point of view, Chilean students did not have “any knowledge of their civic duties, nor the least notion of what fatherland is, with its public powers and administration”.<sup>1</sup> The dark diagnosis expressed by the author was shared by a wide contingent of teachers and intellectuals concerned with the public issue, in a context simultaneously marked by promises and threats: a new century was born, and with it the purpose of beginning a political, economic, social and cultural regeneration became more urgent, framed in an awareness of a national crisis that would tend to turn into *common sense* as the symbolic date of the centenary of the Independence of Chile drew nearer. Thus, the need to expand a shared notion of civic education through the school system and to spread in this way an integrating and normalising concept of citizenship became evident. This concept would have to have a more complex dimension than the mere legal definition previously socialised, this time appealing to dimensions that would imply growing forms of interpellation to the commitment with the representative democratic system. For this purpose, in the years that followed a progressive offer of texts to be used in the school system

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\* This text, of an introductory nature to the subject, is framed within the lines of investigation “Juventud, escolarización, disciplina y civilidad en Chile: un enfoque histórico” [Youth, schooling, discipline and civility in Chile: a historic approach] and “Historia de los textos escolares en Chile” [History of textbooks in Chile], carried out by the author in the Department of History at Universidad Alberto Hurtado.

<sup>1</sup> Hermógenes Pérez de Arce (1902). *Cartilla Cívica para los niños* [Civic Primer for Children]. Santiago: Imprenta Roma, p.7

was generated. These texts approached mainly the challenge of communicating to teachers in the classroom and, in a more mediated manner, to students, what should be understood by citizenship in the context of an excluding political regime which was being increasingly questioned.<sup>2</sup> In these pages, aspects of this tension, together with some potentialities attributed to the condition of citizen, will be dealt with from an approach disciplinarily inserted in the historiography of Chilean education, through an analysis limited to some selected contents from the aforementioned texts.

### FORMALISATION OF CIVIC INSTRUCTION IN THE SCHOOL SYSTEM AND THEMATIC BACKGROUND

In this analysis we will favour the first third of the 20th century as the scene where civic instruction textbooks begin to be more frequently published. However, taking a brief look into the signs about the idea of citizenship found in textbooks of previous years may be enlightening, since the interest of giving meaning to the term and, in a bigger scope, of setting forth the nature of civic rights and duties, was tendentially present at least since the systematisation of the state offer of primary education (1860) and secondary education (1879). The issues that would be recognised as a specific curricular dominion towards the end of the 19th century for primary education (1898: establishment of Civic Instruction), normal teaching (1899: change of the Public Law subject for Civic Instruction and Political Economy) and Humanities studies in public high schools as of 1917 under the subject of Civic Instruction, were detectable in previous textbooks, with different degrees of explicitness.<sup>3</sup> In this way, it is possible to find weak traces of issues which are relevant for our topic in some textbooks for the teaching of History used between the 1870s and 1890s, inserted in a scene marked by the conflicts unleashed between secular and clerical sectors to make a view of national history according to their ideological postulates<sup>4</sup> prevail.

Even though the issue towards which History textbooks were oriented was naturally projected into the past, this did not stop their authors from using it to make references to the construction life in society from their opposing approaches, which implied quite contingent additions. From them, we could deduce, by approximation, a certain notion of duties and rights towards the collectivity. In this line, for example, we could consider some statements made in a textbook used for the teaching of History in religious schools during the aforementioned decades.

<sup>2</sup> In the corpus analysed in these pages, corresponding to ten Civic Education books, there is a plurality in texts for school use and manuals for teacher education. This was a frequent situation during the studied period of time, when it was necessary to prepare them for an emergent subject such as Civic Education. Regarding the categories of school books and manuals (in which the analysed texts would be inscribed), the question in the introduction to the collective work coordinated by Gabriela Ossenbach and Miguel Somoza (2001), *Los manuales escolares como fuente para la historia de la educación en América Latina* [School manuals as a source for the history of education in Latin America], Madrid: Ediciones UNED, pp.15-24 is relevant.

<sup>3</sup> The interest for children's civic education that, together with the strictly instructive, included the ceremonial dimensions and patriotic rites, are approached in the interesting and well documented book by Jorge Rojas Flores (2004), *Moral y prácticas cívicas en los niños chilenos, 1880-1950* [Moral and civic practices of Chilean Children, 1880-1950], Santiago: Ediciones Ariadna.

<sup>4</sup> This dispute about History textbooks is approached in the article by Allen Woll (1977), "For God or Country: History Textbooks and the Secularization of Chilean Society, 1840-1890", in: *Journal of Latin American Studies*, 7, 1, pp. 23-43.

The author was trying to ponder which virtues gave coherence to the republican order and suggested their identification with

“the conservative party, [that] with the honesty and good sense that characterise it, knew how to happily guide the ship of the State. On the other hand, the respect towards religion, on the other hand, has contributed to the preservation of the ambits of order and submission which are indispensable for the progress of the peoples.”<sup>5</sup>

In the other ideological trail, a textbook of secular orientation gave a disapproving look to the colonial times (openly associated to the influence of the Church), emphasising its differences with the republican Chile and intended to use it as a means of contrast to assert the irrefutable superiority of the representative democratic system, which is equalitarian in front of the Law:

“there was no civil equality. The laws did not recognise the slavery of black people and the institution of primogeniture (...) Penal laws were soft, in practice, for the Spaniard of an important family with money, but were stringent for the people in general.”<sup>6</sup>

The emphasis given to one or the other source of legitimacy to highlight, from the past, the bases of political ordering in the present, appeared, with all, as rather tangential argumentation for the problem which occupies us. Franker approximations can be found in textbooks from the same period, which are explicitly oriented towards the communication of the main precepts of the Political Constitution. The challenging mission of socialising its dispositions in children and youth was perceived, however, as a restricted situation in terms of scope, as it only reached higher level students directly involved in the study of Law. Because of this, the circulation of a text explicitly oriented to an extended education of citizens in schools was approved in July, 1878: *El Manual del Ciudadano* [The Citizen's Manual], authored by José Bernardo Suárez.

The *Manual del Ciudadano* was presented as an accessible text in terms of cost (it cost \$0.75 compared to the \$3 that the one used in the *Instituto Nacional* [National Institute] cost) as well as in terms of its didactic approach. The author's intention was for students to learn the contents through comprehension instead of memorisation. For this purpose, the books was presented as “written in dialogue, in questions and answers, which makes its teaching and learning<sup>7</sup> easier”. In this sense, a relationship can be established with patriotic catechisms

<sup>5</sup> Esteban Muñoz Donoso (1890). *Compendio de la historia de América y Chile. Por el presbítero Esteban Muñoz Donoso. Obra escrita para la enseñanza del ramo en los seminarios y colegios católicos* [Compendium on the history of America and Chile by the priest Esteban Muñoz Donoso: a book for the teaching of the subject in Catholic seminaries and schools]. 4th edition. Santiago: Imprenta Cervantes, p.277.

<sup>6</sup> Gaspar Toro (1879). *Compendio de historia de Chile (1492-1884). Para el uso de las escuelas y colegios de la República* [Compendium on the history of Chile (1492-1884), for the use of public and private schools of the Republic]. Paris: Imprenta de A. Lahure, p.48.

<sup>7</sup> José Bernardo Suárez (1882). *Manual del ciudadano. Lecciones elementales de derecho constitucional chileno. Texto aprobado por la Universidad para la enseñanza de la constitución política en los liceos, colegios y escuelas superiores de la República* [Citizen's manual. Elementary lessons on Chilean constitutional law. Text approved by the University for the teaching of the political constitution in public schools, private schools and superior schools of the Republic]. 3rd edition. Santiago: Imprenta del Correo, p.9.

that were in circulation at the beginning of the post-colonial order in Chile and Latin America.<sup>8</sup> The catechistic approach considered by Suárez as didactically convenient, was endorsed in the summarised version of the *Manual* which circulated during the 1880s and addressed a wider audience spectrum and where the author also pressed for a good education, for

“*teachers to do as much as possible to keep in their schools the old school system regarding practical teaching, study proposals and extras, which stimulated students so much and still fill them with enthusiasm. Those auctions were true competitions between children from the same school and may have a place today in those subjects taught by catechisms, such as Religion and Political Constitution (God and Country)*”.<sup>9</sup>

Beyond the levels of traditionalism or innovation involved in Suárez’s proposal (in which the catechistic, as a practice of openly hierarchical education, was present as a way to appeal to the popular world of children and labourers), it is important to consider that the idea that it was necessary for students to internalise their future role as citizens is manifested. This is a notion that will be repeated from this point onward in the rest of the textbooks for civic instruction.

### CIVIC INSTRUCTION TEXTBOOKS IN THEIR DIDACTIC DIMENSION

Continuing with the aforementioned, even though this is not the space to discuss the practical projections of civic instruction in classrooms –which is a matter that makes other type of sources and investigation questions that deserve our attention,– trying to give some signs on how the way to carry out the purpose they hold emerges from the same text is justified. By suggesting this observation angle, the indication of the possible concession of some type of leading role or activity for students is intended as well as knowing under what premises they figured it would be possible to induce the learning of their future duties and rights to children and youth. An indicator that could be taken into consideration to appreciate that dimension is the type of education and activities that each text set forth and the explicit level of presence the actors involved in them had: teachers and students.

According to the aforementioned criteria, it is relevant to consider that the corpus of the revised civic instruction textbooks (a dozen of them individualised at the end of this study) extends from 1882 to 1932. Besides, the texts are authored by teachers as well as lawyers, which certainly implies a different approach in the way to express the contents proposed by the official programmes. Such differences make it possible to understand that, throughout a period of half a century, some of these books echoed the orientations tending towards

<sup>8</sup> In this regard, see the study by Rafael Sagredo (1994), “Actores políticos en los catecismos patriotas americanos, 1810-1821” [Political actors in the American patriotic catechisms, 1810-1821], in *Historia*, volume 28, pp. 273-298.

<sup>9</sup> José Bernardo Suárez (1882). *Catecismo constitucional de la República de Chile. Extractado del “Manual del ciudadano” aprobado por la Universidad para la enseñanza en los colejos, i destinado a la clase obrera i a los alumnos de las escuelas primarias* [Constitutional catechism of the Republic of Chile. Abridged from the “*Citizen’s manual*” approved by the University for the teaching in schools, and destined to the working class and to primary school students]. Santiago: Imprenta del Correo, p.5. The underlining corresponds to italics in the original text.

more activities and guidance for students, while others simply served as a repository of the topics that needed to be covered in class. In the strict sense, texts were thought mainly for teachers to use them and it was to them that certain guidelines were given. Thus, most of the books did not include activities or questionnaires and they were strictly confined to the presentation of topics, in spite of the fact that they introduced interesting and sometimes caustic comments, as will be seen later on.

In the collaboration sense of civic instruction, textbooks did not constitute a mechanism on which education could rest, as we can see it happens (or so it is supposed) in our days. In the strict sense, the bet of most of the textbooks studied was made on the teacher's abilities. At some point, a couple of authors even pointed out that

“we do not think that textbooks are absolutely indispensable elements for its efficiency; but we are convinced that these elements, used with good judgement and discretion, constitute a powerful auxiliary for students and teachers in their respective tasks”.<sup>10</sup>

As it has already been indicated, Suárez's first texts in 1882 recommended the use of catechistic activities and competitions of knowledge between students. In his 1901 book, Rubén Guevara, professional teacher and at that time Headmaster of the *Liceo Santiago* [Santiago Public Secondary School], offered teachers the contents divided into lessons, at the end of which questions were formulated for students to answer. The same invitation was found in Malaquías Concha's 1923 *Cartilla Cívica* [Civic Premier] and in Santiago Peña y Lillo's 1932 *Texto Auxiliar* [Auxiliary Textbook]. In the rest of the textbooks, however, the appeal to students was minimal or inexistent. Yet, this confirmation should not provoke the attribution of a supposed homogeneity and teaching consensus to the way of teaching civic instruction at that time: at the beginning of the 20th century there were several proposals that were more integrating of the activity of students in this field of learning although, certainly, they were seen as isolated avant-garde experiences. In this path, the initiative carried out by Carlos Fernández Peña at the *Liceo Santiago* in 1903 can be invoked under the figure of the *School Republic*. In this education proposal which puts students in a central leading role, civic instruction found itself under pressure to abandon its more traditional cannons, as the starting point was that

“there is the same impossibility to teach physical education or mathematics without exercising the body or the intelligence as there is in the teaching of civic virtues, moral and character qualities, if they are not exercised”.<sup>11</sup>

The teaching of civic duties and rights would be made through the government of the school scope itself, which would be given to the same children and youth. Some decades should go by for this type of approach to start spreading and getting implemented as a means for civic

<sup>10</sup> This is indicated by Amador Alcayaga and Eliodoro Flores (1917) in the introduction to their *Instrucción Cívica* [Civic Instruction]. Santiago: Imprenta y Litografía Universo, p. XI.

<sup>11</sup> Carlos Fernández Peña (1930). *La República Escolar* [The school republic]. Santiago: Imprenta Nacional, p. 109.

instruction. The subject of teaching, the student, would still stay nominally absent in most of the texts that we refer to in these pages, with the exception of two books that included him/her and recognised a co-participating role in him/her in the learning of the bases of citizenship.

The *vocative* acknowledgement of children and youth in the civic instruction textbooks that we have revised, is present in Concha's already commented *Cartilla Cívica*, and in the book which closes the analysed period of time: Peña y Lillo's 1932 *Texto Auxiliar*. In the first, it is frequent that children are called out to consider and interiorise certain proposals from the tone of superiority of adults. There is a counselling spirit which is manifested, for example, when the author indicates that, facing a highly sensitive topic in the context of the 20th century aperture and the social struggles it caused, "*we allowed ourselves to advise children that when they become men, they should not participate in strikes without enough motives for it.*"<sup>12</sup> On the other hand, and answering to an educational juncture of reforming enthusiasm in the institutional as well as in teaching practices, Santiago Peña y Lillo, at the beginning of the 1930s, presented his textbook in such a way that it considers the activity of students (individual and group reflexion of the subjects dealt with in the different units) and integrates them, even symbolically, in the materiality of his book by including several drawings done by students to illustrate certain contents, which is an absent dimension in the group of texts revised. This visibility of the infantile and juvenile in the pages of the *Texto Auxiliar* also makes possible the understanding of the book as belonging to a period that can be conceived as the hinge towards a new type of books that will start to incorporate images and graphics thanks to the material changes in the publishing industry and to new educational approaches.

### **CITIZENSHIP: PROMISES, THREATS AND CONTINGENCY IN THE CONTENTS OF TEXTBOOKS**

As a means of transmission of specific value-based and political conceptions, mediated by the reference to a map of contents that conditions its thematic possibilities as well as by its mission to enunciate from a will of objectivity a valuable knowledge to be disseminated in the classroom, the civic instruction textbooks analysed in these pages are offered as a guide to appreciate traces of the social representation formulated on the idea of citizenship at the turn in the transition from the 19th century to the 20th century in Chile. Viewed from a wider temporal horizon, the spreading of the concept of citizenship was closely related to the ups and downs of the process of construction of the Nation State in our country and in the continent. In this way, what was preached in textbooks of *what citizenship meant* involved a manifestation of what has been considered as the stage of searching for the *homogeneous nation*, i.e. one that was no longer based on the excluding definition and alienation as axes, typical of the mid-nineteenth-century *civilised nation*, but that tried to aim at the strengthening of a national collective with a social and political cohesion that is the result of, among other

<sup>12</sup> Malaquías Concha (1923). *Cartilla de Educación Cívica. Elementos de Derecho Público y de Economía política para el uso de las escuelas superiores y normales de la República* [Primer on Civic Education. Elements from Public Law and Political Economy for the use of superior and normal schools of the Republic]. Santiago: Imprenta Universo, p.74.

mechanisms, the increasingly massive education that would make viable the aspirations of order and progress that guided the leading sectors in the preface to the celebration of a century of independent life and would conjure the threatening storm cloud of the urban class conflict that started to settle in the republican sky.<sup>13</sup>

When approaching our civic instruction textbook corpus from the coordinate of the implicit or explicit notion of citizenship in them, we can perceive how this concept throughout almost half a century goes through a path that leads it from a fundamentally legal and constitutional sense to a more complex idea which is interweaved with the political contingency. Those texts from the first part of the period covered in this investigation identify citizenship preferably with the quality that summarises in one person his adscription to the country (where passive citizenship finally equals nationality) as much as his voting actor nature (active citizen or voter, according to the legal regulations, i.e. a man, of age, literate and not submitted to other impediments indicated by the Law). In this way, civic instruction is oriented, in the first texts, towards the accomplishment of the purpose proposed, for example, by José Bernardo Suárez:

“we sincerely wish that our youth is educated in the principles of the republican government that rules us, and in order to achieve it, there is no other way than the study of our Constitution”.<sup>14</sup>

Behavioural complements and allusions to values will be added to this type of definition, enriching the concept. This process seems to be announced by the texts themselves, as they confirm their solidarity with an evolutive perspective regarding the spreading of social conscience thanks to the action of the school, and predict the favourable consequences that it would have over the political ordering. The author we have just quoted himself pointed out that

“as the Chilean people gets more learned, moral and hard-working and understands its political rights better, our fundamental code will gradually reform itself in a more liberal and democratic sense, until it resembles the one ruling today the Great Republic of the North, the most powerful, strong and happy nation on Earth”.<sup>15</sup>

One of the topics that is usually present in the expansion of the idea of citizenship in the consulted texts is the invocation of patriotism and the respect towards legitimately constituted institutions. In this sense, it is possible to appreciate two veins of such a call: an affirmative one (which we associate with the idea of promise) and a reactive one (linked to a threat situation). Both are manifested in an increasingly direct manner regarding the contingency of the contents in the civic instruction textbooks. In this sense, the authors' critical opinions

<sup>13</sup> We have followed Mónica Quijada's proposal for the conceptualisation of the different stages of the evolution of the idea of nation in Latin America during the 19th century, from her article “¿Qué Nación? Dinámicas y dicotomías de la Nación en el imaginario hispanoamericano” [What nation? Dynamics and dichotomies of Nation in the Hispanic American imaginary]. In: Antonio Annino and François-Xavier Guerra (coord.) (2003). *Inventando la Nación Iberoamericana. Siglo XIX* [Inventing the Latin American Nation. 19th century]. Mexico: FCE, pp. 287-315.

<sup>14</sup> José Bernardo Suárez, *Manual...op.cit.*, p.8.

<sup>15</sup> *Ibid.*, pp.181-182

on the oligarchic political system are expressed with regard to one or other approach, with increasing frankness. In relation to the first invocation of patriotism, it can be characterised as a bond, relatively permanent, in most texts between the condition of citizen and belonging to the national community where citizenship is conceived as organic, naturalised and turning into a guarantee condition of the stability of the social order when based on a healthy patriotism.<sup>16</sup> Some of it is shown in the following fragments:

“the building of the Republic is based on the individual, on the citizen, man or woman, because both form the couple, the foundation of the family. The matter is clearly presented. By educating the citizen we will be able to raise the level of society, trying to magnify our Fatherland”.<sup>17</sup>

“For every good citizen, civic education has to consist in knowing the history of his / her Fatherland, as well as knowing the fundamental laws that rule and regulate the public and private interests of society and of the individuals who are part of that same Fatherland”.<sup>18</sup>

Patriotism emerges from a need in texts. It promises integration, on the one hand, but also an emotional outpouring and a moral imperative that has to be invoked as a reaction towards danger. A topic that may serve to illustrate this dialectic refers to the Compulsory Military Service established in 1900. The civic instruction textbooks necessarily had to allude to it, integrating it within the typical attributes of a correctly exercised citizenship. However, the argumentations in favour of the fulfilment of that civic and patriotic duty started from different moods. Thus, for example, in *Instrucción Cívica* [Civic Instruction] by Alcayaga and Flores, the Service was legitimised based on the fact that

“the good citizen of a democracy is not the one who rebels against the law, abusing of a false sense of freedom; it is the one who at all times has only his own rights in mind; it is the one who knows that absolute and unlimited freedom is synonymous with disorder and anarchy”.<sup>19</sup>

The approach gathered from these words is of invocation from the confidence in the natural calling of the citizen for the fulfilment of duties in the popular world. The way in which another text reflects, from the perception of threat, on the need to discipline the population militarily

<sup>16</sup> The link between citizenship and patriotism in textbooks has been emphasised in multiple analyses of contents applied to national cases referring to the 19th century. An example of this is in the study made by Luis Alarcón Meneses and Jorge Conde Calderón (2007) for the Colombian case in “Social representations of national territory and citizenship in nineteenth-century history and geography textbooks of the Colombian Caribbean region”. In: *Paedagogica Histórica*, volumen 43, nº5, pp. 701-713.

<sup>17</sup> Francisco Machuca (1906). *Principios de Instrucción Cívica. 1er año de las Escuelas Normales. Observaciones dedicadas a los maestros de enseñanza primaria para base de las lecciones de la asignatura* [Civic Instruction Principles for Year 1 at Normal Schools. Observations dedicated to primary school teachers as a basis for the classes on the subject]. Santiago: Imprenta Barcelona, p.11.

<sup>18</sup> Rubén Guevara (1901). *Curso de Instrucción Cívica. Destinados a las escuelas primarias y superiores* [Civic Instruction Course for primary and secondary schools]. Santiago: Imprenta, Litografía y Encuadernación Barcelona, p.5.

<sup>19</sup> Alcayaga and Flores, *op.cit.*, pp.51-52.



is less optimistic and it spreads a mantle of distrust over its self-control capacity talking of the problems associated to the fulfilment of the Military Service. This way, according to Francisco Machuca

“Nothing is nobler and more republican than Swiss military instruction. As soon as the citizen is eighteen years old (...), he is given a complete uniform, a rifle, one hundred bullet cartridges and a notebook to record his shots in the shooting range (...) what would happen in our country if we gave a rifle and one hundred shots to the people and sent them out to the street armed? (...) the best [laws] fail if the peoples are not prepared. This is what has happened in our country with the autonomous commune, the anti-alcohol and the compulsory military service laws. These three laws, which are very good in themselves, are not observed and neither will it be possible for people to observe them but until many years from now, when the people is conveniently prepared”.<sup>20</sup>

In one approach or another, the content of citizenship has become something more complex than the mere reference previous to the exercise of electoral rights. It is an operation that seems to have sense as enrichment of integration and normalisation devices of the target audience of schools which are expanding in coverage. This operation is also tinged with the ideological climate of the beginning of the 20th century, when the certainties deposited in the undefined progress –in its liberal and positivist versions– begin to be eroded by social theories with more aggressive shades (social Darwinism) and by an increasingly hostile international horizon that will dramatically result in the great outbreak of 1914. In fact, this dimension of world reality is another one of the factors that introduces a new topic of discussion about citizenship in some of the authors of our texts: the problem of cosmopolitanism.

The previously alluded *homogeneous nation* supposes politically territorialised loyalty around the Nation State. The educational systems directed their efforts towards that same purpose and, naturally, the contents and orientations inscribed in civic instruction textbooks in the period analysed in these pages as well. However, as a political and intellectual approach with classical Greek roots and active discussions in the 18th and 19th centuries, which includes authors such as Kant and involves the controversy on the viability of a *Welt Bürger* (World Citizen), cosmopolitanism pointed in the opposite direction.<sup>21</sup> The cosmopolitan approach seemed a threat in a double sense: from a socially polemic angle, it could be a reinforcement for labour internationalism, which would plot against the ideals of social integration and continence faced with the conflicts between capital and work advocated by civic instruction textbooks and, on the other hand, by suggesting a bet for a world without borders, it would hurt

<sup>20</sup> Machuca, *op.cit.*, p 10

<sup>21</sup> A brief reference to the idea of cosmopolitanism, inscribed in his proposal to face the challenges of the current global world, is present in the interview to German sociologist Ulrich Beck, who is the promoter of a new cosmopolitanism. See: Ulrich Beck (2007). “En la globalización necesitamos tener raíces y alas a la vez” [In globalisation we need to have roots and wings at the same time]. In: *El Clarín* (Argentina), November 11th, 2007. Available on line at <http://www.clarin.com/suplementos/zona/2007/11/11/z-04015.htm> (Consulted: September 13th, 2008).

national identity. In this second sense, the condemnation of this tendency in civic instruction textbooks appears more explicitly:

“cosmopolitanism entails a political and social organisation opposing the constitution of States, as it supposes the possibility to create an Ideal Nation, which satisfies the ambitions of citizens of the universe” in every aspect.<sup>22</sup>

It is interesting to appreciate that the distrusting perspective about cosmopolitanism as a way to view citizen identity is kept some years later in Malaquías Concha’s textbook, in a framework of different concerns from the moment when Muñoz Hermosilla rejected it:

“There is another no less dangerous doctrine than that of indifferentism and it is that of the cosmopolitans who long to erase the frontiers of nations to be able to love humanity as a whole. For them the idea of Fatherland is too narrow and selfish; they only accept the universal republic. Cosmopolitanism is the indifference in matters of nationality. The intended citizens of the universe, because they are citizens everywhere, are very close to not being citizens anywhere”.<sup>23</sup>

The appeal to citizenship has turned, then, more complex in these texts, because it faces a tension that was not visible in the first stages of the period examined here. It is not the only transformation that can be noticed in the tone of civic instruction textbooks towards the last part of our observations. Citizenship as belonging (where its nature was confused with the idea of nationality), as possession of rights (which has been expressed in its political electoral dimension) and as a moral source of duties (visible in the appeals to a patriotic moral and to national cohesion) would advance through the period of time analysed, to more complex forms of expression in school textbooks insofar as they included as content the analysis of the political contingency itself from perspectives which grew more critical and allusive to the present, although, certainly, always faithful to the nature of communication vehicles of a shared order.

Some aspects of the critical attitude towards the existing political order is found in the books through paragraphs such as the following:

“the hideous monopoly that few try to assure in the governmental progress, will be torn down as soon as the oppression becomes suffocating for the democratic masses, if, as it is believed, the levelling mechanism of social demands is based on the light that dawns today, predicting reforms that will save the needy from the sad situation they live in. Strikes will turn one day into legions of voters capable of imposing their resolutions”.<sup>24</sup>

<sup>22</sup> José María Muñoz Hermosilla (1910) in his *Compendio de Instrucción Cívica* [Compendium of Civic Instruction]. Santiago: Imprenta y Litografía Universo, p.36. The underlining corresponds to italics in the original text.

<sup>23</sup> Malaquías Concha, *op. Cit.*, pp.13-14. The underlining corresponds to italics in the original text.

<sup>24</sup> Muñoz Hermosilla, *op.Cit.*, p.115.

The disagreement on the ways of exercising political power in an oligarchic context has moved from the sphere of opinions in the media scope and public controversy to the pages of textbooks whose mission is to set forth the qualities of citizenship in the classroom. In this sense, school contingency and education are touched on through these textbooks. The energetic invocation from Malaquías Concha to his readers can be understood in this mood:

“it is appropriate to indicate that citizens should never sell their opinion, their vote; that degrades and debases free men, it transforms them into bundles that are sold in the public square to the highest bidder. Children, run from that shame!”.<sup>25</sup>

The feeling of discomfort facing the lacks of a manner of citizen representation method crossed by several deficiencies will remain present in the pages of some of the civic instruction textbooks in the years to follow. At the end of our journey, it is possible to appreciate, already at the beginning of the 1930s and before the presence of authoritarian regimes, how the world context of discredit of liberal democracy in its oligarchic modalities, is also manifested in a school textbook, which recognises as plausible a form of electoral citizenship which is different from the model that the aforementioned books have tried to strengthen:

“the most founded criticism [to current democracy] refers to the system of representation through universal suffrage, which is considered dangerous, tending to be replaced by limited suffrage or the representation of interests as well, through the organisation of unions of labourers, traders, farmers, civil servants, and more, who could participate in the designation of members of the Parliament and even of the President”.<sup>26</sup>

The corporatist proposal refutes the liberal order that the first civic instruction textbooks revised tried to make viable through the expansion of a bi-dimensional version of citizenship

(national and elector). The posterior demands for a more complex conception of the concept (hand to hand with the affirmation of second and third generation human rights) will force new textbooks in the following decades to collect more versatile ideas of citizenship. In the strict sense, the naming of the area of knowledge where these concerns will be sheltered will be a testimony of this complexity: thus, in the following decades, *Instrucción Cívica* [Civic Instruction] will give way to *Educación Cívica* [Civic Education] and to *Formación Ciudadana* [Citizenship Education].

## CONCLUSIONS

After the analysis of some potentialities of the notion of citizenship manifested with growing complexity in the civic instruction textbooks consulted, it is possible to point out that the

<sup>25</sup> Concha, *op. Cit.*, p.22.

<sup>26</sup> Santiago Peña y Lillo (1933). *Texto auxiliar para la enseñanza de la historia, geografía y educación cívica. Tomo III* [Auxiliary text for the teaching of history, geography and civic education. Volume III]. Santiago: Imprenta Universitaria, pp.13-14. The underlining corresponds to italics in the original text.

study of the meanings attributed to this concept makes it possible to appreciate a increasingly franker relationship between the textbook and political contingency as well a more frequent emergence of critical judgements of the political representation system in Chile during the period, which coincides with the period labelled as *Parliamentarian Republic*, a time of oligarchic dominion, which was crossed by different tensions, some of which were reflected in the pages of the texts analysed.

This look into civic instruction textbooks presents a double contribution according to our point of view: it highlights textbooks in their dimension of depositaries of particular social representations of a concept that opens doors to the historical understanding of a critical period of change regarding the social supply and demand of political forms of participation, together with an interesting input to try to understand aspects of school culture at a time that was crucial for our country. For the same reason, as it speaks to us about past challenges, its second value as an analytical exercise also emerges: it constitutes a specular surface that makes it possible to refine, in the perspective of the past-present dialogue, the image of our current textbooks, our changing and uncertain versions of citizenship. These are the daughters of a historic moment in which several threats and promises from the stage here analysed still float in the air, without fully fading away.

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# The curricular reform in civic education in Costa Rica

## What type of textbook should be produced for this new study programme?

MARCELA PIEDRA

### INTRODUCTION

**D**uring the current government administration (Arias Sánchez, 2006-2010), the Costa Rican Minister of Education, Leonardo Garnier, has established ten strategic lines for public education in the country. The second line is ensuring that students learn how to live and how to live together, strengthening the integral and formative character of education so they can acquire knowledge, and the ethical, aesthetical and civic skills necessary for a good and full life (PROCESOS).

The *Ethics, aesthetics and citizenship* project seeks to transform six subjects of the educational system, namely i) Civic Education, ii) Music Education, iii) Family and Consumer Science, iv) Visual Arts, v) Industrial Arts and vi) Spanish which, taken together, deal with the development of identity and social and democratic coexistence.

At all times, the process used a methodology of collective creation of these new study programmes<sup>1</sup> by means of:

- the articulated participation of internal actors of the MEP and external experts.
- the production of theoretical documents for reflection on the teaching of ethics, aesthetics and citizenship.
- the identification of a pedagogical alternative coherent with the national educational policy but more appropriate for these types of learning.
- the search for experiences and programmes in education that link these three concepts in the educational field, both nationally and internationally.

<sup>1</sup> The constitutional body in charge of passing this reform is the *Consejo Superior de Educación*, created by the 1362 Law on October 8, 1951, which has already passed the Civic Education reform (June 9 and August 29, 2008) and the Music Education reform (June 20, 2008)

- sessions for the discussion, analysis and enrichment of the documents, in some of whom there was an open participation of people from various professional fields and with diverse interests (MEP, 2008).

This reform's great effort in terms of time and resources is justified based on three arguments that are interrelated (MEP, 2008):

a. one of the main problems faced by Costa Rican secondary education is dropout (only one third of students who begin Year 1 end up graduating from secondary school), but as in other countries, those who fail one or two subjects and are excluded from different school activities (drama group, sports teams and bands, among others) tend to drop out more easily than those who also fail one or two subjects but belong to one of these groups. This allows us to conclude that the sense of identity and purpose that these activities give to students are fundamental for their permanence at school.

b. one the main reasons for dropping out is the high rate of academic failure. A hypothesis that has been repeatedly confirmed around the world is that those education centres where students have access to good music education, good artistic education, good physical education and a healthy life together are also those that present a lower rate of failure in the so-called academic subjects.

c. we can no longer easily distinguish between the "most useful" subjects and those that are "less useful" in terms of what is now called competitiveness or in terms of students' future access to the labour market. Today, the world's most dynamic industries are entertainment industries, where art and state-of-the-art technology work together for generating the best jobs and the best profitability; electronic industries, where aesthetic design and functionality become as important as engineering design; and the service sector, which clearly depends on the appeal they offer. If education costs are intended to be reduced, as well as maximising private and social benefits that result from it, it should be evident in both cases that education has to seriously take up integral training again: ethic, aesthetic and citizenship education.

Without losing sight of these arguments, it is essential to reflect on how to produce textbooks<sup>2</sup>, specifically for Civic Education, that are consistent with the reform's general framework and that become valuable instruments for its implementation, starting from the fact that in a globalised world there is more criticism each day regarding their usefulness or lack thereof.

Therefore, this document seeks to suggest the main lines to be considered –without intending to be the only option– when producing Civic Education textbooks for the Costa Rican educational system, that can truly contribute to students' education from an ethic, aesthetic and citizenship perspective.

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<sup>2</sup> It is important to note that the document refers to textbooks, understood as those that are designed, written and produced specifically for their use in teaching, and not those that can be used but are less related to pedagogic sequences, called school books (Johnsen, 1996), which traditionally have been used for Civic Education in Costa Rica.

## PHILOSOPHICAL FOUNDATION OF THE REFORM

### 1. General aspects

The general framework that supports the Costa Rican educational system is established in the Ley Fundamental de Educación [Fundamental Law on Education]. The second article states its purposes:

- The education of citizens who love their country, are aware of their rights and fundamental freedoms and have a deep sense of responsibility and respect for human dignity.
- To contribute to the full development of human personality.
- To educate citizens for a democracy where the interests of individuals are aligned with the community's interests.
- To encourage the development of solidarity and human understanding.
- To maintain and widen cultural heritage, delivering knowledge about the history of human beings, great works of literature and fundamental philosophical concepts.

Although this legal framework was established 50 years ago, it is currently in force, and it is committed to a democratic society that seeks to be more just, more caring, more tolerant, more fair and more responsible for its actions, which allows a better life and a better coexistence. This fully agrees with what is stated in the introduction of the new programmes, considering as the reform's philosophical reference and ultimate goal of education an education for life and coexistence.

In order to illustrate this perspective, we can mention the debate that took place in the country 35 years ago when José Figueres Ferrer, during his last administration period (1970-1974), encouraged the creation of the National Symphony Orchestra, the Youth Symphony and the Children's Symphony. This was strongly criticised by a sector of the population, which stated at that time that the priorities should be an increase in production, industrialisation and the modernisation of society. Figueres was well aware that production was important for the country, and when a group of new tractors arrived during those days, he asked a question that put an end to the debate: "Why tractors without violins?"

The debate about the need for an integral education is not new. We boast of the fact that there are more teachers than policemen, but when allocating resources the priority has not been this, and the current Ministry of Education clearly states that.

There were no resources, time or space for arts and aesthetic education. There was no concern for ethic education or education for citizenship either, which together with physical education, industrial arts and family and consumer science, became that peculiar set of subjects we called—in a gesture of macabre irony— "special subjects" ... when the only special thing they had was the little importance we gave them.



In a democratic society, it is not enough that a few have access to an integral and good-quality education; we must work for an education “that prepares students for the pragmatic and dynamic search for ‘what is true’, and include an education that supports the transcendental search for ‘what is good’ and ‘what is beautiful’: an education of ethics and aesthetics as fundamental –but never finished– criteria of human coexistence. An education for democratic citizenship; an education that frees us from discrimination and fear.”

## 2. The educational policy

The Costa Rican educational policy states that education must seek for students’ instruction:

“... [so that they are] aware of the ethical implications of development, so they are PEOPLE with a rich, dignified, free and just life; educated CITIZENS for a participative exercise of democracy, with a national identity, integrated to the world, able to discern and compete, self-fulfilled and able to search for their own happiness; PRODUCERS for themselves and for the country from their condition of workers, which increases their abilities, the learning of skills and the search for knowledge; SOLIDARY for experimenting others’ needs as their own and, consequently, able to look for ways of cooperation and coordination among sectors, to watch over the life quality of all citizens and future generations, based on a sustainable, ecological and social development, and ABLE TO COMMUNICATE WITH THE WORLD IN AN INTELLIGENT WAY, so that starting from an appreciation of what identifies them as Costa Ricans, they make the decisions that will relate them to other cultures as independent, flexible and critical thinkers, having as a guide human rights and duties” (Consejo Superior de Educación, 1994).

This educational policy is based on three philosophical views: humanist, rationalist and constructivist, which together with the basic concepts of ethics, aesthetics and citizenship, become the framework for the production of any textbook that aims to be useful for this reform.

TABLE 1

PHILOSOPHICAL VIEWS	
Humanist	It seeks the complete fulfilment of human beings as people who have dignity and value, able to achieve perfection by the appropriation of the values and ideals of Costa Rican education.
Rationalist	It acknowledges that human beings have the ability to objectively grasp reality in all its forms, to build and continuously perfect knowledge and to make progress and human understanding possible.
Constructivist	It presses the demand to start from each student’s cognitive situation, their individuality, their interests and their idiosyncrasy; therefore, they must acknowledge their culture and their knowledge structures and undertake a formative action in a transforming way.

Box nº 1 shows that the integration of these three philosophical views makes the new study programmes even more complex, since not only is the fulfilment of human beings sought, but the starting point is the fact that this is a continuous process that never ends, and what is sought is that students acquire knowledge (cognitive and formative) based on their experience, their interests and their identity. It requires an active role of the subject who learns, a facilitating role of teachers, the strengthening of the ability to understand (learning how to think), the execution of complex tasks and real-life tasks (in context) and the collaboration of those who participate in the learning process (Salgado, 2006).

Based on the reflection on the basic concepts (table 2), we can conclude that the teaching-learning strategy must be based on practice (dilemmas and real cases), which represents a big challenge in the production of appropriate didactic materials that do not limit students to solely memorise the contents of the study programme, but on the contrary, that encourage them to live the knowledge, skills and democratic values and practices that they are expected to acquire. It means strengthening critical thinking, a necessary ability for all citizens, which consists of evaluating arguments, questioning and using logic. A critical thinker is flexible, reasonable, self-critical, just and constructive, which makes him/her a conscious, responsible and creative citizen who is able to undertake effective and efficient tasks in society (Salgado, 2006: 95).

TABLE 2

BASIC CONCEPTS	
Ethics	Why in a particular context, a set of behaviours and norms in our relationship with others is considered correct. Certain ethic principles can be mentioned: equality, justice, solidarity, reciprocity, responsibility, care, respect and cooperation.
Aesthetics	Contemporary approach based on the principles of post-modernity, where art questions the impassable frontiers between artistic disciplines and focuses on an investigation-action philosophy where their integration is posed.
Citizenship	It essentially acknowledges equality in everyone's rights and duties and the consequent mutual respect and respect for legitimately established rules. Those who exercise citizenship are ideally conceived as people who are committed to democracy as the best way of government. That commitment implies considering it as the best procedure for governing and settling differences and conflicts through a legal and institutional mechanism that consolidates and allows the functioning of the whole of society. It also means that in democracy, government is the government of majorities, but majorities formally and truly respect minorities, and vice versa.

Source: author's compilation based on MEP 2008

### 3. Technical characteristics of the new programmes

The new programmes start from a curricular approach based on the aforementioned national educational policy, developing a constructivist view as support for pedagogical, methodological

and evaluation strategies, and a permanent articulation of ethics, aesthetics and citizenship, as can be seen on table 3.

In this curricular proposal, teachers and students are co-responsible for the teaching-learning process, but their participation has its own responsibilities, scopes and limits. It means that people can learn in constant interaction with others; therefore, the development of collaborative learning is essential, understanding it as the social building of knowledge, where all people work in coordination in order to achieve a common goal (Salgado, 2006: 1007).

TABLE 3

TECHNICAL ELEMENTS	
Elements	• Guidelines or orientations
Curricular approach	<ul style="list-style-type: none"> <li>• Focus on the person</li> <li>• Integration or correlation between the different subjects involved in ethics, aesthetics and citizenship, and between them and other subjects of the study plan</li> <li>• Pedagogical mediation oriented toward the integration of knowledge for the building of learning</li> <li>• Search for a constructivist line</li> <li>• Flexibility and contextualisation principle</li> <li>• Prescriptive elements</li> <li>• Transversality principle</li> </ul>
Pedagogical strategy	<ul style="list-style-type: none"> <li>• Learn by doing</li> <li>• Active</li> <li>• Democratic</li> <li>• Creative</li> <li>• Integrative</li> <li>• Flexible</li> </ul>
Evaluation strategy	<ul style="list-style-type: none"> <li>• Centred and focused on learning processes and on the building of knowledge</li> <li>• The process-centred evaluation is made during each of the proposed stages</li> <li>• More qualitative, group-centred and focused on the knowledge of processes, and not only on the measurement of results</li> </ul>
Methodological strategy: learning by projects	<ul style="list-style-type: none"> <li>• The proposal should promote students' action and participation in real, concrete everyday situations</li> <li>• Students learn by doing and building their own answers, more than receiving them from teachers</li> <li>• Teachers promote and facilitate experiences where students build their learning</li> <li>• Pedagogical practice promotes the participation of teachers, students, institution and community in the development of the project</li> <li>• Proposed situations will guide students for developing reflective, critical, self-critical and proactive attitudes and behaviours</li> <li>• The unit's didactics is active, so that in certain moments it generates group work, pair work, individual work or class work</li> </ul>

## THE REFORM IN CIVIC EDUCATION

The reform intends to strengthen civic education for an improvement of the abilities that are necessary for a collective life in democracy. For a good performance of democratic systems, the basis is the need for an education of citizens who take on their leading roles with a good disposition and commitment, but such education is not spontaneously generated; it is learnt, and therefore, taught.

Civic education aims to address the unfulfilled needs and new demands of Costa Rican society (MEP, 2008):

- facing the challenges of citizen education typical of democracy
- responding to young people's interests
- starting from an overview that can structure the syllabus and its teaching order
- accompanying students' growth process
- accompanying the process of building students' individual and collective identities

The concept of citizenship used in the project was described from two angles: citizenship as such, referring to adults, and young citizenship (Rodríguez and Rosales, 2007).

- **Citizenship:** adult citizenship is first a condition of the rights and responsibilities of people who belong to a society or political community, related by the ability to influence collective decisions or public affairs. This is a formal and procedural aspect, but it is only one aspect. Citizenship is also composed of a series of aspirational aspects:

- It is an unfinished process, under construction.
- Its individual dimension is the search for positive freedom, true political equality, solidarity and equity, tolerance, enjoyment of diversity and a sense of belonging.
- Its collective dimension is the institutional and legal development, based on the same values, developed collectively, that favours the construction of an inclusive national project and with a high social capital.

- **Young citizenship:** it also includes the ownership of rights and duties, except for the right to choose and be chosen for posts in the three government branches. All the aforementioned aspirational aspects make up both young and adult citizenship. Other characteristics refer to the process of critical integration: the fight for that process not to exclude the dreams of young people, the need for a regulated system that is appropriate for the treatment of differences and conflicts, adults' respect for young people as active subjects and not as objects, an understanding of democracy and of the democracy/authority relationship and the creation of values and democratic attitudes by practice.

In general, the object of study of the new Civic Education programme is the development and strengthening of democratic citizenship, in order to improve social and political coexistence. In table 4 the proposal is systematised.

**TABLE 4**

<b>OBJECT OF STUDY OF CIVIC EDUCATION</b>	
Object of study	<p>Knowledge, abilities and practices that allow:</p> <ul style="list-style-type: none"> <li>• the construction in young citizenship,</li> <li>• for young and adult citizenship,</li> <li>• by means of knowledge about democratic citizenship,</li> <li>• in order to improve social and political coexistence.</li> </ul>
Outcome	<p>Critical and integrated citizens</p> <ul style="list-style-type: none"> <li>• Critical:               <ul style="list-style-type: none"> <li>- They seek to acquire information and form an opinion about collective and public matters</li> <li>- They know how to express their critical opinions and consider other opinions</li> <li>- They ensure that their rights and other citizens' rights are respected</li> <li>- They possess citizen competences</li> <li>- They demand a deeper, more sustainable democracy</li> <li>- More inclusive, with better institutions and with a more democratic political culture</li> </ul> </li> <li>• Integrated:               <ul style="list-style-type: none"> <li>- Their critical sense does not lead them to become dissociated</li> <li>- When they feel dissatisfied, criticised or lacking institutional support, they look for individual or collective influence in order to improve what needs to be improved</li> <li>- They know the institutional and legal influence mechanisms</li> <li>- They participate when they consider it is important either directly or through their representatives</li> </ul> </li> </ul>

Dimensions of the study plan	<ol style="list-style-type: none"> <li>1. Cognitive dimension <ol style="list-style-type: none"> <li>a) Democracy/dictatorship</li> <li>b) Democracy and human rights</li> <li>c) Citizenship and young citizenship</li> <li>d) Comparative political systems</li> <li>e) Costa Rican democracy <ol style="list-style-type: none"> <li>i. Security and organisation</li> <li>ii. Democratic institutionalism</li> <li>iii. Main legal rules</li> <li>iv. Horizontal and vertical accountability</li> <li>v. Electoral system</li> </ol> </li> </ol> </li> <li>2. Competence dimension <ol style="list-style-type: none"> <li>a) Negotiation to reach consensuses and manage dissensions</li> <li>b) Participation and representation for influencing collective decisions</li> <li>c) Social and political communication for eliminating illiteracy in this field</li> <li>d) Deliberation with a sense of community for being able to express ideas articulately, starting not only from the individual but also from the group</li> </ol> </li> <li>3. Formative dimension<sup>3</sup> <ol style="list-style-type: none"> <li>a) Values <ol style="list-style-type: none"> <li>i. Freedom</li> <li>ii. Political equality and human rights</li> <li>iii. Solidarity and equity</li> <li>iv. Tolerance and enjoyment of diversity</li> <li>v. Democracy</li> <li>vi. Cooperation</li> </ol> </li> <li>b) Attitudes <ol style="list-style-type: none"> <li>i. Consistent with values</li> </ol> </li> <li>c) Practices <ol style="list-style-type: none"> <li>i. Consistent with values and attitudes</li> </ol> </li> </ol> </li> </ol>
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Source: author's compilation based on MEP 2008

### 1. The new programmes

In order to summarise the content of the new study programme for Civic Education, a summary matrix was presented in the proposal's introduction, which allows observing the topics and their relationships. The horizontal topic is the annual topic, which encompasses the three terms. The vertical process deals with the link between the young person's growth process and the development of citizenship.

<sup>3</sup> Refer to Appendix 1.

	HORIZONTAL TOPIC	VERTICAL PROCESS	TERMS			
			1	2	3	
LEVELS	7	Security/	The closest	<b>Public security:</b> Let's join efforts to prevent disasters	<b>Road safety:</b> Let's join efforts to prevent disasters	<b>Risk management:</b> Let's join efforts to prevent disasters
	8	Identity/ tolerance	Sense of collective identity	<b>Sense of identity:</b> We young people demand the sense of identity	<b>Gender identity:</b> We reconstruct our gender identities	<b>Diversity:</b> Young people: different but equal
	9	Democracy	Democracy: form of political organisation	<b>Participation-representation:</b> We young people demand participation and representation	<b>Human rights:</b> Human rights for all people	<b>Democracy:</b> Let's work to strengthen representative and participative democracy
	10	Political system	Costa Rica: Democracy	<b>Political regimes:</b> We young people learn from systems and regimes	<b>The Costa Rican political regime:</b> Let's participate in strengthening the Costa Rican political regime	Costa Rican electoral system: My participation strengthens the electoral system
	11	Democratic practices	Costa Rica: State and Culture	<b>C.R./Public policies:</b> The Costa Rican State guarantees equal inclusive opportunities	<b>C.R./Democratic attitudes and practices:</b> Young people as citizens	

Source: MEP, 2008, page 12

This study plan incorporates three cross-curricular axes, which can be seen in table 5, through content, its corresponding procedural and attitudinal aspects and the pedagogical mediation and evaluation activities.

TABLE 5

CROSS-CURRICULAR AXES	
Competences	An integrated set of knowledge, abilities and skills; a necessary cross-curricular axis for Civic Education. They are learnt and practiced in all levels of the Third Cycle of Education (Years 7, 8 and 9) and Diversified Education (Years 10, 11 and 12)
Values	Values are expected to be explicit through their corresponding attitudes and practices. They are repeatedly addressed in various expressions
Culture of legality	From a procedural point of view, democracy is a method for settling big differences, and this vital function cannot be fulfilled without national and international norms. The appropriate norms for study topics are dealt with in all levels. Their respect and internalisation is sought, as well as an understanding of the mechanisms to change them when required

Source: author's compilation based on MEP 2008

As it has been set out throughout this document, the pedagogical-methodological proposal of the new Civic Education programmes is based on workshops with a constructivist, humanist and rationalist approach. Thus, the challenge in the production of textbooks for this topic is not only the contribution they can make to citizen education, but also the fact that their creation must be consistent with the proposed approach, allowing the generation of values, attitudes, practices and abilities that are necessary for democratic life.

### ELEMENTS TO CONSIDER FOR THE PRODUCTION OF CIVIC EDUCATION TEXTBOOKS

In general, Civic Education textbooks have had an essentially informative nature and they have been limited to stating contents (concepts, theories and procedures), which leads to a repetitive learning and a literal reproduction of the studied contents.

A new conception, consistent with the presented approach, must lead to a wide variety of cognitive processes that include understanding, widening of knowledge to new situations and problem solving, by means of various resources and activities (Aguilar and Sarmiento, 1993: 1). Different investigations have described the following general principles to consider for the design of textbooks:

1. They should lead to a cognitive and affective disposition for content learning through a presentation of a panoramic view of the content, a specification of its purposes and objectives, an explanation of its structure and sequence, the use of informative titles and subtitles and the inclusion of various questions that activate previous knowledge and awaken students' curiosity and interest.
2. They should specify and simplify the content by means of examples, analogies, metaphors, illustrations, flow charts and algorithms that facilitate learning and retention.
3. They should make students meaningfully interact with the text through activities that



lead to understanding, retention, creative application of knowledge and problem solving. Questions, problems and exercises are the resources most widely used in textbooks to encourage appropriate intellectual activities.

The findings that result from the analysis of national and international experiences in ethics, aesthetics and citizenship also help in the production of textbooks, stating that (Vargas and Olano, 2007):

- The experiences that are considered successful mainly present constructivist curricular and pedagogical elements.
- They are all based on the premise that the creation of citizen ethics must result from an experience that is more experiential than theoretical. This can be explained by two reasons:
  - The development of abilities implies dynamics and spaces of learning, of reflection and of life in everyday events, both in the immediate and in the global environment; otherwise, values, rights and norms would represent empty words if they were not transformed into actions. In order for each person to appropriate these contents for life it is necessary to test them, exercise them, practice them and repeat them, or in other words, live them in everyday life.
  - The best places for education are the classroom, the school and the context that surrounds them. Therefore, lessons –as practical as they may be– cannot be expected to replace life, and neither can textbooks. They must foster life and prepare students for it.

From a humanist, rationalist and constructivist approach and as defined by Aguilar and Sarmiento, a Civic Education textbook must be didactic and should become the ideal means for teachers and students to reach knowledge, abilities, values, attitudes and democratic practices. It must allow a redefinition of the adult-teenager, teacher-student and school-community relationships, as well as an education for life.

At the beginning of the 20th century, Dewey (1995, p. 22) explained that “every authentic education takes place through experience.” An educational education is the result of the interaction between the objective conditions of the social environment and the internal characteristics of the learner, emphasising on an education that develops critical thinking and collaborative learning, the desire to continue learning and democratic and humanitarian ideals. Under this perspective, learning and doing are inseparable actions.

Constructivism as epistemological thesis characterised essentially because the individual is the one who builds knowledge based on the interaction with reality, states the need to generate a curriculum that encourages students to be responsible for their own learning, to be active, participative and creative, to get close to their environment, to know it and react to it, to interact with their peers and teachers, to express their knowledge and to build new knowledge; that is, to act as people who are truly co-responsible for their own learning (MEP,

2008). A Civic Education textbook must promote this and consider three characteristics that are typical of the proposed curricular approach:

### 1. Learning by projects

The curricular proposal chose learning by projects. The way to organise mediation processes involves accepting that school knowledge is not articulated in order to understand it rigidly according to pre-established contents, but to create strategies for the organisation of knowledge based on the treatment of information and on the establishment of relationships between facts, concepts and procedures that facilitate learning.

The study programmes for each of the three terms are focused on the promotion of learning based on a central project that is developed individually or collectively. Although all students are focused on studying the same topic of the programme, each of them will develop their own project that will allow them to solve a problem related to the studied topic.

### 2. The technique for the development of topics is the workshop

The technique for the development of units is the workshop, conceived as a “pedagogical structure of action where both teaching and learning make up a framework of strong personal commitment based on specific proposals” (MEP, 2008). This educational process is implemented by group work, with teachers’ guidance and facilitation.

The programmes include specific suggestions for the development of the workshops, which include at least four moments:

- a) They must start with an activity that promotes or preserves the group condition (the so-called “ice-breaking” techniques serve this function).
- b) The proposal of the central topic must lead to the discussion. The teacher can contribute with topics to be discussed, with guides that question their content and demand their reformulation. This content does not necessarily have to be brought beforehand; it can be the result of a collective discussion or brainstorming. What matters is that it serves as an ingredient for the building of knowledge.
- c) The third moment can be developed alongside the content analysis. It occurs with the participative discussion and it intends to create personal and group stances that facilitate the necessary action to complete the project.
- d) The teacher must ensure that the discussion and the action are oriented toward making the individual and group learning explicit, which will be reflected on the results of the project.

The development of each unit can be seen as one big workshop throughout the lessons of one term; therefore, it is important to go through the four stages. However, it can also be seen as smaller, shorter workshops that are carried out throughout the term. It will all depend on how each teacher decides to plan the process.

### 3. Using the methodology of dilemmas, case analysis and debates

Each topic or workshop should be dealt with not only as something that can be learnt with mere information, not even as knowledge, but as experience, belief and conviction. Therefore, it must be learnt by a methodology that faces students with different types of dilemmas:

- Daily
- Historical
- Artistic
- Fictitious

However, the solving of these dilemmas cannot be arbitrary or accidental; it must incorporate the acquisition of knowledge through systematic processes of identification, investigation, deliberation and solution, for which different positions must be confronted with respect and tolerance (values), that allow the creation of personal criteria to develop stances and propose solutions.<sup>4</sup>

**Case analysis** gives the opportunity to become close to the complexity of real life, where phenomena must be dealt with critically and systematically, considering the diversity of factors that converge in reality. A case study exercises critical thinking, especially if the activity is designed for students to be obliged to formulate hypotheses, to generate different ways of solving a problem and even to share their impressions, thus integrating collaborative learning.

**Debates** are another possibility to integrate critical thinking with collaborative learning. This methodology is convenient for dealing with controversial topics and generating discussion and deliberation. They can be topics that involve critical judgment or that generate various opinions, always in a respectful and tolerant environment.

In the new programmes, importance is given to the abilities and skills that students can develop in order to live in society within a democratic framework, which can be practiced by means of dilemmas, case analysis and debates. There are practices that must be learnt and practiced until they become almost intuitive, which has been called “the democratic feeling.”

### FINAL CONSIDERATIONS

When analysing any educational reform, it is important to start from the fact that information now circulates in a much more agile and adapted way than 30 years ago. Young people’s references are no longer the neighbourhood, the corner or the province where they live, not even national frontiers; young people today are part of an extremely diverse community and a global world. Therefore, it is critical to give them the tools to live and coexist in this context.

Now more than ever, citizen education involves an education of a critical person who is well informed; who expresses his/her opinions and knows how to weigh them up; who knows how

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<sup>4</sup> It is important to avoid Manichean answers (the easy way out, recipes or absolute truths) or turning dilemmas into a mere relativism where everything is the same, everything is worth the same and everything matters the same (MEP, 2008).

to debate and demands a deeper, more sustainable democracy; who seeks to extend his/her rights and other people's rights; who appreciates values of equality, equity, solidarity and tolerance; and who has the necessary elements for his/her organised participation and his/her constructive action for solving collective problems.

In the ethics, aesthetics and citizenship project, it was made explicit that exercising citizenship means: (i) accepting and valuing politics as a necessary activity for collective life, (ii) joining the political system, i.e. participating when it seems necessary and not becoming dissociated when feeling dissatisfied or lacking support from some level of the system, (iii) seeking one's own freedom without interfering with the freedom of other people, (iv) identifying with one's State-nation or political community, acknowledging a shared sense of belonging and historic and space tradition, (v) knowing and understanding the institutional mechanisms to express support or rejection toward measures taken by the government or to ask for intervention in conflicts between groups or people, (vi) choosing between representative or participative mechanisms according to the case, and (vii) abiding by citizen duties. All this implies a huge challenge, but also a big responsibility for the society we want to create.

During the training process for teachers in charge of executing the Civic Education pilot plan in the second term of 2008 in 6 schools of the country, the biggest question was whether the Ministry of Public Education was aware of what this change meant, which could be a double-edged sword for the status quo.

During the next term, the same teachers and students state that not only do the new programmes help them become critical and integrated citizens, but they also do it creatively and interestingly. Therefore, they demand a creation of didactic materials that are consistent with the logic of the programmes. In addition, the access to information technology – specially the Internet – has made possible an easy and almost unlimited access to various resources that were very hard to get before or that had a number of restrictions or conditions, which has boosted students' creativity even more, because they do not think it is necessary to have textbooks for Civic Education.

We can now conclude that although there is still a long way ahead and not everything has been perfect, the change is positive and better times lie ahead.

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**APPENDIX 1****MATRIX FOR VALUES, ATTITUDES AND PRACTICES**

VALUES	ATTITUDES	PRACTICES
Freedom	<ul style="list-style-type: none"> <li>- Respect for other people's freedom</li> <li>- Respect for one's own freedom</li> <li>- Search for the strengthening of individual and collective freedom</li> </ul>	<ul style="list-style-type: none"> <li>- Practices that favour a positive freedom</li> <li>- Rejection of arbitrary restrictions of other people's freedom</li> <li>- Responsible use of one's own freedom</li> </ul>
Political equality and human rights	<ul style="list-style-type: none"> <li>- Respect for human rights, laws and norms</li> <li>- Respect for young citizenship</li> <li>- Search for true political equality</li> <li>- Search for gender equity</li> </ul>	<ul style="list-style-type: none"> <li>- Rejection of arbitrary</li> <li>- Acceptance of just</li> <li>- Practices based on rights and duties</li> <li>- Rejection of adult-centrism</li> <li>- Affirmative actions toward discriminated groups</li> </ul>
Solidarity and equity	<ul style="list-style-type: none"> <li>- Search for true equality: social and economic (ethnic group, social stratum, nationality and for any other inequality)</li> <li>- Appreciation of cooperation and generosity</li> <li>- Appreciation of inclusive state policies</li> </ul>	<ul style="list-style-type: none"> <li>- Protection and defence of the weak, both individually and collectively</li> <li>- Equitable construction of gender</li> <li>- Promotion of social and economic wellbeing</li> <li>- Rejection of exclusion</li> </ul>

Tolerance for diversity	<ul style="list-style-type: none"> <li>- Respect and appreciation of diversity, regardless of its origin (social, cultural or economic, among others)</li> <li>- Equality of rights among different people</li> <li>- Acceptance of the right to disagree</li> <li>- Acceptance of peaceful mechanisms to handle conflicts</li> </ul>	<ul style="list-style-type: none"> <li>- Promotion of diversity</li> <li>- Rejection of racism, sexism and xenophobia</li> <li>- Elimination of mockery towards different people</li> <li>- Rejection of exclusion</li> <li>- Negotiation and peaceful handling of conflicts</li> </ul>
Democracy	<ul style="list-style-type: none"> <li>- Sense of community</li> <li>- Appreciation of gradualism</li> <li>- Appreciation of spaces for participation/representation</li> <li>- Appreciation of transparency</li> <li>- Respect for majorities and minorities</li> <li>- Respect for democratic institutionalism</li> </ul>	<ul style="list-style-type: none"> <li>- Actions for solving problems at school, community and country</li> <li>- Social and political participation</li> <li>- Strengthening of students' government</li> <li>- Rejection of authoritarianism and imposition</li> <li>- Practice of dialogue and negotiation</li> <li>- Practice of honesty</li> </ul>
Cooperation <sup>5</sup>	<ul style="list-style-type: none"> <li>- Search for the strengthening of interpersonal trust</li> <li>- Appreciation of generosity</li> <li>- Appreciation of dialogue and negotiation</li> </ul>	<ul style="list-style-type: none"> <li>- Interpersonal relationships based on respect, loyalty and reciprocity</li> <li>- Organised participation (social or political)</li> <li>- Constructive group action</li> <li>- Practice of dialogue and negotiation</li> </ul>

Created by the Ministry of Public Education (2008). Introducción nuevos programas de Educación Cívica. San José, Costa Rica.

<sup>5</sup> Cooperation is a value typical of the possession of social capital, understood as interpersonal trust and associativity. Refer to: Rodríguez, Florisabel; Castro Silvia and Madrigal, Johnny (editors) (2003). Con la herencia de la paz. Cultura Política de la juventud centroamericana. Heredia, Costa Rica: Editorial Fundación UNA.



# 4

## **THE IDEA OF NATION/STATE IN HISTORY AND SOCIAL SCIENCES TEXTBOOKS**



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# Textbooks and published historic consciousness on the occupation of the araucanía

ANDREA RIEDEMANN

## INTRODUCTION

**M**arch 11, 1990, among several other aspects, meant the beginning of a new relationship between the State and society for many Chileans, something that gave new meaning to words such as citizenship, liberty and justice. In theory, this statement is also valid for the relationship between the State and the indigenous communities in Chile, recognised in article 19,253. In practice, however, if we consider the Mapuche community in particular, a series of unresolved conflicts with the State can be detected in this relationship. Just as Caniuqueo (2006) asked, “where are the roots to this conflict to be found? This has multiple causes in time and space.”<sup>1</sup> Various authors have situated the origin of the conflict in the years between 1881-1883, a time when the Occupation of the Araucanía by the Chilean armed forces took place (Bengoia, 2000), and that marks a step from political independence and territorial expansion to one of domination and dependence in Mapuche history (Mariman, 2007).

However, apart from the analysis presented on this situation by the academic arena, the issue that this work aims to address is what elements textbooks offer to Chilean pupils so that they understand in what way this moment in Chilean history relates to modern times.

Different possibilities exist on how to approach the matter, but it is my opinion that one option manages to introduce the discussion surrounding the concept of historic consciousness in a particularly enlightened manner. Briefly, historic consciousness can be understood in this case as the capacity to understand that a present situation is the result of a historic process,

<sup>1</sup> The quote by Caniuqueo continues in the following manner, “what is striking about this situation is that the conflict is attributed to the Mapuche, thus the Winka community washes its hands of the conflict. In other words, they do not feel included, as if we had lumbered them with responsibilities that do not invoke them (...) this is why it is worth investigating why this responsibility is absent” Caniuqueo 2006: 130).

which implies the establishment of a link between the past, the present and the future (Jeismann, 1997). According to research that exists on this matter, people can have different types of historic consciousness according to the socialisation they received. In young people, elements of socialisation that most affect the formation of historic consciousness are academic education and family culture (Tutiaux-Guillon, 2001). This work will concentrate exclusively on school education and more concretely on the contents of textbooks on the history of Chile. Therefore, the general question that this work aims to answer is the following:

In what measure do school texts put forward interpretational proposals concerning the link between the Occupation of Araucanía and the current relationship between the State and the Mapuche community?

The current analysis will address four texts: the textbooks, “Historia y Ciencias Sociales 2° Medio” (Milos, Almeyda, & Whipple, 2007), and “Historia y Ciencias Sociales 2° Educación Media” (Donoso, Valencia, Palma, & Alvarez, 2007), both texts are currently distributed by the Ministry of Education to municipal and subsidised establishments; the text, “Chile y su historia” by Sergio Villalobos (2005), and finally, “Manual de Historia de Chile. Desde la Prehistoria hasta el 2000”, by Francisco Frías Valenzuela (2007). Within these texts shall be examined the exact historic period corresponding to the Occupation of Araucanía.

The structure suggested for this investigation is as follows: firstly, as a theoretical outline, the most common definitions of historic consciousness and the manner in which this concept is understood here are presented. The second part will present an analysis, the third shall treat how these four textbooks on Chilean history interpret these four particular textbooks on Chilean history in relation to the historic period previously mentioned. Lastly, it will present conclusions and a few final thoughts on the issues evoked.

## **THE CONCEPT OF HISTORIC CONSCIOUSNESS**

The definitions of historic consciousness that will be presented in this article are based mainly on what has been developed by German authors, who for nearly a century now have contributed to the theoretical and empirical study on this subject (in many cases, in collaboration with investigators from other countries). Works using the concept of historic consciousness in Germany date from as early as the beginning of the 20th century (Rüsen, Fröhlich, Horstkötter, & Schmidt, 1991), although perhaps with a slightly different meaning. The “contemporary” understanding of the concept of historic consciousness arose in the 1970’s, in the context of a broader shift in paradigm within science history. More precisely, it was Theodor Schieder (1975) who suggested that historic consciousness is not merely limited to the past, something which becomes history, but rather uses the past as an element to mould the thinking and behaviour of the future. Schieder continues in his definition by stating that historic consciousness does not consist in a contemplative look at the past, but rather traces a line between the past and guiding elements that can be found in the future. The author also sustains that from this definition, the link that exists between historic consciousness

and political action becomes evident (Schieder 1975, p. 4). From this understanding of the concept, the acquiring of historic consciousness by pupils is defined as the main objective of the teaching of history in Germany (Jeismann, 1988).

This first definition was taken years later by Jeismann (1997) whom, maybe due to the simplicity of his definition of historic consciousness, transformed it into one of the most well-known: it is the capacity to understand that human beings, that which they create, along with their ways of socialising exist in time. As a result, historic consciousness associates the understanding of the past, that of the present and the vision of the future.

Bergmann and Pandel (1975) offered, during the same era as Schieder, a more tangible definition of historical consciousness: it is the observable result of, at a given moment of an individual's life cycle, its reception that makes history a process of internalisation and collection of personal processes. The particularity of this definition, and which is especially appropriate in textbook analysis, is that the authors distinguish, on the one hand, between the different expressions of historic consciousness that can be found in common people, while on the other, historic consciousness which is published. These authors define "published historic consciousness" as a result of that reception of history that is socially institutionalised, that is publicly articulated and that is linked with concrete interests. From this arises the concept that published historic consciousness is an instrument for social control since it already bears power, directed at non-dominant social groups, to "forget" their own individual and collective history (Bergmann & Pandel 1975: 19).

The work by the prolific historian –also in the field of historic conscience– Jörn Rüsen, puts forward a more complex definition of this concept, but one which bears particular relevance in the context of this investigation. In a similar manner to Schieder, Rüsen defines historic consciousness as the totality of mental operations through which temporal experiences, using memory as a means, is elaborated in such a fashion that it helps to guide future actions<sup>2</sup> (Rüsen, 1994b). What historic consciousness does then is "provide a sense of temporal experiences". This process can basically be explained in the following manner: when a current experience requires interpretation, it interrogates the past, and the past is brought to the present through memory. Once "brought" to the present, the past experience serves as a guide to interpret both present and future actions (Rüsen, 1994b).

Following the author's line of argument, the task of historic consciousnesses is as repetitive as it is productive. The receptive aspect is due to the experience, perception and observation, while the productive aspect is due to thinking, intention and orientation. In my opinion, this two dimensionality highlighted by Rüsen once again demonstrates that the link between a determined type of historic consciousness can be developed with the political orientation of an individual. Just as Schieder (1975) had advocated, the fact that an orientation can lead to a political action (to be understood in this case as an action that has an affect on public

<sup>2</sup> The concept of "orientation for future action" in the original text in German is, "Orientierungen der Lebenspraxis" (Rüsen, 1994b).

sector) is the fundamental aspect that makes historic consciousness such an interesting field of study for the applied investigation into praxis.

Effectively, some empirical studies on historic consciousness exist. In light of events which occurred in Europe between 1989 and 1991, which drastically changed the political and social horizon in many countries, applied studies into historic consciousness were initiated. According to several authors (Angvik & von Borries, 1997; Rösen, 1994a; von Borries, 1995), the attack of empirical investigation on historic consciousness was strengthened by the conviction that people's historic opinions made their prediction on political decisions easier. This was a matter of great interest during this time.

Empirical studies on historic consciousness have been carried out with both qualitative and quantitative methods. Kölbl and Straub (2001) offer an in-depth revision on these matters, differentiating between the different focuses from which these investigations have been addressed (psychological, pedagogical, ethical focuses, etc.). These two authors also describe some investigations that have been published as intercultural comparisons on historic consciousness (Angvik & von Borries, 1997; Rösen, 1994a; von Borries, 1995), where young people from different European countries were surveyed using a common questionnaire. However, these comparative surveys were severely criticised from a methodological point of view because, in the majority of cases, the cultural specificity of historic consciousness was intended to be examined merely through nationality or mother-tongue (Kölbl & Straub, 2001).

Despite such criticism, I believe it is worth pointing out at this point that in one of the studies mentioned, the final conclusion was that the differences that exist between ethnic groups within the same state are greater than those between countries (von Borries, 1995).

In what follows, the study by Bergmann and Pandel (1975), which suggests that a published historic consciousness exists, represents the theoretical justification for analysing the socialisation that occurs in schools through textbooks. Sticking strictly to the definition offered by Bergmann and Pandel (1975), it is clear that only by means of an empirical study is it possible to answer the question concerning which is "the reception of history that is socially institutionalised".<sup>3</sup> The following analysis of textbooks is understood as a step closer to empirical investigation: it concerns a revision of interpretational proposals that textbooks offer for the forming of historic consciousness in pupils.

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<sup>3</sup> This empirical work is effectively planned: interviews will be carried out with pupils in a commune in the Metropolitan region and a commune in Araucanía, distinguishing between young Chileans who identify themselves as Mapuche, and young people who do not.

## AN ANALYSIS ON THE OCCUPATION OF ARAUCANÍA IN FOUR TEXTBOOKS ON THE HISTORY OF CHILE

As was previously set out, the central question in this investigation is to establish in what measure textbooks offer interpretational proposals concerning the link between the Occupation of Araucanía and the current relationship between the State and the Mapuche community. If the proposed definition of published historic consciousness is to be accepted, in the case of this analysis it makes sense to investigate the explanation given by textbooks on: a) why the Occupation of Araucanía occurred, b) what it consisted of, c) how did the State/army and the Mapuche community relate in the past?, and d) how do they relate today? Firstly, the contents of the texts will be regrouped according to these four specific (analysis) questions and in the second stage of investigation they shall be analysed considering the four texts together (interpretation). The transcript of the four texts in which this work is based is annexed to this document.

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### TEXT 1: MILOS, ALMEYDA & WHIPPLE (2007)

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#### 1a) Why did the Occupation of Araucanía occur?

The first text begins the description of the Occupation of Araucanía with a reference to the colonial era so as to remind the reader that during this time there was a horizontal relationship between the Mapuche community and the Spanish, similar to a diplomatic relationship. So as to explain how the Occupation happened, the authority's point of view towards the Mapuche community is described as turning sour as time progressed, eventually coming to consider them as "backwards" (text 1, line 22). This was an obstacle for the country's economic progress due to extensive land occupation that could have been used for agricultural purposes. This negative perception of the Mapuche community, together with economic interest, explains why the Chilean state elaborated and executed a plan to occupy Araucanía.

#### 1b) What did the Occupation of Araucanía consist of?

The text describes how in the 1860's several strongholds were established and Mapuche land was declared fiscal property, and that later Chilean army troops, under the command of general Urrutia, "entered Araucanía in 1881" (text 1, line 31), thus creating more strongholds. In 1882, the military occupation was spread to the Cautín river, and finally in 1890, European colonisation of these lands was declared.

#### 1c) How did the State/army and the Mapuche community relate in the past?

Despite the fact that the text confirms a diplomatic relationship during the colonial times, this situation remains the same during the early years of the republic (text 1, line 15). Various examples illustrate how the relationship ceases to be one between peers. The State is depicted as executing different actions, while the Mapuche community is mainly depicted as a pawn for the State (the new authorities later decreed that the Mapuche community to be considered Chilean citizens, but the authorities begin to consider it to be an obstacle towards the country's economic progress, the army established several strongholds in Mapuche territory. Later it declared indigenous land fiscal property, and once the War of the Pacific ended, the army

occupied Araucanía permanently). The only action appointed to the Mapuche community in the text is the uprising of 1868 (text 1, line 31).

1d) How do they relate today?

The text refers to two incidents in present times. The first is an indirect reference, in which it suggests that among the consequences of the Occupation is, “the impoverishment of the indigenous population and the emergence of a feeling of rejection or distrust towards Chilean culture” (text 1, lines 43-44). The second quote refers explicitly to the present when it mentions that “the importance of the Mapuche community in national history –past and presents– is due to its participation in the country’s social and cultural construction, as well as being an important part of our ethnic formation” (text 1, lines 45-47).

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**TEXT 2: DONOSO, VALENCIA, PALMA & ALVAREZ (2007)**

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2a) Why did the Occupation of Araucanía occur?

The second text describes the Occupation, both for the conservative and liberal governments, as a valued objective in terms of territory, since this era was one of great agricultural capability. The War of the Pacific reaffirmed the army’s confidence in achieving its objectives, thus explaining the State’s decision to occupy Araucanía so as to integrate it to the national productive activity.

2b) What did the Occupation of Araucanía consist of?

The background to the military Occupation was the sale of indigenous lands and through the exploitation of this area, the Mapuche community was cornered into the south of the province. The consequence of these events, denominated in the text as “spontaneous colonisation” (text 2, line 34), was that the land between the Biobío and Malleco rivers would have already been “bought, occupied or usurped and displaced the majority of the Mapuche community” (text 2, lines 27-28) by 1860. The prosecutor’s declaration as sole buyer, which stopped transactions between the Mapuche community and individuals, is described as an action destined to create problems associated with spontaneous colonisation. Then, the State requested the army occupy these territories in Araucanía. A military campaign directed by Gregorio Urrutia, organised between 1881 and 1883, resulted in several new strongholds, while “the Mapuche community was pushed towards the mountains and regrouped into indigenous *reductions* (settlements founded by the Spanish colonisers of the New World with the purpose of assimilating indigenous populations into European culture and religion)” (text 2, lines 47-48).

2c) How did the State/army and the Mapuche community relate in the past?

Once independence was established and until 1867, the relationship between the State’s representatives and the Mapuche community is described as a period of relative peace. Later, the relationship between these actors is one of constant commercial contact that leads to the permeability of the Mapuche community to adopt some Chilean cultural guidelines. Once the Occupation ended, the objective of creating the *reductions* was to establish the Mapuche community into an agricultural society so as to exert more power over it.

## 2d) How do they relate today?

The only reference to a time subsequent to the Occupation period is contained in the following statement: “despite the fact that these *reductions* were an institution imposed by force after the military occupation of Araucanía, these lands became key elements in the identity and culture of the “people of the land” during the 20th century. Indeed, the main claims made during the 20th century have been in defence of these territories” (text 2, lines 52-56).

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**TEXT 3: VILLALOBOS (2005)**


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## 3a) Why did the Occupation of Araucanía occur?

This text suggests that, prior to official action, the spontaneous advance of people past the Biobío river was notorious. With regard to the State’s motivations, Villalobos claims that, “the principal motive was the need for more agricultural land due to the increase in the demand for food. Also necessary was that the State impose its administration on territories where the national sovereignty had only manifested itself in a weak way” (text 3, lines 30-33). Then the indigenous uprising and the worry installed by the presence of the Frenchman Aurélie Antoine I in Araucanía convinced the government of the need to act immediately. In a paragraph with special indentation and italics, the author of this text writes, “the incorporation of Araucanía was mainly due to the spontaneous displacement in that region and the interest in exploiting that displacement. The occupation was favoured, to a certain point, since the indians needed the white man’s goods and also to sell his own products” (text 3, lines 39-42).

## 3b) What did the Occupation of Araucanía consist of?

The background on the army’s official action, begun in 1862, was that the settlers had formed ranches on lands they had bought or acquired through deceit. Villalobos describes some violence and occasionally the army’s advance had to be sustained with weapons. During one year, the border moved as far as the Malleco river and several strongholds were established. After 1865 the entire coastal sector was occupied and the line was drawn at the Toltén river. A new front was established at Traiguén prior to the War in the Pacific. Once the war was over, the border advanced until the Cautín river founded in Temuco, and later the Toltén river where towns and several strongholds were set up. The text explains that, “The different stages of displacement were carried out in the midst of isolated attacks by the Araucanians and the violent persecution ordered by the military leaders. There was no general rebellion similar to those that occurred previously and everything happened with less fight than was expected”. Towards the end of the text it is suggested that, “the land conquered be auctioned by the State and some be left in the power of the Indians with the condition that they do not alienate them” (text 3, lines 76-77), and later State promoted the immigration of European settlers, in which the text makes special reference to the Englishman José Bunster.

## 3c) How did the State/army and the Mapuche community relate in the past?

This text begins the description of the Occupation of Araucanía with the statement, “for more than a century the War of Arauco has been losing intensity and has been establishing pacific forms of contact between whites and indians”. It explains that through commerce



and religious missions a relationship between indigenous and white communities has been cultivated, which had produced a cultural exchange in both directions, “a strong mixing of races within the Araucanian *reductions* had contributed to bringing them closer to the ways of life and traditions of the white people, who in turn, knew of and had adopted some of the uses and material goods belonging to the natives. This process is known as transculturation”. In one part of the text the State is represented as protector to the Mapuche community, “the indigenous people, despite being protected by the State, suffered a series of persecutions and plundering” (text 3, lines 75-76). Towards the end, the text suggests that after the Occupation, that some members of the Mapuche community became involved in criminal activity, “It was not easy installing law and order due to the presence of adventurers and humiliated indigenous people dispossessed of their goods. Crime, murder and the theft of animals were frequent” (text 3, lines 82-84).

3d) How do they relate today?

The text makes no reference to the present.

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**TEXT 4: FRÍAS VALENZUELA (2007)**

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4a) Why did the Occupation of Araucanía occur?

In the text by Frías Valenzuela, the Occupation of Araucanía is described as a direct consequence of the Mapuche insurrection in 1880 and 1881. The text explains that, “The insurgents attacked Traiguén, cut telegraph communication and devastated the Collipulli countryside. These events made the government determined to resolve the advance of the border until the Cautín river” (text 4, lines 6-8) and later, it states that, “once the Cautín line was established, the occupation of Villarrica was imposed” (text 4, line 19).

4b) What did the Occupation of Araucanía consist of?

The description of the Occupation of Araucanía starts in this text in 1880, but mentions that this process had begun prior to the War with Peru and Bolivia. According to this text, the first concrete event that gave rise to the Occupation of Araucanía was the advance of the Cautín line, product of an expedition of 2,000 men. “On the way several strongholds were founded and roads were built until arriving at Temuco, a stone’s throw from the Cautín river” (text 4, lines 11-12). An uprising by the Mapuche community was stifled by Colonel Urrutia, who consolidated this border and founded several strongholds. In December 1882, Urrutia left for Villarrica with his soldiers who, “opened up paths, made bridges and built strongholds” (text 4, line 24). On the plains of Putué “a negotiation was celebrated with the region’s local caciques (chiefs of tribes)” (text 4, line 26) and more strongholds were established. The end of the text describes the arrival of the settlers and auctions or sales of fiscal land to settlers from other parts of the country, who “contributed to populating old Araucanía” (text 4, lines 41-42).

4c) How did the State/army and the Mapuche community relate in the past?

The first mention of the Mapuche community is related to its rebellion in 1880-1881, when they attacked Traiguén, cutting telegraph communication and destroying the countryside. Further on, it explains how they attacked a stronghold, assaulted carts, killed the drivers and stole

large quantities of animals. Then it depicts how the army advances towards the Cautín river, founding strongholds and building roads. General Urrutia is portrayed as taking “proverbial prudence” (text 4, line 21) by only demanding from the Mapuche community a certain number of animals so as to feed the troops. Later, the reference to the negotiations in Putué is the only mention to pacific contact that could have existed between the State/Chilean army and the Mapuche community.

4d) How did the State/army and the Mapuche community relate in the past?

The text makes no reference to the present.

## AN INTERPRETATION OF THE FOUR TEXTBOOKS

The idea of the Occupation of Araucanía is due to, according to three of the four texts analysed, the interest by Chilean governments to dispose of lands inhabited by Mapuche communities for economic reasons: the potential agricultural activity on these lands promised important benefits. The second text adds to this idea, the security that the army had acquired in achieving its objectives once the War of the Pacific was won. Villalobos, who of the four books is the author that most lines dedicated to the Occupation of Araucanía, is also the one who provides most arguments. To that of the State’s economic interest he adds the need to impose the State’s authority in this region so as to counter the active resistance upheld by the Mapuche community and the presence of the Frenchman Aurélie Antoine in Araucanía. On the other hand, the text by Frías Valenzuela puts forward one reason for the Occupation; the State’s action is described as a direct reaction to the Mapuche community’s rebellion during the years 1880-1881, but the State’s economic interests are not mentioned.

With regard to the matter of what the Occupation of Araucanía consisted of, it is particularly striking that the events described are to be found mainly in material and legal areas. Property wise, strongholds were created, paths and bridges were built, and the border line slowly moves towards the south. In legal terms, Mapuche land is declared fiscal property (or the declaration by the district attorney as sole buyer) and the sale and/or auction of the indigenous lands. Contrary to the aforementioned, few references are made to the implications the occupation of the Araucanía had for Mapuche people who inhabited the territory that the army occupied: the forced displacement of the people is described by using euphemisms such as “to push” and “to corner”, and in one text the army’s invasion is described as an “entry” into Araucanía. Just one text refers, although timidly, to the fact that the relocation of Mapuche populations in *reductions* ended the community’s traditional organisation: “Since the *reductions* were handed over to local *caciques*, many heads of families had no access to these lands, having to work for the recently formed *haciendas* (large estates or farms)” (text 2, lines 50-52). Three of the four texts finish the account on the Occupation with the promotion of European immigration, and the text by Frías Valenzuela adds that this fact contributed to populating old Araucanía, thus implying that this land was uninhabited after the Occupation<sup>4</sup>.

<sup>4</sup> This conjures up the way in which the occupation of the Mapuche territory in Argentina was conceptualised, “the Conquest of the Desert”.

With regard to the relationship between the State and the Mapuche community in the past, all four texts analysed offer significantly different descriptions. From the first text it can be inferred that in the relationship between the governing authorities and the Mapuche community, it was the State that fixed the conditions in which the relationship evolved. The Mapuche community mainly appears as a pawn in the State's action, and only one action is ascribed to it: the uprising of 1868, which was a reaction to the declaration that Mapuche territories were to become fiscal property. This explication of the uprising also transmits the idea that all the other State actions (which the Mapuche community did not rebel against) were implicitly accepted. The second text puts a strong emphasis on the commercial relationship that existed between Chileans and the Mapuche community that opened the door to cultural contact. Absolutely no mention is made to any resistance or opposition by the Mapuche community against the State. The third text, additionally to the commercial contact, mentions the link that is established between white and indigenous people through the missions, giving rise to cultural exchange in both directions. In these texts the State is described as protector of the Mapuche community that, however, did not accomplish this role adequately: "the indigenous people, despite being protected by the State, suffered a wide range of persecutions and plundering" (text 3, lines 75-76). It is particularly striking that in Villalobos' text the mapuche are never actually called "mapuche"; instead, the concepts of indians, indigenous, Araucanians, naturals or natives are used. The fourth text tells of constant hostility between Chileans and Mapuche, and an evident differentiation between the good and the bad. Chileans are only attributed constructive characteristics (they build strong strongholds, paths and bridges, and the Colonel Urrutia is defined as a proverbial prudence) while the Mapuche community is ascribed destructive characteristics (they ruin what is built by Chileans, steal animals and kill people). Furthermore, the State's action is described as merely a reaction to the destruction brought about by Mapuche community.

It can be observed then that concerning this point there are few common elements in the four texts. Depending on the text, the past relationship between the State and the Mapuche community can be qualified as a vertical one (the State establishes the terms of the relationship), horizontal (mutual exchange on a commercial and cultural level), paternal (the State as protector) or conflictive (war and hostility on both parts). In sum, four very different versions.

Finally, there is the question concerning the references that the texts make on the current relationship between the State and the Mapuche community, or in general, mentions of the present remains to be answered. As previously mentioned, just two of the four texts make references of this nature. In the first, two references are made to the present: the first expresses that among the consequences of the Occupation is the impoverishment of the indigenous population and the rising of a feeling of rejection and distrust by the Mapuche community towards Chileans. However, it seems to me that from the reading of this text such rejection appears as an incomprehensible consequence of the Occupation of Araucanía. Why should the Mapuche community feel rejection towards a State with which it had maintained diplomatic relations during the 19th century and which basically produced a change in ownership in

Araucanía? Why did the Mapuche community only make this feeling of rejection known once they had failed to put up more resistance towards the State's actions other than the uprising of 1868?

The second reference to current times is to be found in the first text, which describes the importance of the past and the present to the Mapuche community (“having participated in the country's social and cultural creation, (...) to be an important part of our ethnic group”). With regard to this description it is worthwhile noting that the importance that is given to the Mapuche community can actually be assigned to any indigenous community or group of immigrants in Chile. By not emphasising the specific cultural approach that the Mapuche community had in Chile, I believe that this statement without a doubt offers no convincing argument concerning this community's relevance.

In the second text a reference is made to the present, which however, is not evident: it remains unclear if the authors are referring to the present when they argue, in relation to the *reductions* that, “during the 20th century this land became a key pawn in the ‘people of the lands’ identity and culture”. In fact, one of the 20th century's main claims has been the protection of this territory (the ambiguity of this phrase is based on the fact that the 20th century is over, but the expression “has been” is a verbal structure that refers to a time which is still valid). Furthermore, the lack of clarity of such a formulation is locked in an error that declares the exclusive defence of *reductions* that the Mapuche community has claimed since the 20th century. One part of the Mapuche movement also demands that the so-called ancestral land be handed back<sup>5</sup>, territories which are far bigger than those encompassed by the *reductions*. To say that the Mapuche demand was confined to the defence of the *reductions* implies a failure to recognise that the Mapuche community argued that they had territorial rights to great expanses, and indirectly transmits the idea that the expropriation of these lands suffered by the Mapuche community is not such a serious matter.

Once the interpretation of the four questions that formed the analysis is finished, there remains one matter to be resolved. Although the methodology of content analysis emphasises the importance of referring to what a text actually says (and not speculate what it does not say), I must comment on three aspects that are nearly absent from the texts analysed, but that have been highlighted by other studious authors of these matters and which, to my judgement, are relevant when attempting to explain the relationship between the State and the Mapuche community. The first aspect is the relatively few mentions of the word “violence” upon describing the Occupation of Araucanía. Villalobos is the only author who uses the term on two occasions. His text says, “the occupation was favoured, to a certain point, by the indians’ need to count on the white man's goods and to get their products to circulate outside the Mapuche community. These facts did signify that there was no violence, nor that the advance should not

<sup>5</sup> The Office of the United Nations High Commissioner for Human Rights has incorporated the expression “old lands” to international jurisprudence, making allusion to the so-called ancestral lands. These are lands that were seized from the indigenous communities, but over which they believe they still have rights, just as is argued that “the link between memory and primordial collective bonds” remains (Toledo Llancaqueo, 2007).

be sustained at times with weapons” (...) “the different stages of displacement were carried out in the middle of attacks by the Araucanians and the violent persecution ordered by the military leaders. There was no general rebellion like those that had previously occurred and everything was done with much less fighting than was expected”. None of the other three texts used the term “violence”, thus transmitting the idea that the Occupation was a process of relative pacifism or that contributed to the establishment of peace in the region.

A second aspect, directly related to the previous one, is that the texts fail to mention that the process of Occupation of Araucanía resulted in many deaths.<sup>6</sup> The texts transmit the idea (and text 1 states so explicitly) that the main consequence of these events was the change in land property. According to these texts then, the Occupation was a historic process that implied material losses, but makes no reference to the human losses incurred.

A third aspect omitted is that the new way of life imposed upon the Mapuche community in the *reductions* drastically altered the traditional way of life, leading to a series of difficulties to reproduce the traditional Mapuche culture. On this respect, Bengoa writes, “since the military defeat in 1881 and the occupation in Villarrica in 1883, the Mapuche society has changed internally, as has its relationship with the state and Chilean society. The territorial downsizing was a key and clear element of the change that occurred. Araucanía was declared fiscal property and its territory was colonised so as to start production that is in relation to that of the central zone of the country. The Mapuche community was submitted to the severity of civilisation; they were granted small sections of land, locked into *reductions*, obliged to become farmers (...) This was a drastic change emplaced by the Chilean army. There were years of terror, plagues, hunger, loss of identity and the reformulation of a new culture as an ethnic minority in rural Chilean society” (Bengoa 2000: 329).

What are the implications in the formation of historic consciousness of the fact that these textbooks contain scarce interpretative proposals on the link between different temporal dimensions and that they barely refer to certain aspects that other authors have particularly highlighted? This issue shall now be discussed in the final part of this work.

## FINAL THOUGHTS AND CONCLUSIONS

This present work sought to answer in what measure textbooks offer interpretative proposals regarding the existing link between two different historic moments of Chilean history; the first being the Occupation of Araucanía and the second, the current situation of the Mapuche community, particularly in reference to its relationship with the State. To answer such a question, the concepts of “historic consciousness” (succinctly defined as the capacity to understand that all present situations are a result of an historic process), and its variant “published historic consciousness” (understood as the interpretation proposal that offered by a written text on how the different temporal dimensions are linked) was introduced. The latter was applied to the analysis of four widely used Chilean history textbooks for secondary education.

<sup>6</sup> However, according to Bengoa, almost 1,000 Mapuches died in confrontations with the Chilean army between November 3 and November 9, 1881 (Bengoa, 2000).

As a result of such an analysis, it can be stated that with respect to the Occupation of Araucanía, the published historic consciousness firstly tends to describe this event as a series of predominantly pacific events and secondly, to omit links that exist between such past events and the Mapuche community's current situation.

From this discovery arises a series of questions situated on different levels. Considering that other authors, specialists in the field, have presented a different version of the Occupation to that in textbooks, the first question would be why textbooks opt for this alternative and if so, why are there, as Bergmann and Pandel (1975) argue, interests associated to specific passages of history. In relation to the latter, it is also worth mentioning that in two of the four books analysed, the account on the Occupation has gone almost unaltered during several years: the text by Frías Valenzuela (edited for the first time in 1986) describes the Occupation of Araucanía in the 25th edition of 2007 exactly as it did 22 years earlier. In the text written by Villalobos two interesting changes can be noted when comparing the first edition in 1993 to the version of 2005. Firstly, to describe the republican period prior to the Occupation, the phrase, "armed confrontations rarely occurred" was added. Secondly, the phrase, "the conquered territory was auctioned by the State and some was left in the hands of indians who were prohibited from alienating them", originally stated that "few were left in the hands of the indians". These modifications expand on the idea that the relationship between the Chilean State and the Mapuche community was more or less peaceful, and that the expropriation of Mapuche lands was not something that stood out, that is to say, they are modifications that are in line with the results presented by the analysis.

A second question that arises –and this is particularly relevant for textbooks that are distributed by the Ministry of Education– is if the contents of textbooks are consistent with the public policies referring to the indigenous population. For example, a document by the Bilingual Intercultural Education Programme (PEIB), a programme directed preferably towards children of indigenous descent, suggests that the damage caused to indigenous communities by the State requires reparation, which could be achieved through intercultural education.<sup>7</sup> The New Deal policy also recognises that the consequences that certain historic processes had on indigenous communities were not adequately assumed in the past.<sup>8</sup>

<sup>7</sup> As one of the main principles of interculturality, this PEIB text mentions reparation, and suggests, "Cooperational relationships cannot be built on unjust situations, in which one part affirms that the damage received corresponds to ideas and needs of a previous era, and therefore, must be assumed as something that has no remedy. Interethnic cooperational dealings between national societies and indigenous societies need to imbue consciousness that the latter have a legitimate right to aspire to a fair amendment that must be translated as "giving more to the one who lost more in the past (...). To give back dignity to indigenous knowledge and to value the damaged language, are acts that the school can and must do" (Millacura, 2005).

<sup>8</sup> Among other aspects, the text of the policy mentioned refers to the *Comisión de Verdad Histórica*, "The commission conducted an extensive work whose focus was on making visible a historic, social, political and economic reality that during decades was not correctly assumed" (Government of Chile, 2004: 29) and "The historic account that the commission exposes does aim to be, as it has been previously stated, an official truth, but rather that its work is the fruit of a pluralistic debate in which those who were absent in the history books have been heard. It also recounts how the building of the National State involved, in some cases, acts of violence that even brought about the extermination of entire communities (Government of Chile, 2004: 32).

A third question arises when considering the result of the textbook analysis (the Occupation as a peaceful event and free of obvious associations with the present) and recalling that, according to the definition of published historic consciousness (Bergmann & Pandel, 1975), it obliges non-dominant social groups to “forget” their individual and collective history. Did the Mapuche community comply with the mandate of blotting out the events of the Occupation from its memory?

This last question, alongside others, will have to be answered through a future empirical study. The conviction that underlines such a work is that textbooks, by being an important element of socialisation in young people, can contribute to a better understanding between Chilean society, the State and the indigenous peoples that inhabit Chile. Therefore it is relevant to know how they are perceived.

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### ANALYZED TEXTBOOKS

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**ANNEX: TRANSCRIPT OF TEXTS USED**


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**TEXT 1: MILOS, ALMEYDA & WHIPPLE (2007), "HISTORIA Y CIENCIAS SOCIALES 2º MEDIO",  
SPECIAL EDITION FOR THE MINISTRY OF EDUCATION, EDITORIAL MARE NOSTRUM, SANTIAGO.**

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(Title) Occupation of Araucanía (497 words in Spanish)

1 If we go back to colonial times and the beginning of the Arauco War, the Spanish authorities  
2 attempted to militarily conquer the indigenous lands during the entire 16th century, something they  
3 systematically failed to accomplish. This situation led to Spain establishing a border separating  
4 the territory conquered from the land inhabited by the Mapuche community, and to strengthen  
5 the bonds of a diplomatic nature that maintained the difficult dealings through pacific channels.  
6

7 The arrival of Independence brought no great change to these dealings despite the fact that the  
8 new republican authorities decreed that the indigenous communities would be considered as  
9 Chilean citizens. The valuation of the Mapuche community by the authorities was influenced by  
10 ideological trends that granted a highly esteemed symbolism to the indigenous people, almost  
11 Romantic, but that did not translate as a change in relations in comparison with those that existed  
12 in the 17th century. However, these ideas changed as the century went on and the indigenous  
13 people came to be seen as "backward", and they became an obstacle for the country's economic  
14 progress, especially if they occupied large agricultural territories. Therefore, since the mid-19th  
15 century, the Chilean State began a plan destined to definitively occupy the land that implicated a  
16 slow advance of the border towards the south and the colonisation of these lands through foreign  
17 immigration and Chilean settlers.  
18

19 During the 1860's, along with the foundation of numerous strongholds in Mapuche territory, the  
20 State promulgated a law establishing that the territories occupied by the indigenous communities  
21 were fiscal property, thus causing the Mapuche uprising in 1868. The explosion of the War of the  
22 Pacific meant abandoning the process, but once victory was assured in the north, it was taken up  
23 again. Chilean army troops led by General Gregorio Urrutia entered Araucanía in 1881, founding  
24 a series of new strongholds, among them that of Carahue, Temuco, Lautaro, and later, that of  
25 Nueva Imperial.  
26

27 Following the consolidation of the military occupation of Mapuche territory, secured in 1882 until  
28 the Cautín river, in the following years, until 1890, the Chilean authorities intensified colonisation  
29 with the help of thousands of foreign immigrants, mainly Europeans, and nationals. Some of  
30 the consequences of the Occupation of Araucanía, apart from the most important which was  
31 the change in land ownership, can be identified as: ecological devastation associated with the  
32 burning of forests carried out in order to gain land for agriculture, the expansion of salaried  
33 employment, the introduction of the concept of private property, the impoverishment of the  
34 indigenous population, and the surfacing in it of a sense of rejection or distrust towards the  
35 "Chilean" culture.  
36

37 The importance of the Mapuche people in national history –past and present – is due to its  
38 participation in the country's social and cultural construction, as well as being an important part of  
39 our ethnic formation.

**TEXT 2: DONOSO, VALENCIA, PALMA & ALVAREZ (2007), "HISTORIA Y CIENCIAS SOCIALES 2º EDUCACIÓN MEDIA", SPECIAL EDITION FOR THE MINISTRY OF EDUCATION, EDITORIAL SANTILLANA, SANTIAGO.**

(Title) The Occupation of Araucanía (767 words)

1 The occupation of the Araucanía region was one of the conservative and liberal  
2 governments' main territorial objectives during the 19th century. Recognised as an area with  
3 great agricultural capacity, the interest surrounding it increased as the commercial contact  
4 with the Mapuche community allowed a more in-depth knowledge of the region, which  
5 facilitated a steady and gradual penetration. The success achieved by the colonising  
6 experience in the areas of Valdivia and Puerto Montt at the beginning of the 1850's, and the  
7 consciousness of a winning military capability during the War in the Pacific, were key  
8 elements for which the Chilean state decided to occupy the area militarily during the 1880's,  
9 and integrate it to the national productive activity.

10

11 (Subtitle) Spontaneous Colonisation

12 Following the Independence War, the Mapuche community enjoyed some forty years of  
13 lative peace. During this period and until 1867, the commercial interaction with Chileans  
14 intensified, as was the permeability of the Mapuches to adopt some of their cultural  
15 guidelines, such as learning Castilian Spanish, practising the Catholic faith or dressing in a  
16 "Spanish" manner. This flexibility in view of the external influence did not include waivering  
17 their territorial rights or their political autonomy.

18

19 During these years a process which began towards the end of the Colonial period continued:  
20 the sale of indigenous lands especially to merchants and military settlers residing at the  
21 border. These sales first started in the province of Araucanía (a coastal sector) that was  
22 exposed to the influence exerted by Concepción. In paralel to this, the occupation and  
23 exploitaiton intensified in the area, definitively cornering the Mapuche community into the  
24 south of the province. Towards the east of the Nahuelbuta mountain range, in the longitudinal  
25 valley, the excellent lands for rearing cattle and cultivating wheat and legumes, had favoured  
26 that the agrarian property be extended past the Biobío river. Until 1860, the space between  
27 the Biobío and Malleco rivers had already been bought, occupied or usurped and the  
28 majority of the Mapuche community displaced.

29

30 (Subtitle) The Need to Legislate

31 By the mid-1860's spontaneous colonisation already presented a series of problems. In  
32 many cases, the very same piece of land had been sold on more than one occassion and to different  
33 buyers, large properties were in the hands of speculators that neither used, nor  
34 allowed the land to be used, thus preventing settlers from establishing themselves there or  
35 working the lands. To put an end to this situation a law was declared in 1866, which stated  
36 the National Treasury as sole buyer, thus preventing transactions between the Mapuche  
37 people and individuals. The State was now in charge of the process and sent the army on a  
38 mission to occupy the territory at the border.

39

40 (Subtitle) Reductions

41 Once the War of the Pacific had ended, the government headed by Domingo Santa María  
42 commissioned general Gregorio Urrutia to lead the campaign to totally occupy this extensive  
43 region. For this, a military expedition composed of more than 2,000 infantry, cavalry and  
44 artillery was organised between 1881 and 1883, with the most modern munitions recently  
45 used during the War of the Pacific. The expedition made its way towards the south and  
46 managed to establish a line of advanced strongholds that were the bases of the current cities  
47 of Victoria, Collipulli, Lautaro and Temuco. The Mapuche community was pushed towards  
48 the mountains and regrouped into indigenous *reductions* that were of less agricultural  
49 aptitude. The objective was to settle the indigenous people and transform them into an  
50 agricultural society so as to exert more power over them. Since the *reductions* were handed  
51 over to local *caciques*, many heads of families had no access to these lands, thus opting to  
52 work for the recently formed *haciendas*. Despite the fact that these *reductions* were an

53 institution imposed by force after the military occupation of Araucanía, these lands became  
 54 key elements in the identity and culture of the “people of the land” during the 20th century.  
 55 Indeed, the main claims made during the 20th century have been in defence of these  
 56 territories.

57 Mirroring the constitution of the *reductions*, the process of selling, renting and auctioning the  
 58 lands started by Spanish, Swiss, French and German settlers continued, emulating the  
 59 Valdivia experience, but without the results hoped for. In the long run, the region  
 60 fundamentally became property of Chileans, who reproduced the system of *latifundios* (large  
 61 estates) in the Central Valley. The properties were mainly used for wheat production, thus  
 62 transforming The Frontier into Chile’s barn.

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**TEXT 3: SERGIO VILLALOBOS (2005), “CHILE Y SU HISTORIA”, 11<sup>a</sup> EDICIÓN,  
 EDITORIAL UNIVERSITARIA, SANTIAGO DE CHILE.**

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Title: Man and Territory<sup>9</sup>

Until mid-19th century, the Chilean territory effectively occupied comprised of the territory between the Copiapó and Biobío rivers, where national life had been developed since the Colonial years. Only well into the Republican period, did the Chilean leave this area so as to extend activities towards other regions that had not been already occupied.

Subtitle: Definitive Penetration into Araucanía (1,019 words)

1 Since more than a century the War of Arauco had waned in intensity and new forms of  
 2 pacific contact had been established between whites and indians. Every so often, markets  
 3 were organised to exchange products and cattle in the proximity of the populated  
 4 strongholds near the borders. Also customary was that some hucksters enter the indians’  
 5 lands with packs of mules carrying a wide range of utensils, trinkets and rough liquor, which  
 6 they exchanged for cattle and *ponchos*. Peaceful dealings had replaced fighting since the  
 7 17th century. Armed skirmishes rarely occurred.

8

9 The indigenous people, on their part, had adapted to this situation by increasing the  
 10 production that interested the buyers and landowners. A strong mix within the Araucanian  
 11 *reductions* had contributed to bringing them closer to the ways of life and habits of white  
 12 people, who in turn, knew of and had adopted some of the uses and material goods that the  
 13 natives had. This is called transculturation.

14

15 Another manner of approximation was missionary work, which although resulted in poor  
 16 spiritual results, served as contact between the two communities. Given this situation, the  
 17 indigenous people had gained some advantages and wished for peace. Prior to official  
 18 action being initiated, a spontaneous advance past the string of strongholds in Biobío was  
 19 made felt by the Chilean settlers. Many had established themselves by forming ranches on  
 20 land that they rented or deceitfully took from the rightful owners. Adventurers and criminals  
 21 also swarmed around, who found refuge in the region and committed all kinds of abuses.

22

23 The Araucanía region came to have more than 14,000 white people and an illegal trade  
 24 which extracted over 250,000 sacks of cereals, among other products. Each summer no  
 25 less than 300 merchants penetrated this zone. The development of carbon mining had also  
 26 established a way of penetrating the coastal sector.

<sup>9</sup> The following subtitles can be found in this title: “Definite penetration of the Araucanía, Brief war with Spain, To the north!, Gestation of the War of the Pacific, The different campaigns (1879-1883), Solution of the conflict, The border problem with Argentina”.

27 The first republican governments had made no attempt at occupying the Araucanía  
28 territory, despite the worry and incidents that occurred from time to time. Only in 1862,  
29 during José Joaquín Pérez's government was official action initiated. The principal motive  
30 was the need for more agricultural land due to the increase in the demand for food. Also  
31 necessary was that the State impose its administration on territories where the national  
32 sovereignty had only manifested itself in a weak way.

33

34 An indigenous rebellion, encouraged by political leaders as a consequence of the civil war in  
35 1859 against Montt's government, and the panic spread by the French adventurer Aurelie  
36 Antoine I, who appointed himself as king of Araucanía, made the Pérez government decide  
37 to act immediately.

38

39 *The incorporation of Araucanía was mainly due to the spontaneous displacement*  
40 *towards that region and the economic interest in exploiting it. The occupation was*  
41 *avoured, to a certain point, by the indians' need to have the white man's goods and*  
42 *also to sell their own products.*

42

43 These events did not mean that there was no violence and that the advance should not  
44 have been sustained at times with weapons. Since then official action developed quickly. In  
45 the space of a year, the colonel Cornelio Saavedra, in charge of 1,500 men, advanced the  
46 border line until the Malleco river and founded Mulchén, Angol and Lebu without major  
47 difficulty. Because of the war with Spain, which broke out in 1865, fear that the Spanish  
48 would instigate an indigenous uprising was widespread, so it was decided to occupy the  
49 coastal sector and establish the Toltén river line.

50

51 Advance was suspended during many years. Shortly before the War of the Pacific, the  
52 occupation extended until the line in Traiguén and the town of the same name was  
53 established. After the conflict was over, the occupation was ended with the help of military  
54 corps returning from Peru. First the advance was carried out until the Cautín river and  
55 Temuco was founded (1881). Later the last strip that remained between the centre and the  
56 Toltén river was occupied.

57

58 Besides the aforementioned towns, Cañete, Nueva Imperial and Villarrica were re-founded,  
59 while Collipulli and Victoria, among others were founded, as well as numerous strategically  
60 distributed strongholds.

61

62 The different stages of displacement were carried out in the midst of isolated attacks by the  
63 Araucánians and the violent persecution ordered by the military leaders. There was no  
64 general rebellion similar to those that occurred previously and everything happened with  
65 less fight than was expected. The indigenous communities were adapting to interaction with  
66 the whites and lacked the means to resist, while the arrival of adventurers and the community's  
67 displacement towards the region was swift.

68

69 The advance of the railroad, the telegraph and the building of roads, used by heavy carts  
70 and speedy stagecoaches, as well as possession of modern fire arms, assured the towns'  
71 and *haciendas'* existence and speeded up agricultural development.

72

73 The lands conquered were auctioned by the State and some were left in the hands of  
74 indians with the ban that they alienate them. The demarcation of the lands was precarious  
75 and caused innumerable abuses and fighting. The indigenous people, despite being  
76 roTECTED by the State, suffered a wide range of persecutions and plundering.

77

78 The State encouraged the establishment of Italian, Swiss and French settlers, who  
79 confronted many difficulties when putting into action agricultural works. The land, however,  
80 yielded generously due its great fertility; its contribution towards the country's economy was  
81 substantial. The more important products were wheat, legumes and wood. Life in  
82 Araucanía was marked by the border up until the early years of the 20th century. It was not  
83 easy installing law and order due to the presence of adventurers and humiliated indigenous  
84

85 people dispossessed of their goods. Crime, murder and the theft of animals were frequent.  
 86  
 87 One of the most active businessmen in Araucanía was the Englishman José Bunster, who  
 88 modestly initiated work as a provider to the troops. He was a trader, acquired several  
 89 agricultural properties, organised transport, built a windmill and created a bank.

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**TEXT 4: FRANCISCO FRÍAS VALENZUELA (2007), "MANUAL DE HISTORIA DE CHILE. DESDE LA PREHISTORIA HASTA EL 2000", 25A EDICIÓN, EDITORIAL ZIG-ZAG, SANTIAGO DE CHILE.**

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(Title) Pacification of Araucanía (545 words)

1 The rebellion of 1880. The war against Peru and Bolivia paralysed and even disturbed the  
 2 *reductions* in Araucanía, thus aiding a new insurrection by the Mapuche community since  
 3 the majority of veteran troops were sent to the north. The insurrection began in 1880 and  
 4 aimed at reconquering all the land until the Biobío river precisely when the Chilean army  
 5 was defeated in the war against Peru. However, the critical moment occurred in January  
 6 1881 when the battle of Lima was taking place. The insurgents attacked Traiguén, cut  
 7 telegraph communication and devastated the Collipulli countryside. These events made the  
 8 government determined to resolve the advance of the border until the Cautín river.  
 9  
 10 1. The Cautín line: founding of Temuco. An expedition of 2,000 men left Traiguén towards  
 11 the Cautín river. On this journey they founded several strongholds and built roads until  
 12 arriving at Temuco, a stone's throw from the Cautín river, thus ending the battle they had  
 13 taken on. A stronghold was built there that was immediately attacked by neighbouring tribes,  
 14 which at the same time attacked the convoys of carts, killed the drivers and took large  
 15 numbers of animals. Finally, the colonel Gregorio Urrutia managed to stifle the uprising and  
 16 consolidate the line at Cautín, with the following strongholds: Carahue, Nueva Imperial,  
 17 Temuco, Pillanlelbún, Lautaro and Curacautín. Victorious, continuing with his proverbial  
 18 prudence, he limited himself to demanding every cacique ten animals to feed his troops.  
 19 Once the Cautín line was established, the occupation of Villarrica was imposed.  
 20  
 21 2. The occupation of Villarrica. Colonel Urrutia led his division from Temuco in December  
 22 1882, towards the ancient ruins of Spanish-held Villarrica, now covered by forests that  
 23 surrounded the beautiful lake bearing the same name. His soldiers, who swapped rifles for  
 24 axes, opened up paths, made bridges and built strongholds. Having founded Freire, the  
 25 expedition members arrived on the last day of the month at the plains of Putué, which can  
 26 be seen from the Villarrica volcano. Here negotiations were celebrated with the region's  
 27 local caciques. Once the possession of Villarrica was consolidated, the strongholds of  
 28 Palguín, Pucón and Cunco were founded, while a division operated in the mountains,  
 29 founding the stronghold in Llama, among others, in the Alto Biobío region.  
 30  
 31 Colonisation from 1882 onwards. Once the Araucanía region had been pacified, it was  
 32 considered convenient to colonise it with foreign elements, for which colonising agents in  
 33 Europe were designated. Between 1883 and 1890, some 10,312 German, Swiss and  
 34 French settlers arrived. They were settled into the region, but since the majority had neither  
 35 money, nor agricultural experience, the new colonies failed to produce the desired results.  
 36 In the short term, many of these settlers dispersed throughout the country and their lands  
 37 fell into the hands of Chileans or foreigners better equipped who looked after the land on  
 38 their own initiative. Emigration encouraged by the State ceased and was replaced by  
 39 spontaneous emigration. The auctions or sales of fiscal lands at low costs (\$5 per hectare in  
 40 1898) attracted settlers from other areas of the country and contributed towards populating  
 41 the old Araucanía.

# The nation's fulcrum: Changes in the articulating axis of the imaginary of nation in Chilean textbooks: from the centenary to the bicentenary

RÓBINSON LIRA C.

## INTRODUCTION

**T**he question that surrounds this investigation is the following: what changes can be observed in the image of nation portrayed by Chilean textbooks for secondary education in a hundred years of republican history, from the Centenary to the Bicentenary?

In order to answer this question, three texts have been selected, each of which represents a particular period, namely:

- Luis Barros Borgoño (1853-1943). *Curso de historia general*. The first edition of this work (divided in four volumes) dates from 1893, and the last edition from 1925. It covers the Centenary period.
- Francisco Frías Valenzuela (1900-1977). *Manual de historia de Chile*, edited for the first time in 1950 (between the Centenary and the Bicentenary). Its last edition dates from 2004.
- Lilyan Almeyda, Pedro Milos and Pablo Whipple. *Historia y ciencias sociales*, for Year 10. Two editions: 2001 and 2007. This textbook has been published just before the Bicentenary.
- Regarding the idea of country that derives from the cited textbooks, the conclusion, which we bring forward, is the following:

At the beginning of the 20th century, the idea of nation was linked to the liberal republican ideal and to a horizon of expectations regarding Chile's full insertion in Christian-western civilisation. By the middle of the century, the nation was seen as an entity that sought itself in the recovery of past experiences that gave Chilean race and culture its singularity. At present, the image of nation stands on the idea of "social construction" and takes on the challenge of

a critical view of the past, together with an appreciation for diversity and universal principles, settled on democracy and human rights.

Consequently, even though the nation as a structuring axis of the historical account has not disappeared, it has been re-conceptualised within globalising processes, where the national character is seen as a “node” within “a wider net of power” (Castell, 1999) that operates as discourse in the framework of inclusion, both inside and outside its borders.

This makes Mario Carretero’s thesis (2008) problematic, regarding the fact that national identities cultivated by school are still standing on the traditional, homogenising pattern that excludes differences. At least regarding school textbooks, the tendency has been the opposite, because the appreciation of diversity, even its celebration, makes students see “us” in all “others”.

This opening up to diversity has been reinforced by the interest shown by textbooks of the last period to give students the tools to have a critical view on the past and acknowledge that the nation they belong to is a community where there have been, and still are, a great many cracks, fractures and ruptures, which frustrates the idea of a “homogeneous people”.

In the light of these considerations, the challenge of national history teaching does not seem to be the one visualised by Carretero: to move toward an integrating discourse that is critical of exclusions and that teaches how to live in differences, through democracy and human rights understood as universal values.

If this is not the challenge, where does the tension lie? Apparently, it is expressed in the “paradox” (revealed by the Citizen Education Committee report, 2004) of moving forward toward a history teaching that promotes a critical and reflective attitude regarding the past (as seen in Almeyda, Milos and Whipple’s work), and that, at the same time, includes what that teaching has traditionally been like (represented in Barros and Frías’ texts): establishing the new generation through the instilment/appropriation of contents offered as certainties, resistant of methods that guide toward reflection and doubt.

In order to develop this argument, we will consider the following exposition structure: first, the similarities and differences observed in the three cited texts will be commented; then, we will stop the analysis on those elements that allow distinguishing the idea of “imagined community” that is particular of each text within the dominant cultural principles of the period in which they were produced. Finally, we will bring up certain considerations regarding the challenges faced by national history teaching.

### **THREE TEXTS, THREE CONTEXTS**

Each textbook accounts for the social context in which it was created. Barros Borgoño’s book represents the “golden age” of the liberal bourgeoisie, whereas Frías Valenzuela’s book criticises the *laissez faire* and demands a strong State and rulers with authority that could deal with the social issue, beyond right and wrong. Almeyda, Milos and Whipple’s work was produced

during the post-transition period (or in its last stage, depending on the chosen criterion), and it comments on the re-installation of liberalism, stating the country's challenges in terms of democracy, development and social justice.

Arguably, among these three works, the one that shows the most consent to its present and holds more positive expectations with respect to the future is Barros Borgoño's. This attitude derives from a historical exegesis that, operating under the canons of a "religion of freedom" (Croce, 1996), leaves no doubt regarding the positive evolution of mankind and the auspicious future that lies ahead, when freedom overcomes the last obstacles that obstruct its full display.

In contrast, Frías Valenzuela's work represents another belief, which sees in "nationalism a religion" (Carlton, 1966) and carves out the future based on the recovery of past experiences that have been insulted or silenced by the "liberal religion". If, in Barros Borgoño's words, it clamoured for the control of authority as a means for guaranteeing freedom, Frías' nationalism ensured the recovery of the "principle of authority" (which the Bourbons installed and Portales made reappear, "by a spell"), as a way to prevent freedom from becoming anarchy.

Almeyda, Milos and Whipple move away from this canon. They deal with science; therefore, their invitation is to have a critical view of reality, in order to explain the way in which Chilean society was formed and visualise its challenges regarding democratisation and social equity. There is no agnosticism in this attitude; the referred authors transmit a commitment to universal values that take root in democracy and human rights. Therefore, their work shares the "cosmopolitanism" that characterises Barros' text, although the text lacks the warmth and colour that this author stamped on his writings, especially when he stated the "signs" that announced freedom's inexorable advance, as we will now see.

## **CURSO DE HISTORIA GENERAL AND THE "RELIGION OF FREEDOM"**

### **1. March of history and freedom**

Luis Barros Borgoño was a liberal through and through. He practised this doctrine induced by Diego Barros Arana, who adopted him when at a young age he lost his father (brother of the eminent politician and historian).

Barros read Law, but his passion was history. He was a teacher at the Instituto Nacional and the Instituto Pedagógico, and was a renowned academic and leading political actor. In fact, in a moment of sharp division in the high power, he gave his full support to the fraction that defeated Balmaceda and established the parliamentary republic.

Precisely during those post-civil war years, Barros Borgoño wrote *Curso de historia general*<sup>1</sup>. The organisation of this text was limited to the contents and structures that he himself had

<sup>1</sup> Barros Borgoño, L. (1993) *Curso de historia general: arreglado para la enseñanza secundaria de conformidad al plan de estudios de 5 de abril de 1893 i al programa universitario*. Imp. Barcelona. In this work's complete sequence, this title corresponds to volume I.



defined when participating in the commission that was responsible for making new study plans and programmes in 1893 and 1914.

In the first part of this book, the author specified the objective of school history teaching. He stated that it aspired to develop intelligence and, at the same time, to “inspire in students from a very early age the true feeling of freedom, the ideas of justice and morality and the respect to the law, the basis of every republican society” (Vol. I: 6).

In this statement, we see a ratification of the postulates defended by those who rose against Balmaceda, claiming that the “dictator” planned to destruct the rule of law and undermine the republic and the freedoms guaranteed in the Constitution. Actually, the whole first volume of *Curso de historia general* could be read under that light, despite that fact that the issues it deals with are not related to contemporary history, but mainly to Ancient history.

Indeed, according to Barros, it was in the ancient world when men realised what it meant to be free, which led them to create institutions that were perfected with time and whose main objective was to defend freedom. These institutions, like the Senate, became a bastion that put an end to the attempts made inside or outside the country to destroy citizen freedom in order to install or re-enforce despotism and tyranny.

It all began in Greece, where for the first time humanity learned about the “dignity of the citizen” that loves freedom. Barros presents Greek cities as the “first home of free and democratic peoples” and an example of what men were able to achieve “when motivated by the spirit of freedom” (Vol. I: 53).

Athenians, “motivated by freedom”, founded a model city of an “industrious and commercial” activity. Motivated by the same force, Spartan Leonidas refused Xerxes’ proposition to make him the king of Greece as long as he abandoned the resistance he had organised in the Thermopylae. Barros states that in that occasion Leonidas replied, “I would rather die for Greece than be my fellow countrymen’s master” (Vol. I: 77).

Dying for one’s country meant offering one’s life for freedom and, more specifically, for the laws that guaranteed it. That is why Spartans, who knew of Leonidas’ sacrifice, had an inscription sculpted in the place where he died with his three hundred men that read: “Go tell the Spartans, stranger passing by, that here, obedient to their laws, we die” (Vol. I: 77).

In short, a country that establishes its citizens’ freedom in its laws was something worth dying for and even killing for. When analysing the Roman case, Barros explained Julius Caesar’s military success and his ability to “make order reign everywhere,” but at the expense of violating the old “Roman freedoms.” This motivated some prominent senators to conspire against “a man who established monarchy by fact and who would soon become king” (Vol. 1: 110), in the name of the republic.

However, according to Barros this attempt to return to “ancient practices” failed. Rome had become an empire and lost its original austerity and the high sense of duty that characterised it during the republican period, becoming contaminated with the “softness” of the civilisations

it conquered as it moved toward the east. Freedoms were lost, but not completely; at a municipal (local) level, they were kept.

The latter contributed to social regeneration, which was strengthened by the arrival of Christianity, that introduced the principles “of love, of charity, of equality” and rejected the divinisation of the sovereign, which resulted in bloody persecutions that did not stop the process.

According to Barros, Christianity had to regenerate society but could not stop the breakdown of the Empire, which led to the constitution of medieval kingdoms and feudalism, prime example of political atomisation. Toward the end of the medieval period, Barros discusses the origins of modern monarchy and how absolutism managed to assert its authority in continental Europe (France), but not in England, where the bourgeoisie and barons managed to guarantee their freedoms through the Magna Carta.

Barros states that this statute established that “the king has duties and the nation has rights,” written in law and defended by the people’s representatives, congregated in parliament, an institution created by the English in order to give citizens an instrument of defence against an eventual despotism of their rulers. After that, all civilised nations ended up adopting parliament “as bastion of their freedom” (Vol. II: 20).

*Historia general* continues describing the oppression of absolute rulers and their sad ending: Charles I of England was executed by an order of Parliament; Louis XIV was buried amid “cursing and blasphemy”, “mud and rocks”, thrown by a people that felt drowned “under the firm hand of an inexorable and despotic master” (Vol. II: 72). Louis XVI is presented as a tragic figure representing an old world that was swept by a revolution that opened up a new time, and which was the consequence “of the ideas, hopes and illusions of a people” that wanted to demand “rights and freedoms that had been constricted for a long time” (Vol. III: 12).

According to Barros, Chile had its own place and it was not less glorious than that of other peoples. As did France, Chile welcomed the modern era with a revolution that put an end to a political regime and was preceded by a change in ideas that were later transformed into actions.

These ideas were none other than those of liberalism. Barros affirms that this doctrine fed from English historic experience (Magna Carta, Declaration of Rights in 1688), which resulted in the constitution of a “limited government... that prevents public powers from tyrannising the nation.” On this basis, Locke and the enlightened French created the theories that were decisive when promoting and channelling revolutions that led to an era of liberal governments. Such theories were social contract (“pact among citizens of a state, agreed upon in a common interest for the protection of their rights”), popular sovereignty and the “legal notion that governments are the leaders of the nation and their only rule should be public interest” (Vol. III: 15).

Though late, these ideas arrived in Chile and were decisive for promoting the junta movement of 1810. Barros states that José Antonio de Rojas was a key figure (“the first to bring to Chile

Diderot's *Encyclopaedia* and works by Montesquieu, Rousseau, Helvétius, Robertson, Reynal, Buffon and others who had a great influence on ideas"). Rojas' imprisonment triggered "the storm and opened up in this region the clear and open period of independence" (Vol. III: 278).

## **2. Freedom and Chilean nation**

Based on these considerations, we can deduce that according to Luis Barros Borgoño, the nation's fulcrum was in the institutions that ensured citizens' freedom through the balance of republican powers.

Loving the country was loving the republic. In this, Barros Borgoño continued a long tradition that dated from ancient writers, especially Romans, who were admired by 19th century Chilean tribunes, "men of words" who wanted to imitate them (Vicuña, 2003).

According to Barros, Romans' great legacy was taking the freedom known by the Greek to the world they had conquered. While the legions asserted their power, populations began to "nationalise" in the "customs and rights of Roman citizens" (Vol. II: 98). The assignment to Roman citizenship was therefore not subject to people's ethnic condition (their racial and cultural membership group), but to showing loyalty to Roman laws and institutions, so as to ensure and discipline freedom.

While the republic may have collapsed, the freedom principle survived, until at the end of the middle ages it shone again like never before in the modern era, with the constitution of nation-states.

Under this logic, the freedom principle was the eternal, and nations that adopted the republican model (Chile, after Independence) were the concrete realisation of that principle, the body that nested the spirit of freedom.

Consequently, nations were not a racial entity or a cultural tradition that crossed centuries and was immortal and immutable (as assumed by romanticists). For liberals (like Barros Borgoño), the nation was a historic realisation that could nourish from a shared heritage and racial ties, although that condition was not *sine qua non*. The key was a group's decision to build a political society based on the freedom principle, creating laws and institutions that guaranteed it and inculcating in people (first in the younger generation) a commitment and affection for the established order, which was called "civic virtue", and, more generically, "civilisation".

The fact that for liberals the nation was not a racial and cultural homogeneity but an agreed consent regarding the laws that ordered the exercise of freedom is clearer in the light of Barros Borgoño's comments with respect to indigenous peoples that lived in Chile.

The author emphasised their ethnographic characteristics, which were "very peculiar" because they constituted "an only family with an only language (...) and the same physiognomy." However, Borgoño concluded that "Chilean indians did not form a nation, (...) they had no

ties of unity, they lived in frequent wars, (...) they had no king or law; and among them the bravest was the most feared” (Vol. I: 249).

The Spanish Crown introduced the first elements of civilisation through the Laws of the Indies and the improvement of customs. However, these advances were soon insufficient. Illustrious men who drank from the fountains of illustration realised “the state of backwardness of the colony (...) and the obstacles and difficulties of the existing regime with respect to any hope of improvement and any aspiration of wellbeing and political equality, of commercial freedom and economic progress” (Vol. III: 276).

Under this perspective, the unexpected fact of the Napoleonic invasion of Spain cannot be seen as an accident that ended up triggering the Chilean constitution as an independent nation. Regarding the question of whether history makes sense or if it is just a permanent change, a chaotic flow that is ultimately unattainable and unintelligible, the answer that we can gather from Barros’ work is clear: peoples’ trajectory is no accident; it has a sense. Therefore, those facts that open the way for big progresses can be explained, and it is the historian’s responsibility to find the underlying logic.

As the rest of the American nations, Chile reacted to a specific event (the king’s captivity) and within this framework it autonomously organised itself, supposedly until the return of the monarch. However, Barros states that “under the shadows of the new situation, the ideas of separation from Spain began to appear everywhere” (Vol. III: 144). Why? Because freedom, the agent that moved history (cunningly, paraphrasing Hegel), saw in the 1808 events an opportunity to score a new triumph and continue with its display at a global level.

From the above we infer that the historic approach supported by Barros is basically no different than the way in which Christian religion conceived the world’s development. If in this case the agent was Divine Providence, in the “religion” professed by Barros, it was the spirit of freedom what made individuals, united in nations, shake off the oppression and develop a way of life as demanded by civilisation.

The nation, maximum state of organisation to which a community could aspire, was set up as the main moral reference because it was the incarnation of freedom<sup>2</sup>. In the context of secularisation, it replaced God and had to “speak” to the individual (future citizen) from within, and in order to achieve it, texts such as Barros’ (which were presented as a “truthful, reasoned and touching account of past events”) served as revealed truth. Under these coordinates, we understand that the whole educational and cultural mechanism that was implemented at the end of the 19th century adopted a religious tone, as affirmed by Croce, because it rescued what was “essential and intrinsic” to every religion: “a concept of reality and an appropriate ethics” (Croce, 1996: 16).

<sup>2</sup> “Society” (national and liberal) occupied the place that supernatural forces traditionally had, seen as rulers of human destiny. Emile Durkheim, contemporary of Barros’, expressed this idea very clearly when stating that society (understood as “body of nation”, like Barros used to say) played “the same role for moral life as that which mythologies assigned to the gods of all times” (Durkheim: 1998: 48).

In 1918, when the last volume of *Curso de historia general* was published in a very agitated social context with the world at war, the revitalisation of faith in the “religion of freedom” was presented as a very urgent task, considering that people no longer believed in the parliamentary system, which was attacked by leaders such as Arturo Alessandri. Barros, who ended up competing with the “Lion” in the 1920 elections, took on this challenge, writing that for the present, the study of ancient history was fundamental because “the social phenomena that stirred up the Roman republic (...) are the same that still shake the world at all times during great upheavals (...) civil struggles are disturbances and horrors, with their persecutions and leaders, they are the struggles of all times and all countries, and they mark the period of the great transformations to which human societies are subject over centuries” (Vol. IV: 12 and 13).

Looking at the past in order to understand the present and thus mark out a future was the object of history teaching. If this was done according to the liberal way of thinking, the conclusion was obvious: the changes that society required could not take place at the expense of sacrificing the institutions that were created for ensuring citizen freedom. Knowledge about civil wars that put an end to the Roman republic should be useful for realising the risks of following leaders that ended up fighting for their personal interests and not the interests of society, fracturing national unity.

If the leader also helped the penetration of foreign agents who were interested in causing instability and imposing dictatorship, there was a double danger. Therefore, it is not surprising that the coalition that supported Barros in the 1920 contest paid for an insert on the press condemning Alessandri under the title of “Hannibal Ad-Portas.” This message was not addressed at the popular mass, but at the elite that read *El Mercurio* (where the insert was published) and which had been educated in the selective secondary education, probably with Barros’ books. They were the ones who had to remember what the title evoked, in order to recognise the danger that was threatening the republic and take the appropriate measures. Undoubtedly, for Barros the studied history was contemporary history, although the narrated events had occurred thousands of years before.

## **MANUAL DE HISTORIA DE CHILE AND THE “NATIONALIST RELIGION”**

### **1. Importance of the principle of authority**

Francisco Frías Valenzuela is probably the best-known author of school textbooks. His manuals on general and Chilean history are still published, although the first editions of these works date back to the 1930s and 1940s.

In 1950, the referred author made a summary of the content of his four volumes that dealt with national history (1947-1950), with additions from the first texts he published, dealing with universal history. The result was the *Manual de historia de Chile*.<sup>3</sup>

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<sup>3</sup> Frías, F. (1950) *Manual de Historia de Chile*. Ed. Nascimento.

This book was conceived exclusively for Chilean history lessons, which reflected a difference with Barros' text, which followed the curricular parameters of the 19th century and inserted national history in the framework of general history, understood as the history of civilisation.<sup>4</sup>

In line with the 19th century historiographic tradition, Frías' manual was presented as a truthful account of past events, certified by science; it had a narrative style and followed a chronology. In this point, Frías and Barros matched. They both sought to project rigorousness regarding positive facts and commitment to the history ad narrandum prescribed by Bello. Their differences were given at an interpretative level.

The 1930s and 1940s "revisionism" had a deep effect on Frías. To a great extent, his view of history was structured based on Francisco Antonio Encina's nationalist and conservative premises, which placed the nation's fulcrum not on freedom (objectified in the republican system that tended toward the balance of powers), but on the principle of authority, which was respected even when infringing individual rights, group interests and even the will of the people, expressed by voting; all by virtue of a dear objective: achieving the common good.

Historically, the bases to assert that Chileans should be governed by authorities with leadership and an effective power to exercise it could be found in the colonial period, when in virtue of unique historic circumstances the "Chilean race" was conformed, a particular type of human group that required an effective governance (even authoritarian) to repel their anomic tendencies and channel their energies beneficially, in the framework of an established order.

Following Frías, it all began with the Conquest. During this period, men of a "modern mentality" arrived at this territory to establish order amid a population group defined as "an amorphous conglomeration of tribes that only came together to fight" (p. 101).

The presence of the indigenous element was key to define the Chilean idiosyncrasy, not because they descended directly from the *araucanos*, but because the "Homeric resistance" they offered to the Spaniards forced the Empire to select "in a military sense, Spaniards who came to Chile (...) the military conditions that the Chilean people later showed comes from this type of Spaniard who was militarily selected, and not from the indigenous race" (p. 105).

After the conquest of the territory that bordered on the Bío Bío, another challenged shaped the Chilean idiosyncrasy: an effort to produce wealth in an environment that lacked it. This attitude prevented Chilean society (Spanish descendants and "people", i.e. *mestizos*, mix between Spaniard and native) from becoming too comfortable like colonists in other parts of America, where wealth was easy to obtain and consequently there was "an easy, luxurious and sedentary life" (p. 118).

<sup>4</sup> The "nationalisation" of history in which Frías participated was the result of a struggle that took place since the beginning of the 20th century by sectors that demanded the need to emphasise on "national" culture, in order to get round the dangers of fracture and dissolution due to the social struggle (Lira, 2004). The assumption was that the best knowledge of what united Chileans above all would allow moving forward toward higher degrees of integration. Luis Galdames (1908) paved the path for a national history teaching that recognised a differentiated space in the curriculum, as Encina and other exponents of "useful education" had demanded, who rose against humanist and cosmopolitan education, which was typically liberal. Frías Valenzuela, Galdames' disciple, continued this task. *Manual de historia de Chile* was a proof of that.

However, the effort and ability to overcome adversities was not the only original trademark of the Chilean race. Together with this positive balance, there was a negative one: Spanish descendants stood out because of their rebellious spirit, which resulted in “indiscipline toward authorities” (p. 111). *Mestizos*, on the other hand, were rootless from the “*Admapu* of their indigenous ancestors” and were not really Spaniards; therefore, they lacked “the norms of civilisation.” Hence their vices, especially “drunkenness and criminality” (p. 206).

If these defects did not result in anarchy, it was because the rulers who acted in the name of the Bourbon kings (who introduced in Spain “the centralising habits of Louis XIV”, p. 151) prevented it. When disciplining the people, the Chile of the 18th century lived a “peaceful and progressive period where Chilean society achieved a certain level of stability and maturity that led to emancipation during the next century” (p. 200).

Thus, the independence process (which ended with the conformation of Chile as an independent state) was the result of a long-term social and cultural process that resulted in the creation of a people disciplined by delegates of the absolute monarchy. Once it had matured, that Chilean nation was ready to face the unexpected Napoleonic invasion of Spain, governing itself and later declaring its independence.

The group who led Chile’s entry to the circle of independent nations was an elite that was forced to do so, mainly due to the situation itself and not by an influence of foreign enlightened ideas. Here, Frías contradicted the dogmas of the “religion of freedom” (professed by Barros), stating in large letters that “THE FRENCH REVOLUTION HAD NO IMPACT ON EMANCIPATION.” Immediately after that, the author declared that for Spanish descendants, reading encyclopaedic writers was a “purely intellectual pastime”, something that, contrary to what was thought, damaged those who encouraged the independence at an early stage. This was because “the instinctive fear –according to Encina– of the fact that in Chile might happen the same as in France was one of the biggest obstacles that the emancipation stumbled upon” (p. 233).

Therefore, if Chile ended up gaining independence and replacing the monarchic regime with a republican system, it was because the immanent historical circumstances led to it and not because an abstract, transcendental reason called freedom guided the nation’s destiny. In fact, when some rulers of the post-independence period tried to shape a system inspired by the democratic ideals of the enlightenment by means of legislation, they triggered “anarchy”.

From Frías’ text we gather that a people is not shaped based on laws (as postulated by the classic liberal ideology), but on the contrary, the laws and the government must adjust to the people’s character. Ultimately, this was what explained the failure of the democratising ideals promoted by liberals (“groups of international adventurers or extremist Chileans”, p. 310) and the triumph of conservative forces in the fields of Lircay.

However, the military triumph of the faction that aimed to run the country with a practical, realistic sense was only the first step. The consolidation of these ideals came with Portales, whose main achievement, according to Frías, was having imposed a governing style that

was placed above party factions, social groups and leaders. In the hands of this vigorous minister, the principle of authority “was reborn as if by a spell, drowning anarchy, chaos and negligence” (p. 322).

## 2. Nationalism and modernisation

As it has been stated, recognising that the Chilean people, product of concrete historical experiences, nested an energy that needed to be channelled by a strong, competent authority (in order to be constructive and not lead to anarchy) was the civic lesson that *Manual de historia de Chile* sought to transmit. It is now worth asking about the reasons that made this message have such a good reception, because the manual was not the best-known school textbook on Chilean history in the last century for nothing.

Beyond the didactic merits of Frías’ work, we believe that its popularity lies in the ability of having translated to school language ideas that gave shape to a “nationalist” imaginary of nation, widely shared in that period and which was established in opposition to the liberal worldview in its most exclusive dimension.

During its first stage, the liberal discourse was inclusive: it believed in a wide, national cultural identity that was superimposed on local, regional, individual or social differences and that was inclined to a political identity based on the principle of citizenship and, therefore, on the acknowledgement of the right of all members of the community to participate in the management of the government, either directly or by representatives.<sup>5</sup> Later, this concept of “civic nation” (Quijada, 2003) excluded those who seemed, by a supposed racial “incompatibility”, foreign to civilisation.<sup>6</sup> Barros’ work illustrates this exclusive intention, which was typical of the idea of “civilised nation”, when suggesting that history should only deal with the white race, “because it dominates the world and we are interested in knowing about its history, since

<sup>5</sup> There has been much speculation about the reasons by which the elite chose a rhetorically inclusive national reference as opposed to an exclusive one, based for example on ethnic and legal segregation due to ethnic reasons. Some people state that this choice was mere hypocrisy, while others see it as the result of the effective commitment of the “founding fathers” to liberal ideals, forgetting that the fatherland of liberalism, Great Britain, had no problems in establishing exclusion in its colonial statutes. Another line of argument suggests that the inclusion responded to social dynamics rooted in the colonial period (for example “secular practices of inter-ethnic relations which were hierarchical but relatively flexible”, as suggested by Guerra, 2003); or to situations produced after the break with the Spanish Empire and the need to consolidate a new political order, which forced the elite to “agree” with popular sectors in a nation project. In this last reflection we find Florencia Mallon’s thesis (2003). This author states that the discourse about the nation did not merely “come down” from the elite to the simple people, because the people also participated in its creation. For example, in Mexico indigenous peasants joined the national cause, called by an elite that was willing to negotiate with them in order to ward off danger, after feeling threatened (internally and externally). Under this perspective, if there was inclusion in the discourse about nation, it was because the popular sectors demanded it. In countries like Chile, where the elite quickly consolidated its control (limiting the margin for manoeuvre so that the people could set their terms when planning the nation), there was also a popular participation in the definition of the nation, for example through national celebrations that, although transmitting ideas and values from the elite, were permeated by popular traditions that gave it a very different meaning from what was originally intended (Peralta, 2007). This approach, which emphasises on the condition of the popular subject as an agent that builds the nation (with a bigger or smaller impact, depending on particular historic circumstances) belongs to a line of argument that states that the nation must be analysed as a dual phenomenon: it comes from the top but it cannot be understood without those from the bottom (Hobsbawm, 1997).

<sup>6</sup> This process was parallel to the process of consolidation of the elites, which since the mid-20th century stopped searching for alliances with sectors that were not identified with their social belonging. Quijada (2003) comments that the concept of “civic nation” was replaced with “civilised nation”, which only included “equals” who shared a same way of life, called “civilized”, as opposed to the way of life of popular sectors, dismissed as barbarian.



almost all civilised peoples belong to this race” (Barros, Vol. IV: 35). This author was not interested in other races, like the indigenous “copper-coloured” race.

In contrast, Frías’ text dealt more with the subject of indigenous groups that lived in Chile before the Conquest, contributing with updated ethnographic information regarding those groups and their ways of life at present. More important is the interest of this author in emphasising on the mixed race of the Chilean people, a mix between the “white race” and the “copper-coloured race”, in Barros’ terms.

However, his discussion about sectors that made up the social majority was not limited to purely racial aspects (like Barros). Frías, like the nationalist groups of his period, raised the figure of the mestizo and condemned the poverty in which they lived, due to the oligarchy’s poor management of the social issue.

Indeed, the oligarchy’s indifference toward the people was used by Frías as the main argument to demand a change of regime. According to the author, the State – in the hands of the liberals – limited its social role to a position of “police”, which was clearly insufficient and inappropriate for facing the serious social problems that were aggravated during the “parliamentary republic”, when an oligarchy of “plutocrats and aristocrats” had the control of the government “through the conservative, liberal and democratic-liberal parties” (p. 457).

In the social field, what characterised this government of parties (which ruled the country from 1891 to 1920) was its instability regarding legitimate requests of the popular sectors, which would explain why the 1907 “major Iquique strike” joined by 10,000 workers (who demanded “the payment of wages to the exchange rate” and “free trade to avoid abuses in stores”) was finally silenced by weapons, making workers remain “in their unhappy condition” (p. 487).

In Frías’ text, building a just order under the aegis of a State that promoted growth and ensured the wellbeing of the “race” is presented as the desideratum of a regenerative political action led by a vigorous, unselfish ruler willing to apply the remedy “at the bottom” but also “at the top”, like Portales. In the mid-20th century, when *o* was published, that figure could be no other than popular Ibáñez, the “general of hope”, who promised to eliminate corruption and incompetence of the political class in order to establish a just order for all.

In our opinion, Ibáñez’s success in the 1952 elections is linked to the editorial success achieved by Frías. In their respective areas, both presented discourses that were in tune with a widely shared social imaginary that was established in opposition to the liberals’ “civilised nation”, vindicating the idea of “homogeneous nation”, a term used by Mónica Quijada to define a project of community based on the fact that all people have the right “to participate in the nation’s benefits” (Quijada, 2003: 315).

Due to its integrating sense, the “homogeneous nation” was opposed to the imaginary of the country that started in the golden age of the bourgeoisie (“civilised nation”), inwardly exclusive (barbarians) but outwardly inclusive, referring to the western civilisation and the support of its universal principles, rooted in enlightenment.

Frías' commitment to the idea of a "homogeneous nation" would explain his anti-liberal inclination (which is clear in his negative to consider enlightened ideas as an emancipation antecedent, or in his criticism of individualism) and his romantic inclination when appreciating "the people", originated in the old regime (Conquest and Colony) and deriving from its idiosyncrasy, and not from abstract laws, rules of good governance that would be useful for positively channelling the vital energy of the Chilean race. Based on those rules, Frías justified the need to find an impersonal, authoritarian government inspired in the common good that would put an end to the rebellious tendencies that were visible both "at the top" and "at the bottom" of the social structure.

However, the concept of "homogeneous nation" was not the only reference that inspired Frías. The integrating sense he demanded coincided with the "civic nation" project that emerged from Independence. On the other hand, Frías rescued the "materialistic" character of the "civilised nation", understanding that material progress, made viable by the industry, was sine qua non for national development. Hence the importance he gave to all actions that led to the promotion of industrial development from the public body.

In short, for Frías the modernisation needed in Chile demanded social integration and drastic actions in the economic and social fields. This change had to be conducted by rulers inspired on the political tradition that was glorified by the conservative historiography, under the sign of Portales.

### **3. Nationalism as religion and ideology**

We have previously stated that Barros' text can be read as an attempt to spread faith in the principles of liberalism. This "religion of freedom" installed an ethos based on which the "faithful" must conduct their lives and understand their past, present and future, not only as individuals, but also as members of a community made up of living and dead, called nation.

Nationalism of nationalists like Frías can also be interpreted as a religious belief that "supports, cures, comforts, compensates, enriches, rewards, explains, forces, blesses, clarifies, reconciles, regenerates, redeems or saves" (Geertz, 2002: 159).

Amid a crisis that threatened to dissolve the community, the "nationalist religion" strove to give signs of stability and give rise to a spirit (reinforced by civic rituals) that would tend to the joining of wills around what was unique of the national ethos.

This is where nationalists' nationalism (Frías) was most separated from liberal nationalism (Barros). Moved by the universality of the enlightened ideals, it conceived a cosmopolitan nation, open to the achievements of civilisation from Europe and rooted in certain areas of America (in the vanguard of modernisation). This idea of nation underwent a crisis during the first half of the 20th century, leading to a new nationalist system of a romantic type, that intended to rescue "what is most typical of a people: the traditions, the language, the proverbs, the character and the tradition", making cultural issues "the main criterion of the nation's existence" (Subercaseaux, 2007: 116).

In order to integrate people from inside, nationalists excluded those from outside. That is why Frías questioned O'Higgins' "Chilean-American patriotism", tending toward Portales' "Chilean patriotism", which was "exclusive and excluding" (Frías, 1950: 319).

In this last sense of fatherland, the nation finds its fulcrum not in laws or in the institutional character "agreed on" by the political community (as in Barros' republican patriotism), but on the ethnic and cultural roots that characterise the national community. Under this concept, civic loyalty has less to do with the attachment to a particular form of political organisation (republican) and a lot to do with the respect of the idiosyncrasy of the national "being". Thus, for Frías the unbalance of powers (reflected on presidential authoritarianism) was not a perversion (as in Barros), but it is the model that best fits the type of government that, by nature, the Chilean requires.

Read from the recent authoritarian experience, the precepts on which the "nationalist religion" was based, due to its Portalean inclination, caused unfavourable comments from part of a historiography that, from beneath and in an attitude of resistance, aspired to combine methodological severity with ethical commitment in favour of democracy and human rights.

Structuralist Marcelo Carmagnani, the main exponent of this tendency, saw in Frías text a vehicle used by "organic intellectuals of the oligarchy" like Edwards and Encina to install "collective myths" functional to the social sector they represented. The success of this operation was such that the left ended up embracing "the tributary historical vision of the country from oligarchic myths," thus limiting the possibility to build a hegemony different from that of dominant sectors, which would partly explain the failure of the *Unidad Popular* (Carmagnani, 1980).

This author is right regarding the link that links Frías' textbook with the creators of what he conceives as oligarchic intellectuals. In fact, Encina made highly favourable comments regarding that work.<sup>7</sup> But to say that *Manual de historia de Chile* was an instrument used by the dominant classes (that spoke through Encina) to perpetuate their domination is something that requires a more careful examination, especially if we consider the theses presented in Bernardo Subercaseaux's last works.

This author refuses that Frías and the other historians branded as "nationalists" and "conservative" were exponents of the "oligarchic political science" that successfully tried to install an image of the country that under the deceptive umbrella of unity defended the interests of the dominant class. In his opinion, nationalist historiography was successful because it knew how to be in tune with a social imaginary that attracted different sectors that shared the same idea of nation "as an integrating political unit", located "beyond sectorial interests" (Subercaseaux, 2008: 183).

<sup>7</sup> In the final part of *Manual de historia de Chile* and as appendix, the editors published an extract of a personal letter written by Encina to Frías, regarding the first volumes of *Historia de Chile*, which preceded the *Manual*. The chosen extract says: "Dear friend: I have just finished reading the two published volumes and the proofs for the third until 1891 of your *Historia de Chile*. With your synthesis, you have filled a gap that could no longer be continue without harm for our country."

Thus seen, the nationalist discourse that emanates from Frías' work is not the mere distorting declaration of the interests of the dominant class. It is rather a discourse that knew how to "tune in with the cultural climate of the period and with the parameters of the national imaginary in a time when it was necessary to integrate new social sectors" (Subercaseaux, 2008: 186).

In order to prove this thesis, Subercaseaux confronts the topics in Encina's work (the source that was most cited by Frías) with the discourse of the popular organisations of the first half of the 20th century. His conclusion is that they moved in the same universe of representation: "the assumption of a different Chilean race; the roto and the aborigine as central figures in the history of the country; the exceptional character that Chile had among South American nations for its tradition and its victories against neighbouring countries; the role of the Arauca war and the War of the Pacific in the formation of nationality..." (Subercaseaux, 2008: 185).

Therefore, the positive notes that an influential left-wing intellectual like Julio César Jobet wrote regarding Frías' manual<sup>8</sup> would not be an example that illustrates the obtuse blindness of popular sectors when adhering to the identity references of the oligarchic right. The explanation is more complex, because it implies understanding that an ideology like nationalism does not always or necessarily act deforming reality in order to legitimise domination, because it also works constructively when becoming the support of a nation in crisis that, when seeing its identity being threatened, resorts to a body of "schematic images of the social order" (Ricoeur, 1992) that is efficient for bearing the tension.

If liberal nationalism (Barros) had something in common with nationalists (Encina) and popular-front socialists (Jobet) it was that the three intended to advance toward modernity without disintegrating the community. The three wanted to attract the transforming force of modernity and at the same time exorcise the dangers that this force could entail; mainly individualisation and social atomisation.

Consequently, Kosselleck (1993) is not wrong when referring to the "political concepts of change" (that have an *ism* suffix, like nationalism) and saying that amid the crisis produced by the transformation of traditional society into modern society, they played the ideological role of ensuring continuity in the rupture, thus protecting the community's identity.

## **HISTORIA Y CIENCIAS SOCIALES: TRUTH AND METHOD**

### **1. Critical reflectivity**

In a framework where ideologies no longer have the presence they had in the past, and where states, amid a growing globalisation, are seen as "nodes" within "a wider network of power" (Castell, 1999: 334), what image of nation do textbooks transmit?

<sup>8</sup> "From the examination we have done of Mr Frías' book we gather that it is undoubtedly a book of exceptional merit that occupies a distinguished place in national historical literature." In *Atenea* magazine. Universidad de Concepción. April, 1949.

In order to answer this question, we will make use of a work written by two historians (Pedro Milos and Pablo Whipple) and a doctor of history didactics (Lilyan Almeyda), entitled *Historia y Ciencias Sociales*, which follows the curricular lineaments prescribed for Year Ten.<sup>9</sup>

What first stands out when contrasting this text with those previously commented is that it fulfils the prophecy of a distinguished exponent of the *Escuela de los Annales*, who a few decades ago said that “sooner or later” history teaching at school would move away “from myths or legends, proving the objectivity of its exposition” and becoming “an introduction to criticism” (Crubellier, 1991: 452).

Indeed, in tune with this demythologising intention, *Historia y Ciencias Sociales* refuses to state an only truth about the past regarding the building of Chilean society, and instead chooses to raise awareness about the various perspectives with which it is possible to approach history. The challenge is to make students understand that every investigation and historic narration “is necessarily interpretative” (p. 11).

Therefore, historians seek to use the scientific method (“in order to reduce the subjectivity of their interpretations as much as possible”), but they do it from a particular historiographic tendency that represents “analysis perspectives linked to the historian, the period and the culture in which he/she lives and the ideological parameters he/she uses. Thus, it is normal that there are various versions of history” (p. 12).

Finally, when specifying the purpose of studying history at school, these authors state that it is about helping to “identify errors and reflect on them... and use as model their positive behaviours and their successes.” To this we add that history, as “intellectual activity”, allows the development of skills “for an active, critical learning” (p. 16).

The first issue is related to the purpose that the classics summarised by saying: “history, teacher of life.” The second is linked to Crubellier’s prophecy: that school history would end up becoming an “introduction to criticism.”

This double purpose explains the tension that crosses the text. Students are expected to obtain lessons on good living that allow social coexistence under universally accepted rules and principles: cultural diversity and human rights, or in one word, democracy. Therefore, there is a renunciation of the scientific nature that refrains from installing a moral reference that guides behaviour. For Almeyda, Milos and Whipple, as well as for Barros and Frías, history teaching is formative and not just informative; hence the relevance of presenting “models” to be imitated or condemned.

These models are very common in the analysed texts: they are individuals (Portales, Louis XIV, Cromwell) or collective subjects (“the people”, the “oligarchy”). However, in the work we are analysing now, teaching by models fades away, probably because the purpose of developing critical reflectivity weakens –and sometimes eliminates– the purpose of making history a teacher of life.

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<sup>9</sup> Almeyda, L.; Milos, P.; Whipple, P. (2007). *Historia y Ciencias Sociales*. Ed. Marenostrum.

The preference for this last purpose is clearly expressed in the sections that deal with practical activities for students to carry out regarding the subjects that make up the central narration of the text. We refer to the section entitled “Social science laboratory” (subdivided into “Historical source workshop” and “Historical interpretation analysis”). This section complements another called “Methods and techniques for social science work”, which includes “Historical source analysis and comment” and “Making a historical essay”, among other activities.

In these sections, the fact that investigation and historic narration “are necessarily interpretative” has a practical use. For example, regarding 20th century history and the 1973 coup, in “Historical interpretation analysis” students are invited to confront Angell, Vial, Pinto and Salazar’s views, and answer the question of whether the different interpretations could be useful “for having an image of the past, or if the contradictions among them impede it” (p. 225).

The idea is that students, guided by the teacher, articulate an answer that –considering the presented texts– will probably lead them to conclude that it is difficult or even impossible to agree on one account for national history. This is reinforced in another activity (“I was 15 years old in 1973,” p. 227), which consists of interviewing people who were young on the day of the coup so they give an account of their experience and their particular impression about its effects.

This way of facing history teaching fully achieves the purpose of the scientific caution demanded by Crubillier. Additionally, it proves that it is possible to have an education that respects diversity and promotes dialogue among people who think differently, one of the biggest purposes assigned to a plural, democratic education.

In the light of these observations, it is clear that Carretero’s view regarding a “forced and premature” history teaching that is far removed from the development of “critical skills as demanded by the disciplinary objectives” (Carretero, 2007: 219) and close to the creation of “murderous identities”, is not the tone that predominates in the curriculum nor in school texts (“curriculum in use”).

In Chile, as in other places of the region as can be concluded from an investigation in progress (Cox, Lira, Gazmuri, 2007), what predominates is a systematic effort to make students learn about different views of the past, confront them and recognise that they all carry a legitimate, though partial, truth. Thus, the encouragement of critical reflectivity is linked to the ethic objective of building democracy. Almeyda, Milos and Whipple’s work combines that synthesis.

But is this enough? We pose this question because we understand that democracy is not only universal rules that allow dialogue and mutual understanding within a human group; particularly the community we call Chile. In order for these rules to be internalised, becoming habitus, the community requires an account that illustrates how the principles that identify democracy have become reflected on the nation’s historic development, becoming objectified in institutions and in the events and people that symbolise them and singularise us.

We thus reach the final point in our exposition, which seeks to account for the crossroads where we are now, just before the Bicentenary.

## 2. Crossroads

While preparing to commemorate the two hundred years of our existence as independent country, history teaching is at a crossroads: on the one hand, it needs to gather what traditionally has been (an account that is useful for sustaining the nation in time); on the other, history teaching seeks to consolidate achievements from the last period that place it as an introduction to criticism.

Making both roads converge on one is not an easy task. Traditionally, the account of the nation has been built so that the members of the community, as stated by the first theorists of nationalism, have “many things in common and that they forget many things” (Renan, 1987), which led to a convenient selection of facts (some of which were intensified until paroxysm) and the silencing of others.

As it has been seen, history teaching (which intended to begin criticism) questioned this operation, because it believed that it was typical of a “patriotic function” interested in hiding or distorting to legitimise national order and the groups that directed it. From this perspective, the exaltation of heroes or events that supposedly founded national identity is part “of myths or legends” that the critical function should reveal, report and overcome.

Almeyda, Milos and Whipple’s work moves through this road, and therefore, compared to the previously discussed texts, it lacks heroes and a broad account of events. Facts are subsumed in processes that are carefully presented, mostly without warmth and colour, that is, without the intention of “touching”, like Barros intended.

Continuing with this comparison, unlike Barros’ *Curso de historia general* and Frías, *Manual de Historia de Chile, Historia y Ciencias Sociales* tends to omit or blur the reference to the “Chilean nation” and replaces it with the concept of a dynamic “society” that is full of conflicts and that does not “exist” but “becomes”. Thus, there is no going back to the origins (to what we “are” as a people, according to Frías) or to the principles that would define the course of the nation (freedom, as in Barros). It all aims at eliminating the idea that the nation is “a transcendental truth”, the product “of an original essence and not of the historical action of men, their conflicts and agreements” (Romero, 2004: 199).

This criticism, aimed at Argentinean school literature, would be valid in Chile, because here textbook authors also cultivated an essentialism that was useful for legitimising authoritarianism, presenting it as an “essential feature of nationality” and a “reference point for judging the course of events” (Correa and López, 1999: 195).

Reaching this point, the concern that arises is that, even accepting the condition of legitimating the power that is present in every ideology, isn’t there something in the nationalist (civic, civilising or homogenising) ideology that the school system should rescue as a component for educating democratic citizens from history?

We pose this question, influenced by what Ricoeur (2001) names “constructive function” of ideology, which does not deny its distorting condition, but goes beyond in the search for the ultimate foundation of discourses (like the discourse of nation), with enough symbolic effectiveness to order and regulate life in society.<sup>10</sup>

Ricoeur states that it is difficult for him to imagine that a community does not celebrate “its own birth in more or less mythical terms,” because the “permanent memory of the founding fathers and founding facts of a group” is something that exceeds the aspirations of an authority’s legitimacy, acting as “an ideological structure that can function as an integrating function” (Ricoeur, 2001: 282).

From History, Peter Burke has declared that the “myth” that makes a society treat “as special and even sacred those histories that have a symbolic meaning and where the protagonists [heroes] are greater than life” is cosubstantial to all cultures and a need that is placed in the individual psyche, because “most of us still need heroes (...) even though we have a critical view of them.” The historian concludes that a person’s maturity is not measured by his/her ability to “reject all heroes”, but by the possibility of admiring them, “even when knowing their human weaknesses” (Burke, 2007: 2).

This type of considerations has led to affirm that for the education sector, there is a need to balance the aspiration of “educating children and youngsters in the routines and methods of reflectivity and doubt,” with the traditional objective of “transmitting certain forms of representation” that evoke the nation, ensuring not to “exaggerate reflectivity to the point of making all perspectives contingent and all contents relative,” because ultimately, the school should not be “a garden of doubt” (Peña, 2007: 39; Report, 2004: 54).

Thus, the relationship between the critical function and the patriotic function regarding history teaching (Crubillier, 1991) should not aim at the replacement of the latter with the former. They are both poles in tension that intertwine dialectically. Therefore, the importance of introducing method and criticism is as big as building an order based on the promotion of certain institutional loyalties, stimulated by an integrating account that recovers the idea of “civic nation”, which is preparing to become two hundred years old, by means of the ideals of freedom and equality (proclaimed by our Independence) in the figure of men and women who, in the distant and near past, showed commitment and civic duty or “love of the country”, as understood by Mauricio Viroli (1999).

This political theorist urges us not to lose sight of what determines a country, “what makes it colourful, visible, meaningful.” They are the “memories of the founding fathers,” thanks to which principles that are central for democracy (like the rule of law, equality and freedom)

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<sup>10</sup> It goes without saying that the referred author is not alone in this enterprise. Anthropology (Lévi Strauss, 1970; Geertz, 1992), social psychology (Erikson, 1950) and sociology (Mannheim, 1941) have also reflected on the ideological phenomenon in order to prove that beyond hiding, it responds to people’s intrinsic need to have a shared symbolic reference point to resort to, individually and as a community, in order to overcome confusions and tensions that are typical of social life, especially in crisis situations.



lose their abstract character, becoming understandable by means of an account that refers to events, places and characters that identify the culture to which we belong.

Remembering the “memories of freedom” personified by figures who stood out because of their loyalty to the principles that gave shape to the citizen nation is as important as remembering the founding fathers. That is why Viroli suggests, for example, that for teaching Italian youngsters about “the importance of having a strong sense of citizenship” he would begin by telling them the story of Carlo Roselli and other “anti-fascist heroes that gave their lives for the country” (Viroli, 1999: 191).

The heroes vindicated by Viroli are not object of worship or a model that leads their fellow countrymen to think they are good or better than other peoples because their heroes “did something great.” Heroes are a symbol that stimulates the feeling of commitment to the past required by a national community in order to survive in time and act with a sense of unity against all that degrades and corrupts it.<sup>11</sup>

If democracy wants to offer individuals an identity that is different from the desire of nationalists who want strong identities based on ethnic belonging, it is fundamental to turn to figures and symbolic events that, appropriately narrated –in a textbook, for example– make citizen identity meaningful and open to difference. This cannot be achieved by resorting solely to reason. The inclusive patriotic commitment, based on the universality of democratic principles and human rights, must also be stimulated turning to feelings, because ultimately “we will never become what many political scientists believe individuals will come to be: rational electors” (Viroli, 1999: 188).

Consequently, passion, inscribed in the ideal of republican charity (a love that places the public before the private), is what we should reinstall in the language of our texts and in school practice, in order to lay the foundations for strong citizen identities that fight exclusion. The way to do it is by raising political values which are rooted in “places and institutions that are culturally dense” and in a history “that has been defended by prophets, martyrs and heroes” (Viroli, 1999b: 72).

In synthesis, without refusing to recognise the advantages of a history that introduces criticism, it is worth asking what comes after it, or with it, because we understand that a critical view that dissolves everything cannot be the *desideratum* of education nor the only orientation for

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<sup>11</sup> It is impossible not to connect this point with Émile Durkheim's approach, formulated at the beginning of the last century and addressed at future teachers. The sociologist stated that in order to educate the population morally (in a secular sense) the first thing “was to keep the idea of society intact... and since the nation is no other than a more organised society, you will see that denying the nation is not only suppressing certain received ideas; it is committing an outrage against the source of moral life” (Durkheim, 1998: 49). With these words, Durkheim sought to address those teachers who thought that in order to eliminate the danger of a great war promoted by nationalist movements, the nation had to stop being considered the main point of reference from which to build the collective identity, replacing it with a wider point of reference, humanity, and a new cultural order that was markedly cosmopolitan. According to this author, opposing nation with humanity and favouring the latter by making the former disappear was a serious mistake, because if humanity showed an achievement, it was precisely the fact of having become a “political society” that was organised as a nation. Durkheim stated that to the nation we owe the “little justice we have” and that we had to demand from it “the greatest justice to which we aspire;” ergo, disregarding the nation was “destroying the instrument for the transformations we can expect” (Durkheim, 1998: 50-51).

teachers. We need syntheses, expressed in new accounts that invite collective realisations and that strengthen the ties within that “imagined” –and not only reasoned– community we call nation.

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# Historic ideology and narrative in the teaching of Nation-State: a case study on Colombia and Chile

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## SUMMARY

**T**his lecture presents the supposed theories that underlie the monograph project: “Historic Ideology and Narrative in the Teaching of Nation-State: A Case Study on Colombia and Chile”, which the author is currently aiming to promote through an inter-institutional agreement between *Universidad Católica de Temuco in Chile and Universidad Distrital Francisco José de Caldas* in Bogotá.

The main topic of this lecture is the ideological implication present in the teaching of history that explicitly highlights the issue of nation-state. Accordingly, the first part of this lecture explains the issue of nation-state on a theoretical and historiographical level in the context of Europe. The second part explains the matter of the Latin American nation-state, while the third part establishes the implications of teaching the subject of nation-state in the proposal made by the governments of Colombia and Chile, and lastly, some final thoughts on the teaching of history are considered.

## INTRODUCTION

History, as Edward Carr explains, necessarily implies seeing the past from the perspective of today. This simple statement implies that historians create problems on the past from their own points of view, present the facts and arranges them so as to explain what happens now from what humanity has done in previous times. This present-past relationship is fundamental for historic knowledge.<sup>1</sup>

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<sup>1</sup> CARR Edward: *¿Qué es la historia?*, Editorial Ariel, Barcelona 2001. P. 66

Under this light, abuses against history have been committed by appealing to myths and inventions with the intention of favouring the interests of a single collective.<sup>2</sup> A recent example of this situation is analysed by Eric Hobsbawm in the following manner:

“Israel, like Zionism, has no historic foundations. What is more, it concerns something which goes against the history of the Jewish people, from the Roman Empire until the 19th century. The only story that Israel can use to justify itself dates back two thousand years. Everything that has happened is put in brackets, since neither the foundation of Israel nor the state’s wars can be justified. The discovery of the temple of Israel was transformed in a modern political entity so as to maintain that this city had always been the centre of the Jewish religion and therefore, was the capital of the Jewish people.”<sup>3</sup>

This author maintains that a story was created to justify the need for Jerusalem to become the capital of the future Jewish state and demand justice for the actions that lead to the foundation of the Jewish state post World War II; in sum, history was “mobilised” so as to seek a precedent that gave life to the present.

Furthermore, it is worth bearing this case in mind, if we are to examine the tradition of the Jewish religion, it is clear that the return to Israel was not possible until the new Messiah appeared and the Jews, according to their beliefs, believe the Messiah has still yet to come. Therefore, no religious reasoning for reclaiming Jerusalem as the capital of state exists. The political and historical reasons brought the necessary elements to do so.

These reasons therefore make it interesting to observe the building of the nation and of the national myth is a key matter in analysing the ideological abuse of the historic account. To do so, I shall preoccupy myself with the theoretical analysis of the concepts of the state and the nation so as to draw attention to the historic elements that could arise.

## THEORETICAL PROBLEMS OF THE NATION-STATE

In an interview given by Eric Hobsbawm to Antonio Políto, this author asks the British historian what were the reasons explaining why the nation-state had not disappeared despite predictions made by globalisation ideologists who foretold of its disappearance. Undoubtedly, conflicts that ideologically safeguard themselves in the nation-state still persist.

Hobsbawm explains that historically, the nation-state has been understood in two manners: “In the sense that traditional means a territorial state in which people live in the nation, have some political sovereignty over. *This is the meaning of nation-state, as it was conceptualised during the French Revolution and, partly, during the Revolution in the United States*”.<sup>4</sup> It is the people that chose the government and decide to live under a constitution and concrete laws.

<sup>2</sup> HOBBSAWM Eric: *Sobre la Historia*, Editorial Crítica, Barcelona 1998. P. 20

<sup>3</sup> HOBBSAWM Eric: *Entrevista sobre el siglo XXI*. Editorial Crítica, Barcelona, 2000. p. 42-43

<sup>4</sup> HOBBSAWM Eric: “Entrevista...”, p. 39

The second, in comparison is much more recent and consists of the idea that: “*each territorial state belongs to a determined people, characterised by ethnic, linguistic and cultural peculiarities and that is what constitutes a nation*”.<sup>5</sup> In this view, a nation-state is only one nation, the others, being minorities that live in the same area, but who do not form part of it.

According to these two definitions it should be clear that the nation-state, in the political sense, appears before the concept of nation-state as an ethnic or linguistic means of identification; the nation-state builds a cultural identity ideology and portrays the nation as one single identity. This transformation is generated with the help of a national myth that, it should be said, transforms itself into a justification for nationalism.<sup>6</sup>

The national myths that originate from the state exercise a strong influence over the people, by means of an *official* version of history, which is the reason why the question of how to refer to the nation is crucial.

The “*nation*” must be seen as: “*a social entity only in the measure that it refers to a certain class of modern territorial state, the “Nation-State”, where there is no point in talking of Nation and nationality except in the case that both refer to it (...) nationalism precedes nations. Nations do not build states and nationalisms, but the other way around.*”<sup>7</sup>

Therefore, the existence of nations is not only determined by the function of a class of territorial State, but rather is situated in the context of a determined step towards technological and economic development in which the national question is found at the intersection of politics, technology and social transformation.<sup>8</sup> It is due to literacy and schooling that the national question arises.

In this line of thought, nationalism is built by and from the state and the presupposition that it is nationalism which creates the national state is only an assumption articulated by the state’s interests. This idea is clearly expressed by Ernest Gellner who presents nationalism as: “*a political principle that sustains that there must be congruence between national unity and politics*” and refers to sentiments, where the nationalism sentiment is “*the state of anger that sustains the principle of violence or the satisfaction that accompanies its realisation*”.<sup>9</sup> In reference to nationalism, he defines it as a legitimate political theory that recommends that ethnical limits should not go against political ones”<sup>10</sup>

This is how this definition, in contrast to that proposed by Hobsbawm, that nationalism only emerges in situations in which the existence of the state is already established. For Gellner, the “*necessary condition, although not absolutely sufficient, of nationalism is the existence of politically centralised units and the moral-political surroundings of those units are taken for granted and considered the norm*”.<sup>11</sup>

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<sup>5</sup> Ibid.

<sup>6</sup> Op. Cit. 4 HOBBSAWM Eric: *Entrevista*. P. 42

<sup>7</sup> HOBBSAWM Eric: *Naciones y Nacionalismo desde 1780*, Editorial Crítica. Barcelona 1991. P. 18

<sup>8</sup> Op. Cit. 8 HOBBSAWM Eric: *Naciones*. P. 19

<sup>9</sup> GELLNER Ernest: *Naciones y nacionalismo*. Versión española de Javier Soto, Alianza Editorial. Madrid 1988. P. 13

<sup>10</sup> Op. Cit. 11. GELLNER Ernest: *Naciones*. P. 14

<sup>11</sup> Op. Cit. 13. GELLNER Ernest: *Naciones*. P. 17

In Hobsbawm and Gellner, the State is a historic and political construction created with a specific interest in mind. Gellner does not believe in the emergence of nationalism without the existence of the State, and borders between nations depend on the latter. For Hobsbawm, the emergence of the concept nation-state is secured as of 1830, when it was introduced into political discourses under the name of *principle of nationality*, and is adopted at the beginning of the 20th century as an expression of “*Nation-State*”, with literal political significance.

The clearest case of the intention of creating nationality since the state is found in Latin America, and is pointed out by Benedict Anderson, who argues that the rise of nationalism in Latin America was headed by the *criollo* (people of European descent who were born in Spanish America) communities that early on conceived the idea of *nationality* due to two factors: “*the strengthening of power in Madrid and the distribution of liberating ideas of illustration during the second half of the 18th century. The first to be appreciated in policies applied by Charles III, a process known as “the second conquest of America”, and the second in reference to the mainly transatlantic communications, the success of the thirteen colonies’ rebellion towards the end of 1770 and the French Revolution at the end of 1780.*”<sup>12</sup>

Anderson’s analysis highlights the role of the *criollo* elite in building the idea of nationality, which is sustained by the need to oppose the Crown’s controlling policies faced with an elite that was starting to consolidate and for whom it created many problems, return to absolute power on behalf of Spain. This fight was fed both by the ideas of the American Revolution of the thirteen colonies and the French Revolution, in which a justification was sought to ideologically oppose Spain’s attempt at re-conquering, which Charles III defended as policy to defend. Those claiming to be *criollos* formed part of a political project to create an imagined community of nation in the American colonies.

## THE LATIN AMERICAN NATION-STATE

The first reference to nationalism in South America is of the First Republic of Venezuela (1811) that, according to Anderson, copied many parts of the constitution of the United States word for word, and became an example for each of the new South American republics that had been an administrative unit since the 16th to 18th century. In the words of this author, in order to understand how administrative units could come to be conceived through time as motherlands, we should examine the ways in which administrative organisms create meaning, and thus

<sup>12</sup> ANDERSON Benedict: *Comunidades Imaginadas*, Fondo de Cultura Económica, 1993. Capítulo: “Los Pioneros Criollos” P. 80

the administrative units' influence was reflected not only in consolidating motherlands, but also a form of identity for the people.<sup>13</sup>

There is, according to Anderson, a series of factors that determine the creation of the nation as an imagined community in Latin America. The prime factor in creating a Nation-State is found in different voyages created by the rise of monarchies and of Empirical States, centred in Europe and that ended up comprising of the entire world. The second factor is the exchange of documents that allowed the human exchange reflected in the development of an official language of the State, since language could theoretically perform such a function if they were granted monopoly rights, a characteristic that can be seen in the first American newspapers that began as a way in which commercial news could be developed regarding the metropolis.

In this way, the Caracas newspaper created, completely naturally and still apolitically, an imagined community among a set of specific readers interested in matters such as boats, weddings, bishops, and prices; later it began to be influenced by ideologies and political objectives. This explains the early birth of Hispanic nationalism - where the Hispanic experience's inability to produce its own nationalism permanently reflects the general level of capitalist and technological development towards the end of the 18th century. This in turn explains how the local delay of capitalism and technology was reflected in the Spanish Empire's administrative extension, and the inability to create nationalism from its own empire.

What *Anderson* suggests is that both liberalism and illustration clearly exercise a powerful effect over the independence processes, and with it, the emergence of nationalism, since they gave new republics critical ideologies that went against imperial objectives. In addition to this, there was the specific task of the pilgrim *criollo* officials and the provincial *criollo* printers.<sup>14</sup>

Anderson's argument allows us to see that the *criollos* built narratives marked by symbolic or common identity for the elaboration of the nation's "great account". Museums, monuments, pantheons and official history contribute towards the creation of this account of a nation.

Under this very perspective, Elizabeth Jelin<sup>15</sup> indicates how one version of history was elaborated, which along with patriotic symbols, monuments, pantheons of national heroes, could serve as a central node of identification and anchor national identity<sup>16</sup>, since it was at the beginning of the 20th century that the independence processes were overcome, the state policies tended to homogenise societies around common cultural elements. This led to an attempt at defining and strengthening feelings of belonging, which pointed towards

<sup>13</sup> Theoretically, Anderson has defined nations as *imagined communities*, along with adding to nationalism one of its most determining elements, the understanding that the nation is a historical construction and not a "natural" factor of an entire community.

<sup>14</sup> Op. Cit. 20. ANDERSON Benedict: *Comunidades*. P. 100

<sup>15</sup> Doctor in Sociology, University of Texas. Academic coordinator of Investigation and training of young investigators on Collective memory, repression and reflections on the process of democratisation in countries belonging to the Southern Cone.

<sup>16</sup> JELIN Elizabeth: *Los trabajos de la Memoria*, Editorial Siglo Veintiuno de España y de Argentina Editores, España, 2002. P. 40

maintaining social cohesion and the building of a narrative in which the set of heroes' actions were capable of replacing the actions of others.

As a result, in the words of Jelin, “once these official canonical narratives were established, linked historically to the process of political centralised during the stage of national States, they were expressed and crystallized in the history textbooks used in formal education”<sup>17</sup>, since there is an intention of building the nation's narrative that aspires to install an official history, whether it be through the school system or appropriated by individuals.

## THE ISSUE OF NATION-STATE IN SCHOOLING

The matter of national state has not been forgotten in the contents of school history. Actually, the opposite happens today, as schools dedicate much time to commemorating crucial moments that have become landmarks in the building of the nation. For example, the national festivities have become a confirmation of institutional commitment with teaching patriotic values that are directed towards the shaping of national identity, in which it disseminates both a common past and a future project.

This matter has been studied in the case of Chile, which is why we have proposed to do a comparison with Colombia, since the nation-state as a historical narrative has found that teaching history is a vehicle for diffusing a model of a nation, a common account of the national past.

In the case of Colombia, starting with *Lineamientos para Ciencias Sociales*, we found that the Nation was the eighth curricular axis, called “Political and social organisations as structures that channel different powers so as to address needs and changes”. Here lays the question to be solved, *is the establishment of a nation a necessity, or a game of interests?* That is to say, the nation and nationalism are discussed, but not the state.

Among the conceptual fields suggested to deal with this question we can find: 1. *Modern nation and nationalist ideals*, 2. *Business organisations*, 3. *Class organisations (syndical, rural, women, craftsmen, ethnical)*, 4. *Political parties and ideologies and their conflicts in 19th century*.<sup>18</sup>

We can distinguish that since the *Curriculum* proposal, the question of nation has been raised as a discussion between: the nations as a conflict of interests between themselves, in which conceptually the question must be resolved when explaining what are the *modern state and the nationalist ideals, the country's business organisations, class and party organisations, ideologies and political conflicts in the 19th century*.

Politically, this content of the Nation-State, exactly as it is presented in the curriculum, portrays Colombia as a *modern nation*, which points towards a *national ideal* promulgated by the

<sup>17</sup> Op. Cit. 23. JELIN Elizabeth: *Los trabajos*. P. 42

<sup>18</sup> Ministerio de Educación Nacional: “MEN. Lineamientos de Ciencias Sociales”. Malla Curricular [www.mineducacion.gov.co](http://www.mineducacion.gov.co) Fecha de Consulta: Marzo de 2008.



business organisations, a nation that recognises syndicates, the rural, women's, craftsmen's movements etc., and defined by the political parties and ideologies with historic references to the 19th century; contents theoretically related to the definition given by Hobsbawm when he refers to the state in a political sense, in which the people choose the government and decide to live under a determined constitution and concrete laws. Evidently no relation between the nation and the State exists in this suggestion; on the contrary, it presents an approach that differs from a concept of the other and separates it, as a consequence of a precisely stately political intention.

The Chilean case highlights "*educational correlate*" of an initiative that has been germinating since the nineties in the history field surrounding the explanations around the national past, where versions that tend to dissociate the apparently positive macro-economic situation in this country and the educational policies that allow the implementation of certain contents in the textbooks and in the classroom.<sup>19</sup>

Chile is considered a different case in Latin America, since in the period of curricular renewal, this country was characterised for carrying out a process in which first the material infrastructure conditions were established, and then the changes in the teaching contents were introduced.<sup>20</sup> Unlike other countries where the reforms of the nineties presented simultaneous changes, including those of curriculum, and then came the serious implementation difficulties, in Chile:

*"the transformations were gradually introduced and first there was an attempt to create structural and administrative conditions that would allow the renewal of contents in teaching, with the understanding that this process was the result of political obstacles that prevented promoting the curricular reform at the beginning of the decade."*<sup>21</sup>

The issue of the Nation-State is raised in the *Objetivos Fundamentales y Contenidos Mínimos Obligatorios de la Educación Básica* (Fundamental Objectives and Minimum Obligatory Contents of Primary Education) that must be taught in Year 6, specifically in the *Objetivos Fundamentales Verticales y Contenidos Mínimos Obligatorios* (Fundamental Vertical Objectives and Minimum Obligatory Contents) according to learning areas, in "*Estudio y Comprensión de la Sociedad*" (Social Science) for Year 6 in Primary Level 4, objective number 2 "*Understand Chile's independence process and the shaping of the State and the Nation*" and "*The independence and the shaping of the national State.*"<sup>22</sup>

In Chile, the content of Nation-State makes reference to the independence and shaping of the national State, their precedents, landmarks and national heroes from the period of Independence and the organisation of the Republic are all related. This politically shows the

<sup>19</sup> JELIN Elizabeth, Lorenz Federico: *Educación y Memoria. Siglo XXI de España editores*, 2004. P. 7

<sup>20</sup> FERER Guillermo: *Las Reformas Curriculares de Perú, Colombia, Chile y Argentina*, Lima Editorial Grade, 2004. P. 139-159

<sup>21</sup> Op. Cit. 27. FERER: *Las Reformas*. P. 160

<sup>22</sup> Gobierno de Chile. Ministerio de Educación: "*Objetivos Fundamentales y Contenidos Mínimos Obligatorios de la Educación Básica*" República de Chile, Alameda 1371. Noviembre de 2002

building of a heroic history that legally distributes the State's interests through an official version of history. These contents are related theoretically with the definition by Gellner faced with the concept of State, upon detailing that the State's existence is vital for the emergence of nationalism, since the borders between nations depend on the State, and for political legitimacy, nationalism cannot precede the State.

It becomes clear then that history and schools have been configuring the common identity around two concepts of the State and the nation, since history as *programmatically content* included in schools has managed to also achieve installing its *own temples*: museums, temples, libraries, ruins and accounts that often present themselves as decipherable data and built for humans, as Carretero states, "*form and content are theoretical categories that can give us the key to understanding complex processes and understand the reason why patriotic feasts, commemorations and archives remind us who made the national historic memory.*"<sup>23</sup>

But if we consider in a certain sense nations as *historiographic fictions*, schooling and the *teaching of history* acquire a *strategic* and *structural* character that brings the most critical theories of the 20th century to be considered as the *State's ideological reproduction apparatus.*"<sup>24</sup>

## SCHOOL TEXTBOOKS

For this investigation, the problem of the Nation-State is defined as *historic narrative* that can be studied from "a verbal structure in the shape of a narrative prose discourse."<sup>25</sup> in which the analysis of textbooks is carried out through Hayden White's<sup>26</sup> theory, which is designed to characterise the different levels in which a historic account is told and the construction of a typology of historiographic styles. This author situates us in the understanding of a narrative as an ideological form when he states:

*"the narrative is not only a neutral discursive form that may or may not be used to represent real events; it is more a discursive form that assumes determined ontological and epistemological options with ideological and even specifically political implications."*<sup>27</sup>

This author distinguishes three types of strategies that historians can use to obtain different types of "*explanatory effect*". White calls these different strategies *explanation by formal argumentation, explanation by the plot and explanation by ideological implication*. Within each

<sup>23</sup> CARRETERO Mario: *Documentos de Identidad, la construcción de la memoria histórica en un mundo global*, Editorial Paidós, Buenos Aires 2007. P. 33

<sup>24</sup> Hayden White studies the *profound structure of historic imagination* and has a theory on *historic work*, in which he considers *historic works* to be something visible: a *verbal structure*. The explication of this theory is found in his book, "*Metahistoria, la imaginación histórica en la Europa del siglo XIX*" Fondo de Cultura Económica, México, 1992

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<sup>26</sup> Hayden White is an American philosopher and historian; he is known for being the first author to develop the narrativist epistemological reflection in the United States. He is currently professor emeritus in University of California, Santa Cruz, and professor of comparative literature in Stanford University.

<sup>27</sup> WHITE Hayden: *El contenido de la forma: narrativa, discurso y representación histórica*. Ediciones Paidós, 1992.

of these different strategies, White enunciates four possible *modes of articulation* for which the historian may get an *explanatory effect* for one specific type. For specific argumentation the modes *formism, organicism, mechanicism, and contextualism exist*; for plot he defines the archetypes of *novels, comedy, tragedy and satire*. As for ideological implication, he presents the *tacits of anarchism, conservatism, radicalism and liberalism*.

He continues by clarifying that a specific combination of forms of modes called the historian or philosopher's historiographic "style" in particular, and so as to relate these different styles between each other as elements of the same tradition of historic thinking, he proposes a profound level of consciousness in which the historic thinker chooses conceptual strategies through which he explains his data.

For White there is an inevitable poetic nature of *historic work* and one of the objectives is to *specify the pre-figurative element* of any *historic account*, which tacitly sanctions its theoretic concepts. This is how he proposed four principal modes of historic consciousness based on *pre-figurative strategy* (tropological) that each of them involves: *metaphor, synecdoche, metonymy and irony*. Each one of these *modes of consciousness* provides the base for a different linguistic protocol to prefigure the historic field and on which *specific strategies of historic interpretation* can be used.

It is through the narrative discursive form that presented accounts concerning the Nation-State are elaborated in the textbooks, and to manage to uncover the ideology in the aforementioned accounts we define the *discursive analysis* as a methodological tool that helps accomplish the aforementioned objective.

Discourse is understood as: "*a social practice, a form of action between people which is articulated starting from contextualised linguistic use, either oral or written (...) we refer to how the linguistic forms are put start working to build forms of communication and of representations of the world, both real and imaginary*".<sup>28</sup>

Its comprehension must be done starting from *units of discursive analysis*<sup>29</sup> since "*One of the aspects that characterises the discursive studies is that they take empirical data as an object of analysis, since they start from the basis that the linguistic use is given in context, is part of a context and creates context within the discourse*".<sup>30</sup>

The basic unit, the school textbook is defined as "*the statement*" understood as "*the concrete and tangible product of a process of enunciation carried out by a Speaker and directed towards a Listener*",<sup>31</sup> while the statements combine between themselves to form a text, oral or written, "*therefore, the text is made of combined verbal elements, which form a*

<sup>28</sup> CALSAMIGLIA Blancafort Helena y Tusón Amparo: *Las cosas del decir. Manual de análisis del discurso*. Editorial Ariel, España 2002 P. 15

<sup>29</sup> Calsamiglia and Tusón present the analysis units as fundamental in obtaining the data to be analysed, they must stay in their natural environment, and the investigator must bear in mind the context in which *discursive pieces* are manifested.

<sup>30</sup> Ibid. Cit 38. P. 17

<sup>31</sup> Ibid. P. 18

*communicative, intentional and complete unit.*”<sup>32</sup> This is what this investigation has termed meaning of the text, that refers to factors of the cognitive and social context which, without them being vocalised, orient, situate and determine its meaning. This made it possible to define who elaborates the account on Nation-State that is present in the textbook, *his/her profession, experience in education*, and generally what refers to the *speaker’s individual and social context*.

*“Every text must be understood as a communicative fact (incident or event) that occurs in the course of a social-temporal becoming. For this we start by considering that the fundamental unit of analysis has to be based on the description of a written fact, as a type of interaction that includes verbal and non-verbal aspects in a socially and culturally defined situation.”*<sup>33</sup>

We consider that the following contents must be studied in textbooks in Chile so as to address the subject of Nation-State: *independence and forming of the national State, background, landmarks, heroes of Independence and organisation of the Republic*, since the contents aim at getting the pupils to be able to recognise the *emotions in that era* and the different points of view of the actors who confronted each other to solve the *dependence crisis* with the Spanish metropolis which, from our perspective, politically proves the construction of a heroic history that generates legitimate interests in the State through an official version of history by taking a conservative and mythological perspective that, in turn, allows the democratic participation of teachers and specialists in defining contents.

*Jeretz Topolski*, in his work “The Structure of Historic Narratives and the Teaching of History”<sup>34</sup> sustains that narratives circumscribed to history textbooks and that those elaborated by teachers have a structure or form, and contents that are basically a result of the different intellectual and social mechanisms at work.

Topolski defines three levels of historic narrative that concentrates on the logical and grammatical structure: *“the following can be called “levels” of historical narrative: the superficial or informative level (logical and grammatical); the persuasive or rhetorical level, and the theoretical-ideological level or control.”*<sup>35</sup> Through this theory and the categories of analysis offered by White and Tusón<sup>36</sup>, the narratives found in textbooks edited in Chile can be analysed to see if they exercise a noticeable influence on the social-educational context and if they actually present philosophical elements in the building of a nation.

The aforementioned elements refer to the reconstruction of the National Independence process on behalf of the pupils, the building of the timeline that chronologically organises the process of change occurred during that era, working with simple sources such as letters

<sup>32</sup> Ibid. P. 18 Párr. 2

<sup>33</sup> Ibid. P. 19

<sup>34</sup> Ibid. P. 19

<sup>35</sup> Ibid. Cit. 50 P. 105

<sup>36</sup> CALSAMIGLIA Blancafort Helena and Tusón Amparo: Las cosas del decir. Manual de análisis del discurso. Editorial Ariel, España 2002.

and biographies referring to these historic moments, and the value of this period as a basis of the current democratic republic.

Thus, locating the pro-independence processes and the construction of a timeline, along with the understanding of the emancipation process, the background and important landmarks and national heroes of emancipating processes lead the pupil to understand the external and internal factors that influenced the Independence process, to analyse the historic processes of continents Europe and its influence on the country, study the diverse forms of national organisation and the importance of this period on the forming of the Republic.

Therefore, according to the approaches used by textbooks, knowledge of the motherland's history and its significance to forming a national identity, is relevant for the development of an attitude of appreciation and respect for that which constitutes the identity as a nation. This, together with graphic organisers that present characters and central aspects related to the events and processes from this period, aim to reinforce a more comprehensive and detailed vision of the period in the pupil.

## THE TEACHING OF HISTORY

The importance that history acquires in the educational institution depends on whether it serves as a *vehicle of patriotic emotions*, the problem of the *teaching of history being a game of didactic methodologies and contents*. It presents a series of matters that confirm the value each society gives to recognising the past in the present. This is a problem for Social Science teachers and scholars, those who work in the classroom and are involved directly with the problem of history as a science, school contents and the teaching of history.

This first aspect, that of history as a science, has managed to establish a high level of consensus. As Martínez-Shaw<sup>37</sup> states, the period between the wars introduced a profound renewal in the concept and methods of history, so much so that it fundamentally gave the discipline the status of social science.

*“The starting point of this authentic reconstruction is to be found in the reflection brought about on a three fronts: the protest against academic positivist history undertaken by the Annales school; the demands for rigor and objectivity preached by the economists, and the theoretical and empirical contributions made by inspired scholars of historic materialism.”*<sup>38</sup>

The triple current concurred on a double conviction that articulated the theory and practice of historians: the need of a total history and the need to establish a dialogue with the other social sciences on the basis of all the levels of social reality. It was the Annales school which created the concept of *total history*, through which they criticised *thematic universality*

<sup>37</sup> Carlos Martínez-Shaw is professor of Modern History in Universidad Nacional de Educación a Distancia, Madrid. He has specialised in the investigation on the history of maritime economy in the Ancient Regime in Spain and Latin America.

<sup>38</sup> MARTÍNEZ Carlos: *“La historia total y sus enemigos en la enseñanza actual”* in CARRETERO, Mario y James Voss: *“Aprender y pensar la historia”*. Amorrortu Editores. Buenos Aires 2004. P. 25

since positivist schools were only concerned with a series of privileged facts: the political, military and diplomatic events. They also criticised geographic universality and chronological universality.

One of the sciences with which history quickly started a relationship was economy, which introduced the demand for objectivity to historiography and provided the use of some quantitative methods. Also, quantitative history came to be known as serial history for its description and application to the set of facts from the past. Thus, serial history displaced quantification of any type of historic facts whose dates could be presented as homogenous.

Historic materialism contributed with the concept of social totality, its reflection on the modes of relationship established between diverse planes of social reality and its concept of history as a social science concerned with the processes of constitution, functioning and change of other social formations.<sup>39</sup> Total history acquires thus *letter of nature*, defines its object, elaborates its theory and demands the perception of time as an essential dimension and the monopoly of the past as the historian's territory.

This is how a reconciliation between history and the other social sciences was brought about that allows interdisciplinary collaboration, "*since history accepts concepts and theories of other social sciences, while they only incorporate a temporal dimension in their analysis*".<sup>40</sup> From this emerged certain denominations of history which initially pointed towards building a type of universal history.

*Traditional history* as the first form of history was essentially preoccupied with events relating to political life, but reserved a space to *inventory* the events occurred in the other fields that it considered worthy of being recorded. "*This is how series of specialities like history of art, history of literature, history of thinking or the history of science were born*".<sup>41</sup> These forms, which included the end of really important historic narration, were nothing more than repertoires and works by known authors.

This history has been opening up a space and path in teaching in all levels, from schools to universities, but which preach a narrative history free of criticism of data, a history of events, a history limited to political facts, a history that aims to exercise rote learning, where this form of building current history is a residual of the past, a fruit of the lack of scientific preparation accompanied with a lack of will to update, an absence of readings and reflection on the subject itself and on the teacher's function.<sup>42</sup>

Therefore, the teaching profession has concentrated on teaching partial, sectorial history that runs the risk of distancing itself from reality and consider itself as complete and integrating. Furthermore, the practice of reductionism implies, almost without exception, the prevalence of traditional history and pushes aside the matters considered less important.<sup>43</sup>

<sup>39</sup> Op. Cit. 33. MARTÍNEZ Carlos: *La historia total*. P. 27

<sup>40</sup> Op. Cit. 34. MARTÍNEZ Carlos: *La historia total*. P. 28

<sup>41</sup> Op. Cit. 35. MARTÍNEZ Carlos: *La historia total*. P. 32

<sup>42</sup> Op. Cit. 36. MARTÍNEZ Carlos: *La historia total*. P. 38

<sup>43</sup> Op. Cit. MARTÍNEZ Carlos: *La historia total* 37.

This type of history thought out in presentism, is defined by Martínez as the tendency to limit the teaching of history to more recent periods so as to prevent school failure by compressing the contents, since the programmes are very overloaded. Also, history is conceived as a guide to orientate the present world, which makes historic references turn into a cultural luxury. From this point on, schools and teachers today believe in a *continuous present* where history and *its contents* are defined by the institution and the teacher is no more than a des-integrator of history.

It is precisely the triumph of political institutions as integration agencies of rationalisation and the moral individual, which makes education an *important capital* in the 16th to 18th century, until the republican school of the 19th century.<sup>44</sup>

If we take a look at classic education, we will realise that it supported itself on three basic principles solidly integrated and related to history. The first was the willingness to free the children of their particularities and elevate them with the help of their own work and due to the forming disciplines that were applied in a context of reason and knowledge. This principle corresponds to the particular nature of occidental modernisation, which is based on the opposition of traditional and modern where the past must be used so as to constitute progress.<sup>45</sup>

The second principle was based on the affirmation of the universal value of culture, and even of the society in which the children or young adults lived. This widely surpasses the acquirement of positive knowledge or socialisation, that is to say, the learning of social roles.<sup>46</sup> The education was then both moral and intellectual, but that culture of universal values was strongly associated with a society considered as carrier of modern civilisation and values.

This principle promotes a national education, which annuls the socially and culturally heterogeneous school. On the contrary, it is closer to a community school defined by the belonging of all to one social whole.

The third principle was based on the effort to liberate itself from tradition and the rise towards values closely linked with social hierarchy<sup>47</sup>, thus the school, chose to select the *most hardworking* individuals, *those most capable of thinking*, devoted to the universal and national values. This is what in France was called republican elitism.

This concept was also modern in the sense that it opposed an aristocratic and elitist model, in which the “arts”, philosophy, occupy the summit of an imagined hierarchy that humanities ended up representing the intermediate steps and social sciences the lower ranks, since:

*“This vision clearly corresponds to the national society that performs then a central role and identifies a particular nation with universal values: the economic liberty and democracy in*

<sup>44</sup> TOURAINE Alain: *¿Podremos vivir juntos? La discusión pendiente: El Destino del hombre en la aldea global*. Buenos Aires, Fondo de Cultura Económica. 1996 P. 273

<sup>45</sup> Op. Cit. 39. TOURAINE Alain: *¿Podremos vivir juntos?* P. 277

<sup>46</sup> Op. Cit. 40. TOURAINE Alain: *¿Podremos vivir juntos?* P. 278

<sup>47</sup> Op. Cit. 41. TOURAINE Alain: *¿Podremos vivir juntos?* P. 279

*Great Britain, the liberty, equality and fraternity in France, the theoretical thinking in Germany, the Roman right in Italy, the constitutional principles and equality of opportunities in the United States.*"<sup>48</sup>

It turns out to be more important still to support the idea that access to values and personal freedom is to do with participation in social life, be it the nation as an expression of popular sovereignty or the historic or cultural community. Therefore, "*this education is not centred on the individual but on society and what it denominates as values, particularly rational knowledge.*"<sup>49</sup> This evocation shows us the distance that separates a school's classic education from a school of the subject, orientated towards the personal subject's freedom, the democratic management of society and its changes.

Although since the 19th century central administrations have taken care of teaching history, it has become the basis for the acculturation project focused on creating the Nation-State that was simultaneously diffused through universal and secular schooling. Thus, the teaching of history as we understand it today, is a product of the junction between the ideals of the Illustration and those of Romanticism, which have accompanied development in the National States.

When the Illustration proposed that freedom was not found in bodies nor in things, but in men's consciousness, the idea of an emancipating school emerged, where Romanticism contributed the concept of people and laid the foundations for the nation. In this stage, history occupied a particular space since it was the backbone of a double meaning: on the one hand it provides organised and critical information of the past, and on the other, it offers a supportive memory with a feeling of national identity, and even love for the homeland.

These two pillars, Romanticism and Illustration in a contradictory confluence<sup>50</sup>, have made school taught history provide contents that constitute as an *official narration of a common past*, through which it is hoped to present an important emotional load with the objective of creating an identity with "*national heroes and native men*". In turn, schools hope to create a sense of belonging and identification that becomes stronger with the help of patriotic symbols, icons and hymns that promulgate the institution on a daily basis.<sup>51</sup>

In keeping with this train of thought, modern historiography and schools became inseparable in the configuration of a common identity, and it was around this that the concepts of *State and Nation were completely fused*, which allowed the change from *universal identities to national ones*. Thus, *standardisation* turn into a *central objective* since the beginning of the 19th century, when, along with history, language became a condition in the *transmission* of a common account, which was central for the *patriotic education project*.<sup>52</sup>

<sup>48</sup> Op. Cit. 42. TOURAINE Alain: ¿Podremos vivir juntos? P. 280

<sup>49</sup> Op. Cit. 43. TOURAINE Alain: ¿Podremos vivir juntos? P. 281

<sup>50</sup> Op. Cit. 47. CARRETERO Mario: Documentos. P. 40

<sup>51</sup> Op. Cit. 30. CARRETERO Mario: Documentos. P. 39

<sup>52</sup> Op. Cit. 30. CARRETERO Mario: Documentos. P. 45



This process is reflected in the majority of European countries at the beginning of the 20th century, when national history was incorporated as obligatory content in all levels, with a special emphasis on the first cycles of schooling. It is worth highlighting that prior to the instauration of national history, ancient history performed a moralising role based on the virtuous model of classic thinkers. With the introduction of national history, this spirit was dissolved and it gave rise to the influence of liberal States on the contents of school-taught history.<sup>53</sup>

Carretero states:

“The gradual instauration of liberal States made academic and school-taught history a symbolic battle ground between European nations, which we found proof of in each country, in their civil wars and internal conflicts (...), since while changes occur that transform the political democratic regime into a totalitarian one or vice versa, the modification of history school contents is prioritised.”<sup>54</sup>

Therefore, the school becomes a central place for the collective appropriation of political projects in society, where the teaching of history establishes not only the objective curricula, but also those relating to the social and national identity. As Carretero says: “*teaching history in school tends to produce a biased understanding of academic contents, (...) we can qualify this as anecdotal, personalist, myth sustaining and glorification of the national State.*”<sup>55</sup> Therefore, the school projects history teaching as a mechanism to give students civic education and also to maintain its relationship with the State. History is the place to conserve what is national and regional so as to maintain legitimacy.

But the school does not act on its own. It is the educators who are in charge of developing certain objectives often defined by the institution, through which the teacher builds a school version concerning the academic contents of his or her field of teaching. The teaching of history in school tends to produce a biased understanding of the aforementioned contents because there is a distance between the discipline as such and the “taught knowledge”.<sup>56</sup> What is more, the teacher must complement his or her communicative and ideological abilities to develop the *school knowledge*.<sup>57</sup>

Today, school education maintains valid objectives that hope to create a relationship with the national State, hence the importance of history, since it promotes a relationship between the institution and the patriotic emotions. The Hispanic countries are pioneers in celebrating at school events commemorated on the same day, which have a central and symbolic role that also merits an important time within the scholarly environment.<sup>58</sup>

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<sup>53</sup> Ibid.

<sup>54</sup> Op. Cit. 49 CARRETERO Mario: *Documentos*. P. 46

<sup>55</sup> Ibid.

<sup>56</sup> Op. Cit. 30. CARRETERO: *Documentos*. P. 55

<sup>57</sup> Carretero defines knowledge as the building of an object (“taught knowledge”) to the student (student x) in its didactic pedagogic, educational and cognitive dimension. See: *Documentos de Identidad, la construcción de la memoria histórica en un mundo global*, Editorial Paidós, Buenos Aires 2007. P. 56

<sup>58</sup> Op. Cit. 53. CARRETERO: *Documentos*. P. 63

As a result, school as an institution and the teacher as a professional build a specific idea of history given that “each idea of history is accompanied by specifically determined ideological implications”,<sup>59</sup> where it is ideology<sup>60</sup> that builds the historic relationship and defines the temporal orientations of any account and creates a system of values that affirm authority, be it of reason, science or realism.

The Colombian case study gives a better understanding of investigative tendencies facing teaching history. In order to analyse its context and motivations, it is necessary to refer to the processes of educational transformation that took place from 1975 onwards. This was the year when the *Programa Nacional de Mejoramiento Cualitativo de la Educación* [National Programme of Qualitative Improvement of Education], also known as *Programa de Renovación Curricular* [Curricular Renovation Programme] was launched. The main aspects of this programme were the improvement and updating of the curriculum, the production and massive distribution of educational materials, teacher training and perfecting.<sup>61</sup>

These changes caused a technocratic manner of addressing the development of contents, along with a renewed emphasis on pedagogy. This era marked the beginning of a change in public education in Colombia, with the questions “What should be taught?” and “How should it be taught?”, which caused new decrees and resolutions to be emitted in an attempt to define the curricular contents so that they would be broader, social and meaningful for students. Among these resolutions appears the *Automatic Promotion of Students*, which was carried out with the objective of making the school calendar in rural schools more flexible, but it had adverse effects on the curricular development.<sup>62</sup>

The beginning of eighties was characterised by strong reactions from the teaching profession and the academic milieu faced with the driving design of the curriculum implemented during the previous decade. The *Colombian Federation of Educators* (FECODE), as well as the country’s different academic and disciplinary organisations, began a period of opinion and intellectual educational work that was made known later as the “Colombian Pedagogical Movement”. These discussions mainly materialised themselves on the discussion surrounding the curriculum contents through periodical publications, radio and television programmes.<sup>63</sup>

Several protagonist speakers then emerged during the following decade, writers and academics focused their attention on curricular development starting from the reforms of the nineties. In 1994, the law 115 on General Education, which established the new conditions and guidelines that would guide the curricular policy, was sanctioned. In a complementary way, curricular guidelines were approved for different areas, and later the indicators of curricular achievements

<sup>59</sup> WHITE Hayden: *Metahistoria, la imaginación histórica en la Europa del siglo XIX*. Fondo de Cultura Económica, México 1992. P. 34

<sup>60</sup> White defines ideology as a “set of prescriptions to assume a position in the present world of social practice and act upon it (to change the world or to maintain its current state); such prescriptions go together with argumentations that support the authority of “science” or “realism”.

<sup>61</sup> Op. Cit. 81. COMISIÓN de Historia: *La enseñanza*. P. 115

<sup>62</sup> Op. Cit. 85. MORAL Cristina: *La enseñanza*. P.116

<sup>63</sup> Ibid.

that were to guide the school curricular design on the basis of national guidelines were also approved.<sup>64</sup>

The regulations of the curriculum in Colombia have evolved with the intention of, “providing more specification to the system on what is hoped pupils should learn.”<sup>65</sup> The Political Constitution of 1991 is used as an initial point of reference, followed by the General Law of Education of 1994, and the two basic official resolutions to develop the curriculum: *Curricular Guidelines and Indicators of General Curricular Achievements*.

Faced with these processes, teachers, academics, thinkers of the field of Social Sciences and those interested in the problem of teaching history have dedicated their works to inquiring into the *disciplinary and interdisciplinary knowledge*,<sup>66</sup> the manner in which know-how is converted into a teaching object, the methodological processes, the objective of the teaching profession, and the influence of different social and cultural processes in this field.

These interests have been made explicit in a context where national regulations are incongruent with the particular activity of teachers; academic production becomes a means to make judgements on the quality of education and problems in the teaching of history, in addition to being a means of political action, participation and of generating proposals for changes in this field.

The case of Chile shows in a concrete way how the matter of recent history arises in schools and shares with Colombia the problematization of the Nation-State. The teaching of history, and of the nation-state, turns out to be a priority interlock in both countries so as to homogenise a common history of great national accounts through which pupils build one version of history that is ideologically fundamental in the creation of a nation. Added to this, both countries have built a version of the history of the nation-state that is configured on the idea of “democratic agreements”, where conflict is not incorporated.

If the case of the dictatorship is considered, it is evident that through history an initiative to reconstruct the past so as not to forget is taken on, but the absence of the State is emphasised in certain events. This has created a strong discussion concerning educational policies and contents, where in the case of Chile most of the discussion is among the private sector.

The teaching of recent history in Chile has been influenced by the official version of democracy, and highlights the need for national reconciliation. For this reason, regarding the political situation prior to the *coup d'état* led by Pinochet on September 11, 1973, an account that referred to the two conflicting factions which had opted for armed fighting was elaborated. In the textbooks distributed by the Ministry of Education, neither the word “*coup*” nor “*dictatorship*” are mentioned. Still today, Chile has not come to an agreement as to how to

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<sup>64</sup> Op. Cit. 87. COMISIÓN de Historia: *La enseñanza*. P.117

<sup>65</sup> *Ibid.*

<sup>66</sup> GÓMEZ Esteban Jairo: *La construcción del conocimiento social en la escuela*. Bogotá, Universidad Distrital “Francisco José de Caldas”, 2004. P. 53

denominate the military *coup d'état* that overthrew the Salvador Allende government, nor does it know how to remember it in textbooks.<sup>67</sup>

As a consequence, the educational space has been facing the problem of how to incorporate the recent past in the curriculum, and Jelin states, “*the school is built on a privileged stage, by different memory enterprises that gave it a mandate of memory which is also translated as a political demand*”. In terms of history teaching, this is materialised in the dissociation between *economy* and *politics*.<sup>68</sup>

In both countries there are differences between the “official history” and “non-official” versions. This is the reality Social Science and History teachers address and reproduce: “*if prior to the brutal split between the dictatorships there was a divergence between the “official” and the “non-official” history, the breach afterwards became an abyss*”.<sup>69</sup> In Colombia, due to its current political situation with a right-wing government, versions of history tending to justify a past of grandeur and a future of promising future as a Nation are elaborated.

In the words of Jelin, these contradictions evidenced in the Latin American countries, condition teachers’ activities, which vary from their level of commitment to knowledge to the distribution of omission and silence as a consequence of institutional mandatories.

The comparison between Colombia and Chile is meaningful because it shows from each political context, how an official version of history that the big institutional structures sustain across the curriculum is created and does not allow the social processes to be explained from the point of view of the present conflicts. It also shows how these two countries intend to control interpretations of the official past through the teaching of the nation-state, and through it there is domination over school and official spaces of the present.

<sup>67</sup> CARRETERO Mario: Documentos de Identidad, la construcción de la memoria histórica en un mundo global, Editorial Paidós, Buenos Aires 2007. P. 186 - Cuadro 1. “*Comparación de dos versiones contrapuestas sobre el golpe de estado del general Pinochet en Chile.*”

<sup>68</sup> *Op. Cit.* 91. COMISIÓN de Historia: La enseñanza P. 188

<sup>69</sup> JELIN Elizabeth, Lorenz Federico: *Educación y Memoria, la escuela elabora el pasado*. Siglo XXI de España editores, 2004. P. 8

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# My neighbour, my enemy? nationalism in primary school history textbooks in Chile (1981-2006)

CARLOS FRANCISCO GARRIDO GONZÁLEZ

## INTRODUCTION

**M**y purpose in this talk is to present part of a larger work about History textbooks for schools, titled “Nationalist and racist visions in Year 7 and Year 8 History textbooks in Chile (1981-1994)”. Starting from this work, I will talk mainly about the topic of nationalism. It is worth mentioning that although at the beginning the period of study and the number of levels was much more limited (Years 7 and 8, between 1981 and 1994), I have considered it necessary to broaden both dimensions in an attempt to approach what happens with textbooks in more recent times.

The fact that the the nationalist vision is the main thread of analysis in this presentation is due to the belief that in Chile the manifestation of this phenomenon in the construction of educational discourses has not been given all the importance it deserves, despite its great relevance and even more if the methodological element in it is considered. But, in order to be more precise, I will say that in this occasion I will refer mainly to the vision of our neighbouring countries that school textbooks have presented. This is the reason for the title of the presentation, “My neighbour, my enemy?”, from which I wish to reflect with you.

## THEORETICAL BACKGROUND

### 1. Curriculum and School Textbooks

First it is necessary to briefly revise some notions of curricular theory that will provide a framework of analysis for this proposal. I will begin by expressing that textbooks do not arise exclusively from each author’s particular perspective. They must necessarily be guided by the curricular proposals presented from superior levels such as the Ministry of Education. Under this perspective, the vision conveyed through a school textbook is, in a way, previously determined.

The curriculum itself can be defined as a selection of knowledge, in a broad sense, which a society wishes new generations to acquire. This selection, in most cases, is presented as a consensus, something which may not necessarily turn out to be true. In this sense, authors like Michael Apple suggest that “the curriculum is never a simple neutral collection of knowledge that is manifested in some way in the texts and classrooms of the country. It is always part of a *selective tradition*, of the selection someone does, of the vision of the legitimate knowledge that a group has. It is produced from conflicts, tensions and cultural commitments that organise or disorganise a people” (Apple, M., 1995, p.153). From this it can be concluded that the selection of knowledge taught in classrooms or through school textbooks is never neutral and always has a strong political character; they are power quotas and their legitimisation is what is at stake. Thus, when attention is focused on the ones who choose contents, the ones who hold the power and their struggle to be seen as “legitimately” holding it, are also scrutinised. The selection also includes ideological and society bets that give sense to practices and decisions taken inside the school system at each one of its different levels. It is necessary to add that what is considered as valid knowledge, usually dictated through the prescriptive curriculum, does not reach teachers directly. Michael Apple puts it like this:

“¿How do schools dispose of this “legitimate” knowledge? To a large extent, through something which until now has received too little attention: the textbook. Like it or not, in most American schools the curriculum is not defined through courses or suggested programs, but through a particular artefact, the standardised and specific text for the level of a particular grade in Mathematics, Reading, Social Studies”. (Apple, M., 1986, page 91)

This also happens in Chile. Seen from the curricular point of view, the school textbook frequently fills up an important space produced in the transfer of the selections carried out by the superior levels of the educational system, which are established in the prescribed curriculum, and the curriculum presented to teachers. In fact, textbooks are the devices through which the selections made are known by teachers, as they indicate the contents that have to be treated as well as a series of didactic forms that can be developed in relation to these contents.

Thus, although school textbooks are the result or actual representations of curricular decisions, they tend to place upon themselves a halo of supreme manifestation of knowledge in the different disciplines that use their services. On the other hand, they are also given a function of standardised order so as to give a great variety of students in the school system the same working conditions, theoretically speaking. Taking this into consideration, it is necessary to acknowledge that school textbooks even stray from real forms of knowledge construction in each of the disciplines.

“A very common pedagogic translation in textbooks for teaching is the non-controversial treatment of scientific content. We all know that controversy and conflict are present in the way knowledge is developed within scientific communities, but this disappears in school textbooks, where a single and indisputable truth is often presented.” (Martínez Bonafé, J., 2002, page 25)

The previous information is extremely important, since it gives us some clues to understand how school textbooks turn into inexhaustible sources of truth. This is because each one of them truly presents itself as the **only** possible truth, leading students into error when they are told that this is how knowledge is constructed. Knowledge is presented as a given, indisputable and necessary to acquire without any kind of doubts about its characteristics. Knowledge is not presented as a social construction.

It is thus essential to reflect upon the fact that the influence of the school textbook cannot be limited simply to its use by students; it is also necessary to consider the role that teachers play in its use, just as Jurjo Torres says:

“Traditionally it was thought that textbooks were characterised mainly by two defining aspects: one, that they were a resource specially written and edited for the exclusive use of students, and second, that their aim was to be used at schools (...) but I believe that we could add a third purpose to this dominant didactic means: it is also addressed to teachers. It is the teacher who first has access to it and who decides if it should be bought or not, which book and by which publisher.” (Torres, J., 1994, page 155)

Teachers therefore play a decisive role, as they are the ones who can mediate between students and the worldviews that a cultural instrument as powerful as a textbook can convey. Arguments that expand these statements go hand in hand with the fact that, often at basic levels, many of the teachers who are responsible for specific areas are not necessarily specialised in them. For this reason, the textbook turns out to be their only source of contents, with the risks this implies, mainly when transferring disputable visions (such as nationalist ones) to teachers as well as students. This is even more serious if you consider that there are no instances of preparation to evaluate and work with school textbooks in teacher training programmes.

From the previous point of view, we can mention that Jaume Martínez Bonafé's proposal was essential for our work. He establishes two areas of school textbook study. First, the technological sphere, which is the most frequent in studies, through which some didactic functions attributed to textbooks that go hand in hand with technical aspects like their design, illustrations, editing, etc., are established. On the other hand, there is the ideological aspect, which is scarcely approached by textbook studies, and goes together with a view of knowledge as a social construction, in relation to which selections are made of what is considered valid knowledge and is expressed through the official curriculum, textbooks being its greatest manifestation. It is this second area that was mainly developed in this study.

## **2. Nationalism**

Considering the previous elements, I will now try to present in a concise way a conceptual framework in relation to nationalism.

Nationalism is one the most complex and controversial topics that interested Social Science scholars during the last century. Most of these difficulties regarding its study are born from the diversity of interpretations that this phenomenon has suffered throughout its history.



But in order to begin, it is necessary to mention that nationalism is directly related to another concept that is not characterised by being easily understood. I am referring to the idea of **nation**. As a first approach, the nation could be considered as a social phenomenon, that is to say, a categorisation used by actors to define themselves and others (Giner, S., 1998, page 519).

Benedict Anderson, a contemporary author who is already a classic in this subject, says that a nation would correspond to: “a political community imagined as inherently limited and sovereign” (Anderson, B., 2000, page 23).

Anderson’s proposal has several aspects to highlight. The first one is related to the quality of *imagined* community, because as the author himself points out, as small as the nation may be, it is very difficult for all its members to know each other personally. They will probably never see or talk to each other, or listen to others speak about them, but the image of their communion lives in each one’s mind (page 23). On the other hand, it is established that the nation is imagined as *limited* because despite the fact that it shelters many millions of human beings, it has finite (though elastic) frontiers since there are other nations beyond them (page 24-25). As to their imagining themselves as *sovereign*, this would be related to the fact that the concept is born at a time when the Enlightenment and the Revolution were undermining the legitimacy of the hierarchical dynastic kingdom, divinely arranged. In this sense, nations dream of being free in God’s kingdom, but the guarantee and emblem to attain this freedom is the sovereign State (page 25). Finally, we can say that the nation imagines itself as a *community* because, beyond the inequality and exploitation that may actually prevail in each case, it is always conceived as a deep, horizontal comradeship (page 25).

Now, it is necessary to examine what happens with what is supposedly a derivation of the nation. I refer to nationalism. In this sphere, it is possible to find a very similar situation to the one that occurs in the case of the nation, that is to say, a great diversity of visions. However, for this occasion I have chosen some of the main proposals there are in this respect.

For example, if you distinguish between two kinds of nations, the political nation and the cultural nation, two kinds of nationalism with very specific characteristics can be derived from this distinction. In the case of nationalism based on the idea of political nation “it is appropriate to suppose a greater functional and pragmatic sense insofar as source of legitimacy and generator of loyalty towards a form of State-Nation which, in the Western world, has been transformed into a reality comparable to the liberal-democratic political system” (Giner, S., 1998, page 520). On the other hand, if the cultural nation is considered, we can appreciate a nationalism that “would tend to emphasise the more emotional and committed features, less in agreement with an instrumental logic, all this being consistent with the way of conceiving the nation as an objective that is better in itself than as a device at the service of political life” (Giner, S., 1998, page 520).

Functional and pragmatic sense, source of legitimacy and loyalty; all this summarises to a great extent what happens with the nation and nationalism as an expression in the political

case. As regards the case of the cultural nation, the idea of conceiving it as an object in itself is proposed, thus avoiding the instrumentalisation observed in the case of the political nation. Considering the aforementioned, what is of interest next is to clarify how the idea that nation and national can be objects that are functional to certain interests came to be.

Quoting Ernest Gellner, Eric Hobsbawm suggests that nationalism is: “A principle which states that political and national unity should be compatible” (Hobsbawm, E.,1991, page 17). According to this principle, the unity of the nation would go hand in hand with a government that is able to ensure its permanence, its unity, despite the conflicts and difficulties they could face. But to this argumentation Hobsbawm adds that,

“This principle also implies that the political duty of the components of a nation towards the political organisation that comprehends and represents the nation is imposed before all the other public duties, and in extreme cases (such as wars) before all other duties, whatever kind they may be. This distinguishes modern nationalism from other less demanding forms of national or group identification that we will also encounter.” (Hobsbawm, E.,1991, page 17).

From what has been set forth above, it is possible to state that nationalism makes extreme demands on the members of a nation. Now, this is done in the sense of achieving the survival of the community and its projection in time. In short, this call to protect the nation is one of the main features of nationalism, at least at first sight. I say this because the question of who is most interested in the defence of the nation arises. Are all the members of the nation equally interested? Are there some who are more interested in the defence of this community (the nation)? What has been seen up to now makes these questions possible. When there is great confusion regarding what is understood by nation, is it not possible to set forth that confusion in relation to nationalism as well? When we began the reflexion on nationalism we mentioned the possibility that this concept, together with the nation, were functional to the search for legitimacy and loyalty to certain political interests. This can obviously imply an absolutely different perspective when you come to the analysis.

Hobsbawm stresses the dimension of device, invention and social engineering that is involved in the construction of nations. Even more, the author himself, once again quoting Ernest Gellner, states: “Nations as a natural means, granted by God, of classifying men as inherent ... political destiny, are a myth; nationalism, which sometimes invents them, and often destroys them: *that* is reality” (Hobsbawm, E., 1991, page 18).

The previous statement gives a clear idea of what can be expected with respect to this extremely complex issue. When faced with the discussion about nation, and through it nationalism, its dimension as construction, as invention (something which in some way B. Anderson’s proposal already anticipated), must be considered. Hobsbawm himself is much less categorical with respect to this: “Nationalism precedes nations. Nations do not build states and nationalism, but what happens is the opposite.” (Hobsbawm, E., 1991, page 18).

Starting from this point it can be established that nationalism is a concept that is essential to understand the rising of the idea of nation. From this perspective, nation is a creation, an

invention of nationalism, which is a phenomenon also created by interests, mostly political, that seek to attain legitimacy for some government project. For example, in the case of Latin America, and Chile as part of it, many proposals of the nationalistic kind were born in the 19th century, and from that moment on they extended into the 20th century presenting themselves as legitimators of various political orders as well. Therefore, nationalism and the idea of nation, as it had been previously suggested, would be an instrument of government and domination for groups that gain access to power and are in search of legitimacy.

## **METHODOLOGICAL PROPOSAL**

A qualitative methodology was chosen for this investigation, since the main objective was to prioritise a descriptive-interpretative vision.

In this case we limited the study to the phenomenon of nationalism, which was also our work hypothesis. As regards the corpus of study, a clarification must be made. Due to the curricular reform process that Chilean education has undergone, for the period between 1981 and 1994 we worked with Year 7 and Year 8 textbooks since, according to valid programmes in those years, it was in those levels where the History of Chile contents were mainly developed (Decree Nº 4002, 1980). However, for more recent years it was necessary to work with Year 5 and Year 6, since it is in these levels where most of the History of Chile contents are currently developed (Decree Nº 40, 1994). Now, the textbooks examined were those that the State officially gave out in municipal or subsidised establishments throughout the country. Thus, the sample required for the study was not constituted on the basis of random criteria, but rather in terms of being able to flood the symbolic space we wish to gain access to through it (it is a theoretical sample).

As regards the methodology itself, the investigation's main tool was *content analysis*. It is convenient to consider that by content we do not understand something that would be located within the text itself, but outside it, in a different plane in relation to which the text functions as an instrument (Navarro, P. y Díaz, C., 1993, page 179). The objective of the content analysis itself is to destabilise the immediate intelligibility of textual surface, showing the aspects which it is not possible to know by intuition directly but are present. Therefore, it is important to go from the *product*—the text—to the sphere of the textual *production* (Navarro, P. y Díaz, C., 1993, page 188).

It must be mentioned that an important criteria considered in the content analysis is the existence of intertextual and extratextual strategies. Intertextual strategies aim at determining the virtual sense of a text through its relationship with other texts. On the other hand, extratextual strategies try to establish the virtual sense of the text relating it to its non-textual assumptions. Of these strategies, the extratextual one is useful in the sense that it makes it possible to relate texts to certain realities—non textual—that are assumed by themselves or that involve them in some way. This can, for example, consider the immediate context of production of a text, that is, the set of non-textual aspects—not directly present in the text—of

the specific communicative act that originates it. This would point to the circumstances of the communicative situation, presumably known by the producer as well as by the receiver of the text, but that do not appear in the text (Navarro, P. y Díaz, C., 1993, page 189-190).

Within the content analysis, an important aspect is to consider the so-called recording units (Navarro, P. and Díaz, C., 1993, page 192), which make it possible to guide the development of the investigation. In our case, concepts such as nation, race and war, among others, were fundamental recording units.

The credibility of the investigation went hand in hand with triangulations via sources. In this sense, it was essential to be able to analyse the characteristics of the plans in force during the periods in question and see how many of those proposals were reflected in the textbooks. Likewise, a theoretical triangulation that arose from previous investigations (most of them conducted abroad) was considered. This allowed us to give our interpretations a much clearer sense.

## **STUDY OF SCHOOL TEXTBOOKS**

Then it is now necessary to begin revising how nationalism is presented in primary education History textbooks.

### **1. The 1981 - 1994 period**

Among all the possible aspects that can be chosen regarding nationalist visions in textbooks, I have decided to analyse the relationships with our neighbouring countries. The most dominant is the one related to conflicts and wars.

It is important to consider the relationships with neighbouring countries because, in part, the nationalist feeling developed in textbooks is founded on the relationship Chile has with its environment. That is to say, in many cases the basis to present nationalist visions is the way in which this relationship is seen.

The first element is the names given to the relationships with neighbouring countries. For example, in the 1980's the following titles were used to introduce this content:

**“INTERNATIONAL CONFLICTS”**

(Villalobos, S. et al, Year 8, 1985, page 61)

**“BORDER PROBLEMS WITH ARGENTINA”**

(Villalobos, S. et al, Year 8, 1985, page 65)

Some of the titles that can be found in textbooks from the 1990's are the following:

**“THE WAR OF THE PACÍFIC AND INTERNATIONAL PROBLEMS”**

(Duchens, N. and Schimidt, B., Year 8, 1994, page 26)

**“PROBLEMS OF BORDERS”**

(Duchens, N. and Schimidt, B., Year 8, 1994, page 55)

With headings like these, whenever the topic is treated there is obviously one inference: Chile always has conflicts, problems or wars with its neighbours, which makes it difficult to describe these relationships as harmonious. Everything seems to point to the strengthening of the message that our neighbours have agreed, throughout a long time, to conspire, scheme, and try to take something away from us. According to the way some authors present the topic, our neighbours have not even valued the contribution and support that our country has sometimes given them. The case of the war against Spain can be mentioned here: *“Chile’s supportive gesture with Peru, which had such a high cost, was not imitated by other brother countries and not much time passed before a conspiracy of the neighbouring governments made things very hard for Chile”* (Villalobos, S. et al, Year 8, 1985, page 62).

After making this observation, the treatment of the War of the Pacific starts. There is obviously a clear intention of victimising our country, that is, trying to show it as constantly envied, threatened, attacked by its neighbours. Although in the accounts of the relationships with the rest of the countries in America the agreements or treaties signed at different times are mentioned, it is always our neighbours who do not keep them, they break them or do not respect them. Clearly, international relationships are determined by the performance of two or more parties, where each one of them has to be willing to acknowledge their faults and possible mistakes. This does not occur in the case of Chile.

At this point it is also worth recalling what some textbooks from the 1980’s called the “national fate”. This concept justifies many of the actions that Chile develops in relation to its neighbours (particularly against Peru and Bolivia), mainly in everything that relates to its intention of achieving total control and supremacy in the Pacific Ocean, which was the sense of the idea of national fate. An author explicitly referred to this saying that: *“(…) the existence of the Peru-Bolivia Confederation represented a danger for the predominance of Chile in the Pacific”* (Villalobos, S. Et al, Year 7, 1983, page 99).

As we can see, anyone who reads the textbooks from the 80’s and early 90’s, will find the relationships with our neighbours somewhat traumatic and this would explain a look of suspicion, a warning and the need to be ready to respond to any attack. Naturally, this is fertile ground for the development of nationalist postulates as it is evident that, for some, a weak position before its neighbours would leave the “Chilean nation” on the threshold of a major tragedy.

Evidently after presenting relationships with neighbouring countries in such a controversial way, it is normal for war to be one of the main ways through which different disagreements are attempted to be solved. It is on this point that I wish to reflect briefly.

A fundamental situation that I wish to point out are the absences or silences in the account of the wars waged by Chile against its neighbours or possible enemies. In all the texts examined it is quite amazing to realise that if a war is being discussed, no losses are produced: casualties are never mentioned! The only occasion when this occurs is when they mention the sacrifices of great heroes who would need to end up like that almost as an essential condition to reach

the seat of honour they have in official national history. This is evidently an exaltation of heroic death, but not of the more common death there is in wars, which is the forgotten death of ordinary soldiers, those who finally pay the costs of these processes. Those deaths are hidden, they do not exist in school textbooks. That is to say, the wounded or soldiers who suffer the effects of war are not mentioned either. All this evidently ratifies the idea of war as a way of facing international controversies, making it seem something valid, legitimate and even necessary many times. On the other hand, war is presented as clean, aseptic, filling up the national spirit only with glory and greatness. Thus, the silence and omission that characterise many curricula and textbooks, in this case merely confirm nationalist visions that seek to legitimise these perspectives which are absolutely questionable from an ethical point of view.

Now, let us take up the issue of heroic death again. If only heroes deserve to be remembered, a symbolic case for Chile is Arturo Prat, who is extensively reviewed highlighting his act of greatest heroism in the bay of Iquique. The image of a hero per se is constructed before the students' eyes. Regarding the latter, it seems interesting to mention what professor William Satear says about this:

“in order to understand the paradoxical fact of heroism, it is not the intention of the individual who acts that matters, but the reaction of society to his act (...) Then, to understand the roots of heroism we must study why human societies require heroes” (Sater, W., 2005, page XVIII).

As professor Sater himself indicates in his very interesting study about the case of Arturo Prat, he goes through different moments in which his popularity increased or decreased, always related to the political context of the time<sup>1</sup>. In the period I am referring to (1981-1994), official study programmes led textbooks to use figures like Prat's in terms of an example worthy of being followed, and in this sense textbooks were explicit:

“Arturo Prat is Chile's great naval hero. The great captain did not hesitate to give his life in the bay of Iquique to defend the motherland. He had virtues we must imitate. He was a studious and thoughtful man, he studied law and got his degree as a lawyer as well as being a naval officer.

After spending long nights on guard on his ship, he ran to night school to teach modest people.

Through his letters, the tender love his wife and children inspired in him is observed. Prat also stood out for making friendship a value; he helped his fellow countrymen in hard times.”

(Duchens, N. and Schimidt, B., Year 8, 1994, page 120)

<sup>1</sup> For example, Prat was revitalised as a hero from the crisis of the Parliamentary Republic on, after his popularity had gone down once the War of the Pacific was over.

It is important to point out that in the account there is a panoramic journey through all of Arturo Prat's exemplary life and he is mentioned as someone worth imitating. It is clear that what is sought is to use his example to strengthen the national spirit which, according to the political discourse of the time, had been broken since the 1970's<sup>2</sup>. This is even clearly accepted by textbooks and they bring up the need to restore that lost unity: *"A motherland where everyone must achieve well-being and happiness; where there are no divisions that end up separating men and destroying the motherland."* (Duchens, N. and Schimidt, B., Year 8, 1994, page 121)

In general, in the case of Prat (and other examples developed in the textbooks, such as that of the young soldiers who participated in the battle of La Concepción) we can recognise the intention of using this example as a way to exalt nationalism, showing figures who summed up in themselves that which they want to present as the image of the good Chilean, who is even willing to give his life when faced with a foreign attack. Likewise, we must consider that this case and others were tremendously important commemoration opportunities during the 80's. Frenchman Jackes Le Goff associates this insistence on recalling heroes and commemorating their feats essentially to those who are conservative and, even more, to nationalists, for whom memory would be an end and an instrument of government (Le Goff, J., 1991, page 170). Thus, it is striking that according to the textbooks examined, the greatest displays of heroism have taken place in wars. This is obviously also intended to install the Armed Forces as guarantors of institutionality and of the most essential values of the nation.

## 2. The period after 1994

In this case we will begin by examining what happens with the study programmes that have been reformed since the mid 90's, and then we will analyse what happened with textbooks.

First we must remember that today most of the History of Chile contents are presented in Year 5 and Year 6, which is not what happened before the reform. In order to give the presentation continuity, I will analyse how the relationships of our country with its neighbours are developed.

Let us see now how the War of the Pacific is presented in the plans and study programmes for Year 6. In the unit titled as "Territorial definitions and political and social changes at the end of the 19th century", situations like the following are mentioned:

### **"Activity 1**

**They describe the War of the Pacific: its antecedents, some of its milestones, its characters and its consequences...**

Example

1. Based on an allusive reading, they answer the following questions working in groups:

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<sup>2</sup> We obviously say this if the idea that the national spirit existed and was only one is established.

- a) Which was the event that triggered the War of the Pacific?
- b) What economic consequences did it bring to the country?
- c) What was Chile's situation being the only producer of saltpetre in the world?

They share with their work with the class and then they make a synthesis chart about causes and consequences together.

(Year 6 Study Programme. Social Science. 2004. Page 42)

As we can see, the programme presents the situation lived in Chile starting from the War of the Pacific as an occasion when the country obtains many benefits, specially economic. There is no kind of questioning about the human costs of a war and least of all what facing a situation like this means to neighbouring countries. Just the opposite, it would seem that what is aimed at is developing a feeling of pride in students when faced with this situation.

Now it would be appropriate to examine how official textbooks take charge of this situation.

In a Year 6 textbook given for free by the Ministry of Education, we can appreciate situations like the upholding of nationalist notions. The most typical case is still related to the treatment of the War of the Pacific. After developing the antecedents of the war in one page, at the end there is an activity whose objective is to reveal the violence and extreme situations lived in a war, but not in a way that is directly related to Chile. For example, there is the following question:

*“What wars are there in the world today? Choose one of the conflicts and discuss with your families and in class how it could be solved in a pacific way.”*

(Cembrano, D. and Cisternas, L. Year 6. 2003. Page 44)

In this case we can clearly see how the topic is transferred to the present, but far from the national sphere. Therefore, although the issue of war is argued, the War of the Pacific is not questioned directly. Then, the next page is completely devoted to the Battle of Iquique and, specially, to Arturo Prat's heroic act. It develops an account which ends with an observation from a Peruvian *military chief, who says about Prat*: “Men who fight like that make all of mankind greater” (Cembrano, D. and Cisternas, L. Year 6. 2003. Page 45)

Just with this phrase the attempt at questioning in the previous page is disputed. Moreover, in an attempt to get students to develop a degree of “historic empathy”, the textbook takes advantage of the following passage from the previously mentioned account:

*“The battle was imminent. Arturo Prat, captain of the Esmeralda, made sure his people had breakfast and wore their best clothes; then, drummer and bugler Gaspar Cabrales, who was only 10 or 12 years old, called attention! To gather all the crew. Prat harangued them (...)”* (Cembrano, D. and Cisternas, L. Year 6. 2003. Page 45)



This is taken as an opportunity to ask questions that seek to locate the student in the battle: *“How would you have reacted if you had been in young bugler Gaspar Cabrales’ place?”* (Cembrano, D. and Cisternas, L., Year 6. 2003. Page 45).

What calls our attention first is the reference to a 12-year-old boy, the same age as most of the students in Year 6. On the other hand, we can reflect on how many answers can be acceptable for that question. We may think that the intention is clear: the boy or girl must put himself in Gaspar Cabrales’ place, a degree of “historic empathy” in a situation of war must be appreciated. Likewise, once again they resort to the idea of the heroic act, which we already examined in the textbooks from the previous period, where Prat’s figure was central, and now also Gaspar Cabrales’. All this presents one of the many tensions shown by textbooks; they try to combine traditional visions with others that wish to be a bit more updated and critical, finally creating great confusion. The only thing they do is benefit the more traditional and intolerant visions.

Another textbook after the year 2000, which was also distributed for free by the Ministry of Education, presents one of the problematic aspects of the treatment of wars with neighbouring countries. We refer to the intention of showing war as something beneficial for the countries who obtain victory:

“Advantages for Chile

Chile’s victory in the War of the Pacific signified:

- Incorporating to national territory the regions of Tarapacá and Antofagasta which were Peruvian and Bolivian territories, respectively, before the war.
- The incorporation of these territories rich in saltpetre turned Chile into the only producer of saltpetre in the world, which allowed the country to obtain important income and State wealth that was invested in public works such as schools, railways and others.
- Foreigners’ interest in investing in Chile increased, specially Englishmen and Americans.
- After this conflict Chile was considered an important military power in South America.
- Despite the victory obtained in the war, the action of the military forces was revised and there was a reorganisation of the army taking the German or Prussian organisation as a model.”

(Giadrosic, G. León, M. Avilés, M. Year 6. 2003. Page 86)

As we can see, the textbook clearly takes a position regarding the war from the moment when it refers to the consequences of the confrontation as “advantages for Chile”. In fact, the list that follows only refers to beneficial aspects of the war, from an economic, territorial and military point of view. There is no kind of comment regarding the negative aspects of the war. For example, there is no mention of the effects the War of the Pacific has until today on the international relationships among the countries involved. This situation clearly avoids giving a historic dimension to phenomena which belong to the country’s everyday life.

To the aforementioned is added what is proposed in another textbook from the period (Cembrano, D. and Cisternas, L., Year 6, 2003, Pages 46 and 47), where pages are exclusively devoted to the economic transformations derived from the War of the Pacific, which would have brought progress to the country. Thus, this reinforces, necessarily, the idea that war is not bad business.

From this point of view, obviously war is implicitly assumed as a valid formula to solve conflicts and in addition to this, a possible triumph may mean an opportunity of progress and benefits for the country. Moreover, situations observed in the texts examined in our investigation of the 80's and 90's are repeated again, on the matter that in war there are no losses of any kind (people killed or wounded) among the soldiers. The only ones who suffer some kind of cost are the heroes, thus validating the idea that death in war confirms people as an example worth imitating. It is also important to mention that there are no cases where sources are contrasted, which may allow a look at the different visions of the conflict there are in each of the countries. The only possible vision (or truth without counterweight) is the one presented by the Chilean vision, all the rest are excluded.

## **FINAL THOUGHTS**

First, the nationalist visions that are still present in textbooks are worth mentioning. We cannot deny that the visions of the 80's and 90's do not have the same strength as the ones after the year 2000, but neither can we say that they have disappeared. Many of them have been sweetened with much more acceptable aspects but, in the long term, even when they are so explicit and direct, their effects are probably still the same. With this, our intention is not to refuse to recognise the attempts that have been made to improve. Evidently there is progress. But frequently it remains halfway because the main tensions are still there.

The initial question "my neighbour, my friend?" is clearly justified when analysing textbooks. By the minute, many of them would seem to be more interested in presenting our neighbours as "enemies" with which the only way to deal is reduced to war, instead of as peoples who have to look for peace together. A vision of cooperation for the construction of a better future is dismissed and one of distrust and confrontation is installed.

What memory do textbooks represent? Do they take charge of the fact that historic knowledge is a construction and not a truth revealed? These are some of the questions that can arise when going through the textbooks. For now, we can state as a possible answer that most textbooks present quite a monolithic view of reality. Disagreements are not something that is considered at the moment of constructing the official historic memory. There is a dominating discourse and it would seem that nobody is willing to question it seriously.

Maybe the latter has much to do with how we understand the construction of an identity. Up to now, the construction of our identity has been traditionally plagued by a search for a supposed unity, an essential element for all that may be positive for the nation. In this sense, the description of our supposedly unique national identity feels more than correct when we

do it appealing to the external, to that which makes us different from the rest. For example, our neighbours in Latin America and, starting from that, the existence of a latent danger, the risk that our exclusiveness may be affected by those who are lying in wait out there.

Thus, considering all that has been said, it is also necessary to consider the relationship of our teachers with textbooks. Have they been trained to make the most of the potentialities of textbooks? Have they been trained to face the biased visions present in textbooks? Are they able to question textbooks or do they just reproduce what they express without much critical judgement? These are questions that arise today and need to be discussed urgently.

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## History and social science textbooks as sources for the history of education and instruments for the training of teachers and future citizens

PAMELA OLIVARES FELICE

**T**his reflection responds to the need of understanding the relationships between education and the spreading of an image of the country. For that effect, we have considered textbooks as a privileged medium in this transmission process.

*Purpose:* The objective of this work is to contribute to the understanding of textbooks, considering them an instrument of content analysis.

Investigating the content of history textbooks leads us to relate them with the contexts in which they were or are edited, that is, a national and international historical context. In this investigation, it seems essential to establish a connection with the pedagogical and institutional orientations for public policies where these textbooks fall.

Beyond the textbook and its context, the content analysis also leads us to a study of its different components. Text, hypertextuality, argumentative strategies and iconography appear as elements that form textbooks and reflect the orientations of the time. The context is not neutral.

Our reflection highlights the evolution of the functions that textbooks have performed in history teaching, and it makes us question the current orientations and their coherence with the values of “citizenship and democracy” that society is building or intends to build.

Our purpose is to emphasise the importance of a content analysis that integrates new ways of using textbooks and incorporates new didactic and communication media attached to the textbooks, as a central element for teacher training in the context of new social and historical challenges.

## EVOLUTION OF TEXTBOOKS

### 1. End of the 19th century: textbooks as instruments for national unification and inclusion

Since the end of the 19th century, the education of people has been thought as a moral education that responds to the realisation of a social and cultural consensus of that time, regarding situations of change and protest and the social issue that covers all its importance at the end of the 19th century, and a period of strong social movements at the beginning of the 20th century. This coincides with the annexation of new territories at the north and south of the country. At the end of the 19th century and beginning of the 20th century there was an official unifying and patriotic discourse, which was reflected on textbooks.

Despite new demographic and political considerations (demands of integration for a national project), as well as cultural and territorial demands, Chile created an image that tended to flatter the image of the “*roto chileno*”, which emerged from the “encounter of two warring groups” (Spaniards and indigenous peoples).<sup>1</sup>

In public schools, history textbooks replaced patriotic primers in the mid-19th century. In primary education, history textbooks as such did not exist.<sup>2</sup> History lessons were included in reading books due to the lack of resources for their editing and distribution. History lessons appeared in reading books. Spelling books included tributes to national symbols such as the flag and the national coat of arms.

*“When the wind moves the flag at the top of buildings, we feel joy and want to shout: Long live Chile!*

*For the love of the flag, which is our country, you promise to be good, now and forever.”<sup>3</sup>*

In the history lessons from Abelardo Núñez’s reading book, an illustration about the stratification of races and a comment perfectly represent the orientation of the time. Below this “representation of human races”, the author writes: “the white race is the most beautiful of all races” and “the white man dominates over this group not only because of his physical beauty, but because of the intelligence that is visible on his appearance. The white man has dominated and will dominate the others, both for his physical vigour and for his power of civilisation that allows him to develop his intelligence and knowledge of science.”<sup>4</sup>

The content had a hygienist orientation and considered school as the remedy for a “social illness.”<sup>5</sup> A discourse that constantly used medicinal language was expressed in different ways

<sup>1</sup> Cf. Francisco Albizú Labbé, “El mestizaje chileno como mito histórico-cultural”, *Ibérica, Métissages en Amérique Latine*, Paris, Ed. Hispaniques, nouvelle série n. 3, 1994, pp. 13-34.

<sup>2</sup> Cf. Esteban Romero Carreño, *El discurso de la patria: la historia de Chile en la sala de clases (1843-1880)*, Tesis para optar al grado de licenciado en historia, Pontificia Universidad Católica de Chile, 1994, 103 p.

<sup>3</sup> Claudio Matte, *Nuevo Método de lectura graduada*, Brockhaus, Leipzig Germany, 1884. Usually called “*El ojo*”.

<sup>4</sup> In José Abelardo Núñez, *El Lector Americano, compuesto para las escuelas hispano americanas*, Libro Tercero, Santiago de Chile, s. E.d., 1913, p. 128. Approved by Universidad de Chile through a decree of June 13, 1883. This book was published until 1930. Its content had to be adapted to Mexico, Costa Rica, Nicaragua and Bolivia, where it had to circulate.

<sup>5</sup> Miguel Luis and Gregorio Víctor Amunátegui Reyes, *La instrucción primaria lo que es, lo que debería ser*, Santiago de Chile, Imprenta El Ferrocarril, 1856, 391 p.

in the textbook contents. By means of Darwin's evolutionary theory<sup>6</sup>, social determinism justified the fact that weaker men or groups of men were destined to die due under life's adversities. Social Darwinism explained the historical evolution of people, representing universe as a battlefield. That is how a world's decadence was represented through barbarism or a state called "primitive" of native peoples in American and Chile. In a world under construction, they represented danger and destruction of all national existence. Thus, like the discourses of the time, the history content of texts was built between "civilisation and barbarism."

## 2. First half of the 20th century: the "roto chileno"; popular image

Another important moment in the evolution of contents was the first half of the 20th century, where the folkloric aspect of the indigenous world was emphasised. The roto chileno, an emblematic figure of the mixed race, also changed. The soldier of the end of the 19th century was transformed into a worker who was dedicated to building his country. He thus represented the hardworking, patriotic population. In the educational contents, the image of the citizen followed the path of the national hero.

Nationalism was considered by the instances of the State a new pedagogical tool that could re-establish a situation and respond to a historic and economic fatalism.<sup>7</sup> We witness what was called a "national awakening."

The "nationalisation of consciences" was the idea that partly founded the building of a national educational system.<sup>8</sup> The school appeared at the beginning of the 20th century<sup>9</sup> as a space or medium that would allow a political and ideological consensus among the future citizens for their integration in a common space and reference.

The nation, a territory that had to be defended at the end of the 19th century, became an affective concept during the first half of the 20th century. Citizens had to be heroic, generous, fraternal and hardworking. Other little-known heroes appeared, occupying the status of "founding fathers of the country": they were poets, writers, jurists, inventors and teachers. To the celebrations of national symbols, their meaning and evolution was included.

In primary education, there were few textbooks that dealt with this subject, because teachers' oral method was favoured. There were only two long texts: Francisco Valdés Vergara's *Historia de Chile para las Escuelas Primarias* (1917) and Luis Galdámez's *Estudio de la Historia de Chile* (1925).<sup>10</sup> The 1910 primary school programme stated that "the best book is the teacher's live,

<sup>6</sup> Trip aboard the Beagle in 1831-1836.

<sup>7</sup> There were pieces written by Francisco Antonio Encina, *La educación económica y el liceo*, Santiago de Chile, Imprenta Universitaria, 112, 189 p. by the same author, *Nuestra inferioridad económica*, Santiago de Chile, Ed. Universitaria, 1986, 1st edition. 1912, 246 p.

<sup>8</sup> Cf. Patrick Barr Melej, "Patria y pedagogía: reformistas, nacionalismo y búsqueda de una respuesta a la cuestión social en la educación pública chilena, 1940-1941", *Solar, Estudios Latino Americanos*, 1998, pp. 73-86.

<sup>9</sup> 1920: Law for obligatory public education for 6 to 13-year-old children, in force until the 1965 reform.

<sup>10</sup> Francisco Valdés Vergara, *Historia de Chile para las Escuelas Primarias*, Valparaíso, Imprenta de la Patria, 1917, 455 p. Luis Galdámez, *Estudio de la Historia de Chile, Santiago de Chile*, S. Ed., 1st edition, 1906-1907, 444 p.

impressive words”<sup>11</sup> and made teachers the main actors, who had to dramatise the events. Dramatisation thus began, and so did diction, a traditional method in history lessons.

Sublimated patriotism became an everyday, popular element through an “active teaching of history”.

The “imaginary trip”, as it has been called, became the new learning method, because events had to be dramatised in class. Textbooks occupied a second place, because teachers only used them as reference. History lessons consisted of flattering those deeds that contributed to the improvement of society from an economic, political and social perspective. It was impossible to imitate heroes’ actions, as stated by the programme. History was a history of events, and therefore it was moralistic. Society was a society of merits and good conduct.

The 1910 programme stated that indigenous peoples had special skills for war, bravery and bold strategies. Prejudices against their spiritual and cultural life were still present. The tone was even more pejorative and degrading. Rigoberto Rivas’ reference book for history lessons, making reference to Francisco Vergara’s text, states:

“They ate wild animals, lizards, snakes and frogs. They usually ate the flesh from the enemies they killed in war.

- ¿What were indians like for not making themselves appropriate clothing, housing or food?

They were ignorant.

- Why were indians cold and hungry?

Because of their ignorance.

- What happens to ignorant people?

They must suffer.”<sup>12</sup>

The authors of textbooks defined human progress through topics such as habitat, clothing, buildings, transportation and education. They were the essential factors of “modernity”. For example, poverty in the colonial period was compared with students’ reality in order to emphasise technical advances like electricity. This way of presenting history insisted on the positive material and spiritual evolution of the history of nations, as long as they were made up of hardworking, patriotic people. Thus, the image of national identity depended on the ability of each nation independent from colonial power to develop social, political, technical and economic progress.

The history teaching objectives were no longer making students repeat anthems and copy national symbols, but teaching them about the love for a country that is always directed toward progress. Therefore, the actions of great men led to the positive evolution of the nation’s history. Cultivating a patriotic feeling, a “true patriotism” as stated in the programmes of the

<sup>11</sup> 4761 decree of July 4, 1910. Inspección Jeneral de Instrucción primaria, *Programa de las Escuelas Primarias*, Santiago de Chile, Cervantes, 110, 252 p.

<sup>12</sup> Francisco Valdés Vergara, *Historia de Chile para las Escuelas Primarias*, op.cit., in Rigoberto Rivas, *Instrucción para la enseñanza de la historia*, Santiago de Chile, Imprenta Universitaria, 1913, p. 88.

beginning of the century, aimed to give students a liking for action. This meant exercising the citizen duty first as a student within an educational space and respecting the institutions of the State.

In this sense, the 1928 programme reinforced the main ideas of the 1910 programme, emphasising a more active learning of history and developing the idea of “school for life”. These new perspectives in history teaching were opposed to a traditional teaching, eliminating all contents that were impractical for the understanding of the child’s everyday environment:

*“The child’s adaptation to the present and to the immediate future demands too much from him for us to use a big part of his time simply familiarising him with the dead, or satisfying a vain curiosity regarding what once was.”*<sup>13</sup>

Active teaching favoured children’s adaptation to their environment and their immediate needs. There was also an attempt to establish links with other subjects, such as Spanish and maths, natural science and geography. Contrary to the 1910 programme, students were the ones who had to identify with the events and show their creativity in the reconstruction of historiographic scenes. That is how the imitation and dramatisation stages were two important moments in the acquisition of knowledge about Chilean and universal history.

The programme recommended varying audiovisual media and encouraged the search for other investigation sources, such as newspaper articles, family conversations, testimonies, etc. The programme thus presented an innovative methodology based on action and discovery, calling for the development of curricular and extracurricular activities. Despite the various documents for the exploration of national history, textbooks were still considered an essential medium for teaching, and an indispensable material for teachers.<sup>14</sup>

The history of great figures of the country integrated new elements to allow familiarising with them. Thus, the biographies of heroes included elements from their childhood, youth and death. In addition, their image was no longer consecrated and they became common citizens, in order to achieve a certain humanisation of great heroes.

Another important aspect was the fact that there was greater emphasis on “historical stages” than on a chronological presentation of events. This programme also tended to bring back original peoples through stories about spiritual life and cultural contributions in miscegenation. New figures and heroes appeared, such as Galvarino, Lautaro, Tucapel and Rengo, and the *araucana* woman appeared through heroic figures such as Fresia, Tegualda and Guacolda.

Through the textbook as the main medium for history teaching, the intention was to act directly on society. The student-citizen was a producer and agent of progress. Through history education, nationalism transmitted the idea of work and social and moral merit. Work became a fundamental element in the understanding of national history and in the building of a country.

<sup>13</sup> Ministry of Education, Republic of Chile, *Programas de Educación Primaria*, Santiago de Chile, Ed. Bacells & Co., 1928, p. 207.

<sup>14</sup> *Ibid.*, p. 132-133.



In a post world war context where the League of Nations was created, Chilean contemporary history emphasised the positive aspects of the rise of progress and world peace. In this sense, the history programme translated the need to emphasise fraternity among nations.

The 1928 reform was replaced with a counter reform programme enforced by General Ibáñez's administration in 1930, but it maintained the main pedagogical orientations.

The idea of nation was redefined in this first half of the 20th century. Its image included new elements, such as the expressions of local cultural particularities. An image of the nation was built through everyday elements in order for it to become "a natural horizon of everyday life"<sup>15</sup>. The popular dimension recovered its importance in the reformulation of the national identity that sought a new consensus, emphasising the feeling of *chilenidad*. For that effect, in 1941 a plan was created to accentuate the feeling of *chilenidad*<sup>16</sup>, based on which the idea was to educate optimistic, healthy and vigorous generations.<sup>17</sup>

History textbooks reflect pedagogical intentions and political orientations that are expressed in a particular national and international context. During the first half of the 20th century, the concept of nation covered a social, economic and political dimension, but also an aesthetic and cultural dimension through education. In this sense, the contents of the history programmes experienced changes. However, western cultural criteria and aspects of rural and cultural life of the central region of the country were still the main elements in the building of this image of the nation.<sup>18</sup>

### 3. Second half of the 20th century: the citizen as protagonist of social changes

The 1965 education reform (Decree 27,952 of December 4, 1964) represented another important milestone in the evolution of the contents of history textbooks. First, there was a visible change in its presentation. Textbooks with colour covers were published, as well as with new illustrations, drawings and photographs, including creations by illustrators from the publishing houses. The programme changed, emphasising more on the evolution of childhood and adolescence and their relationship with the environment. Children's sociability came to represent the participative role in a particular group that shared common orientations and interests with other members. This participation in the social history of their environment represented an important orientation of the programme: the citizen-actor, protagonist of the social, political and economic changes of society. A collection of the CPEIO entitled "the new man" illustrates this purpose.

Social sciences that replaced history emphasised the integral education of the individual. Texts

<sup>15</sup> Anne Marie Thiesse, *La creación de identidades nacionales, Europa XVIII-XXe siècle*, Paris, Ed. Du Seuil, 2001.

<sup>16</sup> Ministry of Education, "Plan de acción de Ministerio de Educación Pública para acentuar el sentimiento de chilenidad", *Revista de Educación*, Santiago de Chile, June 1941, p. 62.

<sup>17</sup> *Ibid.*, p. 65.

<sup>18</sup> Teachers could resort to the most widely used manuals, which were Francisco Frías Valenzuela's *Historia General, según el programa del IV año de Humanidades*, Santiago de Chile, Imprenta Nascimento, T. 1, 1933, 436 p. and also Walterio Millar's *Historia de Chile ilustrada, Texto auxiliar para las escuelas primarias y anexas a los Liceos* (approved by the Ministry of Public Education, Decree nº 1272), Santiago de Chile, Ed. Orbe, 1942, (5th ed.), 377 p. There were other texts, such as Luis Pérez's *Lecciones de Historia de Chile, 1937*, but they were not mentioned in the programme.

made people appreciate manual labour and technical work, guiding future citizens toward an intensive production, an “intelligent consumption” and the defence of natural resources.<sup>19</sup> One of the main objectives was to develop a teaching that was appropriate for the new techniques and the new organisation of work, aiming at the modernisation of production.

The nation was defined above all as a territory: production space. The concept of civilisation and barbarism was still present, in the sense of two opposing images of the rural world. The first view, representing a traditional rural world with a rudimentary craft production –the primitive state stopped in time– was opposed to an exploitation of the land as an element of modernity and social and economic wellbeing for the country: “civilisation”. In that sense, the USA was presented as a model of development. Thus, the ability to dominate nature determined a nation’s grandness. Implicitly, a parallel was established between the conquest of lands and man’s domination over them and a colonisation of those that were necessary for technical and productive progress. Therefore, the domination of nature was an important topic, because it gave origin to the national territory and also justified conquest and colonisation.

The concept of enemy external to the nation was not present. What was emphasised were the amiable relationships with neighbouring countries, adding the importance of negotiations with Bolivia due to the border problem.

Miscegenation appeared as the ethnical, violent factor of the nation, and its consequence was acculturation. There was an emphasis on the relationships of dominations and slavery that were generated. The myth of the Spanish contribution began to fade, emphasising the contribution of indigenous cultures in the formation of the “Chilean character”.

During this period, school textbooks underlined the collectivisation character of groups in the political functions of the citizen, and their economic role in work and in education: elements of social and economic progress. The message was clear: future citizens were called to participate in the history of their country with responsible attitudes, exercising their rights and duties.

Manuals insisted on the social and political processes that constituted the history of nations. The citizen was active. The concept of political power referred to two key words: freedom and democracy. The organisation in groups was the basic organisation that allowed acting and influencing political decisions.

Thus, manuals were presented as texts that provided new elements, i.e. references and knowledge of civic education; they appeared as guides. For example, the chapters “How to participate in groups” and “How to solve problems that come up in groups” reflected this orientation.<sup>20</sup> The future citizen is both actor and social subject.

#### 4. End of the 20th century: patriotism and civil obedience to the nation’s values

The nationalist spirit was transformed at the service of a traditional image of the nation (1981

<sup>19</sup> Mario Leyton, Assistant Secretary of Education, Los programas de educación general básica, *Revista de Educación*, nº 12, November 1968, p. 13.

<sup>20</sup> *Hernán Godoy Urzúa*, *Ciencias Sociales*, 7 año básico, Santiago de Chile, Ed. Universitaria, 1970, 118 p.

reform). Patriotism replaced nationalism in discourses. The orientation of history teaching was specified in monthly articles in *Revista de Educación*.<sup>21</sup> Most articles referred to a historical event, a battle or a tribute to famous figures of the country. The view of the nation is essentially military, based on the concept of race and territory.

Contrary to the 1960s-1970s texts, history textbooks in the 1980s favoured illustrations such as reproductions of authentic documents, images with a historical value, etc.

Conquest made territories the origins of the nation as a physical space. Miscegenation was the ethnic origin of the nation. Within the representation of pre-Hispanic civilisations, miscegenation was presented as the encounter between two nations. In most textbooks, the Spanish contribution was valued in this “encounter”.

In the 1980s textbooks, history was evoked mainly through the personification of national history. The repetition of black and white images gave the impression of a history with no movement, a static visual impression. Politics was the consecration of power exercised by “models of a nation.” They belonged to the artistic, cultural, scientific, political and religious fields and were mostly military chiefs or heroes. Conflicts had to do with decisions of countries or Chiefs of State. There was no relationship between the countries’ politics and the role of citizens. In most textbooks, the 19th century occupied an essential part. For the 20th century there was a certain political homogeneity. The navy, policemen and the 1980 Constitution guaranteed national sovereignty.

### **TEXT ANALYSIS: WHAT FOR?**

Considering textbooks media sources that participate in the symbolic building of the nation and legitimise the idea of unity or cohesion of a national community, the issue presented today is the analysis of current textbooks. However, for such study it seems critical to do a retrospection on the contents of textbooks and on their corresponding programmes and political contexts in which they were produced.

On the one hand, investigating study programmes and manuals would provide elements for understanding the spreading of national identity at school. This investigation field would be an approach that would open up new investigation perspectives for the history of Chilean education.<sup>22</sup>

On the other hand, this type of investigation seems important for teacher training. That medium for the spreading of knowledge and cultural and political references includes content about “knowing how to be” and “knowing how to transform”. This school knowledge, which is mostly condensed and referential, should be explored in all its teaching, political

<sup>21</sup> Examples of articles: Ministry of Education, “La Bandera”, *Revista de Educación*, Santiago de Chile, n. 56, 1976. Manuel SOTOMAYOR OSORIO, “Mes de la Patria – cantemos expresivamente nuestro himno patrio”, *Revista de Educación*, Santiago de Chile, n.73, 1979. Humberto Barrientos Ortiz, “Los símbolos patrios y nuestros alumnos”, *Revista de Educación*, Santiago de Chile, n. 90, dic. 1981, etc.

<sup>22</sup> For a bibliography about Chilean textbook analysis, refer to the website of the UNED MANES investigation centre, <http://www.uned.es/manesvirtual/ProyectoManes/index.htm>

and historical dimensions. Such approach for the study of textbooks would allow a bigger pedagogical concern that could still take into consideration the “knowing how to transform” of new generations.

On the one hand, for the development of knowledge and skills that are necessary for a committed and participative citizenship<sup>23</sup>, we would have to think of an usage that makes students participate in the acquisition of knowledge, and textbooks should be a tool that encourages a critical spirit and a constructivist and investigative practice (including various documents and their sources, as well as various activities).

On the other hand, we must think about the social and political consensus that is created from textbooks. It is about studying the characteristics of the concept of citizenship and seeing how they are presented in textbooks. Analysing the content from a historic perspective would allow understanding the impact of textbooks in their time and the evolution of contents. Therefore, it seems interesting that they should be analysed through a quantitative and qualitative methodology that relates the text with its context.

Implicitly or explicitly, textbooks appear as guides that present lines of conduct, projecting social, political and economic models. In this sense, history lessons are considered a civic collectivisation medium for future citizens. In teacher training, we believe it is important to address these questions: how is the content of textbooks built? What do they use as documents, that is, with what media and for what purpose?

<sup>23</sup> Ministry of Education, *¿Cómo trabajar los Objetivos Fundamentales Transversales en el aula?*, Santiago de Chile, 2004, p. 82.



# 5

## **Content analyses in History and Social Sciences textbooks**

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# Pictures of Greenlanders and Samis in Norwegian history Textbooks

BENTE AAMOTSBAKKEN

## INTRODUCTION

**T**istory as a school subject has continuously to struggle with the choice of perspective when presenting historical facts and assumptions. By choosing to focus on one element the author runs the risk of excluding other elements. Authors of educational texts are used to cope with this dilemma, but authors writing textbooks for the curriculum subject of history have to pay a special attention with regard to mechanisms of inclusion and exclusion. The problematic aspects in the history subject have to do with the presupposition that history should deal with truth and facts. In history textbooks students mostly rely on validated conclusions which are thoroughly documented. The strict claims of documentation and validity represent a difficulty for the authors of history textbooks because the contents of the textbooks should represent facts, and not fiction, communicated in a comprehensible and precise manner. This article will draw attention to what I refer to as ‘a missing element’ in narratives related to the indigenous population in Norway. The missing element is related to the absence of the perspectives of the natives in the presentations of the conquest of new territories in Greenland and the northern part of Norway. A quotation from a Norwegian textbook in history from the 1970s will start the discussion of this omission:

*På Grønland bukket den norrøne befolkningen under på 1400-tallet, etter at forsyningene fra Norge hadde opphørt. Sammenstøt med eskimoer og hungersnød kan ha blitt for mye, og avgjørende var det kanskje at skip ikke lenger brakte tømmer og jern til Grønland.<sup>1</sup>*

*In Greenland the Norse population died out during the 15th century after the supplies from Norway had ceased to arrive. Skirmishes with the Inuit population and starvation might have*

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<sup>1</sup> Halvorsen, Terje and Tore Linné Eriksen, *Fortid og samtid: Norsk historie før 1870* [Past and Presence. Norwegian history prior to 1870]. (Oslo: W.C. Fabritius & sønner, 1978), 76.

*been fatal too, and the decisive factor might be that ships no longer brought timber and iron to Greenland. (My translation)*

The quotation reveals a rather one-sided perspective as the focus is solely on the fate of the Norse population. The Inuit population of Greenland is seen as a nuisance and no light is shed on the possible explanations for the skirmishes. Behind the surface of this short text you may detect assumptions like ‘the Inuit population is the troublemaker’, ‘the Norse population died out because of attacks from the natives’ etc. It might be claimed that it is unfair to isolate a quotation from its context. In a narrow sense the context is the chapter in the textbook in use in a classroom. In a broader sense, however, contextual factors like intertextual patterns of presentation of historical facts play an important role.<sup>2</sup> History textbooks are written and published in an intertextual manner, i.e. the books are structured like previous history textbooks and they contain to some extent similar narratives, conclusions and discussions found in older textbooks. The history textbooks more or less inherit structural and narrative patterns from previous literature. In other words, Nordic students are used to study the narrative of the Norse population in Greenland from the point of view of the colonists. It is of course quite natural to focus on the Norse population and its fate when you deal with Norwegian history in the secondary school. However, by choosing one clear focus you may risk excluding another. In this case the natives get little or negative attention in the quoted text. They appear in the text, but they are placed there just to underline the problematic aspects of the situation for the Norse population.

The theoretical concepts of intersectionality and intertextuality can be drawn upon to shed light on perspectives chosen in history textbooks. The use of these two concepts is not contradictory as they both are cross-disciplinary and based on various kinds of interactions. For instance, the concept of intersectionality has frequently been used to look into the relationship between majority and minority cultures. The Danish researcher Dorte Staunæs regards intersectionality as “a useful tool to trace how certain individuals tend to be positioned not only as different, but also as problematic, and in some cases also as marginalized”.<sup>3</sup>

In the example above the Inuit population is regarded not only as different but also as problematic. The concepts of intersectionality and intertextuality can be used simultaneously to analyse how the problematic and marginalized position of the Inuit population is revealed in various layers of the textbook. All textbooks are in fact striking examples of intertextual practice and intertextual ways of writing and thinking. The word ‘intersectionality’ etymologically refers to the process of crossing; i.e. lines crossing other lines or roads crossing each other. This

<sup>2</sup> For a discussion of intertextuality applied to the field of pedagogical and non-fictional texts see Bente Aamotsbakken, “Pedagogiske intertekster: Intertekstualitet som teoretisk og praktisk begrep” [Pedagogical intertexts: Intertextuality as theoretical and practical concept] in *Tekst i vekst: Teoretiske, historiske og analytiske perspektiver på pedagogiske tekster* [Text in growth: Theoretical, historical and analytical perspectives on pedagogical texts], ed. S.V. Knudsen, D. Skjelbred and B. Aamotsbakken, (Oslo: Novus forlag, 2007). See also Luis Ajagán-Lester, Per Ledin and Henrik Rahm, “Intertekstualiteter” in *Teoretiska perspektiv på sakprosa* [Theoretical perspectives on non-fiction], ed. B. Englund and P. Ledin (Lund: Studentlitteratur, 2003).

<sup>3</sup> Dorte Staunæs, “Where have all the subjects gone? Bringing together the concepts of intersectionality and subjectification” *NORA* no. 2 (2003): 101.

inherent conceptual metaphor has been used to illustrate the interplay between categories like race and gender.<sup>4</sup> Later on the “crossing” of majority and minority groups attracted attention, and today the concept of intersectionality is often drawn upon when categories like disability, nationality, ethnicity and sexuality are brought together.<sup>5</sup> In the example from the history textbook the Inuit population, who represents a minority group, is confronted with the intruders, the Norse colonists. The description of the Inuit population gives a rather threatening and destructive impression. The quotation from the textbook also reveals a possible link between starvation and the Inuit population. This textual connection is of course not visible on the surface of the text, but is hidden in the deep structure, where inferences have to be made to detect it. Consequently, the Inuit population does not only represent a problematic ethnic minority, but a true threat for the Norse population.<sup>6</sup> Intersections are thus made between the categories nationality, ethnicity and race.

Julia Kristeva has also used the expression ‘intersections’ when it comes to the crossing points between textual surfaces. However, Kristeva’s concept does not have implications related to recent theoretical reflections on intersectionality. Her concept is solely related to textual expressions, but all the same, it is worth while bringing her reflections into this context for several reasons. According to Kristeva the creation of new texts is dependent on the existence of previous texts, and the reminiscences transferred from one text to another, make intersections possible. Central metaphors in Kristeva’s theories about intertextuality are ‘texture’ and ‘mosaic’.<sup>7</sup> The metaphor ‘texture’ is related to the concept of implicit intertextuality, which implies that influence and patterns from previous texts are unconsciously integrated in new texts. Such patterns and influences are hard to trace, and the reader of the texts therefore experience a feeling of something “already read”.<sup>8</sup> The metaphor ‘mosaic’ on the other hand implies a type of intertextuality which is quite explicit. This kind of intertextuality is revealed in the text as references which are easier to trace. Furthermore, the explicit intertextuality implies a ludic attitude which plays with the reader and challenges his cultural and literal competence.

<sup>4</sup> For a discussion of the categories gender and race see Kimberlé Williams Crenshaw, “Mapping the Margins: Intersectionality, Identity Politics, and Violence against Women of Color” in *Critical Race Theory. The Key Writings That Formed the Movement*, ed. Kimberlé Crenshaw et al. (New York: The New Press).

<sup>5</sup> For developments of the concept of intersectionality see Nina Lykke, “Nya perspektiv på interseksjonalitet: Problem og möjligheter” [New perspectives on intersectionality: Problems and possibilities] *Kvinnvetenskaplig tidskrift*, no. 2-3 (2005): 7-17, and Leslie McCall, “The Complexity of Intersectionality” *Signs*, no. 3 (2005): 1771-1800. See also Susanne V. Knudsen, “Intersectionality - A Theoretical Inspiration in the Analysis of Minority Cultures and Identities in Textbooks” In: Eric Bruillard, Bente Aamotsbakken, Susanne V. Knudsen and Mike Horsely (eds): *Caught in the Web or Lost in the Textbook*. Stef, IARTEM, lufm 2006.

<sup>6</sup> As there are only very uncertain estimates on the number of inhabitants in Greenland in the century in questions, it is problematic to speak of minority versus majority population. There is reason to believe that the contact between the Inuit and the Norse population was poor. This is related to the fact that it is assumed that the Norse population starved when the climate changed and the possibilities to cultivate the land diminished. The colonists had not learned the Inuit way of life, which implied hunting and fishing to survive. Another reason for the poor contact between the two groups was found in the fact that the Inuit population were scattered around the country whereas the Norse population lived concentrated in the two small villages, Austrabygdi and Vestrabygdi.

<sup>7</sup> Julia Kristeva developed the concept of intertextuality. See for example Julia Kristeva, *Desire in Language: A Semiotic Approach to Literature and Art* (New York: Colombia University Press, 1980).

<sup>8</sup> Roland Barthes, “From Work to Text” in *The Rustle of Language*, ed. R. Barthes, 60 (Berkeley: University of California Press, 1989).

The conventions tied to the textbook concept are, as already pointed out, highly intertextual. The quotation above shows intersections with other similar texts in history textbooks. In other words, the sequence reveals, on the one hand, examples of well-known writing conventions and ways of presenting a theme, and, on the other hand, the same sequence clearly describes the native population as a problematic, but simultaneously a marginalized group. The interesting aspect of the sample text lies in the complexity revealed by intertextual patterns connected to the intersections of ethnicity, nationality and race.

The textbook also contains a paragraph concerning Greenland in which the focus is solely on the missionary achievements of Hans Egede. His efforts to introduce Christianity to the Inuit population are commented upon in connection with Danish control of Greenland:

*Det er først og fremst gjennom den misjonsvirksomhet blant eskimoene som nordlendingen Hans Egede drev, at det danske herredømmet ble sikret. I femten år først på 1700-tallet reiste han rundt, misjonerte og gransket landet. Han er blitt kalt "Grønlands apostel".<sup>9</sup>*

*It is first and foremost the missionary campaign among the Inuit population undertaken by the Norwegian Hans Egede which secured Danish supremacy. For 15 years in the beginning of the 18th century he travelled around, evangelizing and exploring the country. He has been named "Greenland's apostle." (My translation)*

Again the mention of the Inuit population is inadequate; i.e. they constitute a missing element. In the quotation, the focus is on the missionary achievements, and nothing is said about the potential impact it must have had on the native population. It is more or less taken for granted that mission had positive effects. Reflections on the belief in the force of nature and gods among the native population are not in any way integrated in the presentation.

Another striking feature in this brief fragment is the selection of verbal expressions. The use of words like 'secured' and 'evangelized and surveyed' conveys a positive view on the work of the missionaries. Consequently, the perspective once more belongs to the ruling class and administration. In the first quotation the verbal expression 'bukket under' (ceased to exist/died out) reveals a perspective linked to the fate of the Norse population in Greenland. In this expression, which has very negative connotations, a transfer of responsibility on to the native population can be sensed behind the textual surface.

The textbook also contains a chapter called "Kamp om kontrollen over Finnmark" (The struggle for control of Finnmark). This chapter represents a somewhat different attitude towards the native population than what has been seen in the presentation of Greenland quoted above. The difference might have to do with Finnmark's role as an attractive region for Norwegian control. Since Finnmark, the northern county of Norway was not defined by clear national borders and jurisdiction, this territory was exposed to colonial interest by the neighbouring countries Russia, Sweden and Finland. The textbook describes the attempts by the Norwegian

<sup>9</sup> Terje Halvorsen and Tore Linné Eriksen, *Fortid og samtid: Norsk historie før 1870* [Past and Presence. Norwegian history prior to 1870] (Oslo: W.C. Fabritius & sønner, 1978), 118.

government to get a firm foothold in this territory, and in this context the Sami population is mentioned. It is said about the Sami people that they were exposed to taxation both from Russian, Swedish and Norwegian authorities, i.e. before laws and regulation brought an end to this. In addition the textbook focuses on the Coast Samis who were forced to retreat to the inner parts of the fjords when the Norwegian settlers occupied the coastal areas. The quotation below does not make a major point of the fact that the Coast Samis must have faced considerable obstacles as the Sami population increased during the decades to follow.

However, the textbook is more nuanced in the description of the Sami population than in the corresponding description of the Greenlanders. This is seen in the tendency to choose modifying adverbs in the descriptive sequences:

*Den samiske befolkningen var ikke avhengig av konjunkturer og tilførsler utenfra. På 1500-tallet ble nok sjøsamene trengt bort fra sesongbebodde fiskeområder av den norske bosetningen, og de trakk seg lenger inn i fjordene. [...] Ved grensereguleringen ble flyttsamene sikret rett til flytting med reinen over landegrensene, uten å bli skattlagt i mer enn ett land.<sup>10</sup>*

*The Sami population was not dependent on economic fluctuations and supplies from other parts of the country. It must be admitted, though, that in the 16th century the Coast Samis were forced to retreat from the seasonal areas of fishing by the Norwegian settlers. They withdrew to the inner parts of the fjords. [...] Through the regulation of the national borders the Sami nomads were secured the right to move with the reindeer across the national borders without being submitted to taxation in more than one country. (My translation)*

The use of the modifying adverb 'nok' which I have translated with 'it must be admitted, though,' expresses the authors' hesitation regarding the situation for the Coast Sami population. On the other hand, it has been claimed that the Sami population was in a lucky position because of their self sufficiency. In other words, the perspective is once more twisted; i.e. the focus is drawn away from the situation for the Sami population and Norwegian settlers get the closest attention. This tendency lasts throughout the presentation.

### **TEXTBOOKS' DEPENDENCY ON PATTERNS - THE INEVITABILITY OF INTERTEXTUALITY**

The samples presented above originate from one single textbook, but a variety of textbooks in the subject history reveals the same tendencies to under-communicate the existence or the importance of the indigenous population. This way of presenting historical events for students have a solid tradition, and this tradition is rooted in what I want to refer to as an intertextual practice. In all sorts of textbooks the reader is unconsciously relying on intertextual phenomena like patterns, quotations with or without quotations marks, texts borrowed from other books,

<sup>10</sup> Terje Halvorsen and Tore Linné Eriksen., *Fortid og samtid: Norsk historie før 1870* [Past and Presence: Norwegian history prior to 1870] (Oslo: W.C. Fabritius & sønner, 1978), 114 f.

encyclopaedias etc.<sup>11</sup> This practice is very natural and almost axiomatic for everyone writing textbooks for any level in the educational system.

Since textbooks are designed to be readable for most students in an ordinary class or group, they tend to repeat the patterns from former textbooks. Textbooks in the subject of history are dependent on recognizable patterns and ways of depicting events and phenomena. The reader, i.e. the student and his and her teacher, expects to find certain patterns represented in exercises, follow-up questions, illustrations and textual elements. If these expectations are not fulfilled, the textbook and its texts will break down or not be taken seriously.<sup>12</sup> Roland Barthes has in one of his essays described the concept of intertextuality as “quotations without quotation marks”.<sup>13</sup> As mentioned above, he has also referred to the feeling of something “already read” or “dépjà lu”. The conscious reader or the user of textbooks strongly senses this when reading a textbook or making other use of it.

The patterns referred to above could in addition be regarded as “mental patterns” for everybody writing a text. In other words, such patterns seem inevitable. The author of textbooks consequently seems to submit to them and instead of trying to get rid of them or bend and stretch them in order to create something new.<sup>14</sup>

We should expect ‘something new’ when new educational reforms are launched and implemented. In the history textbooks there seem to be only minor changes when it comes to the presentation of such themes as referred to above. A relevant comparative basis for the presentation in the history textbooks is found in textbooks for the mother tongue. Both history and mother tongue are curricular subjects characterized by long body texts accompanied by exercises, illustrations and explanatory comments. In other words, these subjects have ample room for reflections, and we consequently want to look upon them as subjects fit for training the ability to reflect critically. If we look at the presentation of minority groups in Norwegian textbooks for the mother tongue we find that the same view on the indigenous population that has been revealed in the History textbooks lures in the background. The newest national curriculum in Norway (LK06) implemented in 2006, has, however, secured the position of the Sami language by claiming that all students should get acquainted with the Sami alphabet. An

<sup>11</sup> Graham Allen has reflected upon the more recent use of the concept of intertextuality. See Graham Allen, *Intertextuality* (London: Routledge, 2000). See also see Bente Aamotsbakken, “Pedagogiske intertekster: Intertekstualitet som teoretisk og praktisk begrep” [Pedagogical intertexts. Intertextuality as theoretical and practical concept] in *Tekst i vekst: Teoretisk, historiske og analytiske perspektiver på pedagogiske tekster* [Text in growth: Theoretical, historical and analytical perspectives on pedagogical texts], ed. S.V. Knudsen, D. Skjelbred and B. Aamotsbakken, (Oslo: Novus forlag, 2007).

<sup>12</sup> A striking example of an untraditional textbook concept is found in Egil Børre Johnsen’s textbook in the subject of mother tongue Norwegian. This textbook was untraditional and new due to its length or volume, and the bearing idea of having a fictional figure acting like a guide through all chapters in order to create coherence and recognition for the students. The textbook concept raised debate and got a lot of attention, but it proved too extraordinary to be sold. Although this example of an untraditional textbook practice occurs in a different subject than history, it may illustrate the problem of breaking with expectations and intertextual patterns.

<sup>13</sup> Roland Barthes, “From Work to Text” in *The Rustle of Language*, ed. R. Barthes, 60 (Berkeley: University of California Press, 1989).

<sup>14</sup> Michail Holquist goes even further than Julia Kristeva in grounding intertextuality in Bakhtin’s thought including the social and cultural contexts of his work. See Michail Holquist, *Dialogism: Bakhtin and his World* (New York/London: Routledge, 2001 [1991]).

example of the willingness to safeguard the Sami population's constitutional and educational rights can be sensed in a speech delivered by the Secretary of State, Lisbeth Rugtvedt, on April 25th, 2006, when she addressed a conference dealing with questions related to indigenous populations:<sup>15</sup>

Norway has a clear commitment to make arrangements so that the Sami population can secure their language and identity. This is a consequence of Norway's approval of the ILO-convention no. 169 "About indigenous populations and tribes in independent nations". Also the Sami statutes, the Constitution and the Educational statutes impose such an obligation on the Government. In addition to being a clear commitment, the preservation of Sami language and identity is part of what secures the cultural diversity in Norway and what enriches us as a nation. (My translation)

It is a clear contrast between today's official policy and the presentation of the Sami population in older textbooks. Today the Sami population are granted the same constitutional rights as the majority in Norway. The Sami language has obtain equality in status compared with the two official Norwegian languages. The textbooks in history tend, however, to describe and discuss problematic questions related to the Sami culture, and this tendency complies with the character of the subject of history; the students should be able to reflect upon events in the past.

### **THE FOCUS CHANGES?**

It is worth mentioning that more recent history textbooks seem to have shorter chapters about the Sami population than the textbooks in the 1970s and 1980s. One example in this context is Karsten Alnæs' book *Norges - og verdenshistorie før 1850* (Norwegian and world history prior to 1850) (1988). A revised version from the 1990s shows the same tendency. The Inuit population of Greenland is not mentioned at all, and the Sami population in northern Norway is dealt with in a short chapter of less than one page. A drawing of a Sami shaman accompanies the text. However, the presentation is balanced by the thematization of the violation of the Sami civil rights. This also applies for other frequently used history textbooks from the 90s and the 21st century (Eliassen et al. 1995, Grimnes & Nøkleby 1995, Libæk et al. 2001). But, a closer look reveals, however, that the same tendency to depict the native population as a problematic element persists. There is a clear tendency to depict the Sami history, consciously or more unconsciously, by showing the Samis in a biased way. When the intruders occupy Sami territory it is the Sami people that represent the problem. The power

<sup>15</sup> Under the following link Lisbeth Rugtvedt's speech is available: [http://www.regjeringen.no/nb/dep/kd/dep/politisk\\_ledelse/-Lisbet-Rugtvedt/taler\\_artikler/2006/Politiske-visjoner-og-satsing-pa-samisk-.html?id=113935](http://www.regjeringen.no/nb/dep/kd/dep/politisk_ledelse/-Lisbet-Rugtvedt/taler_artikler/2006/Politiske-visjoner-og-satsing-pa-samisk-.html?id=113935)  
The text in Norwegian language is as follows: "Norge har klare forpliktelser når det gjelder å legge til rette for at den samiske folkegruppen kan sikre sitt språk og sin identitet. Dette følger av at Norge har sluttet seg til ILO-konvensjon nr. 169 om urfolk og stammefolk i selvstendige stater, men også sameloven, grunnloven og opplæringsloven gir staten en slik plikt. I tillegg til at det er en klar plikt, er ivaretagelse av samisk språk og identitet en del av det som sikrer det kulturelle mangfoldet vi har i Norge og med på å berike oss som nasjon."

to do justice to the Sami population rests with the author writing the text and in addition the editorial finish of the textbook.

## CONCLUSIVE REMARKS

In the study of Norwegian history textbooks above, an improvement of the level of objectivity in the description of the Sami population, their civil rights, language and culture is evident. When it comes to the Greenlanders and the territory of Greenland, it can be postulated that the country is still regarded as a colony, also in the more recent textbook in history. The colonial past of Greenland is history, but the depiction of the country in the Norwegian history textbooks is still affected by a rather nationalistic view on the issue. The indigenous population is rarely mentioned and its fate is not taken into account, also in the more recent textbooks. This difference in description offers an interesting distinction: when it comes to indigenous population within the Norwegian national borders, the history textbooks reveal more democratic and less racist views, but as regards the more distant regions like Greenland, the attitude to the native population has not changed remarkably from the 1970s up till now. This means that there is still need for more balanced view regarding the description of the indigenous population in Greenland.

## TEXTBOOKS

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# The illustration of Africa: africans in social science textbooks. Characteristics of the Colombian case

MARÍA ISABEL MENA GARCÍA

**T**he article deals with how illustrations of Afro-Colombian people appear in a sample of 20 Social Science mass-circulation textbooks for years 3, 4 and 5 (primary education) published in the 80's, 90's and the 2000. The analysis was organised into the following topics: emergence of the African community, subjects to which images are associated and how to promote Afro-Colombian studies from school iconography.

Through the issues above mentioned I intend to show how illustrations in textbooks are the consequence of theoretical anchorages built, imposed and strongly maintained over the history of Africa and racialised Africans. The bases for a country that has ethnic cleansing in its chore as the first step for the negotiation of the nation's edification were founded with this policy in which all *criollos* (people of pure Spanish descent born in Spanish America) that pride themselves in being the founding fathers are inscribed. The indigenous past had to be washed away and the embarrassing chapter of slavery had to be silenced. With this repertoire of images and a tragic memory confined to silence as a constitutive essence of Colombian pride, the Afro-Colombian iconography exposed in textbooks does not facilitate the teaching of a history worthy of the slavery-descendant communities.<sup>1</sup> The people illustrated arise with a double purpose: first, they are put within the reach of children; second, they are images of people through which a repertoire was formulated at the end of the 18th century and fixed during the 19th century that allowed the classification of human beings into hierarchical types (racialised).

Thus, the images that appear in the pages of their textbooks are part of the intellectual ruptures that need to be forged in the implementation process of the subject of Afro-Colombian Studies.<sup>2</sup>

<sup>1</sup> It refers to the communities that were hunted and transported as merchandise to different places in the planet; the basic argument of this serfdom was that because of their skin colour they were considered beasts of burden.

<sup>2</sup> The CEA (*Cátedra de Estudios Afrocolombianos*; in English, Afro-Colombian Studies) is a legal instrument (decree 1122, year 1998), which established the compulsory condition of implementing studies about Afro-Colombian communities for the educational system.

Analysing stories constructed in textbooks about the African population, in the light of comparative studies (in this case Colombia-Chile), would allow the strengthening of the inclusive view that all countries in the diaspora should have in the constitution of a progressive and intercultural educational system.

As an introduction to the subject, it must be said that there are two components of important validity for Afro-Colombian studies. On the one hand, the recognition of the obscurity with which the academy has dealt with the topic of Africa and its descendants, according to which the intellectual Kalulambi said that “the presence and development of Africanism in Colombia could be put in a shy perspective, which still had not generated an intellectual and investigatory trend that could have bearing on a radical or critical change in the embryonic and primary views and readings that have been made of Africa from Colombia by intellectuals, investigators, educational institutions, social movements and leaders.” Surely, questions such as how much we know about this issue in our passage through primary and secondary school, come to mind [Dosage about Africa: Preschool = 0; Primary school, years 3 – 4 – 5 = Colony, year 6 = 0; Secondary school, year 7 = Egypt, years 8 and 9 = slavery and new conflicts, years 10 and 11 = junctures]. It goes without saying that in universities, in the specific case of Colombia, there is no offer that allows the removal of the euro-centric knowledge from which the academy nurtures itself.

It is thus clear that educational systems are indebted to their third root, for the African diaspora community as much as for the collection of students that, of course, includes society in general insofar as the construction of a national memory was instituted on the exclusion of 26% of the Colombian population.<sup>3</sup>

In second place, the historical conditions that textbooks reflect keep a frozen view over the come about of Afro-Colombian peoples. Díaz shows that “a good example of this is the study of Afro-colonial cultures, a problem that is still weakly and precariously addressed in social investigation to achieve a deep historical comprehension of black Colombian population.” This perspective does not allow them to be included in the teaching of history as heroes and heroines in the construction of the nation and, as such, to have the conditions to dispute the position of the country’s architects.

This document is part of an investigation that has been in the fortunate situation of having the following junctures:

- A Master’s thesis titled “La historia de las Comunidades afrocolombianas a partir de las ilustraciones contenidas en los textos de Ciencias Sociales para la educación básica en Bogotá” [“The history of Afro-Colombian communities from the illustrations in Social Science textbooks for primary education in Bogotá”] 2004-2006.
- Pressure groups installed in the Afro-Colombian movement willing to talk, without fear and with their names, about racism and racial discrimination; declaration about

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<sup>3</sup> It is one of the official figures with greatest consensus in the country.

slavery as a crime against humanity and therefore worthy of compensating its victims, from which demands upon historical amendment arise.

- A bicentennial that supports independence and summons the old question of who the descendants of the transatlantic traffic are, *those who did not arrive on Columbus' ships* and their imprint in the countries of the African diasporas.
- Some historical processes that question the legitimacy of the school history contained up to now in various devices such as textbooks, the CEA lineaments, and national and local museums and archives.
- The possibility of an Afro as the empire's president.

In the state of the art, there are some consensuses on the analysis of texts. They are cultural devices, which point to the *paideia* of an epoch, replace and complement the teacher's work, and are beginning to be seen as the main alternative of bibliographic consumption. In the case of school history the dilemma is between learned history and dreamed history.

Textbooks are immersed in the middle of the problematic tension between the school discipline and pure history. They constitute a kind of booty between historians, teachers, Social Science professionals and publishers, which come to solve the matter by joining one another and filling the contents and images in the texts with elasticity. Every time it is more necessary to consider that there are elements that enter the sphere of our reflexion, such as Social Science and CEA lineaments, videos, movies, hypertexts (of course, there is the strong presence of the Internet in our lives). The documents produced by the organisations themselves constitute another actor that is entering the public policy.

- The antecedents in this investigative work took into account, besides the aforementioned, studies on:
  - History (learned)
  - History teaching
  - Analysis of textbooks
  - Analysis of textbooks and racism
  - Iconography - Illustrations
  - Representations and imaginaries
  - Coded CEA textbooks

The general objective of this work is to show the emergence of Africans in Social Science (history) textbooks in order to promote the teaching of African history in compulsory education.

Methodologically, this considered several aspects. On the one hand, there was the critical analysis of content, which makes it possible to show the symbolic burden texts have. On the other hand, it was necessary to go into the discussion proposed by the historian Meter Berke, who belongs to the third generation of the *Annales School* historians. They are the ones who begin the discussions on historiographic sources; icons, altarpieces, and photographs are

considered sources of rigorous fidelity for cultural studies. Images turn, according to this author, into admissible testimonies of the different types of history. The corpus considered 20 texts from those publishers with the longest tradition in the publishing market and, on the other hand, illustrations in texts with shorter trajectory were also observed.

The participants were mostly teachers from 4 Colombian departments: Bogotá, Casanare, Antioquia and Valle del Cauca. In general terms, the following perceptions have been developed in reference to the subject:

- All peoples have had slaves.
- Africans themselves participated.
- When segregation scenarios are presented the subject turns away from Colombia, illustrating the United States and the South African apartheid.
- There has to be no discrimination, we are all equals.
- God created everybody as equals, why return to democracy.

Many participants are missing, but especially when I travelled around several places I thought everything was clearing up and taking shape. However, an Afro-boy brought me back to the shocking reality of racism and its implications in boys and girls.

Closing the introduction of school illustration which may constitute a historiographic referent of African history and its diasporas, I am going to bring up my second commitment with this presentation: the emergence of the African community.

### **WHAT DO IMAGES ABOUT AFRO-COLOMBIANS SHOW AND IN WHAT ROLES DO THEY APPEAR?**

Images are situated in the colonial times, silencing the power of the millennial African history previous to the enslavement. Bodies are shown with chains and shackles, heavy trades, and hullabaloo. Africans disappear from national history; there are no Afro-heroes to have given their lives for the formation of the nation. Let's remember that foundational myths define themselves in a society according to places, characters, emblematic phrases, and busts zealously safeguarded in national and local museums and archives. The national memory ingredient is set in italics, inasmuch as, because of the analysed texts, there are important regional shades when analysing.

There is another striking element. Illustrations that appear in texts have no available sources as for where images come from, and its respective tracing leads us to the owner of the images: church, art and science. In some textbooks, there is not even a bibliography to situate a little bit, and in a preliminary way, the tendencies or types of historical writing that are shown in the texts.

As all of the above is missing, it can be concluded that these devices are not suitable texts to sustain curricular development of CEA. In timely fashion, I considered it necessary for there to be a proposal to adapt, complement and design texts as an input for Afro-Colombian studies

according to the implementation needs of CEA. In that same sense, appealing for measures such as the right to historical (true) representation, would force the redefinition of the ancestral stigmas from which Afro-Colombian communities have been illustrated.

### **ABOUT THE EDUCATIONAL AMENDMENT**

The discussion about the Afro-amendments needs to be linked to the non-stereotyped right to information as a sort of non-negotiable and hence, indivisible right. There is also an intention to facilitate primary education students' access to relevant, fair and updated information that will generate conditions for future citizens to incorporate the most significant conquests of the African peoples and their fight for dignity. Of course, if we knew what history school iconography corresponds to, we could comment on a less-lost-in-time-and-space story (deconstruct their own discourse).

- These sources are almost exclusively on traffic and slavery.
- These illustrations could be sources available for children if seen through inter-disciplinary analysis.

The power of story telling in schools makes these institutions define what is worthy of remembering and those events that it is advisable to forget. Because of this, it is necessary to collapse traditional historiography and do the follow up of actions that contain double amendments: one for the transatlantic traffic and another for the intense armed conflict which Afro-territories live. Consequently, that iconographic deconstruction would also imply the denaturalisation of what up to now has been shown as normal, generic and, hence, universal social orders.

### **HOW COULD THESE ILLUSTRATIONS PROMOTE AFRO-STUDIES?**

Now let's explore an idea of how to use this iconography.

The first consideration is that the extremes the Afro-topic has reached need to be left behind. On the one hand, nobody can talk about it, because as it is such a delicate and complex topic it turns into the monopoly of a minority that speak in the name of 26% of the Afro-Colombian community. This is a situation that is investigated by more scholars every day, but which basically continues in the hands of the same experts it has been in for years.

On the other hand, anyone without a minimum knowledge can speak in the name of the Afro-Colombian people. In this sense, festivals, gastronomic activities and, in general terms, folklore are turned into emblematic elements of the work done in the name of these communities.

Without leaving the power these strategies may have aside, I would like to propose the use of images to speak of African history without the need to turn to other contexts and situations that are supposedly similar, but are of a different nature, actually. The exercise herewith suggested is an example, just an idea to use school iconography in favour of African history.

Start by putting different texts for the eye to get used to them, make the exercise flow, allow children to comment what they see. These students' expressions should be the starting point for a habitual and organised reflexion (problematizing curriculum).

Avoid mixing situations that are different in the historical colonial context (they were all discriminated: Afros, indigenous people, women, and the poor). Save a specific place for the African topic, and when you feel that you are moving away from it towards other processes, take up the speech thread again. This avoids the risky situation of suggesting a specific curriculum that ends up strengthening the invisibility of African history.

Some teachers are reluctant to present the African topic as a specific knowledge. For this group of teachers, all of Colombia is of mixed or indigenous ancestry and, in this sense the Afro-Colombian characteristics are an inexistent past. The identity of human beings is already an exhausted shapeless speech passed on by illustrations. It is urgent to recognise the incorporation of flesh-and-bone beings to the constitutional postulates of multiculturalism and to the pluralistic ethnic groups that live in the Colombian territory.

Teachers could clarify who worked the colonial economy in an objective manner through the illustrations labelled as "occupations", "professions" and "work". The situation in the mines, the climatic conditions of the country, the slaves' previous knowledge, the punishment they had to undergo if they did not work until they fainted, could easily be described when seen from some of the illustrations.

Because of the aforementioned, it is not convenient for this story to be told outside the official history. In fact, the exercise is set forth for the context of colonial history.

Link maps; spatial location is a good starting point as reference for other places. For example, imagining 15th century Africa in the 21st century is relatively easy with tools such as Internet, that makes it possible to contact the whole world. There is much information for you to find in projects such as the slave route, which was thought precisely to break the silence on traffic.

Organise the students' questions and concerns thematically. In this way, groups of students can be divided and responsibilities may be assigned. Questions such as "Why were they hunted?," "Why did they allow others to hunt them?," "What were they hunted for?," are queries that need to be sincerely and honestly answered. They imply reasoning from two different logics: one that considered life as sacred in all its manifestations, and another that, to reach power and hegemony, people would be willing to turn human beings into merchandise. Documentaries such as *Roots* have information that must not be underestimated. On the other hand, the integrity of a discipline such as history contributes to transversalise projects that involve different areas. Ethics, for example, could be helpful.

Do not hesitate to look for advice; the different institutions responsible for the CEA implementation should offer different kinds of training (from courses to postgraduate processes) to qualify

teachers. Avoid those offers that study in depth what you think you already know about the Afro-community.

Watch out for the effects of this work on the scholarised population. I agree with a group of teachers about the risk of the subject in classrooms where the population is basically Afro-Colombian and in classrooms where there is none of them or where they are a minority. However, the subject should not be avoided for these reasons.

We consider that the key in the example is to explore the history of Africa, not from slavery, but as the origin of humanity. It is up to the teachers' creativity to find some basic guidelines to work with Africa as a whole without fear, but with depth and respect.

Finally, the network strategy should make it possible to share doubts, queries, proposals, and mechanisms to go into and out of the topic. If this is not so, the matter will surely remain petrified in the hands of the hegemony. I believe that we will be able to direct everything but the teacher's will. If we manage to have forward-thinking teachers, we will probably stop repeating the visionary proverb that says: *Until lions have their own historians, tales of the hunt will always glorify the hunter.*



# Brazil in Latin America: The image of Brazil in History textbooks

JULIANA PIROLA DA CONCEIÇÃO

## INTRODUCTION

**F**or a long time, the idea of the need to organise a “feeling of Latin Americaneity” has been spread, considering the position of Latin America in the world context. From this intention, challenges emerged for History as school subject, because priority should be given to the construction of a national and Latin American identity where the history of each country should be considered together with the history of the American continent. A common past, a common history, a common future.

But how is it possible to have a common perspective in a Brazilian and Latin American identity, when Brazil is thought of as the “other one”, the “different one” (in the country itself and in other countries)? If we consider the construction of a Latin American social imaginary, is Brazil seen as an integrating cultural part of Latin America? Do Brazilians see themselves and/or are they seen as Latin Americans? The common representation of the history of Brazil as *exceptional, original or atypical*, when compared to the historical development of other Latin American countries, reasserts old prejudices and makes it even more difficult to think of an integration of Brazil in what is understood by Latin America. (Cristofoli in DIAS, 2004).

Starting from these general questions, I intend to discover what visual representations of Brazil are constructed and spread in Latin American History textbooks, and to investigate whether they contribute to the construction of representations of Brazil as an integrating cultural part of Latin America. In this sense, this discussion is inserted in a proposal to investigate education as a political strategy of diffusion and consolidation of representations in the context of Latin American political relationships.

The object of the investigation was two History textbooks belonging to Latin American countries of the end of the 20th century and beginning of the 21st: one in Argentina, which borders on

the south of Brazil and is part of the Southern Common Market (Mercosur), and the other in Colombia, which borders on the north of Brazil and recently signed cultural cooperation agreements with the country.<sup>1</sup> They are: the 1996 edition of the book *Historia: Europa moderna y América colonial*, by María Ernestina Alonso, Roberto Mario Elisalde and Enrique Carlos Vázquez, published by Aique (Argentina) and the 2003 edition of the book *Identidades 6: sociales*, by Vladimir Melo Moreno, Álvaro Chaustre Avedaño, Oscar Pulido Cortés, Claudia Alicia Rodríguez T. and Samuel Ávila Garzón, published by Norma (Colombia).

The choice of school textbooks as sources for this investigation is due to their multiple functions and their importance in the teaching of History, as a privileged instrument of communication of history and of construction and diffusion of a collective cultural memory and identity, which should be constructed by education. As stated by Agustín Escolano Benito (2001),

As a true educational micro-world, textbooks are also mirrors whose material frames reflect the characteristics of the society that produces them, the culture of the surroundings in which they circulate and the teaching that, as a self-referring system, regulates their use. (BENITO in OSSENBACH; SOMOZA, 2001. p. 35).

The use of textbooks as sources for a historical investigation also reflects affinities with Cultural History, mainly because of the appropriation of categories such as *representation* and *identity*, placing education and, more specifically, History teaching, as an investigation object that is vital for understanding the cultural formation of a society.

In this sense, I will use as base the concept of *representation* created by Roger Chartier (1990), and the definition of *identity* proposed by Sandra J. Pesavento (2004).

Because work belongs to the category of “knowledge to be taught”, seeing textbooks as instruments of the teaching-learning process whose discourse can be modified or re-signified, this investigation is also situated in the study of the curriculum as an important element of school culture. Thus, I will use the definition of *curriculum* proposed by Jean-Claude Forquin (1993).

For the reading and analysis of the images chosen for the investigation, I will use as foundation the methodology applied by Alberto Manguel in his book *Lendo imagens: uma história de amor e ódio* (2001), where priority is given to the history suggested by the title of the book, the story of how the book came to be, the story of the creator and the vision of the spectator.

### **THIS OBJECT, THE TEXTBOOK...**

School textbooks, seen here as objects in circulation loaded with representations for the construction of a national and collective identity, are a rich source for the constitution of

<sup>1</sup> One of the agreements seeks for cooperation, exchange, promotion and diffusion of the Afro-descending culture, and the other is oriented towards conservation, with the diffusion of cinematographic works of both countries. Both agreements were signed on October 29, 2007 in Bogotá, Colombia.

a new historiography of History teaching, in the light of Cultural History. In this sense, that type of source can be used as an indicator of the project of social construction brought about by schools, serving as an instrument of analysis on the “mediation” that schools carry out between society and formation agents, which means interpreting part of their social function (CORRÊA, 2000).

As investigation objects, textbooks are slowly being seen as part of movements of reflection, re-signification and broadening of sources, approaches and topics, whose debates take place in different areas of knowledge, mainly since the second half of the last century. Especially within the Academy, many groups that bet on different approaches spread their methodologies and objects, seeking among other objectives to take on “places” in the academic discourse. Such movement was also noticeable in History and reflected mainly on the current conceptions that involve the intersection between Politics and Culture.

Considering the specific case of school textbooks, the most typical movement is the broadening of studies on the History of the Book. These investigations transcend the mere materiality of their object and cover imaginary and mentalities, but also reading and writing practices, their policies, representations and appropriations. Thus, it was in the field of Cultural History (and its boundaries with politics, economics and society) that investigations on school textbooks were most extended.

In Brazil, investigations on school textbooks have repeatedly linked History with Education. The re-signification of that boundary has restructured the concept of History of Education, which began to have a critical view of the present and the possibilities of transformation in the educational reality. In addition, the appropriate treatment of different types of sources and the interpretation starting from a rigorous conceptual foundation broadened the consideration of agents and the notion of historical facts. This investigation is consistent with that context.

### **IMAGES AND REPRESENTATIONS: POSSIBILITIES FOR INTERPRETATION**

In order to create an interpretative narrative of the selected images, I started from Alberto Manguel's annotations (2001), where priority is given to the history suggested by the title of the book, the story of how the book came to be, the story of the creator and the vision of the spectator. In that sense, the notion of common spectator and the concept of lay reader were considered. That is, since the approach focuses on images representative of Brazil from History textbooks produced and consumed in different Latin American countries, I took their readers into account – primary and/or secondary school students whose interpretation/appropriation is not conditioned by image analysis theories.

Thus, as did Manguel (2001), a systematic method of image interpretation was not considered, but the way in which emotions can affect the possible interpretations of the images by means of the interrelation between culturally anchored references. I thus consider that the images that surround us also make us who we are, so that images as well as stories inform us and take the place of direct perceptions, forming, (con)forming or (trans)forming identities.

Ana Maria Mauad (2007) affirms that images have a double function in textbooks: educating and instructing. According to the author, the group of visual images that make up a textbook can be considered as an iconographic group, historically defined in the dialogue with the current visual codification system, defined in social dynamics by the agencies that contribute to the social production of images (MAUAD, 2007. p. 111).

In addition, Mauad (2007) states that from an educational viewpoint, images are the medium of social relationships, symbolising in various ways those values with which society is identified and which she regards as universal, thus orientating the uses and functions of visual images in the process of constructing social representations that are considered educationally valid (MAUAD, 2007. p. 112).

In turn, João Batista Gonçalves Bueno (2001) comments that the use of images in school textbooks reveals the problem of manipulation of images as historical records. According to him, some textbooks go to great pains to include legends, reinforcing the idea that the information present in the text is correct. Others, on the contrary, leave out information about the authors of the paintings, which makes the reader see the image as a record that is produced at the moment of the historical fact. This editorial staging does not consider the multiple interpretations of the reading practice and limits the understanding of the text/image to those senses favoured by the author or editor. A didactic layout is created that, in most cases, aims to determine information irrevocably for the sense of vision, trying to present a truth that the reader must accept with no complaints. The author also poses the question of reading iconographic images in class, deeply rooted in cultural and historically constructed practices, determined to form students' interpretations.

On the basis of these considerations and by virtue of the object/source, it is not possible to base a coherent methodology or system of reading images in the same way as how we read writing (which is implicit in the code we are "translating"). Consequently, in a lay reader's interpretation of an image, the responsibility does not fall on the artist but on the viewer. However, in this particular case we should consider other determining factors of that reading, which are external to the production of the image but internal to the medium that presents them: the editorial stages.

For a better understanding of that process and aware of the impossibility of reaching a truth but only the largest possible number of approximations, I believe that the information about an artist's biography that is reproduced in a textbook must be taken into account, as well as the information about the biography of those people around him who, to some extent, determined the production of the work of art, as well as the tendencies, movements and changes that affected the world during that particular period.

This work methodology only allows glimpsing the possibilities of appropriations (always particular and not universal, despite that fact that there is a set of acquired conventions that must be considered) based on those images of Brazil reproduced in our source textbooks. They are clues for the readings, narratives, representations and appropriations formed by

interpreting generations and communities that lie between the production of the reproduced work (which was not created for that medium or intention) and a common viewer's reading.

Based on these brief considerations, I begin my investigation on the use of images for the construction of representations of Brazil in Latin America.

## **IMAGINING BRAZIL...**

### **1. Brazil in Argentina**

The first image to be analysed belongs to the book *Historia: Europa moderna y América colonial*<sup>2</sup>, by María Ernestina Alonso, Roberto Mario Elisalde and Enrique Carlos Vázquez, published by Aique in 1996.

The textbook is divided in six chapters, each of which has its own subdivisions. The chosen image appears on page 210, in the fourth chapter, and it is used to illustrate the Portuguese colonisation in Brazil during the 18th century. It does not include any catalographic information, but there is a brief explanatory text to its left:

*Casa grande* was the name of the house where the master of the *ingenio* and his family lived, and the *senzala* was the place where black slaves resided. The *ingenio* was the factory where sugar canes were processed and sugar was obtained. *Casa grande*, *senzala* and *ingenio* were the nucleus of the productive estate: plantations (ALONSO; ELISALDE; VÁZQUEZ, 1996, 210).

The image is actually called *Casa Grande do Engenho Noruega, antigo engenho dos bois*, and it is only part of the plan in perspective of the *casa grande* at the Ingenio Noruega, in Escada, Pernambuco - Brazil, drawn by plastic artist Cícero Dias around 1933 to illustrate the book *Casa Grande e Senzala* written by his friend Gilberto Freyre. Today, the original painting can be found at the Collection of the Gilberto Freyre Foundation.

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<sup>2</sup> This book was widely used in Buenos Aires during the second half of the 1990s decade, according to information from "Todo Libro", Buenos Aires, 2005.

FIG. 01 – CASA GRANDE DO ENGENHO NORUEGA, ANTIGO ENGENHO DE BOIS



Cícero Dias, 1933 illustration – Gilberto Freyre Foundation

The question is: why was this image selected when there were so many others to choose from?

It is interesting to note that the text at the top of the drawing emphasises the gold cycle in Brazil during the 18th century and scarcely comments on the decline of the sugar cycle by the end of the 17th century. Wouldn't it be more coherent to illustrate the gold cycle? Why did the team responsible for the book choose this particular image?

An internationally renowned Brazilian artist, Cícero Dias was born at the Ingenio Jundiá, Escada municipality, 50 km away from Recife (capital of the state of Pernambuco) on March 5, 1907. He was the grandson of the landlord of the *ingenio*, the Baron of Contendas, and the seventh of the eleven children of the couple made up of Pedro dos Santos Dias and Maria Gentil de Barros Dias. His childhood was no different from that of the other children at the *ingenio*, with games and tricks, the presence of the *cagaço*, visits to neighbouring *ingenios*, school and education. This childhood world also appears in the poem-like text created by Cícero Dias:

Havia então esse mundo fantástico: a casa-grande de Jundiá era uma casa-grande clássica, o assoalho era feito de tábuas de madeira-de-lei, a casa, uma casa absurda, cheia de histórias fantásticas. Caíram paredes, partiram-se telhados, a casa hoje está em ruínas, parede podre, carcomida pelos cupins, habitadas por fantasmas e lendas mágicas. Saudade de minha cama no Jundiá [...] (apud SCARPA, 2007).

As a child, Cícero Dias studied at Recife, but it was in Rio de Janeiro when, at the age of thirteen, the painter began having contact with the modernist movement. He registered at the Escuela Nacional de Bellas Artes, where from the start he showed an unstable personality. He began

studying sculpting and after a short time he gave up and switched to painting. His works revealed the rare world of sugar-cane plantations, furious passions and dreams.

He had a great interest in experimenting with new tendencies, an idea that clashed with the severe orientation of the Academy. He requested cancellation of his studies in 1928 and started studying on his own. That same year he presented his first individual exhibition.

In 1929, Cícero Dias went back to his home state. His time in Recife was a period of intimate relationship with his land and his people. Together with Gilberto Freyre he remembered the past at the *ingenio* and they walked around the *senzalas* of the whole state for almost a year, in search of material for Freyre's work, *Casa Grande & Senzala*, edited in 1933, with drawings by Cícero Dias.

After organising the First Afro-Brazilian Congress in Recife in 1929 together with Gilberto Freyre and Manuel Bandeira, and participating in the First Modern Arts Hall in 1931 with Lúcio Costa, Dias settled in Paris in 1937, where he spent most of his life, getting involved with surrealists, especially Paul Eluard and Pablo Picasso. He was imprisoned by the Nazis during the occupation of France and only went back to Paris after a call from his friends. Eluard compared Cícero to Picasso, saying they both combined the heritage of their homelands with the realisation of an art that was understood worldwide.

Cícero Dias died in 2003 at the age of 95 at his home in Paris. He was buried at the Montparnasse cemetery in the French capital. He was married to Raymonde and had one daughter, Syvlia, also a painter.

It was no chance that Cícero Dias illustrated the first edition of the 1933 *Casa-grande & Senzala*. The drawing of Ingenio Noruega, printed in the publication, is an immediate reference to the sociologist's work.

Quando Gilberto teve que procurar pintores para ilustrar Casa-Grande & Senzala, eu era o mais chegado a ele, e o que estava mais por dentro da matéria, por causa dos engenhos, dessas conversas todas. Então eu procurei me esmerar bem.

Mas os desenhos para Casa-Grande & Senzala são apenas de informação, de forma que são muito chatos, entendeu? Você não tem liberdade. Por exemplo, a casa-grande do engenho Noruega, tudo dela está lá no desenho.

Infelizmente a casa caiu, no tempo em que era governador Carlos de Lima Cavalcanti, que, por causa de brigas políticas, negou dez contos para preservá-la. Todas essas casas-grandes caíram. Essas casas todas, inclusive Jundiá, onde nasci, caíram (apud Bandeira; Fonseca; Polo, s. d.).

In her article *Laços fraternos: Cícero, Gilberto e Zé Lins* (2007), Olívia Mindêlo states that the ingenio is for Dias in painting as it is for Gilberto Freyre in sociology, since both were sons of the *casa-grande* and of the colonial culture that developed at Zona da Mata and which

permeate their work, not only because they were both born and raised there, but also because they were able to produce works of art based on those references. It was also the *ingenio* that created an affectionate bond between the two friends that lasted all their lives. Mindêlo also stresses that the subject matter in Dias's first works is directly linked with what inspired the work of other artists and intellectuals such as Gilberto Freyre, José Lins do Rego and Ascenso Ferreira, all of them considered to be regionalists-modernists.

In 1948, the author of *Casa-grande & Senzala* registered this. In the text *Presença de Cícero*, written in Paris, Freyre stated that more than twenty years before he and Dias had grown close “*para nunca mais deixarmos de ser companheiros da mesma aventura: a de procurarmos chegar ao universal através do regional*”. Freyre's first work was published in places such as Argentina, the US, France, Portugal, Germany, Italy and Venezuela, among others, becoming a representation of Brazil.

But why was the drawing in Gilberto Freyre's book used to depict the Portuguese colonisation in Brasil in the school textbook? Why was only part of the original plan used? What implications could that have for the construction of an image of Brazil?

Such questions guide us in the construction of possible answers, but they also lead our investigation toward the search for other clues; in this case, about the editing process and the teaching or illustrative function of images in school textbooks.

Textbooks are also mirrors of the society that produces them; that is, a space that represents values, attitudes, stereotypes and even the ideologies that characterise what historians call the imaginary of a period, which is also a parallel narrative of the dominant collective mentality. The images of school textbooks are then pretences of a community's social memory that intuitively transmit the explicit and hidden curriculum that the system promotes, accepts or tolerates. [...] However, the power of the iconic assures, even more uncritically and subliminally, the instilment of the sensibilities on which the image's language is based (BENITO apud OSSENBACH; SOMOZA, 2001. p 44).

When looking at the section of the drawing that was chosen for the edition of the textbook, we notice that in that portion there is a larger presence of black people: the kitchen, the *senzala* and the patio that separates the house from the *senzala*, a fact that can also be seen in the covers of the 20th and 26th editions of *Casa-Grande & Senzala*, from 1980 and 1989 respectively.

In some details that can be considered naïf, Cícero Dias represents almost literally some passages of Freyre's book, such as the games played by the landlord's children and their *moleque leva-pancadas* – “*espécie de vítima, ao mesmo tempo que camarada de brinquedos, em que se exerciam os ‘premiers élans génésiques’ do filho-família*” (FREYRE, 2003. p. 113) – in the scene where we see a white child holding a whip and lassoing a black child who tries to run away.



However, the problem does not lie on Dias's work and its later simplification and/or reduction, nor on Freyre's work, which has been systematically praised since its publication, but on the fact that by the end of the 1990s, Freyre's exotic Brazil still served as a parameter for the construction of representations of Brazil abroad, mainly in Latin America.

The representation of Brazil as "exotic", "different", the "other" Latin American country, detrimental to a vision of Latin America where similarities prevail – in this case, the process of colonisation, marked by the Iberian conquest and the transplant and adaptation for the new world of the corresponding institutions, whether in politics, law or religion; due to the extended systems of coercive work imposed on large groups of natives, as well as those brought from Africa, the cornerstone of production systems based on the concentration of property starting from the land and its produce – reasserts old prejudices and makes it even more difficult to think of an integration of Brazil in Latin America. Consequently, I believe that the way in which Latin American topics are presented in History teaching can many times result in a stereotyped vision deriving from the fragmentation of contents, which compromises the execution of an articulated work.

## 2. Brazil in Colombia

The second image to be analysed belongs to the school textbook *Identidades 6: sociales*, by Vladimir Melo Moreno, Álvaro Chaustre Avedaño, Oscar Pulido Cortés, Claudia Alicia Rodríguez T. and Samuel Ávila Garzón, published in 2003 by Grupo Editorial Norma.

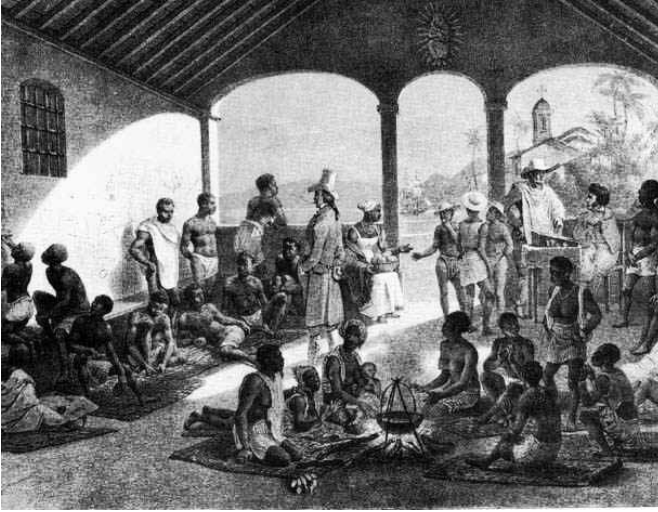
The textbook is divided in eight units, with their corresponding core topics. The second image chosen to be analysed appears on page 134 of the book, and it makes direct reference to Brazil.

The image is located at the bottom right corner of the page and as was the case in the Argentinean book, it is not accompanied by catalographic reference that may help the reader identify the work of art. There is only a short text at the top of the image that reads:

Engraving that represents the selling of slaves in Brazil during the 16th century  
(MORENO et al, 2003. p. 134).

The image is actually a faded portion of a painting by an important artist of the 19th century, Johann Moritz Rugendas (1802-1858), entitled *Slave Market*, from 1834.

FIG. 02 – SLAVE MARKET, JOHANN MORITZ RUGENDAS, 1834



Johann Moritz Rugendas was a German painter born in Augsburg on March 29, 1802. He studied at the Academy of Arts of Munich, specialising in the art of design.

He was born to a family of artists and joined Baron von Langsdorff's expedition, where he travelled all around Brazil from 1822 to 1825, painting scenes and landscapes of the country. Rugendas was hired in 1821, at the age of 19, by Russian consul general Baron von Langsdorff to accompany him on his scientific expedition to Brazil, to paint urban and natural landscapes.

While in Brazil, the painter lived for two years in Rio de Janeiro, at Baron Wenzel von Marschall's house, making several trips to the city's outskirts. In 1824 Rugendas visited Minas Gerais, where he painted landscapes, scenes of native traditions and slave work. Upon his return, he left the expedition and was replaced by designer Adrien-Aimé Taunay. Rugendas began travelling on his own, visiting Mato Grosso, Bahia and Espírito Santo. In 1825, he returned to Rio de Janeiro and went back to Europe, carrying 500 drawings and approximately 70 paintings. In 1835, in Paris, he published the book *Voyage Pittoresque dans le Brésil* with help from naturalist Alexander von Humboldt, by Engelmann & Cie, in a luxurious lithographed edition. The work was translated into various languages, including Portuguese, by Sergio Milliet.

In 1831 Rugendas returned to Brazil and travelled around the rest of the continent until 1846, visiting various other American countries to paint landscapes and everyday scenes. From 1831 to 1833, Rugendas settled in Mexico, where he was politically involved, and then went to Chile, where he lived for twelve years. During that time he also visited Argentina, Peru and Bolivia, painting scenes of farm life and indigenous customs.

In 1845 Rugendas returned to Rio de Janeiro and made portraits of D. Pedro II, Empress Tereza Cristina and Prince D. Alfonso. He was invited to participate in the Exposição Geral de Belas

Artes. The next year, he travelled back to Europe, going through Salvador and Recife. Due to financial matters, he gave his collection of drawings and watercolours to King Maximilian II of Bavaria, in exchange for an annual allowance. Rugendas died on May 29, 1858, in Weilheim, Germany.

According to Paulo Roberto Pereira (2000),

Como os demais viajantes do século XIX, Rugendas era comprometido por princípio com a documentação de um mundo que permaneceu desconhecido devido às práticas defensivas e protecionistas da coroa lusa. Esse esforço documental incluía, porém, o registro da situação particular de percepção. [...] A tarefa de Rugendas não se restringia, portanto, à documentação de uma situação objetiva, envolvendo o esclarecimento do valor do dado sensório (PEREIRA, 2000. p. 81).

In the book *A América de Rugendas* (2002), Maria de Fátima Costa and Pablo Diener comment that the thematic amplitude of Rugenda's work has encyclopaedic characteristics and, according to the artist himself, his project consisted of “*tornar o mundo americano conhecido na Europa*”. The authors state that Rugendas's work is pioneer in the sense that it deals with geography in a global way, observing both the topography and the details of the natural, animal and human worlds that are unique to each region.

In every country he visited, Rugendas did not acquire the global vision of a circumstantial traveller. He was also involved and managed to “*ver do interior*” the life of young American societies. Thus, his works provide us with valuable historical content, rich in details, covering a wide perspective that is not limited to specific or anecdotic information (COSTA; DIENER, 2002).

However, the authors – who compare the hundred engravings made in Europe and published in *Viagem Pitoresca* with the studies and drawings made in Brazil – affirm that the transformation process that Brazil underwent with the artist is clear, because Rugendas wanted to paint for a public that was eager for the picturesque, which makes his work truly beautiful, but distances it from a documentary book. According to the authors, a commercial intention drove Rugendas to make concessions, using second-hand material. “*Não é um retrato fiel, mas uma visão poética do país*”, state Maria de Fátima Costa and Pablo Diener (2002).

Again, the question is, why, among so many images, was this one chosen? Why was only a portion of the original work used? Why was the image reproduced in black and white?

The first issue that should be questioned is the caption at the top of the image, saying it is an engraving that represents the selling of slaves during the 16th century. Rugendas, author of the original work, lived in the 19th century and his intention was to depict scenes and landscapes that he saw in Brazil during his travels, and not situations that happened 300 years before. The change of dates is a serious mistake and can have grave consequences for

the construction of representations of the past, entailing anachronisms. Moreover, it shows lack of concern for the historical truth from the people responsible for the textbook.

The second curious matter is that the proposal for the chapter in question refers to the “current” situation of Afro-descendants in America, but this is an image from the 19th century, referred to as belonging to the 16th century, used to illustrate the page of the book. This can confuse readers and lead them into error, and possibly make them believe that the selling of slaves is a current phenomenon in Brazil. Only with a careful reading of the text at the top and side of the image can they understand that the illustration refers to the origins of the Afro-American presence in America, and not to the present situation.

Another matter to be analysed is the fact that in the textbook, the image was reproduced in black and white. The argument of saving ink can certainly not be used in this case, because in the rest of the page some texts were highlighted in different colours, as is the case of the title and the dialogue box directly below it. The image was intentionally changed to black and white to emphasise the blackness of the main characters that make up the scene. The problem is that it is not explained to the readers.

Moreover, when comparing the image in the book to the original work, we notice that in the selected portion there is a predominance of black slaves who are almost nude, with their breasts visible, with detriment to the rest of the image where slaves also appear. That selection, which by no means is unintentional, carries a common representation of Brazil: the sensuality of black women or the so-called *mulatas* (a term that is used to name the slaves who were chosen for sexual exploitation by their masters). In this sense, the textbook reinforces that type of representation.

When examining the image closely, both the original and the selection, another detail calls our attention: the slaves seem very calm and not at all uncomfortable with the fact that they are to be sold. This fact is maybe linked to the image/representation Rugendas had of black slaves and slavery in Brazil.

In the chapter entitled “Usos e costumes dos negros” in *Viagem pitoresca através do Brasil* (1954), Rugendas comments:

Dir-se-ia que após os trabalhos do dia, os mais bulhentos prazeres produzem sobre o negro o mesmo efeito que o repouso. À noite, é raro encontrarem-se escravos reunidos que não estejam animados por cantos e danças; dificilmente se acredita que tenham executado, durante o dia, os mais duros trabalhos, e não conseguimos nos persuadir de que são escravos que temos diante dos olhos (Rugendas, 1954. p. 196)

Rugendas, as did Freyre almost one hundred years later, did not perceive the situation of black people in Brazil from the point of view of sadness and discontent. With both authors, what we see is an image/representation of black people who seem to have “negotiated” their freedom and who, even in situations of inferiority, are not upset.

According to Susana Dias (2006) in her article “O exótico e o pitoresco nas pinturas”, the analysis of the images of Brazil produced by travelling artists has been interesting for Brazilian investigators for a long time. This is due, in part, to the fact that these images say something about history, people and foreigners, about how cities were organised, the types of work and the plants and animals that existed, but also to the fact that travellers’ images tell us about the story of their authors, the places and societies they belonged to, the influences they received and transferred to their works, and the technical preferences they had. According to the author, that gives us the possibility of seeing ourselves through their eyes.

Dias (2006) states that the travellers’ images participate in the construction of the European and Brazilian identity in some sort of approximation and distancing, of establishing differences and similarities. In that sense, she quotes Elisa de Souza Martinez, coordinator of the postgraduate course in Arts of the Department of Visual Arts at Universidad de Brasilia:

Não é de admirar que predomine na maior parte das cenas pintadas pelos viajantes um Brasil exótico, reiterando a necessidade de identificar o nativo do Brasil como um ser diferente, produto de um mundo que não é europeu (MARTÍNEZ apud DIAS, 2006).

Susana Dias (2006) also comments on the impossibility of portraying the journeys around Brazil impartially and neutrally, because during their expeditions, most artists wanted to collect the greatest possible amount of visual information in a short time, and so they preferred drawings or watercolours on paper in small formats. Later on, mostly outside Brazil (as was the case with Rugendas), annotations, quick drawings and sketches were transformed into oil paintings on canvas or wood in a process that could last many months. In that process, journeys to the imaginary, to memory, to registers and techniques gave shape to the scenes.

The author affirms that many images were painted starting from common places in order to adjust to the European public’s taste, because when returning to their countries of origin, painters adapted their observations to the taste of the objective public of their works.

Given these considerations, we can conclude that, as was the case with the Argentinean textbook, the image used in the Colombian textbook reinforces the picturesque representations of Brazil – in this case, the Brazilian black woman who seems very calm as a slave, and whose sensuality is brought out by the artist – in detriment of an integrated vision of what black slavery truly represented in the continent.

Nevertheless, the textbook in question deserves to be valued for its intention of presenting the influence and permanence of black culture in Latin America as a whole, and not as a phenomenon that is exclusive to Brazil. The problem lies on making Brazil be remembered solely for being Afro-descendent, which again places the country in a position of being “exotic” and “different” compared to the other countries in Latin America.

## CONCLUSION

The objective of this investigation was to analyse the visual representations of Brazil that are depicted in Latin American History textbooks and to discover whether they contribute to the understanding of Brazil as an integrating part of Latin America.

In the analysed textbooks, we can see that Brazil is still represented as “exotic”, “picturesque”, the “other” Latin American country, in detriment of an integrated vision of the history of the continent, where what prevails are the similarities of our historical process, which makes it even more difficult to think of an integration of Brazil in Latin America.

In the Argentinean case, we see that the exotic Brazil of Dias and Freyre is still a parameter for the construction of representations of Brazil abroad, mainly in Latin America, which shows that it is very difficult to transcend the traditional historiography.

In the Colombian case, in spite of its innovative intention of presenting the history of America through the perspective of the construction of identities, the result is compromised when we observe that the said identity is still full of dissociated representations. The question then arises of what identity is intended to be constructed.

A point worth mentioning is the lack of concern from the people involved in the production of the analysed textbooks for providing catalographic information about the images used for the illustration. In the first case, the textbook included an image belonging to the 20th century to illustrate the 17th century, without warning the reader. In the Colombian case, the textbook included an image from the 19th century, saying that it belonged to the 16th century in a chapter that discussed the current situation of black slavery in America. Apart from that, there was no information about the authors of the original works or the changes made by the editors of the textbook. All that disinformation can confuse the reader and lead to errors. Consequently, great care should be taken when using images in school textbooks, mainly because they will be the foundation for the construction of representations that will permeate a collective social imaginary.

To sum up, this investigation allowed us to prove that, in spite of the advances in the official discussions about the need to construct a national and Latin American identity by means of History teaching in Latin American countries, school textbooks continue to include representations of themselves and of others that do not favour the construction of that identity, which leads us to question the place that those books take in History lessons and the possibilities of transcending that reality.

Regarding the difficulty of seeing Brazil as an integrating cultural part of Latin America, the question arises of what place Brazil should take.

The representations of Brazil included in the analysed textbooks are certainly a result of appropriations with History professionals, and they refer to the history they learned as children. Furthermore, as stated by Chartier (1990), the representations involve relationships of power and cultural practices. It is then worth asking the question of what relationships of

power are being questioned, stimulating the construction of dissociated representations of identity in Latin America.

### **SOME OBSERVATIONS**

The investigation starts from the consideration that, when dealing with school textbooks as cultural objects, taken as the main source of the investigation, they must be compared to other sources that allow the widening of the view for issues that consider, concurrently, the production of the textbook, its circulation and the appropriation of the representations they include.

Lastly, I believe that the appropriation of the representations is made, at least initially, by means of a free visual interpretation, particular to lay readers and common spectators: the students who read those textbooks. That thought was the basis of this investigation about the possible appropriations of the representations of Brazil included in History textbooks that are used in different countries of Latin America, and the construction of an idea of Latin Americaneity starting from contemporary political-cultural contexts.

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# The image of immigrants in Year 5 textbooks: a look into textbooks distributed by Argentine compensatory programmes (2006-2008)

MARÍA SOLEDAD BALSAS

## INTRODUCTION

**M**y purpose in this paper is to problematise the discourse strategies of the presentation of immigrants in Social Science textbooks for the second cycle of primary education (years 4 to 6). My interest centres on those titles which are most bought by the National State in the context of public policies for the provision of textbooks and their distribution in poor schools throughout Argentina from 2004 onward. Thus, I will analyse how the *others'* social image is built from the publishers' proposals the State buys and distributes. Thereby, I aim to critically revise the school discourse on immigrants and the processes of construction of national identities.

Within the chosen approach, Gramsci's (1995) *ideological hegemony* concept is fundamental to explain the organisation of common sense as a historical construction of the dominant class. The contribution of Althusser's (1988) structuralist theory of social reproduction is also valuable, as it states that schools constitute the main *ideological apparatus of the state*. Finally, Adorno and Horkheimer's (1985) conceptualisation on the role of *cultural industries* in the formation of social stereotypes are of great interest within this context.

## BACKGROUND

According to the diagnosis presented in the National Plan against Discrimination, studies conducted in Argentina on the image of immigrants in textbooks, indicate the "absence, decrease or disarrangement of the hierarchy of particular cultural groups such as Latin Americans, Orientals and Africans, while the hyper-representation of others is observed. From the textbooks and illustrations it is possible to reconstruct an imaginary in which blond people perform more valued and better paid activities than dark people" (Decree 1086, 2005: 175).

According to Cucuzza (2007), the scarce space given in textbooks to Afro-descendants is limited to isolated historical events. Generally, their contribution to Argentine culture is omitted.

The image of European immigrants in Argentine books has had the attention of several authors from various disciplines. First of all, Zelaya and Suayter (1990) have noticed the odd omissions that characterise compulsory texts in Tucuman between 1900 and 1940.

Even when the iconographic plane shows their massive presence in the national context, the term “immigrant” is not used in the more than one hundred books examined. This fact would answer to a non-integrationist strategy, which emphasises the foreign condition of the other tending to deny his/her establishment in the country. In second place, Braslavsky stresses “the hiding of relevant information, such as the presence of capitalists among immigrants, their cultural contributions -particularly in terms of ‘political culture’ -, their cooperative organisation into colonies and, according to the text, their diversity, and the false promises and harassment vast groups of immigrants were objects of” (Braslavsky, 1991: 67).

In relation to the image of Korea and Koreans presented in Social Science textbooks for the second and third cycle of primary education (years 7 to 9) in the Buenos Aires jurisdiction and in the Autonomous City of Buenos Aires, Mera and Iadevito (2007) emphasise the scarcity, lack of update, lack of forcefulness and decontextualisation of such coverage. With regard to the images included in books, the authors record a complete absence of references to Korean people. Curiously enough, photographs accompanying texts where they are mentioned refer to Chinese and Japanese people. In general, the assumptions underlying these operations of sense show a “classification of Asian countries as non-traditional or exotic countries” (Mera and Iadevito, 2007).

Regarding Latin American immigrants, Urribarri (1999) notices in Argentine History and Civic Education textbooks published during the 90’s for Polimodal Education (years 10, 11 and 12), a construction of MERCOSUR’s (*Mercado Común del Sur*; in English, Common Market of the South) citizens as enemies or “different and deviated” with respect to the “normality and naturalness” of Argentine ideas, values and traditions, even though it is not as rigid as in past decades. This image is based on a systematic reference to wars in which Argentina tends to be exempted from any responsibility, an issue which is also recorded by Brezzo (2001), who analyses the image of Paraguay in History textbooks. Since the origins of the National State, Argentine textbooks have shaped a negative image of Paraguayans and of their otherness anchored in the Triple Alliance War. Even though as of 1980 some basic premises of this representation begin to be questioned, the innovations observed turn out to be insufficient even to revert the generalised ignorance that characterises the approach to that country’s history.

When analysing Chile’s image in History, Geography and Civic Education textbooks used in Argentina during the second half of last century, Romero et al. (2004) observe that flows coming from neighbouring countries are associated, as opposed to what happens with European migrations, to the increase of poverty and urban marginality, to secrecy and the

diffusion of habits that are strange to national values, especially in older books. In this sense, while in textbooks published before the comeback of democracy an “essentialised national identity” is presented, as of the 80’s – although with different orientations and rhythms for each publisher - the definition of us gets more and more problematic.

Finally, Cruder (2008) makes an important contribution by studying images in textbooks for the first years of primary education published in Buenos Aires. In spite of their apparent heterogeneity – due to the abundance and colourfulness of the images included - it is possible to recognise in them a homogeneous scene characterised by a strong, almost monocultural imprint. Here, the references to the *others* are scarce and are based on the neutralisation of differences, distance and exoticism. According to the author, the new Argentine citizen grows under the shadow of a new homogenising denial, which is expressed overshadowing the national and Latin American characteristics according to the privilege of representations that tune in with a globalised culture and aesthetics.

## **GROUNDWORK**

Despite the numerous investigations devoted to the study of social images which textbooks contribute to constructing, little effort has been made in Argentina to investigate the impact of State purchases in this area (Llinás, 2005). In this framework, it is considered useful to carry out a diachronic study of public policies referring to the provision of textbooks in the local context in relation to the image of cultural diversity offered to students in poor schools. The need to evaluate the proposals included in textbooks bought and distributed by the State is founded on the interest in avoiding the legitimisation through schools of interpretations publishers build according to their own interests, which become the official discourse from State purchases. As Llinás (2005) suggests, it would be pertinent to exclude from State purchases those titles that present conceptual mistakes, antidemocratic or discriminatory values. “By constituting initial and, therefore, quite distinctive readings, [textbooks] may leave indelible prints in most children, especially, in those who have less cultural capital” (Fernández Reiris, 2005: 19).

Then, if the growing concentration and transnationalisation of the ownership of textbook publishers that operate in the local market is taken into consideration, the need to know better the ways through which textbooks currently contribute to modelling national identities, becomes a priority. According to Martínez Bonafé (2002), the economic and geographical expansion of companies in the area, together with the curricular homogenisation produced by the adoption of the Spanish educational reform model in several Latin American countries, Argentina among them, may have an important cultural repercussion in the medium term. In this respect, Beas Miranda maintains that there are no known investigations which confirm that there is, in fact, a development of a curricular homogenisation propitiated by the expansion of some Spanish publishers. He points out that “It would be as much as stating that there is a neglect of national powers in educational matters, leaving one of the supporting elements of

the educational system, the curriculum, in the hands of foreign companies.” (Beas Miranda, 2005: 171). In this context, the question about the dangers of the naturalisation through textbooks of alien views to the educational system and, above all, of the National State’s own interests, presents itself as worthy of further study.

## **METHODOLOGY AND CORPUS**

This paper is based on a case study in which I considered some quantitative aspects. Starting from the content analysis, I have given particular attention to the importance granted to the subject as of the space dedicated to it, its position, its reiteration, the scientific forcefulness of the information offered, the relationship between text and image, and its relationship with valid curricular dispositions, among others. There are three books integrating this corpus and they belong to three transnational publishers. They constitute some of the main titles bought by the National State for the area of Social Science in Year 5, according to the resolutions approved by the Nation’s Ministry of Education, Science and Technology during the period of interest. The decision to base the analysis on the most bought titles is founded on the greater circulation this implies.

## **ON THE PURCHASE PROCESSES OF THE TEXTBOOKS SELECTED**

Over the last years, the Nation’s Ministry of Education, Science and Technology has conducted two textbook acquisition processes for the Second Cycle of Primary Education. The first started in October, 2005 and was approved in December, 2006. 3,343,713 books for a sum of 35 million Argentine pesos (11 million dollars, approximately) were bought with National Treasury funds, a budgetary item of the Ministry of Education, Science and Technology and an external loan granted by the Inter-American Development Bank (Resolution N° 1738, 2006, Ministry of Education, Science and Technology).

The second purchase process was carried out in February, 2008. This time, 14 million Argentine pesos (US\$ 4 million approximately) from the National Treasury were used for the acquisition of 1,333,844 textbooks (Resolution N°141, 2008, Ministry of Education, Science and Technology).

In both cases, there were ten publishers selected. Most of them are companies belonging to transnational groups: only two of the providing companies are of national origin. The list of Social Science books purchased for Year 5 includes nine titles which vary in quantity, even though they are the same for each process. It is interesting to observe that the greatest number of copies bought per title for the area of Social Science, belong to multinational groups. Purchases from national publishers are, generally, of little incidence, particularly in this area. In both cases, the contracts were signed under direct purchase of products.

## **ON THE CURRICULAR DISPOSITIONS**

Starting from the concern expressed by the Culture and Education Federal Council in relation to the fragmentation that the educational system experienced during the last decades, Priority Learning Nucleuses were established for all levels on education. They constitute a body of common knowledge, which tend to overcome the inequality and heterogeneity in the system, without promoting, as it is stated, its uniformity. They were elaborated by jurisdictional and national technical and political representatives and they came into effect in 2005. They are organised in three cycles and present a sequential structure.

As expressed in official documents, an intercultural approach is adopted, which favours the right to speak and gives space for cultural knowledge, appreciation and production of the most diverse forms of cultural expression of different rural and urban population sectors. In this context, intercultural education and bilingualism are recognised as fundamental to favour the interaction – sometimes conflictive - between culturally diverse groups. In this way, the need to strengthen the particular without leaving the elements that constitute common culture unattended is accepted. As such, the Social Science area that corresponds to the Second Cycle of Education is oriented to promoting a national identity that is respectful of cultural diversity, democratic values and practices, critical reflexion and analysis of messages proposed by the media, among others.

The contents for the Social Science area are structured around three axes: a) in relation to societies and geographical spaces, b) in relation to societies throughout time, and c) in relation to human activities and social organisation. Despite the acknowledged need to promote interculturalism and bilingualism, in Year 5 immigration does not appear as a specific content to be taught in any of the three axes.

Although it is said that “the knowledge and the development of a critical attitude towards the fact that in Argentina there are groups of people coexisting who have unequal access to material and symbolic goods” and “the identification of different cultural manifestations of the past and present in Argentina, analysing changes and continuities, as well as reflecting on the historic character of such manifestations” (Ministry of Education, Science and Technology, 2005), there is no explicit linkage established between these contents and the migratory phenomenon. In this sense, a bilingual and intercultural education without the recognition of the immigrant figure is, at least, incomplete.

## **CORPUS ANALYSIS**

### **Textbook 1: Ciencias Sociales 5 [Social Science 5], SM Ediciones**

This is the most diffused Social Science Year 5 textbook, as it records the greatest amount of purchased copies: 110,3351 between 2006 and 2008. It was published by a multinational

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<sup>1</sup> Own elaboration of information based on data expressed in Resolutions N° 141/2008 and N° 1738/06 of the Ministry of Education, Science and Technology, Argentine Republic.

company present in Spain and eight Latin American countries, which operates in Argentina since 20012. The book has fourteen units, included, in turn, in three thematic axes. Besides the contents of the area, it integrates others related to Education in values. As it is stated in the presentation, the proposal points at “promoting respect and appreciation for others (...)” (Textbook 1: 2).

However, the space granted to immigration is almost inexistent. The textbook only makes reference to the topic in relation to the study of demography. This time, the immigrant is defined in a generic manner: “people coming from other countries.” Next, the phenomenon is associated with the increase of population. Then, two questions are suggested as activities: “1. Is a person who is born in another country and lives in Argentina part of the country’s population? 2. What events can drastically alter the number of inhabitants in a country?” (Textbook 1: 39) (The highlighting is mine).

As it is clear from the aforementioned, immigration is constructed as a disturbance of the established order. It appears as a decontextualised and abstract phenomenon, which has weak ties with the student’s reality. Unlike the depth and diversity of elements proposed to approach internal migrations, in which maps, two photographs and a more extensive text are included, the information on immigration is scarce, abstract and incomplete and it does not include visual aids. Are all people from other countries immigrants? What distinguishes a tourist from an immigrant?, And from a refugee? There are no allusions to immigrants’ countries of origin or to the motives which favour their movement. Then, nothing is said about the immigrants’ situation in the countries of destination.

Despite the acknowledged importance of respect and appreciation towards the other, the approach to immigration-related contents shows a schematic view that, more than expanding the student’s comprehension about the phenomenon, tends to question their belonging to the Argentine society and to emphasise their number as a negative factor.

### **Textbook 2: Ciencias Sociales 5 [Social Science 5], Serie del Faro, Kapelusz**

This book belongs to a publisher with a vast background in the national sphere, which was founded at the beginning of last century by an Austrian immigrant (Landau, 2006). Currently, it is part of a publishing group based in Colombia and present in most Latin American countries as well as in Spain<sup>3</sup>. It constitutes one of the two most bought proposals by this publisher for Year 5 in the Social Science area. There are 52,4254 distributed copies in the period of time studied. It is divided into eleven units, each of which includes Ethical and Civic Education and Technology contents.

The view on national identity proposed here is anchored to territory, among other symbols:

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<sup>2</sup> [www.edicionessm.com.ar](http://www.edicionessm.com.ar)

<sup>3</sup> [www.carvajal.com](http://www.carvajal.com)

<sup>4</sup> Own elaboration of information based on data expressed in Resolutions N° 141/2008 and N° 1738/06 of the Nation’s Ministry of Education, Science and Technology, Argentine Republic.

“Cartography, as a graphic representation of the territory, contributes to the strengthening of the feeling of belonging to our country. Maps included in textbooks, newspaper articles and other publications within popular reach, have surely allowed you to have a more precise idea of the shape and extension of our territory, and to associate them to our country’s identity as much as the flag or the national anthem” (Textbook 2: 25) (The underlining is from the original text).

Just as Smith (1997) states, in those nations that were formed from successive waves of immigrants, as it happened in Argentina, the need to forge a coherent mythology and symbolism based on the cultural components available arises as an indispensable condition for survival and national unity. According to Devoto (2003), these strategies were particularly effective to create the nation’s imaginary community in its early days. But, what is the purpose of their inclusion in current education? Does it perhaps arise as a consequence of the presence of an *other* that is supposed to be massive?

Despite not being part of the prescribed curriculum, the book devotes several pages to the migratory phenomenon. Most of them are included in the third unit, which deals with population, its composition, and its distribution, among others:

“If the structure or composition of the Argentine population is analysed, the following can be observed: (...) Composition according to birth place: it divides the population into two groups, the natives or people born in the country and foreigners.”

(Textbook 2: 56) (The highlighting is mine).

A pie chart accompanies the text and informs that 95.8% of the population, according to the last National Population Census, is of native origin, while the remaining 4.2% corresponds to foreign population. In this last case, a detailed report is given for each continent, with America being one the most numerous with 1,041,117 residents in the country. In second place, Europe appears with 432,349 people. Asia comes third with 29,672 respondents. 1,883 inhabitants of African origin are recorded and only 747 from Oceania.

Throughout the book, the demographic growth of countries such as Bolivia, Peru, Brazil and Mexico is also highlighted in contrast with the scarce population growth registered in Argentina. Likewise, the fact that immigrants contribute to the demographic growth of Argentina is also explained. However, there is an insinuation that this “contribution” turns into a problem when in other parts of the book it is said that “the excess of population makes it hard to find a job” or when superpopulation is associated to environmental and social problems. In this sense, immigration is not related to the capital’s need for a greater availability of labour in order to cheapen production costs, or to the expansion of the consumer market, or with the dynamism which characterises intercultural societies (Solé, 2001).

Then, through a text which occupies most of the space and a graphic organiser that indicates the direction of the flows produced from and towards Latin America, the topic of population

movements is deepened. There is reference to their typology and the motives that provoke them, among other aspects. In the text, Argentina is described as a country of “emigrants and immigrants”, even though in the map the country is coloured in pink, the colour that identifies receiving countries. While in the text the United States and Europe appear as the main destinations of Argentines, in the map, the flows coming from Argentina go towards Spain, Brazil and the United States. There is no mention in the text or in the map of Argentine immigrants in other frequent destination countries such as England, Germany, Israel, Italy and others (Novick, 2007).

Regarding the incoming flows, the text states that “(...) the country receives population from bordering countries, Peru, Eastern Europe and Asia (Korea, China), even though in less quantity than last century” (Textbook 2: 58). This last idea is ambiguous – it could be interpreted from it that the immigration the country received last century came from specific countries - and it seems to contrast with the census figures reproduced in the preceding pages. Except for the flows coming from America, the rest of them are not represented in the map. Curiously enough, the source of the represented data is not indicated. In this way, the image of Argentina as a receiving more than a sending country prevails.

In the next page the following text is reproduced:

“(...) currently, these two parts of America [it is referring to Latin America and the Anglo-Saxon America] also differ in their level of economic development and the demographic characteristics of their population (schooling, health, life expectancy, among others). While the Anglo-Saxon countries in America are developed and industrialised, the Latin American ones are developing or scarcely industrialised” (Textbook 2: 59).

According to van Dijk (2005), this is a simplistic and stereotyped view of the continent that says nothing about regions, rich classes or people from central and southern countries, or about the poor and excluded from the northern countries. This description contradicts what is described in the following pages:

“Respect and appreciation towards ethnic diversity. America is a continent of great ethnic diversity. Indigenous people, conquerors and immigrants are part of our history and our culture is a result of it. To recognise this reality and respect it is the State’s task as well as ours. It is part of our obligations as members of society: to recognise, respect and promote ethnic and cultural diversity; to avoid the exclusion of minority groups; to fight discrimination and racism in order to achieve a society that is fairer, multicultural and united in its diversity; to compensate social inequalities, not just tolerating differences, but respecting, valuing and accepting them as well. The right to cultural identity is a fundamental human right and the basis for coexistence and national unity” (Textbook 2: 64).



Even though the term “immigrant” appears, the text is included in a section related to Ethics and values in a reading on indigenous rural population.

Unit 9, which is devoted to the study of America under the Empire’s regime, proposes a text on race and racism, where the following paragraph is included:

“The concept of race does not help to explain human beings’ behaviour, because there are no inherited biological factors that determine how a person is going to behave – such as lazy, shrewd or dominant behaviours. All human groups have the same characteristics. Currently, investigators do not speak of “race” anymore but of “population” to explain how human beings adapt to physical, ecological and cultural environmental contexts.”

(Textbook 2: 177) (The highlighting is mine).

According to Gvirtz et al. (2005), the replacement of the term “race” for “population” does not seem to imply here a deep conceptual modification. Even though the genetic interpretation of racism is questioned, a form of racial division with a strong cultural and territorial imprint still survives.

This is even more evident in the photograph accompanying the text. Seven children of both genders and diverse origins can be seen in it. In the centre of the image, a fair-skinned blond girl is surrounded by two boys who are presumably of Latin American origin. Further away there is an Afro-descending little girl. In the second row, behind the main character, another blond child is seating next to an Asian boy who, given the adopted perspective, occupies the background of the image. Contradicting what the text suggests, and despite the almost advertising idea of diversity proposed by the image, it is possible to recognise in it a certain hierarchy among the children posing for the photograph, and consequently, of the cultures they represent. Besides, the fact that the teaching of concepts of race and the phenomenon of racism is included in a History-related unit attracts attention. Thus, this is presented as a fact with scarce with current society.

From the previous information, it is possible to reconstruct an interpretation of the identity processes based on a nationalist view of us which is complemented by a subtle negative construction of the others. However, in this context not all immigrants are conceptualised as undesirable: only those who arrive in groups to fight for jobs, the access to services and to make trouble enter that definition. Despite incorporating contents related to racism, discrimination, human rights and the respect for cultural diversity, it is interesting to see that the immigrant is not constructed, predominantly, in relation to these topics. In general, the immigrant is not presented as a subject of rights but as a threat.

### **Textbook 3: Ciencias Sociales 5 Federal [Social Science 5 Federal]**

#### **Colección Las Mil y Una, Aique**

The third book belongs to a publisher with Spanish capital operating in the local market since 1976 (Wainerman, 1999). In the year 2000, it became part of a French multimedia company

with a strong presence in Europe, among other countries.<sup>5</sup> There were 37,555<sup>6</sup> copies of this proposal distributed between 2006 and 2008. Even though it is not between the three most bought books, it was chosen because it shows certain innovative features.

It has 147 pages divided into 11 thematic units. In two of them, the phenomenon of immigration is approached. Such units refer to the organisation of society and the living conditions of the Argentine population. Together with the concept of immigrant and the term “foreigner”, the notion of refugee also appears here. A black and white photograph, which reproduces the image of two coloured children and a coloured man who are skinny and sad-faced and carry bundles is accompanied by the following epigraph:

“Together with the deaths of human beings and the destruction of goods, wars also provoke other sufferings, such as the one endured by people who have to abandon the land and home where they live. In the picture, Rwandese refugees in Tanzania, 1994” (Textbook 3: 18).

As can be inferred from the previous quotation, the refugee concept appears linked to the African continent, to hunger and poverty. There are no references to ideological, religious or identity persecutions.

However, the information offered on the migratory phenomenon tends to be more precise and complex:

“The reduction of the percentage of foreigners and the modification of immigrants’ origin. Currently, only 4.2% of the Argentine population has been born in a foreign country. In 1914, 30% of the total population was of foreign origin” (Textbook 3: 59).

As can be seen in the previous example, the relativisation of the explosion of immigrant flows is made clear, particularly that of Latin American origin, which is present not only in other publishers’ proposals, but also in the reading of the phenomenon that mass media frequently present (Halpem, 2007). In this way, it is possible to observe an intention of problematising social processes and making them critical to the eyes of the reader: “At times, the rulers of a country do not respect the right of some inhabitants to have certain religious ideas or to speak a language different from the official one” (Textbook 3: 18).

However, it is also possible to recognise some stereotyped interpretations:

“Between 1870 and 1929, the most important migratory contribution was the one coming from Europe: in that period, around 6 million people arrived in Argentina. (...) Towards the middle of the 20th century, the origin of international migrants changed: people from bordering countries (Paraguay, Chile, Bolivia, Uruguay and Brazil) and Peru started to arrive. These migrants were

<sup>5</sup> [www.larousse.com.ar](http://www.larousse.com.ar)

<sup>6</sup> Own elaboration of information based on data expressed in Resolutions N° 141/2008 and N° 1738/06 of the Nation’s Ministry of Education, Science and Technology, Argentine Republic.

employed in agricultural and mining activities as well as in urban jobs, such as construction and domestic help” (Textbook 3: 59).

The text is accompanied by a black and white photograph of workers from last century engaged in agricultural activities. While the image refers to the past and implies effort, the text reinforces the low qualification of the tasks developed by Latin American immigrants. No allusion is made to the enterprising role that many of them currently play.

Little is said of immigration from other continents:

“The history of the settlement process of our country is related to the following historical periods: indigenous settlement, Spanish conquest and colonisation period, arrival of European immigrants (end of the 19th century and beginning of the 20th century), internal migration in the 1940 and 1950 decades, most recent population changes that took place at the beginning of 2000” (Textbook 3: 57) (The highlighting is mine).

What is hidden under the denomination “most recent population changes” are the flows from Asian, African and Eastern European countries. As regards social relationships, it is said of the first group that:

“Many of the garments we use were produced in places as remote as the Asian continent. In this way, we are connected with people who live very far away and that we will probably never meet” (Textbook 3: 19) (The highlighting is mine).

This text is accompanied by a photograph of a shirt, with an epigraph that says: “made in China.” Just as it can be seen in the quotation above, there is an emphasis here on the distance and the lack of contact, while denying that Chinese immigrants are already here and are frequently employed in the textile area.

Even though it is possible to recognise a greater complexity in the information that portrays the social processes and a critical position in relation to the equalisation of immigration with the threat that results from massiveness, there are also absences, generalisations and interpretations that lead to the construction of negative stereotypes, which have immigrants as protagonists, especially Latin American and Asian. For this last case, it is important to stress the exoticism that characterises the way in which this group is presented.

## **IN CLOSING**

Despite not being recognised as a content to be taught in the prescribed curriculum for Year 5, the migratory phenomenon is part of three of the main publishers’ proposals bought and distributed by the State. However, it is important to point out that the perspectives assumed in each case differ in the space given to the topic as much as in the approach proposed. In general, the textbooks analysed take up again the centrality that curricular dispositions give to

the respect for cultural diversity and the diffusion of democratic values for social coexistence. Nonetheless, in the books as much as in the regulatory documents, these contents are not associated with the figure of the immigrant. Many times, such contents take the shape of moralising rhetorical statements that contribute little to the comprehension of social dynamics and to the elimination of discriminatory practices. In other occasions, these statements are contradictory with other messages offered in the same book.

Frequently, the immigrant is presented in relation to population studies more than as subject of rights with characteristics of his/her own. In this way, more than being built as a source of cultural wealth, he/she is constructed – implicitly sometimes, and others not so much - as a threatening element, which because of its massiveness puts social order at risk. However, not all groups are presented in the same way. As of textbooks, it is possible to recognise diverse attitudes according to the source of immigrant flows. In this way, the image of Western Europeans is presented as positive, even though historic. It refers to the collective group with greatest visibility in images. The presence of Latin Americans arises as an undesired phenomenon. In the case of Asians, exoticism appears as one of the most frequent strategies. The references to Africans are few and allude, in general, to their refugee condition. In this case, no direct relation is established with their presence in Argentina.

Then, it is possible to conclude that the majority of the Social Science textbooks the State buys and distributes for Year 5 contribute to the reproduction of the *invasion* imaginary which mass media frequently suggest considering their own interests, without a proven statistical basis. In view of this situation, the responsibility of the State is evident.

To finish, the de-regularisation of the publishing market, the concentration of the property of cultural industries and the trans-nationalisation of their presence, seem to limit the possibilities of a genuinely multicultural education. To revert this tendency, it would be necessary to reduce the ambiguities within the curricular dispositions regarding interculturalism and bilingualism, to promote a greater participation of Argentine publishers – especially the smallest ones - in the State purchasing process, as well as increasing their incidence in the Social Science area and excluding from the State's purchases those titles that present stereotyped views, conceptual mistakes and discriminatory values either by presence or omission of information.

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## Collective creation of thematic didactic material about the Metropolitan Area of Goiânia/Goiás, Brazil

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In a previous investigation entitled “Place, Urban Culture and Teaching Knowledge” produced between 2004 and 2006, a diagnosis was presented regarding Geography teaching and teaching knowledge of Geography teachers of the Goiânia/Goiás area. That investigation proved the incipient relationship between schools and universities, mainly with respect to the spreading of knowledge produced by the latter. In the Geography postgraduate programme of the Universidad Federal de Goiás – UFG, various studies have been carried out on topics such as Urban and Regional Dynamics, Environmental Impact, Geomorphology, Agriculture, Teaching and Tourism, focusing mainly on Goiânia and the State of Goiás. Therefore, there is a significant geographical production regarding the space of those locations, but teachers generally do not have access to that knowledge.

Based on the conclusions of the first stage of that study, a team was created with UFG investigators and some Geography teachers of Goiânia, with the purpose of intensifying the dialogue about urban problems in Goiânia and their teaching. In the second semester of 2006, the work of the team proved that one of the biggest problems for addressing the everyday reality of students in class is a lack of didactic material appropriate for that purpose.

In that sense, it has been thought that creating thematic didactic material together with primary school Geography teachers was a way of improving that work. This would allow tightening the links between school teachers and academic production, and it would contribute to the development of investigations in the area of Geography teaching with the training of teachers at all levels who are involved with investigations, and mainly with geographic education for primary school students. A basic principle of the work is that teachers must be autonomous in their teaching job in order to decide on their theoretical and didactic sources, not allowing textbooks to be the definers of that job. However, it is very important to have good textbooks available for teachers and students so they can make an independent and critical use of them.

In order to achieve that goal, the Investigation Network on City Education (REPEC) has been created, made up of professors and students from different universities and local teachers, for the creation of thematic didactic material about the Metropolitan Region of Goiânia for primary education students (between 9 and 14 years old).

The specific objectives of the investigation are: 1. To produce thematic didactic fascicles; 2. To study about watersheds and cartographic literacy; 3. To use the didactic fascicles experimentally together with the investigation team; 4. To evaluate the results of the use of didactic material and to make the necessary reformulations; 5. To publish thematic didactic material about the metropolitan area of Goiânia and circulate it together with Geography teachers in Goiânia; 6. To establish a systematic exchange between the University, via Geography Course, and the municipal department of education. The production process of the fascicles is taking place in the following stages: 1. Initial reading and analysis of the available bibliographic material; 2. Doing field work for the collection of information and data; 3. Production of the fascicles; 4. Experimentation of the produced material; 5 Final (re)production of the material and wide disclosure.

That investigation understands that cities and urban areas are important references for people in general in their lives. In that sense, the city is not only an urban sprawl because in the city social life is produced, as well as lifestyles with different cultures. That is why the city and urban culture are seen as an important reference point of everyday life of Geography teachers and students. The city is conceived as a product of social relations and as a contradictory space. Therefore, the practice of citizenship expresses the contradiction present in the city, because it is in that practice of citizenship when its inhabitants can be recognised as agents who have rights in that process of production of the city.

Thus, the study aims to contribute to a project of an educating city, considering its role as an educating agent and its educational dimension. As such, the city is a content to be taught, as well as being a space that is educational in itself. Particularly, the reference of an educating city in the context of Geography teaching means a bet on the feasibility of that project through the mediation of schools, educating citizens that know the city in which they live, who understand that space in their social and historical production and who are aware of the importance of their participation in that production.

From this perspective, the place is also an important reference point. In Geography and in its teaching, that category has been emphasised, particularly in the context of globalisation. Things have a greater and stronger meaning in the place. Today there is a big paradox: as the world becomes more globalised and frontiers are crossed more due to the need for and reality of exchange, mainly economical, the place is more strengthened as an opportunity where processes take place that are usually produced in its generalisation. Even though there is a tendency of global processes imposed on those places, its effective realisation allows the confirmation of that tendency, and it can also not happen. Thus, if we want to give a real meaning that students can learn at school through Geography, it is necessary to analyse the

facts, phenomena and events in their true realisation, i.e. in their local/global dimension (CALLAI, 2003).

For example, the city of Goiânia was considered a place of everyday experience of Geography students and teachers who live, work and study there and who have their own identity and their own history, which results from their relationship with other places and with the world.

Goiânia was founded in 1933 as part of a national policy of occupation and modernisation of areas in the country's inland. It is known as a planned and modern city. However, its dynamics has been marked by an intense expansion, together with a logic of segregation and exclusion. The result was the structuring of a complex space with structural problems of supply of basic services and housing for most of the population, with serious environmental problems, an intense vertical growth and an expansion of poor outskirts and urban segregation. The city now has a population of over a million inhabitants and a population density of 1,100 inhabitants/km<sup>2</sup>. In addition, with an urban expansion that extrapolates its municipal limits, that city is currently the central nucleus of the Metropolitan Region of Goiânia and it maintains relations that are not always articulated with its neighbouring cities that belong to that region, which in turn is the basis for a more integrated and democratic management.

For the creation of a wide concept about that urban space, certain elements can be considered, such as: modernity, planning, intense urbanisation, urban expansion and vertical growth, setting up of the city, intense processes of segregation and valuation of the urban land, creation of multiple centres within the city, concentration of the commercial dynamics and of services of the state and the region. All those elements contribute to the characterisation of most large Brazilian cities, but some of them stand out in Goiânia: the uncontrolled expansion of the urban area, real estate speculation and valuation of areas with the expulsion of poor population toward the outskirts, the building of a large number of closed horizontal blocks of flats of high standard in the outskirt areas, selectivity in the supply of urban services and equipment, intense pollution of rivers, creation of large urban erosions, insufficient maintenance of green areas and parks in the outskirts, lack of public leisure areas, inadequate public transportation services, low integration among municipalities of the metropolitan area and a precarious metropolitan management.

In the investigation, those aspects were considered relevant as content of the didactic material. They are materials of a local/regional dimension that have as reference point the place of teachers and students, with the intention of addressing that place's problems methodologically in order to contribute to the creation of concepts.

In the current stage, in 2008, two didactic fascicles are being produced. The first deals with an articulate cartographic literacy with the concepts of landscape, place and environment. The elements oblique and vertical vision, three-dimensional and two-dimensional images are treated based on the concept of landscape. The elements location, "laterality", references and orientation are dealt with based on the concept of place, and the concept of environment is the base for presenting the elements of the cartographic alphabet: point, line and area; legend;



proportion and scale. The second fascicle deals with the topic of Watersheds, seeking to go beyond the limited approach of its treatment when dealing only with contents about water and drainage system and proposing the following structure: classification of Watersheds; drainage system (pattern, classification, hierarchies); water cycle, aquifers and watercourses; influence of the relief; utilisation and handling of water resources.

In the production of the fascicles, priority is given to the fact that students must be active subjects of their own knowledge, considering their place and their daily nature as a relevant spatiality.

Thus, in the fascicle that deals with cartographic literacy<sup>1</sup>, the first objective is that students know the cartographic configuration of the region, i.e. its cartographic representation, so they can quickly locate it. For that effect, a map of the Metropolitan Region is available in different scales, including basic information about that region and about some public leisure spaces, as well as issues regarding students' previous knowledge about Goiânia and other provinces of the area. In another section of the fascicle, students' ability to observe their surrounding landscapes is explored so they can "problematise" them. The most common questions are: "Can we call what people have built 'landscapes'?" "Is the landscape you see every day pleasant? Is it familiar and warm? Can you draw it?" "How do you feel in an unknown landscape in Goiânia, in another city or in the country?" "Do you know what the importance is of observing the city's landscape from different perspectives or different points of view (from the front, from above, from the top of a building or even from a plane)?" The explanations that follow give the idea that maps are a two-dimensional representation of reality, which is actually three-dimensional. Thus, students are expected to create the idea that when they look at a map, what they see is a drawing of objects as seen from above. That creation should be addressed having as background the Metropolitan Region of Goiânia, with its most important landscapes. What follows is an orientation for students to look at the representations of some areas of the city of Goiânia and a question asking which one shows more details. Then comes the fact that scale is the size that a particular object or space acquires depending on the context in which it is inserted, and that the idea of scale is used every day – even though we sometimes do not realise it – to establish a relation of importance or emphasis between objects and/or places where there is interaction. Next comes the idea that the same scaling reasoning can be used for other places, presenting activities such as: "Talk to your classmates and your teacher and try to identify where (what place or street) in your neighbourhood there is more movement. What are the reasons for so much movement? How many vehicles and people go through that place? How many stores are there in that place? Describe the movement in that environment." In order to think about the city and its environments and aiming to explore other elements of cartographic representation such as point, line and legend, students are asked to say in which place or street in Goiânia there is more movement, so they can identify the reasons for so much movement; imagine the number

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<sup>1</sup> The theoretic base for the definition and structuring of the contents was mainly Simielli (1999) and Moraes (2008).

of vehicles, people and stores in the city and compare the movement in that place with the place chosen as having more movement in their neighbourhood.

In the whole fascicle, the general orientation for cartographic literacy is present: promoting activities that seek to develop students' ability to do a critical reading of maps and to map the reality in which they live. Additionally, the basis is the idea that students build their geographical knowledge from within and from their everyday knowledge, that such construction is given by the broader objective of creating a geographic reasoning and that a conceptual thinking and an appropriate language are necessary. Cartographic literacy is part of that, with the creation of the fundamental concepts: localisation, orientation, proportion and representation. Thus, we can say that the fascicle is structured in the connection of three axes: the geographic concepts of place, landscape and environment; the cartographic literacy topics of localisation, orientation and representation; and the territorial base, which is the metropolitan region of Goiânia. Note that the place is now a necessary reference as scale of analysis of teaching contents, but looking for a local/global articulation as a scaling superposition that fosters a complex spatial reasoning.

In the fascicle that deals with watersheds, students are asked to link that topic with their everyday life, after having identified and learned about characteristics of the main elements that make up a watershed, such as spring, water divisor, valley, flooding plain, surface and rock substratum. After that, elements are presented for a discussion of the relationship between watersheds and water cycle in order to address the concepts of groundwater table and aquifer. The influence of relief is also presented, as well as the influence of vegetation in the behaviour of both surface and groundwater tables. Another topic for students to study is the pattern of drainage and density, and relief and drainage system. Aiming to perceive watersheds as integrating units of natural and social aspects and closely linked with people's everyday life, this study also presents the specific problem of the use of watersheds in urban areas, the resulting environmental impacts and aspects of their management such as legislations and urban planning.

In order to address the relationship between the dynamics of watersheds and students' everyday life, the issue of frequent floods in periods of rain in large cities was presented. In order for students to realise why that happens, the influence of relief, vegetation, land, geology and use of land on water drainage systems is presented. The fascicle then explains that in the area where Goiânia is located, the relief is smooth, with rounded hills that have 750 to 800 metres of altitude, the bottoms of valleys are flat and basins have a wide area for the collection of rainwater. However, the growth of the city and the human occupation of those basins have led to a decrease in vegetation, and asphalt paving and the use of concrete in buildings have resulted in a waterproofing of the surface. Therefore, drainage of rainwater occurs superficially or through underground fluvial networks (the so-called "wolf's mouths"), leading to a quick accumulation of watercourses and sudden floods.

The presentation of that problem which usually occurs in large Brazilian cities is followed by information about legislation that regulates the use and handling of water, aiming to minimise problems of the occupation of basins.

With this work, students are expected to go beyond the common idea of watershed as an element of the natural landscape, so they can relate it with their daily life and learn about concepts such as drainage, watercourse, fluvial channel and groundwater table, widening their own concept of watershed.

After the production and review of the abovementioned fascicles, the next stage of the investigation is the creation of a workshop with a small group of public school teachers of Goiânia. This workshop intends to present the material to teachers so they can analyse it, suggest modifications and decide on the possibility of testing them with their own students. The aim is for the work with students to be carried out in 2009, with a subsequent evaluation in order to publish the fascicles and make them available to public schools.

The production of that material was oriented by the idea of school Geography as a specific way to think about and interpret reality and spatial relations, more than a discipline that presents data and information about places to be memorised. It is a discipline that seeks to create spatial thinking, and that requires teaching broad geographic concepts. The idea is that those concepts are fundamental tools for the understanding of the various spaces, for finding and analysing the meanings of the different places and their relationship with everyday life. Schools and Geography lessons are responsible for giving rise to conceptual thinking that allows a change in the relationship of individuals with the world, and allows individuals to widen their experiences. However, we know that concepts are not formed in the minds of people by direct transference or reproduction of contents. In that process we must consider the everyday concepts of the people involved (CAVALCANTI, 1998, 1999, 2005).

Finally, we emphasise that the production of that material has the higher aim of finding real possibilities for Geography, giving priority to the development of students' spatial reasoning and thus contributing to the education of citizens for a participative life in their place and in their city. The premise is that spatial reasoning is necessary because social practices have a spatial dimension, and that schools can contribute to the development of such reasoning. Therefore, students should be considered as active subjects in their education process and in their social, emotional and intellectual development, and teachers should be active subjects in the mediation between students and objects of knowledge.

Considering the objectives of the investigation, we can assert that it already presents positive results with respect to the reflection on the challenges of school Geography, the spreading of studies taken place in the academic field and the production of didactic material about the selected area, as well as the integration between universities and schools. All those activities have an important result in the search for a consolidation in Geography teacher training that effectively includes investigation in teaching. In that sense, we can say that the biggest challenge

is experimenting with investigation and collective production, so that such experience can be beneficial for the challenge of producing textbooks with teachers instead of for them.

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# Approach of the physical-natural topics of land surface in geography textbooks

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**O**ur investigation deals with Geography teachers' notion of the concepts of nature and environment and their relationship with teaching physical-natural topics of land surface, particularly lithosphere, to 11-year-old students. Our purpose is to assess the theoretical references offered to teachers for their lesson plans.

In this investigation, some reflections are made regarding the approach of that topic in Brazilian Geography textbooks. The purpose is to discover which contents are dealt with when presenting the physical-natural topics of land surface and to what extent the concepts of nature and environment are present in those texts.

The idea of analysing how contents are treated in Geography textbooks arises from the fact that in the teaching-learning process these books have become the material most widely used by teachers for lesson planning and development of activities.

When a book becomes the only source of information used by teachers both for educating and for keeping themselves informed about current events and the development of the scientific field and school, it will be seen as an important obstacle for the development of students in the world.

In order for a book to fulfil its function properly, Peluso (2006, p.128) explains that it should

incorporate technical and methodological advances in the area, be free from conceptual and information errors and re-establish contents and activities for the practice of citizenry by means of a geographical reading of reality.

Books should be conceived as one of many available resources. The use of other teaching support material is necessary.

In Brazil, there are three programmes dealing with textbooks: the National Textbook Programme (PNLD) aimed at primary education and literacy for children, the National Textbook Progra-

programme for Secondary Education (PNLEM) and the National Textbook Programme for Youth and Adult Literacy (PNLA). The purpose of these programmes is to provide public school students (federal, state and municipality) with access to textbooks.

The PNLD is the oldest of the programmes, having started with a different name in 1929. Since that time, the programme has been improved and new nomenclatures have been included.

According to Spósito (2005), the production of school textbooks in Brazil represents more than 60% of the publishing market. The reason for this growth, especially during the last decades, is a significant increase of students in schools and also a large market open for public policies oriented towards the acquisition and distribution of textbooks, since the Federal Government is the main buyer of this material.

In order to evaluate the quality of the textbooks that will be acquired using public funds, the National Fund for the Development of Education (FNDE) began the evaluation process in 1996. Textbook evaluation in Brazil is part of the PNLD and the Ministry of Education, aimed at the acquisition and distribution of textbooks for primary public schools. Since the year 2004, this policy has slowly extended to secondary education (PNLEM). Initially, Maths and Portuguese textbooks were distributed. In 2007, History and Chemistry textbooks were included, and in 2008 Geography and Physics textbooks were selected for their use in 2009 (FNDE, 2008).

In detriment of the controversies around evaluation policies and the results of textbook evaluation, a debate has made it clear that,

although the books' authors and editors are the agents of production, diffusion and selling of textbooks, their practices and indicators (of sales or preference by teachers, for example) are not evaluated, but the works themselves are evaluated, taking as reference their scientific and pedagogical dimension. (Spósito, 2006, p.62).

In order for teachers to do a good work at school, they must have good material to support the teaching-learning process – in this case, textbooks – and of course a coherent training, based mainly on delivering knowledge which is fundamental for their profession, as proposed by authors such as Gauthier (1998), Pimenta (1999) and Guimarães (2005).

Consequently, textbooks are one of the teaching materials that are most widely used by these professionals. Thus, if a teacher has good material to support the teaching-learning process, it is clear that the results can be even better. I agree with Schäfer on the fact that “the quality of teaching and learning depends much more on the teacher's performance than on the quality of the textbook”. Undoubtedly, there is a need for investing in teachers' qualification and recognition.

Regarding the basic requisites that Geography textbooks should have in order to be a good teaching support guide, there are different proposals. Among these proposals, we can find Castrogiovanni and Goulart's (1999). According to them, a Geography textbook that promotes the development of a critical view must consider factors such as: (a) accuracy in its statements,

(b) promotion of creativity, (c) correct cartographic representations, (d) valuation of reality and (e) focus on space as a whole.

Schäfer (1999) and Andrade (1989) join the debate by stating the need to have clear objectives in the teaching-learning process prior to the selection of textbooks, since these objectives are one of the factors for selecting that material.

Spósito (2006a) adds the need to consider the general adjustment of textbooks to the specifications of the different subjects involved in the teaching-learning process: students, teachers and schools. Regarding students, the author stresses among other reference points that the contents and activities must start from students' knowledge, formulating proposals and strategies that integrate the knowledge they already have with the new concepts that are developed, and that textbooks must also stimulate creativity and contribute to the development of students' autonomy. Regarding teachers, textbooks should allow them to play a critical part in the teaching proposals, as well as having correct, updated and good-quality information. As for schools, textbooks should be compatible with the political teaching plan, with the curriculum and with the working conditions, as well as allowing a connection with other fields of knowledge.

In this sense, it is important to discuss, present and examine the way in which textbook selection takes place, particularly in the case of Geography, in order to have a better understanding of School Geography.

In an investigation carried out at the Laboratory of Studies and Investigation on Geographic Education (LEPEG, 2004), by means of surveys, it was discovered together with 102 Geography teachers working at the *Secretaría Municipal de Educación de Goiânia (GO / Brazil) – SME*, that the selection of textbooks used in schools is made by the following: the teachers themselves (26.47%); teachers, that is, their collective opinions in order to choose the proposal that best fits the cycle (22.54%); it was already approved before they entered the school (19.6%); the school, usually represented by the teaching coordination (9.8%); the MEC, arguing that, although they are responsible for the selection, the textbook sent to the school is not always the one that was chosen (5.88%); they don't know (2.97%); and they wouldn't say (12.74%). Based on this information we can see that teachers are not always the people who choose what textbooks will be used. Even when teachers do select them, it all comes down to the conditions in which they can make a good choice, as shown by Schäfer (1999, p.136):

The idea that the teacher can choose a textbook is not true. In general, teachers are not trained, do not have time for analysis and receive the available books at home and free of charge from major publishing houses. Thus, there is a false freedom of choice, defended by the publishing sector.

Schäfer adds the fact that in order to evaluate textbooks, teachers working at SME in Goiânia receive from the MEC a textbook guide and some collections. If they do not have access to all the collections, they choose a book they know or someone else knows, instead of any other.

Debates regarding the importance and the role of Geography textbooks in primary and secondary schools took place during the process of renewal of that science, especially at the end of the 1980s. During the years that followed those debates, mainly at the end of the 1990s, there were various attempts to face the advances made in this field of knowledge in the preparation of textbooks.

In order to show some of those advances, Vesentini (2006) uses the example of natural topics in textbooks. According to this author, there seems to be general consent in the fact that the regular way of facing this matter in education is a misunderstanding: first the physical base, then people and finally economy. For this author, from a critical viewpoint, this approach in teaching has begun from three structures: first, the treatment of social issues together with natural issues, putting climate, for example, together with agriculture, relief together with industry and so on. The second is the presentation of nature and humanity in an evolving perspective of natural history, where the history of society appears as a moment of natural history. The third natural approach is presented as depending on the social part, however acknowledging nature's own dynamics.

Using this classification to understand the organisation of textbooks, an evaluation was made of the 19 volumes that make up the Geography textbooks approved by the PNLD/2008 for 11-year-old students.

The objective of this evaluation is not to identify incorrect concepts, but to discover which approach is used to deal with physical-natural topics of land surface.

The result of this investigation showed that, although textbooks may have one of these structures, the treatment of natural and social aspects comes together for a critical view. In some of the analysed books, the relationship between society and nature occurred in a naturalistic perspective, where society as humankind is another element of the environment and an official support of the impacts. Another perspective that was discovered was the technique by which alternatives are offered for society to minimise environmental impacts that society itself has created or may create.

We therefore need to present two references for reflection. The first is that in some books, the relationship is so incipient that the approach of physical topics seems to be taking place without considering social relationships. There still are a few textbooks that do not deal with topics such as relief, rock and especially land.

Regarding the content presented when dealing with physical-natural topics of land surface, especially lithosphere, it was discovered that these books refer to relief, rock and land, with emphasis on the first. These references can be dealt with as a group, in pairs or on their own.

The data analysis shows that relief is the basic topic, and it is presented in all books that deal with topics related with lithosphere.

Almost all textbooks deal with relief starting from a classification of high plateau, plain,



depression and mountains, based on their formation by internal agents and on their transformation by external agents. The classification of Brazilian relief is a recurrent topic, although not present in most textbooks. For the classification of Brazilian relief, the main reference was professor Luciano Jurandyr Sanches Ross. Although some textbooks do not present its characteristics, they show other classifications, such as those by AB'Saber and Aroldo de Azevedo. Debates regarding social issues and relief draw on environmental impacts. They focus on changes made by society on relief, such as engineering works (tunnels, rubbish dumps) and the process of construction on hillsides, because they might result in landslides. Another recurrent approach when working with internal agents is their correlation with events such as earthquakes and volcanisms, together with the population's purchasing power and/or technological advances in the region where the impact was produced.

Rocks are dealt with in approximately half of the analysed textbooks. In these books, the topic is treated mostly in terms of the concept and the different types – magmatic, sedimentary and metamorphic. Regarding the social approach, its use for our daily lives is presented such as the use of minerals in the production of glass and in construction (paving). In some textbooks, contents such as weathering, transportation and sedimentation appear as important topics for the discussion of land formation.

There are fewer textbooks that deal with land than those that deal with relief and rocks, and they appear only in conjunction with their treatment. The contents are basically origin, concept, constitution, land profile and environmental impact. Environmental topics that are commonly discussed together with that subject are erosions and, less frequently, sloughing.

It was discovered that in those textbooks that deal with social issues, the focus is on the dynamics of nature or a joint treatment, with a naturalistic approach.

The concept of nature was generally not covered together with the development of these topics, but on special chapters. When examining this fact, we can prove that there are critical perspectives, presenting the design of nature beyond natural elements, and that there are non-critical perspectives, presenting an external nature that is represented by hydrosphere, atmosphere and lithosphere.

Both the environment and nature were examined from two viewpoints: together with the treatment of topics linked with the lithosphere and in a separate chapter. Almost all textbooks deal with this topic, and it is mainly presented together with physical problems (mostly land and relief). When introducing environmental topics together with relief, most debates draw on earthquakes and tsunamis. When they are examined in a separate chapter, the focus is on subjects such as erosion, floods, landslides, pollution, waste, sewer systems and heating, among others.

Regarding the perspectives on the subject of environment, most of them are critical, but there are many traditional perspectives such as naturalistic and technical.

Based on these considerations, I will now present the main objective of this investigation:

showing the importance of working with the concept of nature and environment in a critical teaching perspective, in order to present the physical-natural topics of land surface such as rock, land and relief. I thus seek to show that the dynamics of society is an important content to help go beyond the view of nature as natural elements (vegetation, relief, rivers, etc.) and many times as an equivalent of environment.

The concept of nature as a cultural construction is understood in different ways, which justifies the existence of various concepts in the same historical period as well as in different historical periods.

In order to reflect on these considerations, it is necessary to understand the epistemological evolution of the concept of nature and its different views. For example, in ancient history a magic conception was the norm, placing nature as an endless source of mystery and practical obstacles to be surpassed; Greek times were inspired by the contradictions of society; the Renaissance dealt with principles of cosmology, denying that the world of nature – the world of physical science – was a living organism blessed with intelligence; in modern times, nature is presented as an analogy between the processes of the natural world, studied by scientists, and human problems, studied by historians.

Among these ideas, there is one that stands out: a view of nature as an object to be dominated and manipulated and a natural man living outside it. According to Gonçalves (1989), the natural man would be unchangeable and would become an important element to maintain the status quo.

According to Suertegaray (2000), the design of nature as an external element – a collection of all human things produced without a human intention, in geography – was the reason for social organisation, the possibility of social construction and to some extent of technical development, a resource mediated by work in the production of wealth.

Together with this perspective, there is one that sees human construction as nature. For Morais (2000), the integration between nature and society is such that it is hard to think of nature without man, because what gives it meaning is human existence itself.

From this understanding, if the teaching-learning process of physical-natural topics is to be guided in class, then Geography contributes with the formation of citizens who are critical and conscious in order to understand their own reality and their relationship with world events.

Regarding the category of environment, Suertegaray (2002) explains that this term indicates an idea of being in relation with the environment, and that the way of understanding it shows different conceptions of the world. According to Silva and Hainard (2005, p.29), “... When we use the word ‘environment’ we refer to the relationship humans have with their natural and social contexts.” Although such indications for understanding the environment exist, they are recent.

Until the mid-twentieth century, Geography, science and society in general understood the environment from a point of view that was mostly naturalistic. According to Moraes (2005)

in the positivism criticism, the environmental subject was eliminated from the theoretical horizon of social sciences, appearing during the last years in a very technical plan and only few have included epistemological and methodological considerations. It is in this second approach that Moraes (2005) intends to contribute to the debate. The author proposes a rescue of centrality and epistemological importance in scientific works.

As a contribution to that debate, Moraes (2005) defends the following positions: (a) anteriority of the disciplinary development of environmental investigation with respect to interdisciplinary work, (b) anteriority of methodological reflection with respect to empirical investigation – investigate, ask and understand the assumptions present in the various methods before using an instrument whose fundamentals are unknown, (c) minimal conceptual patronisation – which constitutes the basis for a communicative relationship between the different fields, science and investigation, (d) ethical problem identification – questioning the way in which investigation and teaching institutions carry out environmental investigations and show who are the subjects they talk to and reflecting on the social splitting in scientific investigations.

Due to the contemporary environmental crisis, the concept of environment has expanded, and including the human perspective (social, economical, political and cultural) has become a challenge, because its analysis requires an understanding of the social, cultural and ideological practices involved. It is not possible to understand the environment from a deterministic perspective, because the way in which society is organised and acts in the environment is dynamic.

Regarding time periods in Geography, in other fields of knowledge and in society in general, several authors (Mendonça, Suertegaray, etc.) stress the last decades of the 20th century, especially the 1970s, in the world scene. According to Fonseca et al (2007), while the environmental topic was most relevant during that decade due to pollution and degradation of the environment and the crisis of natural, energy and food resources, its origin dates back to the end of the 18th century with the industrial revolution and modern science. However, we must consider the degradation present in other periods of history, such as epidemics, hunger, wars and so on.

For Cicillini et al (2007, p.242), the environmental problem “is a direct consequence of the idea that humankind, for being able to reason, acquire, produce and organise knowledge, ranks above nature and the laws that govern the planet and keep it in balance.”

In order to discuss the different perspectives of thinking about, understanding and analysing Environmental Education, the aforementioned author presents four environmental approaches. These methods will be presented in order to justify the need to be clear on the consequences that the environmental design has on education and on the formation of citizens and citizenry. The following are those concepts and their main characteristics:

- Conservationist: it only visualises a change in the behaviour of the individual instead of values of society. It is based on biological aspects of the environment and on an idea

of conservation that ignores social relations. The practices whose foundations were established in the conservationist-naturalistic perspective are deprived of theoretical and methodological references and alien to the questions of their determinants. This is what Moraes (2005) calls naturalistic perspective. For this author, naturalism is limited to a naturalistic philosophical attitude before the world, history and the relationship between society and nature. Mankind is seen as a factor that alters the environment's balance; not as society but as "antropic."

- **Technicist:** it ignores political and economical aspects and proposes technical solutions; the handling of natural resources as the solution to the current crisis, such as the production of less-polluting cars as opposed to an improvement of public transportation, or recycling methods as opposed to the production of more durable products. For Moraes (2005), this approach is common in the field of environmental investigation, searching for a justification of science in relation to the society it has created, placing technology above conflicts and controversies.
- **Archaic-naturalistic:** it is based on nostalgia for the past, recovery of lost ideals and the discourse of returning to nature. For Moraes (2005), this attitude is present in conservationism and can generate anti-humanistic perspectives when placing nature above mankind.
- **Socio-environmental:** it has identified certain social subjects with different levels of responsibility, since the costs of environmental degradation can be seen as unequal and combined in society. It thus shows that the origins of the crisis are related to the political-economical and cultural organisation methods of society. Some authors have named this perspective environmental.

In this sense, the debate on the environmental approach presented in textbooks gains importance, since it shows, among other things, how teachers can deal with topics related to relief, rocks and land in Geography lessons with 11-year-old students.

This debate is necessary, because the relationship with the concept of environment, when considering the naturalistic conception, runs the risk of considering solely the dynamics of nature for the analysis of environmental issues, since the main topics that will be discussed in relation to environmental issues would be limited to those oriented to natural aspects. This would have as consequence a perspective of chauvinism regarding nature, under the slogan of conservation, for example, or omitting the production method to understand the unequal development of society.

This indication is one of the possibilities of overcoming the treatment of topics related to relief, rocks and land by means of an approach that is purely naturalistic, although there is a dynamics of nature, as shown by different authors.

We believe that the presentation of nature and the environment as critical perspectives in the teaching-learning process made explicit by the relationship between nature and society

promotes the development of students and shows the importance of Geography and, specifically, of the physical-natural topics of land surface in order to understand their daily lives, interacting with the world.

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# A look into the imaginary of science and technology in secondary education history textbooks

MÁRCIA LOPES REIS

“Everything this book states rests on the concrete foundation of what someone has really done or said in a concrete context and well described as of practice and place” (Black and Atkin, 1996, p. 3).

“The scientific culture represents the collection of knowledge that you need to be able to understand public matters. It is a combination of facts, vocabulary, concepts, history and philosophy. It is not about the specialised subject of experts, but about a more general thing: the less precise knowledge used in public discourse (...) The thing is that making sciences is not, by any means, the same as using it, and the scientific culture is only related to the latter” (Hazel and Trefil, 1991).

## INTRODUCTION

**T**he epigraphs say part of what is intended to be demonstrated in the matter of the imaginary of science and technology in secondary education History textbooks: the demand for a description of the concrete context, the practices and places in which inventions have been made, the artefacts, machines, techniques, the new social technologies, and what is underlying is the way of describing them as something which is not historic, nor conflictive, nor dialectic...

For this reason, we will deal with this subject in two parts. In the first part, we will outline the epochal challenges that those who analyse the curriculum as one of the fundamental dimensions of educational theory and practice must face. In the second part, we will discuss what can be learnt from the imaginary of science and technology by the way in which they are taught in secondary education History textbooks.

There are many challenges that educational systems need to face by the beginning of the new century. This way, still strictly referring to the curricular domain of subjects, it is practically impossible to find one that does not need a new formulation, even if it is because of the important changes that are happening and affect in an essential manner the form and content of how students need to be prepared for the society of a future that is already here, especially, as regards science and technology. This can be understood, partially, through the acceptance that scientific knowledge and “its sister”, technology, play a decisive role in the structuring of forms, organisations and relationships that are already being established in many places around the world as foundations for the 21st century society. This does not imply an underestimation of the influence of other disciplines or, by any means, of their knowledge.

### **SCIENCE AND TECHNOLOGY IN CURRICULA**

There arises the need to socially, economically and politically contextualise the subject of science and technology. Comparative studies of the curriculum show that in many countries Science has a long tradition in secondary education, either as an integrated subject or divided into different disciplines, such as Physics, Chemistry, Biology or Earth Science, but never in History. Even though in the last decades the importance of technology in the modern world has been acknowledged, the historical origin is still not dealt with in the human sciences. Because of this, several options in the teaching of this subject in secondary education schools have been used (Medway, 1989; Layton, 1993). The first option consists in incorporating technological aspects in the different Science study plans. The second consists in establishing a Science, Technology and Society course that replaces or complements the Science courses. The last option consists in introducing a Technology course in the study plan for secondary education. What happens is that if they separate into a new discipline, one realises that it is about the history of knowledge. Hence, to begin with, some findings in the history of knowledge and its relationships with the process of teaching and learning need to be known.

One could think that this would be possible in the subjects of Social Science or Sociology. But in this aspect there are other tasks to be solved, as the course is not always available in secondary education. This year (2008) in Brazil, for example, Sociology has become compulsory again after more than 30 years of exclusion from the list of secondary education subjects, together with Philosophy. Even though we are in the society of knowledge, there is still a discussion about contents, and science and technology would not be among the subjects chosen by a team of experts who still have the idea that they are part of the tasks of History...

In the 90's, G. Bachelard and T.S. Kuhn thought that the history of knowledge was not linear or purely accumulative, and that all transformation in ideas as an effect of the transition from a scientific paradigm to another is produced by “the change in the formulation of questions and answers, more than by the new empirical discoveries.”

## THE “NEW” SOCIETY - THE ROLE OF KNOWLEDGE

The transformations we have in the contemporary world manifest that a “new society” is emerging based on the production of knowledge and its circulation, which is becoming faster and more generalised. What is new is the centrality of information and knowledge. This forces us to consider learning as a fundamental factor of this new society and this is a challenge for education that needs to be reconsidered.

Contemporary societies are increasingly basing their sense of purpose on knowledge, replacing other forms of social structuring such as religion, land ownership, capital ownership, or the usufruct of political power through the use of force. Knowledge becomes a main source of legitimisation for the future society and it tends to be in constant renovation. In this context, almost every aspect of what we call the “educational system” will be radically transformed and learning will turn into a fundamental factor.

Education turns into a basic variable to define the future of a knowledge-based society, which will be more or less democratic according to the distribution of the education it has. A good quality education will make it possible to avoid marginalisation and exclusion in a knowledge-intensive economy.

Even though the phenomenon of exclusion does not depend only on education, whoever lacks it will be excluded from a knowledge-based society. How will this exclusion be avoided? By offering an education that makes “learning how to learn” possible. The basic demand for any educational system will be permanent retraining, i.e. offering the capacity to generate education throughout life.

“Learning how to learn” emphasises that the important thing is not only learning contents, but learning cognitive operations that lead us to learning those contents. We know facts, events, processes, phenomena, and we need to know how we know them. This is an unavoidable task for a knowledge-based society. A recent work by UNESCO (2004) showed that the volume of world-wide knowledge is doubled every two or three years, that 7,000 scientific and technological articles are published every day, that the information sent from satellites orbiting the Earth would be enough to fill 19 million volumes every two weeks, that secondary education students who finish their studies in economically developed countries have been exposed to more information than what their grandparents received during their whole lives and that, in the next three decades, there will be changes which will be equivalent to all those produced in the last three centuries.

Maybe this huge demand is what originates the tendency that understands that schools today are not adapting quickly enough to face the changes that the knowledge and globalisation society demands. The traditional school paradigm, reflected in a common curriculum divided into subjects, taught in pre-established units of time, sequentially arranged by levels and controlled by standardised tests, is no longer being useful. As stated by Fink and Stoll, “this paradigm may have worked in 1966, but it is not working in 1996 and it will not work in 2006.



The postmodern world requires a different school model, more in accordance with the changing nature of economy and of the social structure.”

The OECD report about Quality in Education, states that “The current situation is dynamic and varied. Schools are organised now in a different manner, in terms of homework as well as of the responsibilities assigned to teachers and the differentiation of roles among teachers (...) Teachers need to be able to adapt to continual changes - dramatic in some countries- in the content of their teaching as well as in the way of teaching better” (OECD, 1994: 9). These changes influence the demand for a redefinition of the teacher’s job and, surely, of the teaching profession, of its training and its professional development.

This is why Salomon (1999: 42) wrote that “the role of the teacher is being modified from information transmitter, the solo flute player in front of a disrespectful audience, to designer, a tour guide, an orchestra conductor.” Blumenfeld pointed out in 1998 that the role of the teacher should change from an authority who distributes knowledge to an individual that creates and orchestrates complex learning environments, involving students in appropriate activities so that they are able to construct their own understanding of the study material, working with them as partners in the learning process. One of the demands that society places on teachers is the capacity to continue to learn and innovate.

### **WHAT COULD BE FOUND IN SCHOOL TEXTBOOKS**

The curricular lineaments that could be found in textbooks would have the idea that the development of technology has revolutionised society since the 18th century as an assumption. Technological advances and the interrelationship between science and technology in the 20th century have transformed modern life at great speed: television, the car, the computer, telecommunications, etc.

It is common to consider technology as liberating in itself, and the vision of the scientific-technological progress, not only as the progress of human knowledge, but as real progress for men. In this way, science and technological advances will make men happy. However, this idea is seen by more and more people as a “myth”. Science and technology have made man happy, but they can also destroy him. Aldous Huxley’s “Brave New World” and several science-fiction works are a testimony of this anti-progress position that conceives sciences not as liberating, but as dehumanising and men-enslaving.

Some Enlightenment thinkers had already criticised this complex society where man cannot be happy, where he dehumanises himself, and they proposed a return to the past. Rousseau set forth the matter asking if the progress of science made men more virtuous: “Has the reestablishment of sciences and arts contributed to the purification or to the corruption of customs?” (ROUSSEAU, Speech on sciences and arts). Rousseau answered this question by saying that they have contributed to corrupting man and he talked of a “state of nature” where man is good and can be happy. Today it is more difficult to find thinkers, as “anti-progress” as they may be, that support that return to the past. Instead, what is advocated is the control

of science and technology and the rationalisation of the use of the new technology that surrounds us, so that what Postman (1994) has described as the monopoly of technology over culture does not occur.

With the Renaissance and later with the Enlightenment, an optimism concerning the increase in the material development arises due to the fact that geographical, scientific, political-military and economic factors cause a radical transformation of society. As Carl Mitcham expresses in his analysis of attitudes towards technology throughout history, this optimism “will generate an argument supporting the theory that technology is inherently good and, therefore, its bad use is accidental.”

Optimism as regards technology and its parts arises in the 16th century, together with a new conception owed to Bacon, and expressed through the birth of the new experimental science. Knowledge must come from the union of theory and practice, a unity based more on practice than theory. Knowledge must come through experimentation, through the interrelationship with things themselves. This knowledge acquired through technological contact with the world, represented by two important figures from the Renaissance such as Leonardo Da Vinci and Galileo Galilei, is considered to be truer than abstract theory, so experimental science separates and takes distance from philosophy.

Technology begins to be understood as a creative power in human beings. It is the essential human activity and human beings could not survive without it. Carl Mitcham states that the human being is not redefined as a “*homo sapiens*” but as a “*homo faber*”. A new model of nature that arises with the new experimental science supports this optimism regarding technology and technological progress. This refers to the mechanist model of nature; the distinction between nature and artifice disappears, nature operates as a perfectly geared mechanism and is considered to be nothing but art.

With the overcoming of the teleological model of nature and the independence of Reason over Faith that took place in the Renaissance, as well as with the appearance of the new experimental science, during the 17th and the 18th Centuries, the idea that man was continually elevated from ignorance and superstition towards more rationality and freedom is generated. In the 18th Century, the Idea of Progress arises and drenches the whole world with culture. History is conceived as linear and in continuous refinement, and Progress is a reality of the 18th century society which was seen as the peak reached by Mankind. All the aspects of the Enlightenment society were perceived as the zenith of history: arts, sciences, society, and mankind as a whole were the progressive product of history.

The development of the Industrial Revolution, a technological revolution, resulted in the confirmation of this Idea of Progress by increasing production and, with it, wealth. Progress was now considered economic progress, but it came together with inventions and mechanical refinements. Technological scientific progress was conceived as positive for all mankind in every sense.

There is still a need to know the different arguments that have supported the idea that technology and techno-science have lead man unilaterally to exaltation due to their liberating power.

a) Technological activity is what differentiates men from animals, in such a way that without technology there would not be any human beings. While animals need to adapt to the environment because of their natural needs, man can adapt the environment to himself thanks to technology. Thus, technology is a reaction to organic or biological needs. The animal is limited by nature, while man prevails by means of technology. Technology is then liberating.

b) Technology also liberates us from discomfort, it gives us comfort. The material benefits that technological progress provides allow us to “live better”. On the other hand, the technological-scientific advances reduce the effort that work imposes, thus favouring man by relieving him from work. As technology has advanced, a better working day has been achieved, and therefore man has more leisure time, which he can use in his education or self-realisation. The time that he does not devote to production can be devoted to himself. Technological-scientific progress has thus achieved well-being and free time, both necessary for human happiness.

c) Technological advances in relation to transport and communication have given man a wider knowledge of the world and of himself, as well as greater possibilities of communication. The revolution of information and communication technologies does not only allow man to have more exchanges, but it makes it possible to achieve better social arrangements too. Through informatics, so it is said, man will be able to participate in the decision-making process of society at every moment, achieving direct democracy. Informatics technology and telecommunications will provide more political freedom.<sup>1</sup>

But, there is still the possibility that technology may be a domination tool. Technologies are focused on manufacturing objects and instruments that invade man’s privacy with the purpose of controlling him. The philosophers from the Frankfurt School insist that science and technology today have turned into a domination ideology justifying man’s mastery by man and of nature by man.<sup>2</sup>

Television has also been considered as a par excellence instrument of control and dominion which has received much criticism in this sense, but other technologies such as informatics are also turning into domination instruments more and more. These technologies violate the right to private life, and they are in the hands of power to consolidate its authority. In these circumstances, even if technology itself allowed direct democracy, this would be fictitious, since the government would always be in the hands of whoever has power over the media.

On the other hand, technological developments of power or the ill-intentioned application of technology in politics may one day cause the destruction of man by man. History or sociology

<sup>1</sup> You can read the article I published under the title “Educação para e-cidadania: entre a reinvenção das práticas cívicas e o neo-tecnicismo”, *Ibero-American Magazine on Education*, n. 42, sep.-dic., 2006, pp. 55-68.

<sup>2</sup> This topic can be studied in depth in the chapter of the book *Del texto a la imagen – paradojas en la educación de la mirada* (Nau Llibres, 1997), edited by Angel San Martín Alonso, and where I have done the analysis titled “Marx, Weber and Habermas as theorists of technology: paradoxes of the educational practice.”

of knowledge have to teach that since man started to manipulate instruments and turn into a “homo faber”, weapons appeared, which could be used to hunt, but also to kill other men. The history of mankind, understood as a history of science and technology, is also the history of increasingly powerful weapons, capable of destroying mankind, and its possession has become an instrument of power. Again, technology in the hands of power is used to consolidate its authority, but this time human knowledge is used in ingenious inventions created by man against human life itself.

As Habermas states, the technological interest inherent to natural sciences necessarily implies the idea of domination of nature. Technological-scientific progress is not possible at the expense of nothing. Nature is the direct price that progress makes mankind pay. Unlimited economic growth based on new technology clashes with a nature that is finite. The current super-technological man violates nature and breaks its ecological balance. Besides, we degrade the environment due to our “comfort”: “the complex current technology does not allow us to use some things without staining others anymore” (Delibes, M. *A world in agony*).

But man belongs to Nature, and the aggression towards it means an aggression towards man himself. Between man and nature, technological-scientific progress prevails as a disintegrating element. As Miguel Delibes says, “man has its roots in Nature and by uprooting him with the bait of technology we have stripped him of his essence.”

Based on this criticism, many thinkers have proposed a “return to nature”. According to them, man’s happiness depends on his reintegration with nature. Hence, city life, the symbol of current progress, is rejected and replaced by life in the country. The exaltation of country life has been the purpose of Miguel Delibes’ complete work. The rejection of the city and the proposal of life in the country as an alternative to a civilisation based on the technological progress that dehumanises society and attacks Nature, was also the 18th century romantic rousseunian proposal, and one of the main contents of the “hippie” movement, a social movement in the 60’s and 70’s. After that, the “ecologist” movement arose, and its *raison d’être* is precisely the conservation of nature before the deterioration produced by technological progress and the new ways of life it generates in present day society. But none of this is part of textbooks...

### TEXTBOOKS – A SAMPLE

This sample is made up of 15 texts on the Industrial Revolution included in the most frequently used textbooks in secondary education in Sao Paulo, Rio de Janeiro, Porto Alegre, Recife and Salvador which were published 5 years ago. The data analysis is done based on three categories: materials, energy and information. In this sense, the imaginary is very far from the most important and influential model of scientific change, which is Kuhn’s. This new model presented in his book –*The structure of scientific revolutions*– is the starting point for a new image of science as well as a new way of making philosophy/history from science. He presents a conception of global science as an alternative to the traditional one.

As an example, I have chosen one of the texts in the book *Historia e consciência do mundo* [History and awareness of the world] (Cotrim, 2004). A part of a chapter on the Industrial Revolution is quoted below, which has not been translated in order to preserve its authenticity:

“As grandes invenções modernas

Segundo o historiador William Henderson, a grande era das invenções modernas divide-se em duas fases distintas:

A primeira (1700 – 1850) foi dominada pelo carvão, pelo ferro e pelo vapor. Nesse período houve a transição da oficina para a fábrica e da empresa individual para a companhia por ações.

A segunda (1850 em diante) coincide com a aparição das grandes firmas e monopólios. Está associada, acima de tudo, com o aço, com a eletricidade, com o motor de combustão interna e com a síntese de novas substâncias.

De modo mais específico, podemos relacionar entre as mais importantes conquistas técnicas que marcaram o início da Revolução Industrial as seguintes inovações:

1735 – produção do ferro com carvão-coque, por Darby

1769 – desenvolvimento da máquina a vapor, por James Watt

1785 – desenvolvimento do tear mecânico, por Richard Arkwright

Além dessas inovações, outros grandes inventos marcaram a Revolução Industrial:

TRANSPORTES		
ANO	CONTRIBUIÇÃO	RESPONSÁVEL
1834	Motor elétrico	Jacobi
1867	Dínamo	Siemens
1885	Automóvel	Daimler/Benz
1897	Motor diesel	Diesel
1903/04	Avião	Irmãos Wright/Santos Dumont

Cabe lembrar que a história das invenções é uma sucessão de desenvolvimentos tecnológicos, não existindo **invento** que não possa se ligar a contribuições anteriores e posteriores.”

The design and concepts of those first analyses are qualitative. The approach chosen allows an attempt at global comprehension, beyond texts as a first explanation and conceptualisation of the study of the imaginary of science and technology perceived in the educational practice.

In relation to the definition of social imaginary, Barbier’s work (1997) is taken into consideration. Basing himself on Castoriadis’ (1975) reflexions on the imaginary institution of society, he

points out that what is called social imaginary is a mixture of social significations of imaginary nature whose production does not refer to one or several individual psychic elaborations nor to those of groups or organisations. They are historical and therefore evolutionary, and they produce institutions that can be analysed according to the cultural context of the period. They are imaginary because significations cannot be reduced to something real or rational. And they are social because they prevail on every member of society without necessarily being known as such.

It is clear that there are no stages left in textbooks, i.e. the series of data that begins with a pre-paradigmatic stage is not established (different schools compete for the dominion of a field of investigation; in these schools there is very little agreement on the object, methods and forms of study of such science; the investigation conducted cannot produce a cumulative corpus of results). Then, when the field of investigation groups itself around a particular school or collection of basic assumptions, we find ourselves faced with a paradigm which turns into the foundation of all investigation in that field. In the textbooks analysed, the elements are presented as “something that arises” and is established without conflicts, as if there was a paradigm already known.

Consensus on a paradigm marks the beginning of normal science. The paradigm begins to articulate and be defined. The development of investigation development in the stage of normal science leads to the discovery of certain anomalies which are resistant to being solved through the use of the paradigm. This makes us think that there is something wrong in the paradigm, and the efficacy and correlation of the paradigm is questioned, thus going into a crisis stage. There seems to be no crisis in textbooks regarding the change from one mode of production to another.

“Extraordinary science” begins with this crisis; alternative theories proliferate. Crises end in one of the following ways:

- a) The questioned paradigm finally solves its anomalies;
- b) Anomalies are unsolvable; they cannot be solved with the paradigm or with the new perspectives opened;
- c) An alternative paradigm arises solving anomalies and beginning to achieve a new consensus.

Changes in paradigms constitute scientific revolutions. The models in the texts analysed are inductivist and deductivist. The creation of new apparatuses does not resemble any fact that may cause a revolution. There is still more: everything seems to be decidable, but History shows there may be deep historical disagreements.

## FIRST CONCLUSIONS

To conclude this study, a proposal is made of what should be defined as a broad curricular programme with different objectives. This can be summarised as follows:

1. Make technology known to students:
  - To understand culture
  - To live in society
  - As preparation for higher technological studies.
2. Students have to acquire knowledge about the three basic pillars of technology (materials, energy and information), and about the deep relationships they have with natural sciences and society.
3. Students must actively participate in the generation of technological products.
4. Students must learn to use technological products.
5. Students must explore their capacities and interests in the sphere of technology.

In a different way from the social imaginary of textbooks, the history of knowledge has been, up to now, the final result of the constant dialectical tension between the imperative need for objective knowledge and the development of mythical and fantastic images, as a means of domination or, simply, to make up for real ignorance and to calm men's existential fear and insecurity. Likewise, none of that is clear in textbooks...

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# Evaluation of the theoretic model of Napoleon Franceschi and Freddy Dominguez's textbook: an approach from critical discourse analysis

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**T**he fundamental objective of the present article is to approach Franceschi and Dominguez's textbook on *Historia de Venezuela Contemporánea* [Contemporary History of Venezuela], making special emphasis from the educational point of view on the theories sustaining the design of the text. The approximation to this text is based on critical discourse analysis (CDA), which is a perspective that deals with the revelation of aspects related to power abuse, domination and social control. As it is well known, critical discourse analysis is a perspective more than a theory, it is an attitude with which to face certain problems that affect society (Elrich, 2008), which in this specific case seeks to reveal the use of a theoretic model with concrete ideological intentions.

With this study, I do not seek, and it is not our interest, quoting Van Dijk(1994), to engage ourselves in applying a model or a theory or validating a paradigm. Our interest is to make social problems, power and inequality evident through discourse. For me (Van Dijk continues), it is not important to be part of a specific school; I prefer to *investigate social problems*, in this case, the teaching of History from a specific textbook.

The theoretic model from which the construction of the text is conceived, may lead us to reveal implications that, undoubtedly, have to do with the ideology from and for which the text is written.

In this respect, Van Dijk (1994) adds that for a discourse to affect a mass of people, it is necessary for such a mass to know the language and, therefore, for them to have formed cognitive outlines that allow them to inscribe in them what they see, hear or read. There is no repercussion if no minimal knowledge frameworks have been built before about what is intended to be taught. There must be shared cognition, group cognition, group preconceptions, and group attitudes. In this way, to understand how discourse may influence society it is necessary to comprehend what is related to the ideology of groups and, in this specific case, from what cognitive outlines discourses are generated (p.47).



In this case, it is about a textbook with special characteristics in its nature. A textbook is the guide used by the teacher and the student to develop his/her intellectual process. This is why it is of vital importance to discover how the student is conceived in this process and what role is performed by the teacher in it.

Besides carrying out their specific function, textbooks are historic documents where the science and pedagogy of every epoch are reflected together with each author's life experiences in their particular socio-historic context (Cornejo and López Arriazu, 2005; Cornejo, 2005a). Together with the aforementioned, the textbook may also bring to light the conception there is of the student and his/her role in the learning process.

This has always been evident in texts corresponding to Social Science subjects and more specifically in History texts and History of Venezuela texts. The context in which the text is produced is of great importance in the case of any production of discourse. The text does not exist and cannot be understood without the context that gives specific meaning to it.

Piñon (2005:10) states that: "The word constitutes the par excellence tool for the appropriation of skills and knowledge but, and fundamentally, for the constitution of otherness and of 'a symbolic place' which lights new roads in the development of students".

A textbook makes specific use of the linguistic features and words within it. The reality built through the use of words is a creation of the author or authors. It is a description of reality made through recounted facts and their presentation, which conforms in all a description of the world, a world that in many cases the student does not know.

Through the study of the printed word in textbooks, it can be understood how these, throughout history, have helped to build diverse symbolic places and, in turn, have been modified by them.

In this sense, Coll and Edwards (1996:1) assert that "the educational discourse has turned into a priority focus of attention for investigators of teaching and learning processes in schools in the last two decades...", and that "the analysis of educational discourse, and more concretely, of teachers and students, is essential to keep on advancing towards a better understanding of the why and how students learn – or do not learn - and why and how teachers contribute to promoting this learning to a greater or lesser extent."

Here, we want to take a further step by presenting discourse analysis as a work tool not only confined to experts in this area, but that can and must be used by the teacher as an aid in his/her daily work.

The History of Venezuela, and specifically the contemporary one, is one of those sciences in which argumentation and ideology, as well as the conception that whoever writes the text has of whoever reads it, filter through the contents. The construction of every text, specially the school one, is based on the reader-student. The chosen readings, the selected activities and even the discourse with which a relationship is established with the text, bring to light the theoretic model from which the text is built, and reveal the ideological implications in it.

Now, before going deeper into the educational theories that sustain the construction of the text, it is appropriate to dwell on the characteristics of the context in which the book is produced, in order to describe the historicity of that period of time.

The analysed textbook has the following characteristics from the contextual point of view: Napoleon Franceschi, one of the authors of the text, is a History Professor graduated from the Pedagogical Institute of Caracas. In his postgraduate studies he got a Master's degree in Intellectual History of Europe and the United States of America (Master of Arts, University of the Pacific, Stockton, California, USA) and graduated Summa Cum Laude from Andrés Bello Catholic University (UCAB) as a Doctor in History. He has taught for 30 years, the first of which were in Secondary Education.

Since 1976 he has taught in the Geography and History Department at the Pedagogical Institute of Caracas. As a retired teacher, he has been hired for the postgraduate courses and thesis tutorship in the Master's degree in Education majoring in History Teaching at the Pedagogical Institute of Caracas as well as in the History Doctorate at UCAB and other institutions.

Professor Freddy Dominguez shares many of Professor Franceschi's jobs and accompanies him in the authorship of other textbooks for the third stage of Primary Education. He has been sectorial general Director of Ministry of Education programmes and responsible for the UNESCO Education for All programme in the year 2000.

The text at issue is published by Colegial Bolivariana, C.A. approved by the Ministry of Education according to resolution N° 658, dated August 25th, 1986, published in the *Gaceta Oficial* [Official Gazette] n° 33,543, dated August 28th, 1986. The text is presented by both authors in the first pages, where it is described using the following qualifying terms: coherent and systematic organisation of the historic lapse going from 1830 to the present. They state that, in the book, an analysis of problems is made through a global approach. The presentation of the text continues as follows:

“The kind of approach we developed makes it possible for the student to have an overview of the analysed aspects, as well as understanding the process of historic evolution in a rational and organic manner, thus, he/she will be able to distinguish the basic elements of a historic period of time and differentiate the rest of them” (p.3).

The model through which they approach historic facts will allow, as they claim, to understand the process of historic evolution in a rational and organic manner, so that in this way they are able to distinguish basic elements in a historic period of time and differentiate the rest of them. The text gathers the complete Official Programme currently in force and some other aspects, besides being, according to its authors, an updated text with a novel approach to the Contemporary History of Venezuela.

Additionally, in the following pages the authors indicate the characteristics that distinguish this text from the rest:

- **It is an effort to revitalise historic conscience:** it is a product (as they assert) of several years of teaching work and investigation by the authors. They consider that the text may become not only the text consulted by students, but a consultation text for the family as well, which will allow everyone who uses it to acquire a broad and deep knowledge of the vicissitudes of the last years of our history.

- **It is arranged according to aspects and periods.** The periods are the following: a) 1830-1870; b) 1870-1899; c) 1899-1935; d) 1936-1945; e) 1945-1948; f) 1948-1958; g) 1958 until today. It is also arranged according to the following aspects: political life, social structure and its dynamics, education and culture.

- **Aspects the student will find:** according to the authors, the student can find in this text the sequence of the main historical events that took place from 1830 to current times. Likewise, he/she will be able to know the characteristics of each government and the great political changes that have taken place in Venezuela, from the limited participation of society in the choosing of its rulers, dictatorships and tyrannies to the resulting current democratic regime. The discourse strategy through which contents are developed will allow students to analyse the problem of the change from an agricultural republic to the emergence of one of the world's most important oil countries, without leaving out the problem of the survival of development.

- **Guidelines to work with the book:** they assert that the fundamental task of the student will be to: read, prepare filing cards, charts and summaries about each of the objectives planned in the programme. They suggest the student should write essays from the content of the text on a specific aspect of the country's historic evolution. The student will be able to respond effectively and in depth in oral discussions or interventions when he/she is compelled to present evidence to support the objectives achieved and the knowledge obtained .

- **Other assistance given by the book:** the text includes complementary readings which reinforce the knowledge the student needs from this subject. They also include documents and a glossary at the end that will allow the pupils to use a series of concepts they are not familiar with, in their opinion, and that will facilitate the comprehension of many historic aspects.

- **For the teacher:** they complain that no text can substitute the teacher, who with the vastness of his/her knowledge, life experiences, experiences and explanations, gives life to the historic process. This textbook is an aid for the teacher, so that the fulfillment of this important subject's objectives is carried out within a more effective didactical and historic procedure, and whose results may satisfy both students and teachers (Dominguez and Franceschi, 1989).

Now, if the objective of these lines is to analyse the learning model over which this material has been design as well as its ideological implications, it is appropriate to mention some of

the basic principles of each trend, at least of the most characteristic elements that will allow recognising their evidence in the analysed text.

First of all, model is defined as: “a mental figure that helps us understand things we cannot directly see or explain” (Dorin, Demmin and Gabel, 1990). This way, when an author or authors think about the elaboration of an educational material, they do so by basing themselves in a learning model, i.e. in a series of algorithms that by being achieved will help the student learn the expected contents.

The question in this case would be: how do authors assume what the student learns? What is the role he/she is called to play in this process? What is the role of the teacher? And finally, what role can the text play? As these discourse elements reveal themselves in Dominguez and Franceschi’s text, these questions will be answered.

The three fundamental models on which a learning strategy may centre are: behaviourism, constructivism and cognitivism, whose fundamental principles could be summarised as follows:

BEHAVIOURISM	CONSTRUCTIVISM	COGNITIVISM
It is based on observable changes in the individual’s behaviour. It focuses on the repetition of behavioural patterns until they are carried out automatically.	It is sustained on the premise that every person builds their own perspective of the surrounding world through their own experiences and mental schemes developed. Constructivism focuses on the learner’s preparation to solve problems in ambiguous conditions.	It is based on the processes that take place behind behavioural changes (internal processes). These changes are observed to be used as indicators to understand what is going on in the mind of the learner. (Schuman,1996)

The best way to analyse upon which model the authors based themselves to design the text and its ideological implications will be by doing an analysis according to the following aspects or dimensions: linguistics features, the student-reader conception, the role the teacher is expected to play, establishing comparisons between the three previously defined models.

Peggy Ertmer and Timothy Newby set forth the formulation of Schunk’s five questions (1991, in Ertmer and Newby, 1993), which they created to distinguish each learning theory in the elaboration of certain material.

1. How does learning occur?
2. Which factors influence learning?
3. What role does memory play?
4. How does transference take place?
5. What kind of learning is better explained by the theory?

These five questions raised by Schunk and validated by Ertmer and Newby will be answered in each of the three aforementioned dimensions, in order to define the model upon which the material was designed and its ideological implications.

In this study, we additionally have the extra of having already worked with the text with different groups of students in the first year of the diversified cycle.

### **LINGUISTIC FEATURES AND STUDENT-READER CONCEPTION**

Linguistic features establish power relationships (Van Dijk, 1994), legitimise certain positions and deprive others of authority. Likewise, through text elements, such features may suppose a conception of who receives the discourse, what role they play and what is expected from them. In the analysed text, linguistic evidences have clear behaviourist characteristics. The use of verbs specifically alluding to Bloom's taxonomies, to begin with, reveal the tendency both authors respond to.

Bloom (1956) and his colleagues started the development of a taxonomy in the cognitive, attitudinal (affective) and psychomotor domains that would guide texts and the posterior writing of objectives. Many authors are familiarised with Bloom's Cognitive Taxonomy and it would not be adventurous to say that many texts and pedagogical discourses are still anchored to it:

Bloom's taxonomy:

- Knowledge
- Comprehension
- Application
- Analysis
- Synthesis
- Evaluation

In the text, the authors use a behaviourist discourse when their "labels" permeate all the presentation of the book in the aforementioned aspects: "Will analyse" and "Will understand", are the verbs used to indicate achieved objectives. In this case, the writing of essays, the elaboration of filing cards as observable behaviours, the obligation to take tests, as evaluative moments (sort of learning photographs) reveal the orientation of the text.

From the point of view of critical discourse analysis, pre-existing characteristics and competences are assumed in the student, and it is established that they will be part of the student's products: essays and tests which have no orientation in the text.

In behaviourism, the model of the mind, i.e. the mental figure that helps to understand concepts, behaves as a "black box" where knowledge is perceived through behaviour as an external manifestation of internal mental processes, even though these last ones are unknown in their structure.

At least in written discourse, the way in which learning is conceived is like a transaction where the student receives finished knowledge from the textbook. The student will find, understand, characterise elements thanks to the information lying in the text and his/her role is limited

to that. There presentation of the text does not describe how the student will attain these observable behaviours or if these are the result of internal processes in which experiences and conjectural processes are accompanied by the teacher.

The question in this case is: what verification elements are established by the authors to demonstrate that the student achieved the objectives set forth?

Apparently, learning occurs when the student gets the information from the text. Personal experiences or the student's opinion about the aspects treated are not considered. What is the aim? What can repetitions and memorisations aim at? Undoubtedly, meaningful learning is not the objective, which reveals an ideological structure from which the text is built.

Starting from the fact that constructivism states that knowledge is the construction of the individual (Parkman, 1996) and reality a deeply subjective concept, the selection of lexicon in the text studied does not achieve through it the creation of that interaction link in which the student discovers him/herself included within the knowledge creation process.

The use of third person in the narration of events and even in the presentation of the text, generates distance between the student-reader and the text. Likewise, the teacher is a receptacle of the discourse in an indirect manner: he/she is mentioned in the presentation of the book, but then, he/she is not mentioned again in the development.

The use of third person (*the author found, instead of I found*) is a well rooted tradition in the scientific community. However, many editors and professional organisations (including the Council of Science Editors) recommend the use of first person, as it produces a more accurate writing and because it presents the author as an active participant in the investigation.

Now, in relation to cognitivism, this paradigm sustains learning as a process in which there is a succession of modifications of meaning in an internal manner, intentionally produced by the individual as a result of the interaction between the information from the environmental and the active individual (Carretero, 1998).

If the individual, in this particular case the student, is not included in the language used in the text, and if we also take into consideration the unidirectional manner in which tradition in history didactics has established the communication between teacher and student, it is frankly very difficult that the student may ever accept and take advantage of him/herself as an "active" individual.

## 2. What elements influence learning?

In the text, knowledge is presented through language as a complete product, i.e. the student obtains it, extracts it in a unidirectional manner. Therefore, the conception of the process may be defined as banking, i.e. the student is the bank where the teacher deposits knowledge by using the text.

In the case of a subject such as History, the role played by memory has a noteworthy importance. The tendency is to present History as a sort of world almanac in which historic events answer

fundamentally to: What happened? Where did it happen? When did it happen? In the boldest of cases - very uncommon - the teacher and the text dare to raise the uncomfortable question of “Why did it happen?” Therefore, memory, in this case, replaces analysis, reflexion, and the questioning that could, no doubt, generate meaningful learning.

The student is conceived by the text as an inactive, ignorant individual that possesses no knowledge; an empty container that needs to be filled with wisdom from the text and the teacher. Now, it is important at this point in the article, to point out in a responsible manner, that we are not trying to discredit the intellectual effort that these two teachers have made from the point of view of historic science. There is no doubt that it is a brilliant compilation of information, where an accurate summary is made of such extensive periods of time. However, it would seem that authors write for themselves, or at least for someone of their same argumentative and academic stature.

Language tends then to create, in an unconscious manner, a gap between knowledge and the student. There are no doubts that was not the authors’ intention. It is simply a reality that is generated as a consequence of the linguistic features observed.

### **THE ROLE THE TEACHER IS EXPECTED TO PLAY**

In the presentation of the text, the authors state, as already described in previous lines, that “no text can substitute the teacher”, and it is on this statement that we will reflect on first.

“Cognitivism theorists acknowledge that a good amount of learning involves associations established through proximity with other people and repetition. They also recognise the importance of reinforcement, but emphasise its role as feedback for the correction of answers and its function as a motivator. However, even by accepting such behaviourist concepts, cognitivism theorists see the learning process as the acquisition and reorganisation of cognitive structures through which people process and store information” (Good and Brophy, 1990: 187).

The role assigned to the teacher in the text is that of companion in the student’s learning process, at least, it is what is asserted in the presentation of the book. However, an emphasis is made on the “extension of his/her knowledge, life experiences, experiences and explanations” and it is even stated that they are the ones who “give life” to the historic process.

Therefore, the teaching-learning process is not conceived as feedback, but unidirectional, as it has already been stated. Knowledge is compact, defined and complete in the text and in the teacher. What is intended when the student’s analysis abilities are systematically ignored? The discourse presented in the text and by the teacher constitute a power discourse as they are the only ones listened to, and what they say, those historic arguments they present, are legitimised by the academic setting which is the classroom.

In relation to this, Foucault (1973) states that in every society the production of discourse is controlled, selected and redistributed by a certain number of procedures whose function is to conjure powers and dangers, master random events and to avoid their heavy and fearsome materiality. In this case, a power is conjured - that of selective amnesia- and a danger - that of ignorance - as well.

On the other hand, the motivating elements are pointed out when the behaviour observed is the one desired, and even the expected performance is indicated in tests and discussions put forward in class. It would seem that there is no processing of knowledge, but a simple reception of it. Vygotski, as a representative of social constructivism, considers human development as a process of cultural development, human activity being the engine of the human development process.

The concept of activity acquires, in this way, an especially relevant role in his theory. For him, the process of formation of superior psychological functions will occur through practical and instrumental activities, but through social interaction or cooperation, not individually.

The instrumentalisation of superior thought through signs, specifically verbal ones, clarifies the relationship between language and thought (Frawley, 1997). This cooperation which, in a certain way, takes the student as an equal in this relationship, gives the teacher a central role, while in constructivism the one who has it is the learner.

Once again, it is appropriate to clarify that the teacher's role is irreplaceable, as asserted by the authors, and regardless of the optimum linguistics features of the discourse present in the text, and as dignifying as the student's conception may be, it is the teacher who is in charge of the academic fact and learning begins or stays with him/her. Now, to achieve meaningful learning, as suggested by theorists, it is necessary to involve the student not only as a simple observer, but as manager of his/her own learning, for this to have authentic relevance.

## **COMPARISON WITH DICK AND CAREY'S MODEL**

Now, a contrast will be established between the structure set forth in the text and the process suggested in relation to the interaction established with the student, the role performed by the teacher and the steps that need to be taken according to Dick and Carey's (2001) model. This model is the one with which the author found greater coincidences.

First of all, it is necessary to mention the stages in the model:

### **1. Identify the instructional goal (*Identify Goals*)**

In the first step what is identified is what the student is expected to do once the instruction is completed. The setting of an instructional goal is obtained from a list of goals, from a study on needs observed, or from a list of difficulties presented by students in a specific setting (Carey and Clark, 2001).



In the case of the analysed text, the final behaviours the student will observe by the end of the course are indicated in its presentation. However, such behaviours do not involve the development of critical thinking competences; filing cards and essays are mentioned in the text, but none is described in their implications.

## **2. Develop an instructional analysis (*Instructional Analysis*)**

After identifying the instructional goal, it is necessary to specify what kind of learning is required or expected from the student. The goal is analysed to identify skills and subordinated skills that need to be mastered. In other words, in this stage, the designer of the material identifies those skills that should be taught in order to reach the instructional goal. In this process, an outline is obtained in the shape of a flowchart which shows the skills and the relationships between them (Carey and Clark, 2001).

The instructional goal is described as the ability to participate in class, write essays, and answer questions in the tests the teacher gives. No thoughts are given to the implications these goals will have in the student's internal process, or to the relevance they will have in his/her daily life.

In this way, History is presented as an eminently theoretic, rote learning course in which personal analysis or development of opinions and judgements are not required, where the student does not play any role. The events set forth in the text belong to the past and that is where they remain.

## **3. Identify the entry skills and the characteristics of students (*Entry Skills*)**

Students will have to master certain skills to be able to learn the new skills that will be given to him/her. These skills are brought by the student from previous learning. In fact, in the studied text there is no description of the characteristics of entry behaviour or basic skills expected from the student (p.10). On the contrary, competences are assumed that have not been properly verified.

## **4. Writing of objectives (*Create Task*)**

The instruction designer writes in this case specific signalling about what students will be able to do once the instruction ends. This signalling is based on those skills identified in the instructional analysis. In general terms, the objective is a specific signalling about what is expected for the student to master or learn by the end of the instruction. (p. 10)

In the case of the analysed text, the authors state that after working with the book and with the teacher's participation, the student will be able to: UNDERSTAND, ELABORATE FILING CARDS, ETC. What critical thinking can be cultivated by making filing cards? What analysis capacity can be developed when students' potentialities are underestimated? Is it that no deep analysis processes may be structured where the intention is not to unify judgements doing ideological proselytism, but to cultivate critical thinking in favour or against what the student decides?

### 5. Elaboration of measuring criteria (*Develop Instruction*)

In this stage, the criteria which will measure the student's ability to achieve what has been described in the objectives are elaborated. In other words, tests which measure what has been pointed out in the objectives are elaborated. In this stage of the model, the text indicates that the assessment of achievement will be done according to the competence acquired by the student when he/she is able to: FILL IN FILING CARDS, PASS TESTS, PARTICIPATE, etc.

### 6. Design and development of the instructional evaluation (*Evaluate Learning*)

Once the elaboration of the instruction is finished, data is collected to improve it. The designer carries out what is known as: one-to-one evaluation, small group evaluation and field evaluation. Each type of evaluation gives the designer valuable information to improve instruction (p.13).

Formative evaluation, as contemplated in the model, can also be applied to instructional materials and to instruction in the classroom. Now, in the case of the text studied, the authors only suggest as evaluation or verification of learning, the performance of the aforementioned activities, as the units in which the text is divided do not consider verification activities. It is assumed that the student will attain the expected objectives with the readings and the teacher's assistance.

## FINAL CONSIDERATIONS

There is no doubt that it is not an easy task to try to reconstruct a text in order to reveal the learning theories that sustain its elaboration and its underlying ideology. There are diverse elements to consider. However, there is something important to emphasise: the text has already been used with study groups and a participatory observation has been done with them.

Experience says that:

- The text seems hermetic for students: the language and even the presentation of the contents is confusing for the students, in many cases generating frustration by not being able to find the specific issues the teacher gives him/her.
- The language tends to be elitistic: students report deficiencies when trying to understand the language used. Even though it is true that the text has a glossary at the end, and that we do not seek to simplify language, it could be more user friendly if it considered the writing and discourse characteristics and competences that the receivers of this written discourse have .
- The language used by the authors tends to be exclusive: when reading, the student does not feel related to what is recounted. Even though it is true that the writing is done using first person plural (us, ours), the other linguistic features in the text do not include the student.

- Text discourse: power discourse:

Van Dijk (1996) establishes that discourse is power and that persuasion is the biggest controller of linguistic acts in modern times. As a linguist, as a discourse analyst, I observe that mind control is given, generally, through discourse, i.e. “mental control is discursive” (p.23). In the text, linguistic features are observed that allow strengthening not only a behaviourist position facing the learning process, but an ideological construction of it by presenting historic facts as finished and anchored to the past.

Finally, discourse at a global level is, from the researcher’s point of view, mainly behaviourist. Experience has said that conceiving any kind of learning in this way may guarantee desirable and observable behaviours in the classroom, but no meaningful and relevant learning. History as a Social Science and as a subject to be studied must play, undoubtedly, a more determinant role in the education of citizens, a responsibility that certainly does not fall only on the text and its authors, but also on the teacher that administers the subject and on his/her commitment to do authentic education. Lastly, this process also requires a student committed to his/her learning, who is the protagonist of his/her changes and responsible for his/her educational process.

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# Social Studies Textbook Research: What's in it for Teachers?

STAVROULA PHILIPPOU

## INTRODUCTION

**T**extbook research, as this has been conducted over the past 50 years, and especially after World War II, by academic and international political institutions (e.g. Council of Europe, UNESCO) can be located within the 'hidden curriculum' tradition of research. Such studies have mobilised both quantitative and qualitative methodologies to explore, map out and diagnose, how images of 'enemies' and 'others' are constructed stereotypically in text, how prejudice and exclusion are performed, what meanings lie between and beyond the lines and images (e.g. Pingel, 1999; 2000). This is especially relevant for Social Studies subjects, which have historically held a key role in 'officialising' the modernist project of the nation-state, but also for societies in conflict, where curricula and Social Studies textbooks acquired a key role in explaining, justifying and maintaining or resolving conflict (see, for example, Pinson, 2007; Soysal & Antoniou, 2002).

## CURRICULUM, TEXTBOOKS AND SOCIAL STUDIES

Textbooks are very significant within educational systems because they reflect curriculum developments, specify and interpret the content of the curriculum and structure it in a way that is suitable for teaching and learning (Koutselini-Ioannidou, 1996). They thus perform a very important pedagogical role. However, textbooks can be limiting, since they often dominate the entire curriculum to the exclusion of other materials (Cortes & Fleming, 1986; Nieto, 1996). For example in Greece, students have been found to use the textbook for 90% of their lessons (Flouris & Calogiannaki, 1996). Even though textbooks are in interplay with the curriculum and teachers, they are extremely important not 'as texts themselves but for what broader social and political debates, struggles, and orientations they represent' (Soysal, 2002, p. 280). As Schissler and Soysal (2005) point out:

Textbooks do not just convey knowledge; they represent what generations of pupils will learn about their own pasts and futures as well as the histories of others. In textbooks, we find what a society wishes to convey to the next generation [...] [T]he analysis of textbooks is an excellent means to capture the social and political parameters of a given society, its social and cultural preoccupations, its anxieties and trepidations. [...] History, geography, and civic textbooks, though simplified, lay out for us the basic temporal, spatial, and discursive organization of regions, nations and the world (pp. 7-8).

The fact that such a significant volume of research has been conducted on textbooks exemplifies their political importance in national educational systems (c.f. Apple and Christian-Smith, 1991). A number of studies, for example, have indicated the ethnocentrism, stereotypes, racism and prejudice shown by educational materials and particularly textbooks in History and Geography, for example in the USA (Nieto, 1996), the UK (Maw, 1991), the Balkans (Koulouri, 2001; Kapsalis, Bonides & Siptanos, 2000), Europe (Coulby, 1995; McLean, 1990), and Cyprus (POST-RI 2004; 2007; AKTI 2004; Papadakis, 2008; Koullapis, 2002; Kizilyurek, 2002; Philippou, 2004).

## **METHODOLOGY**

This paper draws upon three sets of data from History, Geography and Civics curriculum and textbook research to exemplify how this has been conducted in the divided context of Cyprus, where a (segregated) formal education has historically been fuelling nationalism and conflict between the two larger communities on the island, Greek Cypriots and Turkish Cypriots. In all three cases, a social constructivist perspective was adopted and qualitative methods were used, combining content and discourse analyses. The analytical tools which were employed to analyse the text drew from nationalism theories and analyses of Greek-(Cypriot) state and national citizenship as well as post-colonial and post-structuralist analyses of constructions of 'Europe', 'European identity' and 'European citizenship'. In the first example the History and Geography syllabi and textbooks for the 5th Grade were analysed to identify constructions of Europe and the European dimension (Philippou, 2007); in the second example, History, Geography and Civics Education syllabi and textbooks for primary and secondary education were analysed to explore how solutions to the Cyprus problem (and by extension Cypriot identity) were constructed in text (Philippou & Varnava, forthcoming February 2009); and in the third example all Geography textbooks for primary and secondary education were analysed to explore constructions of 'Europe', 'European identity and citizenship' (Philippou, 2008). In all three cases the syllabi and textbooks analysed were those used in Greek-Cypriot education, which are centrally published by the Ministry of Education and Culture of the Republic of Cyprus; some of these textbooks are imported from Greece and are published by the respective Ministry of Education and Religious Affairs.

## FINDINGS

The analyses of these documents, led to various findings which are presented in detail in each of the respective publications for these studies. My aim in this paper is to pull some common themes located in the findings of these three studies, so as to address the concerns of this Seminar. These themes are: (Greek)-Cypriot citizenship; European identity and citizenship; and constructions of 'Others'.

### 1. (Greek)-Cypriot citizenship

Constructions of (Greek)-Cypriot citizenship was strikingly similar in the three studies; four key mechanisms were located by which this was constructed in text. Firstly, the use of language in text was such that the term 'Cypriot' or 'nation' systematically denoted Greek Cypriot or Greek nation in Cyprus, implying that all Cypriots are Greeks and that others, including Turkish Cypriots, are not Cypriots. Secondly, the historical narrative in place supported a construction of a Cypriot identity as Greek and of Cyprus as historically Greek, monocultural and exclusive of other (old and new) communities and minorities of Cyprus, including Turkish Cypriots. This is a linear chronological historical narrative of victimisation which essentialises Greek identity into blood-bonds of brotherhood and into an undifferentiated national group. Since Cyprus is constructed as 'historically Greek' and Turks as recent conquerors, then the presence of Turkish Cypriots is de-legitimised because they are construed as remnants of 'conquerors' or products of 'islamisation', or at best, a minority, a cultural groups with no political rights; this is fact formulates the third mechanism by which Cypriot identity is formed in text. The fourth mechanism identified refers to the content ascribed to the Cypriot identity as compared to the Greek one. Text on the Greeks and Turks of Cyprus, whose identities are defined as national (ethnocultural) and distinct, each attached to a respective motherland, using national symbols and anthems respectively. Cypriot identity on the other hand is ascribed a civic-legal content, which attaches Cypriots to the Republic of Cyprus as a state and as a place of residence with no emotional or psychological appeal. This kind of emotional or psychological appeal is more evident in the textbooks analysed when historical, economic or cultural bonds with Greece are explained.

### 2. Europe and European Citizenship

The second theme which emerged involved the contents ascribed in text to 'Europe' and by extent to European citizenship and identity. An understanding of 'Europe' as a concept with ethno-cultural content which is inherited from the Greeks, Romans and the Christians is in place when historical and cultural representations of Europe are discussed. This definition includes Cyprus because of its Greek and Christian cultural profile for the textbooks: Cyprus is construed as European because it is perceived as firmly associated with the Greek-Roman culture and Christian heritage. This implies an orientalist understanding of Europe and the West (see Said, 1993), an understanding which has historically underpinned imperialist and colonial practices throughout the world, including Cyprus. When European citizenship is at stake, it is usually defined in text as a political identity which is directly linked to the European

Union, of which the Republic of Cyprus is a member-state since 2004. However, this also tends to be exclusive since European citizenship pre-supposes citizenship to the Republic of Cyprus, which complicated by the division of the island and the fact that the Turkish Cypriot authorities do not recognise the Republic of Cyprus as representing them, but as representing the Greek Cypriot community.

### **3. 'Others': 'Enemies', invisible, or just others**

The third theme is very relevant to the previous themes of identity (be it national or European), because often times the 'self' is defined in text in opposition to the 'others'. These 'others' can be categorised under three groups for the Greek Cypriot textbooks analysed. The first group is the prevalent, eternal 'Other', the 'enemy', the 'Turks'. They are portrayed in text in similar terms when both the present and the past are the focus of the textbook, the implication being that since they have been historically 'barbarians', 'uncivilised' and 'conquerors' since the Ottoman times (1571-1878 AD), they maintain the same characteristics today as the recent invaders of Cyprus in 1974. Interestingly, 'the Turkish Cypriots' are comparatively invisible in the text, since there are more frequent references to the 'Turks' and the 'Turks of Cyprus' than to the Turkish Cypriots. Similarly, other Cypriot minority groups are invisible in text, as Armenians, Maronites and Latins are rarely referred to and their perspectives do not inform the text.

Thirdly, when other 'others' are investigated these are usually national groups or countries studied for Geography, or peoples which had some role in the historical course of Cyprus or Greece in History. The knowledge provided about other peoples tends to be stereotypical; even though this derives from a benevolent effort to emphasise some of the positive characteristics and attractive features of each country, culture and its people, in several chapters, there are sections which deal with the 'characteristics' of each people and which provide stereotypical information. The way these characteristics are attributed to each nation is subjective and absolute; it also implies that each national group is homogeneous and that for example, only Germans live in Germany, Italians in Italy and so on. For example, in the 5th Grade geography textbook Italians are characterized as 'impulsive, expressive and behaving in a friendly way to foreign visitors' (p. 183). The British people 'combine their love for green with their love for natural life' (p. 136). In the history textbooks 'others' are usually portrayed in negative terms, because they enter the historical narrative as threatening the Greek nation or the Byzantine Empire or Cyprus. For example, in the 5th Grade history textbook, which focuses on Byzantine history, reference to other peoples occurs when they interfere with its frontiers or the Empire sets out to conquer them. This is the case for example with European peoples like the Slavs, Bulgarians, Russians, Avars, Genovese, Venetians, Normans and others. There is no effort to see these movements beyond their 'aggressive' character against Byzantium, the implication being that they were motivated by greed rather than necessity. Similarly, non-European (Persians, Arabs, Ottomans-Turks) peoples are construed as dangerous enemies not only to the Empire, but to the whole of Europe or Christianity; the Byzantine Empire thus becomes a defensive and unique bastion for the whole continent. Interestingly, this approach often

constructs the 'West' or 'Europe' with enemy characteristics when the roman-Catholic Church and the Crusaders antagonised with the Byzantine Empire over the East.

## DISCUSSION

The findings of these three studies contribute to our understanding of curriculum (including syllabi and textbooks) as a political and ideological text, as a historical and cultural construct which reflect certain constructions of identity and others, which legitimise certain versions of the past and, by extension, the future in the case of Cyprus. These are important issues for curriculum theory and the sociology of curriculum. However, I would like to conclude this paper by turning our attention to teachers and what textbook research could mean to them: textbook research is not or should not only be useful at the 'high profile' level of policy, curriculum and planning or for academic purposes. It is also essential in pre- and in-service teacher training as a way to inform the 'low profile' world of classroom and teaching; in other words, textbook research should be made available, through seminars and conferences such as the present one, or during in-service training of teachers in relevant university courses so that teachers develop tools to critically engage with textbooks whilst teaching to address issues of nationalism or Euro-centrism (such as those presented earlier in the paper) or other issues that textbook research makes available to us (such as those presented by colleagues in this seminar today). This is important not only because teachers are expected to extensively use textbooks in the classroom, but also because teachers today are expected to critically engage with textbooks as one out of a multiplicity of potential sources and tools to use during teaching. In some countries teachers have a role in evaluating and selecting textbooks for their school and class. In other countries, where a single-textbook policy applies, they have to teach a prescribed textbook. Whichever textbook teachers have available, however, their role is equally important in how they will choose to use it during teaching. Arguably, even a very 'bad' textbook may be used in pedagogically positive ways, if the teacher is trained to not only 'follow' the textbook page-by-page, but also to select, complement, critique, re-hierarchise, replace and so on, some of the activities or materials available in textbooks. This is why I would argue that, though textbook research is important from an academic perspective in and of itself, it reaches its full potential for impact if it is mobilised towards teacher education, if it used towards empowering teachers in viewing curriculum not as a given or 'natural', but an ideological and political text, as a cultural construct. At the same time acknowledging the immense role of the teachers should not be used as an 'excuse' or argument by educational authorities to keep obsolete, pedagogically poor or biased textbooks for use in schools. On the contrary, textbook research (including research over how teachers use them in class) supports arguments towards frequent, academically sound revision of old textbooks or authorship of new textbooks, to address the weaknesses it has located. Since the 1960's and 1970's there have been various examples of research (e.g. Elliott, 1991; Carr and Kemmis, 1986; Hopkins, 2002) which involves teachers in participatory and action research designs for curriculum and teaching materials development; these examples bring



together researchers and teachers in complementary ways, so that curriculum practice is reflective and curriculum development dynamic. To this end, and especially in the case of centralised educational systems such as the Greek-Cypriot one, Ministries and educational authorities need work closely with universities and schools not only to initiate research but also to facilitate research and capitalise upon research findings. This means acknowledging the complexity of educational and curricular phenomena as well as the power of teachers in curriculum implementation; a real academic and political challenge.

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# School textbooks and regional history

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**T**his paper is part of a critical exploratory investigation project on the modes of integration of regional history in school textbooks approved by the Ministry of Education in the History of Chile area.

We start from the assumption that studies centred on the capital (and the central zone of the country in general) have been prioritised when elaborating school textbooks, showing that history as the explanatory key to national history.

We believe that such a situation does not allow the visualisation of relationships between regional history and national history, and the contribution that local studies can make to the understanding of national processes. In addition to this, the situation is not consistent with the demands of the current national educational reform, which aims to contextualise teaching by incorporating local reality as a way for the student to recognise the environment, just as the History and Social Science Plans and Programmes (Year 10) point out.

## **REGIONAL HISTORY**

Regional history studies have had an important boom over the last few years. Some emerging institutional contexts and changes in the historic discipline itself explain such a development.

In the first place, the consolidation of the careers of History and Geography in the country, both in the north and in the south, has allowed the promotion of research on regional issues. Studies like the one on neighbouring relationships (Sergio Villalobos, Jorge Pinto, Leonardo León, among others), on the knowledge of native peoples (José Bengoa, Jorge Hidalgo, Luis Carlos Parentini, Holdenis Casanova), on settlement and occupation of spaces (Mateo Martinic, Sergio González, Luis Carreño), have recreated a history that enriches the long-settled visions that closely relate national history with the history of the central zone.

In the second place, the consolidation of Regional and National History Congresses has promoted academic spaces of interdisciplinary dialogue which have deepened the knowledge of different regional domains. In this sense, studies on the economic and social processes have found in regional history a productive area for their development, as they assume, on the one hand, a direct criticism of history centred on the political aspect and suggest, on the other hand, that the characteristic and explanatory features of regional development have to do with the social and economic processes, before the evident fact of the tardy presence of the State-Nation in these fields.

In the third place, the paradigm crisis that social sciences have faced, especially history, has brought out that great explanatory accounts of universal and national history do not make it possible to show local processes or go deeper into an appropriate knowledge of reality. Facing this paradigm crisis, answers have pointed to interdisciplinary dialogue (early on with ethnology and anthropology, and later with economy and sociology) and the rescue of new themes: studies on social movements, emerging groups (indigenous people, infancy, popular subjects, women, etc.), invisibilised zones (private life), among others.

In this context, regional studies, which were underestimated for a long time facing a national history centred preferably on the political, have positioned themselves with a double effect:

- a) They render it possible to make history building local views which enrich the understanding of national processes when integrated to other spaces.
- b) It is in regional studies that we can progress towards more integrated research of the field of knowledge, incorporating economic, social and cultural variables which it is more difficult for national history to approach, because of its synthetic nature.

¿To what extent has this progress in historiographic perspectives been incorporated in current school textbooks? The presentation of our problem implies asking ourselves about the relevance of textbooks in the teaching of history and the need to incorporate regional issues in them. In order to comply with the first requirement, we have to contextualise the present role that textbooks play in the educational system as a whole.

### **TEXTBOOKS AS A SPACE OF DIALOGUE AND INTEGRATION**

Textbooks are still relevant as a teaching tool, as they focus on the contents acknowledged by the official curriculum and integrate national culture (School Textbook Consultant Council Report, 2000).

The Ministry of Education has centred its action regarding textbooks on improving their quality standards through public tenders and budget increase, with the aim of reaching a greater number of students, as well as covering more learning areas and levels. Currently, the number of school textbooks distributed for free adds up to 15 million (Ministry of Education, 2007). In addition to this, it has been acknowledged that there is a key element in them for the transference of knowledge, the development of comprehension in students and equal

access to education (Cristián González, 2007).

However, recent studies show that school textbooks in general are well evaluated by some students and teachers, although the strategies for their correct use have not changed in the last few years, being used by teachers to “cover contents” and by students “to copy them” (Ministry of Education, 2006).

On the other hand, didactic demands still centre on an important aspect in the elaboration and use of school textbooks, as they should be the ones to incorporate the latest advances in the historic discipline. The critical vision about this points to the lack of relationship between knowledge produced by research and scholars (which supposes new epistemological and methodological approaches that tend to promote re-readings of historic problems) and the teaching of history in class (which supposes didactic approaches). This contribute to a simple transference of contents (reproduction) with no possibilities of renovating the History and Social Science curriculum (José Carlos Gibaja, 1998). On this matter, Rafael Valls points out explicitly: “It does not seem possible to accept as a good history textbook, from a theoretic perspective, that which, besides having a clear and acceptable didactic and formal structure, does not establish an active and creative-critical relationship with students or does not incite them to develop their historic argumentation, comparison or reasoning capacities.” (2001).

It is significant that the *Study on the use of textbooks in secondary education. Executive Summary*. (Ministry of Education, 2006), shows, in the case of History and Social Science, a high degree of satisfaction in teachers in relation to the contents offered by textbooks (especially appreciating the use of concepts, graphs, plans and maps), but when you ask the students, the lowest evaluation (with 36% in Year 10) is related to the fact that the contents do not seem close to their interests.

### **THIS LEADS US TO RAISE ANOTHER KEY ASPECT: THE CURRICULAR FRAMEWORK**

The current curricular framework emphasises that the teaching of History and Social Science should not constitute a distant knowledge unrelated to the students’ world, but should aim to “develop an attitude of respect towards the historic and cultural diversity of humanity and appreciate one’s identity”, as well as avoiding a biased history by constantly updating contents and encouraging the use of evidence (*Curricular Framework*. Decree 220/1998, page 97, Ministry of Education). Although these objectives to be achieved by the historic discipline may be appreciated, the lack of reference to the role that regional history should have in this is surprising.

Such a void is also manifested in the *Cross-curricular Fundamental Objectives*, where the search for “the development of a sense of personal identity [...]” is clearly expounded. From our point of view, this divides the psychological and knowledge planes into lots, instead of transversalising them by the acknowledgement and appreciation of their own regional history. In addition to this, it is pointed out that students should develop a “reflexive and critical attitude” so that they can understand and reinforce the “national identity and social

integration”, although there is never any reference to the fact that it is essential to incorporate regional history in the reinforcement of that “national identity”. Finally, in the field of the development of thinking, students are expected to develop the ability to solve problems, facing different situations with a critical disposition within the family, at school and at work. (*Curricular Framework*. Decree 220/1998, page 21, Ministry of Education). However, nothing is said about the fact that these abilities have to allow students to solve problems whose origin is –although not exclusively- in regional history itself.

On the other hand, in the *Good Teaching Framework*, in a section titled “Preparing learning: Implementation of the curriculum so that all students achieve quality learning”, it is indicated that teachers should not teach their discipline in a vacuum, but considering their students’ specific and particular contexts, especially their “cultural and family peculiarities” (*Good Teaching Framework*, Ministry of Education, page 8), with which –we believe– regional history must be really considered in the Plans and Programmes, and consequently in school textbooks.

The Ministry of Education itself identifies as one of the main demands from society to the educational system the fact that it should be founded on an “ethical conscience of universal values and on feelings of belonging and national identity” (*The Reform in Progress: good education for everyone*. Ministry of Education, 1998, page 20), which constitutes another sign of the need to explicitly consider frameworks –personal or local– in which this sense of belonging is shaped.

If we analyse the Secondary Education Plans and Programmes more carefully, the approach with which the geographic contents are presented in Year 9 never ceases to amaze one. This makes it clear that an appropriate geographic knowledge of the country must begin by knowing the geography of one’s region. Such an approach is absent in the Year 10 programme, where the contents are centred on learning of the History of Chile, setting forth five units and ten fundamental objectives. With this, students are expected to attain a “global vision” of the development of national history and understand that the current situation of their country responds to the historical processes that constitute its past.

In order to achieve the objectives presented, two articulating axes are proposed: a systematic chronology and a linkage of the contents studied with the “students’ immediate experiences”. The presence of these axes is based on the idea that it is impossible to study all the History of Chile in only one year, therefore the chronological systematisation and the linkage of what has been learnt with the environment and the immediate reality, should allow the student to hold on to the strategies and tools necessary to go on learning on his/her own those historical processes which were not dealt with in depth. If we look at the second articulating axis, the objective is to make students empathise with the life experiences of human groups that participated in the historical processes, incidentally ensuring meaningful learning. However, when it is time to integrate those articulating axes with the Fundamental

Objectives, only one of them stimulates students to connect what they have learnt with the “immediate environment”, motivating students to relate “that” which they learn with their region, province or commune.

As to the activities suggested by the Ministry of Education, most of them aim to connect the topics with national identity, but only some of them bring the contents closer to the immediate environment. The same happens with evaluations, which are very varied, but do not progress enough towards knowing how students connect the national history contents with their own region’s reality or what new knowledge they constructed starting from this connection. Finally, as regards the bibliography proposed, the scarce weight of regional history and the scant inclusion of historiographic developments achieved in this field over the last decades is made more evident.

## **CONCLUSIONS**

However, despite this critical approach, we acknowledge the progress the current Educational Reform has implied at the moment of thinking of a much more understanding national history that promotes competences in students, expanding the historical contents towards topics that until some years ago were even scarcely recognised by national historiography, such as the study of emerging actors (women, children, workers, indigenous people, etc.) and new realities (cultural and social). For the same reason, the scarce relevance that regional history has in the study programmes and the scant acknowledgement of the progress in historiography over the last few years does not cease to amaze one. This would ultimately explain the scarce weight these themes have in school textbooks.

Thus, the guidelines that the Ministry of Education formulates for the elaboration of school textbooks suffer from the same voids mentioned previously in the analysis of the study programmes, that is to say, the inclusion of new historical contents and the search for the linkage with the social environment, but without promoting the study of regional history. For example, in one of the guidelines from the Ministry of Education for the elaboration of school textbooks – for Year 10 in our case – there is reference to the space framework as an element of contextualisation and comprehension of historical processes, although the notion of space is not exploited enough to progress towards the understanding of regional processes. Thus, it is pointed out that the “Textbook has to make the specialty of the historical processes explicit as an essential dimension to explain the social complexity, without reducing it to a topological scene of recounted events” (Ministry of Education). However, this document does not clarify that certain historical processes, such as the economic dimension, can only be understood from a regional perspective, understanding as regional not the administrative political division, nor the one that refers to the purely geographic aspect, but to the dynamic and systemic relationship produced between local actors, interests and processes, which help to understand national history.

Anyway, a larger study should focus on understanding which are the practical and operational difficulties in the field of publishing at the moment of choosing one textbook design or the other (in terms of content and form), helping to understand, but especially to overcome, the reduced historiographic approaches that operate at the moment of elaborating school textbooks.

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# Contents of history and social science textbooks 1983-2006

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## **1980s AND 1990s: FROM POST-DICTATORSHIP TO NEOLIBERAL POLICIES**

In the mid-1980s, a series of transformations began that were deepened during the 1990s and which had a strong impact on the Argentine educational system, on the organisation of the curricular structure and the Social Science area in particular. These transformations strongly affected the production of textbooks, and due to their characteristics, they could be classified in two groups: on the one hand, those that were intrinsic to the educational system, dealing with changes in the educational policy of the country; and on the other, those that were external to the educational system, regarding changes in Social Sciences, particularly in history, and their reception in the Argentine historiographic field.

### **1. Intrinsic transformations**

The return to the democratic regime in 1983, after seven years of dictatorship, involved important changes in society. In the educational system, it meant re-thinking, among other things, the concept of authority, the teaching-learning processes and the inclusion of new contents, in an opening-up and reception of theoretic and methodological changes that occurred in other national contexts.

At a national level, the Ministry of Justice and Education completed the process that had begun in the 1960s, regarding the transfer of the administration and management of primary education to jurisdictions. In parallel, in 1984 it invited the society and especially the educational community to participate in the National Teaching Congress, whose activities were carried out

until 1988.<sup>1</sup> A large number of debates and conclusions developed in this field were the basis for the next decade's transformations, particularly the Federal Law on Education (LFE).

In some jurisdictions, the transfers of educational services of primary education and the debates about what transformations were necessary in the contents to be taught were reflected in new curricular designs. For example, in 1986, in the Municipality of Buenos Aires the new curricular design for primary education was approved (the previous one dated from 1981).<sup>2</sup>

These processes were deepened during the next decade, and they were combined with transformations in the structure and characteristics of the educational system. Thus, in December 1991 by the 24,049 Law of Culture and Education, secondary education and tertiary education (non-university teacher-training courses) were transferred to provinces, ending the transfer processes of educational levels. In April 1993, the much-discussed 24,295 Federal Law on Education was sanctioned, the first law on integral education since the creation of the system in the last decades of the 19th century.<sup>3</sup>

The main characteristics of this reform on curricular contents can be summarised as follows: a definition curricular policy was designed at the central level, but with a decentralised application by each jurisdiction<sup>4</sup>, which implied the need to establish a first year of curricular

<sup>1</sup> In this Congress, a series of diagnoses and reports produced by independent academic groups during the final years of the dictatorship were recovered. Despite the differences and antagonisms that arose in the congress, several agreements were reached, regarding the need to decentralise education to provinces, extend compulsory education, review contents and ways of teaching them, focus on deprived sectors and reformulate teacher training plans and policies.

<sup>2</sup> Among the Social Science objectives and contents included in this curricular design, we find the inclusion of constructivist pedagogical conceptualisations, as well as an appreciation of didactic knowledge and an emphasis on the function of Social Sciences as educators of critical subjects able to understand social reality, interpret it and operate on it. To this we add the idea of renewing historiographic approaches in contents, which goes from a criticism of history teaching with a purely identity-formation purpose, to the introduction of the idea of historical processes and their multiple temporalities, as well as a timid arrival of economic and social history and a growing importance in Years Six and Seven of American and Argentine history of the second half of the 19th century, and the 20th century.

<sup>3</sup> A more detailed analysis of the 1990s Argentine educational reform and its comparison with other Latin American reforms can be found in AAVV, *Las reformas educativas en la década de 1990. Un estudio comparado de Argentina, Chile y Uruguay*, Buenos Aires, 2004; Tiramonti G., *Modernización educativa de los 90'. El fin de la alusión emancipadora?*, Buenos Aires, FLACSO/TEMAS, 2001; For a critical view of this process, refer to Pavigianiti N., *La Ley Federal de Educación como Elemento de Regulación de la Realidad Educativa Argentina. Sus Orientaciones hacia la Privatización, la Provincialización y Descentralización de las Decisiones en los Poderes Ejecutivos y el Retiro del Gobierno Nacional del Financiamiento de la Educación Pública*, Buenos Aires, OPFYL, Cuadernos de Educación N° 3, 1995; AAVV, *Las reformas educativas en los países del cono sur. Un balance crítico*, Buenos Aires, CLACSO, 2005.

<sup>4</sup> For the complete educational system, the most important modifications were: Changes in the structure of the system's levels, replacing the system of one cycle of 7 years of primary education and one cycle of secondary education of 5 years, with a 3-level scheme: one of 2 years of initial education, one of 9 years of primary education (divided in 3 cycles of 3) and the 3-year polimodal level; a reform in the system's government and administration, establishing three levels of government. The federal level, run by the Federal Council of Education (CFE), had the function of arranging the curricular policy, the mechanisms for the recognition and equivalence of titles from formal and non-formal education and the criteria for the application of the new academic structure. The national level, run by the Ministry of Culture and Education had the function of providing technical assistance, coordinating the definition of certain normative criteria, producing information about the educational system's variables, evaluating performance and establishing compensatory policies of the differences in educational opportunities. Finally, the jurisdictional level, run by provincial governments and the city of Buenos Aires, had the function of providing educational services in its establishments and applying the educational policies that had been decided on in the other two levels; extending the obligatory nature of the system to ten years, from the last year of the initial level (pre-school) to the ninth year of EGB (Year Nine); institutionalising a national system of educational quality evaluation, organised by the national ministry with the purpose of evaluating the functioning and quality of the system; and renewing teacher training by a massive training programme run by the Federal Network of Continuous Teacher Training.

specification agreed upon by national and provincial authorities regarding what to teach: the Common Basic Contents (CBCs).<sup>5</sup>

Therefore, school contents were redefined through the CBCs agreed on in the Federal Council of Education and Culture for all levels of the system and for teacher training. From a teaching and academic point of view, these contents were the result of different consultations to experts of various disciplinary areas, teachers and national and provincial technical teams. From these national CBCs, considered the relevant knowledge that had to be taught and not curricular designs, programmes or study plans, each jurisdiction had to elaborate its own curricular designs that, based on national designs, could be adapted to particular situations.

Regarding this last point, the reform began by producing a transformation, modernisation and updating of Social Science contents (an area that absorbed the subjects of history and geography but which also included contributions from sociology, economics, anthropology and political science). The subject structure was replaced with areas of knowledge, which brought important changes to the contents that corresponded to the years of the previous secondary level, distributed between the third cycle of EGB (Years Seven to Nine) and the polimodal level (Years Ten to Twelve).

The new CBCs emphasised the need to guide social science education toward an explanation of historical processes as a result of social, political, economic and cultural relations established among human groups in time and in space, focusing on more recent periods and on the Argentine context. The current social reality thus finds one of its keys for interpretation in the analysis of the past. Therefore, another of the axes of these new contents are the procedures related with the understanding and explanation of social reality, that is, with the way in which disciplines of the social science field produce knowledge.

Although Common Basic Contents do not prescribe a curricular organisation for social science teaching, but present a set of conceptual and procedural contents for each cycle and level, during the years that followed the reform, they became the reference point used by publishing houses for the production of textbooks.<sup>6</sup>

Decentralisation allowed jurisdictions to decide what contents to include for each year and cycle, and to make their own jurisdictional designs. Thus, each jurisdiction produced its designs based on the CBCs, with the freedom to distribute the cycle's contents according to its criteria and needs, which generated a horizontal differentiation of contents.<sup>7</sup>

<sup>5</sup> For a detailed analysis of the curricular transformation of the last decades in Argentina, refer to Braslavsky C., "El proceso contemporáneo de transformación curricular en la Argentina", en Filmus D. *Las transformaciones educativas en iberoamérica. Tres desafíos: Democracia, desarrollo e integración*, Buenos Aires, Troquel, 1998.

<sup>6</sup> Only by the end of the 1990s, the Ministry of Culture and Education created CBCs for the EGB level, separated for years of education (and not for the whole cycle). Jurisdictions – except for the Buenos Aires Province – began to approve their own curricular designs as from 1997.

<sup>7</sup> This heterogeneity was also extended at the rhythm with which each jurisdiction adapted to the new normative framework. Thus, the Buenos Aires Province, for example, quickly modified its structure and created its own curricular designs. Four years after the sanctioning of the federal law, it had completely transformed its academic and curricular structure. On the contrary, the city of Buenos Aires never modified its educational system and strongly opposed the transformation demanded by the national law, developing new curricular designs for the first and second cycle of primary education (Years One to Six), guidance for Year Seven and new programmes for the subjects of Years Eight and

This lack of homogeneity, explicit in contents and structure, is a very important element for analysing the characteristics of the publishing market during the 1990s, as we will soon see.

By the end of 2006, a new educational reform was produced. A new Law on National Education replaced the Federal Law on Education. An analysis of its characteristics and impact on school contents is beyond the time scope of this work, although until now it does not seem to have had a big impact on the textbook publishing market.<sup>8</sup>

## 2. External transformations – Changes in historiography

It is almost a platitude to place the transformations that occurred in western historiography during the last three decades under a sign of crisis. This diagnosis refers to various subjects: the outbreak of interpretative and methodological paradigms stabilised in the 19th century and their explanatory ability, the criticisms to the explanatory ability of history by other disciplines and the debate and reformulation of the relationship between historians and history with society and state. This uncertainty resulted in a reflection by historians on their practices and the conditions of production of their discourses.

However, it is also undeniable that seen from a different perspective, the last decades have been of a great historiographic effervescence. There was an extraordinary expansion in the number of problems, topics and ways of approaching historic investigations<sup>9</sup>, which were combined with an appreciation of the individual and his actions –blurred under the hegemony of structural history– and with a concern for ways of spreading knowledge produced in the discipline.

In Argentina, since the return to democracy in 1983 and in the more general framework of the boom of studies in social sciences, historic investigations and reflections about the past have taken a new course.<sup>10</sup> In the national academic fields, one of the novelties was

<sup>8</sup> Nine. The disparity in the implementation of the reform is not significant only among jurisdictions, but also between levels and cycles. Thus, the first and second levels of EGB were massively implemented by most jurisdictions, but the introduction of the third level of EGB and mainly the *polimodal* level was much more limited.

<sup>9</sup> The new law introduces in its text as part of the curricular contents common to all jurisdictions: regional integration, particularly MERCOSUR; the cause of the recovery of the Falkland Islands; the processes of rupture of the constitutional order, especially during the last dictatorship, which resulted in the establishment of state terror in order to reflect on the value of democracy and the rule of law; the rights of children and adolescents; the cultural diversity of indigenous peoples; and equality and respect between genders. They have all been included to some degree in the current editorial proposal.

<sup>9</sup> The territorial borders of investigations for historians expanded until new topics were reached, such as the history of sensitivities, daily life, childhood, smells, states, the production, circulation and consumption of cultural goods, cinema, places of memory, reading, cultural practices, rites and beliefs, ways of sociability; new subjects such as women, children and minorities; new conceptual or methodological ways of approach such as microhistory, the history of practices or the history of concepts; new fields such as the history of ideas, intellectual history, cultural history or the renewed political history.

<sup>10</sup> The rearticulation of the intellectual field, visible since the democratic transition, was based on the crystallisation of processes developed in institutions outside the state machine. In them, multiple projects took place in the social science area, basis of many of the historiographic lines that will be manifested in the next decade and that are rooted almost at the beginning of the dictatorial regime. These teams of social investigators played an important role in the transition and were incorporated in public and private universities, and CONICET. For a more detailed description of the state of the field in the 1980s and 1990s, refer to Romero L. A., “La historiografía argentina en la democracia: los problemas de la construcción de un campo profesional”, in *Entrepasados*, año V, N° 10, pages 91-106, 1996; Pagano N. and M. Rodríguez “Una aproximación a la historiografía argentina reciente: temas, debates y tendencias”, In *Actas del III Congreso Internacional de Latinoamericanistas*, Santiago de Compostela, Spain, 2002.

the consolidation of the age-old process of institutionalisation, materialising in a series of historiographic mechanisms and criteria that began to act as common rules of the discipline, which contributed to the constitution of a more “professional” historiographic space in a context of a wide internationalisation of historic studies.

Since the 1990s, these processes were combined with a growing effort to make national historiography engage in a dialogue with processes developed at an international level. This can be seen in the contacts with foreign academic institutions, an invitation to renowned foreign historians of the most dynamic and original national historiographies to give classes and seminars, or the number of historians who complete their training in academic fields abroad. Thus, historians, students and through them, wider publics such as teachers from other levels of the educational system, began to have contact with, and became updated in topics, methodologies and authors that until then were almost unknown in these public fields.<sup>11</sup>

The increase of resources allocated to universities and organisations such as CONICET or the SECyT’s Scientific and Technological Promotion Agency contributed to the development of these new approaches, increasing the number of investigations, projects and teams.<sup>12</sup>

Contrary to previous decades, during the 1990s the new historiographic tendencies were more or less quickly transferred to the educational system.<sup>13</sup> The large number of university professors and investigators who during the 90s were part of the teams of officials and technicians of the Ministry of Education, the groups of authors from textbook publishing houses or the groups of teacher trainers from national and provincial programmes to support the educational reform, was decisive.

These internal and external transformations are very important for analysing the transformations in history textbook contents during these decades.

### **SOME GENERAL CONSIDERATIONS ABOUT HISTORY TEXTBOOKS**

Just as historical knowledge is a privileged instrument for shaping a society’s historical conscience, the set of ideas that flow in it and give shape to its imaginary is much more complex and contradictory than the contents of the textbooks used in formal education. However, those contents are not alien to that imaginary, “*because what appears in history, geography and civic education textbooks takes root in strong ideas of our society.*”<sup>14</sup>

<sup>11</sup> Undoubtedly, external historiographic models guided the renewal of historic studies during those decades. However, it is necessary to point out that they are not merely adopted, but they are locally filtered in the historical characteristics of the historiographic field, the available resources and the specificities of available sources.

<sup>12</sup> Paradoxically, this knowledge that has been accumulating was not massively received by the wider public; on the contrary, the massive consumption of history works triggered since the 90s was channelled toward works that were not produced in the professional field. This has led to numerous external and internal criticisms to the process of professionalisation.

<sup>13</sup> Another period where this reconciliation between academic field and educational system can be seen is during the first decades of the 20th century, where renowned historians from the New Historic School were also teachers of the middle level and wrote textbooks for that level, tasks that were considered critical within the functions of the historian and of history in order to consolidate a national identity.

<sup>14</sup> Romero L.A. (dir.), *Proyecto Visión argentino-chilena en el sistema educativo (VACHESE). Seminario de difusión y discusión de resultados. Documento de Trabajo*, Buenos Aires, Facultad de Filosofía y Letras, 1998. page 7.

Textbooks are the curricular material with the biggest impact on classroom learning and they have a configurating role in teaching, which makes them qualitatively different from other resources.<sup>15</sup> Even outside the classroom, most of the time that students spend studying revolves around textbooks.

Undoubtedly, textbooks are one of the curriculum resources that have a higher influence on teachers for making decisions about planning, even more so in educational reform contexts. Frequently, teachers solve uncertainties generated by changes in the official proposal with the selection of a textbook that, at least apparently, offers an appropriate adaptation from the curricula to the classroom.<sup>16</sup>

Another factor that strongly marks the need to pay attention to textbooks is that the text's importance is inversely proportional to the family's purchasing power. According to C. Braslavsky, "*this tendency would prove the need for historians and didactic investigators to devote themselves to their analysis and improvement.*"<sup>17</sup>

This analysis cannot continue without considering that textbooks are a result of different logics and not only of the development of the discipline in the academic field and of didactic considerations. The logic of company and market take part as much as the state of historiography does or the demands of the educational reform and the production of these books.<sup>18</sup>

## HISTORY TEXTBOOKS DURING THE 1980S AND 1990S

### 1. The 80s and transformations after the dictatorship

Until the mid-1980s, the supply of history textbooks for the middle level was controlled by a historiographic and pedagogical proposal that could be defined as traditional. There was a predominance of a historic account based on a chronological succession of events, generally political and military, and there were numerous anecdotes and a focus on heroic figures. The medium of this account were books with a lot of information, thought more as study and reference material for homes than as something to be worked with in the classroom. Consequently, they were valued in terms of the quality and truthfulness of their information. When they included images or documents, the idea was that they spoke for themselves, saying what happened, and were not seen as sources to examine.

Most books had only one author, who was usually a middle-level teacher whose importance outshined the publishing house and the editor, relegated to the background. They were texts with a very long useful life. Books by authors such as Ibáñez (1961), Astolfi (1949) or Etchart

<sup>15</sup> Refer, among others, to Parcerisa Aran, Artur: *Materiales curriculares: cómo elaborarlos, seleccionarlos y usarlos*, Grao, Buenos Aires, 1998, Gimeno, J. "Los materiales y la enseñanza" in *Cuadernos de Pedagogía*, Nº 194.

<sup>16</sup> For a deeper analysis on the debate about textbooks and history teaching, refer to: Lanza, H.: "La propuesta oficial y la propuesta editorial para la enseñanza de la historia en la escuela media", in Lanza, H. and Finocchio, S., *Curriculum presente ciencia ausente. La enseñanza de la Historia en la Argentina de hoy*, Tomo III. Buenos Aires, Miño y Dávila, 1993.

<sup>17</sup> Braslavsky, C.: "La didáctica de la historia en dos continentes" in *Propuesta Educativa* Nº 2, May 1990.

<sup>18</sup> Grinberg, S.: "Texto escolar y mercado editorial en contextos de transformación educativa". In *Propuesta Educativa* Nº 17, December 1997.

and Douzon (whose book had nine editions in 1962) were reedited with almost no changes for more than two decades.

However, the evolution of the discipline mentioned in the last section, together with what was then an incipient democratisation process of society, contributed to the spreading of a growing concern for contents –especially in history and civic education– that were transmitted in the educational system since the end of the last military dictatorship. Textbooks began to be seen as a medium for the transmission of a democratic culture, in order to educate students as citizens.

Investigations about this subject coincided when stating that there was a divorce between academic historiography and textbooks<sup>19</sup>. A comparative study of the programmes and texts of four subjects – History, Language and Literature, Civic Education and Physics – concluded that the biggest delay in terms of development of the scientific discipline occurred in history: *“...New trends that have had an impact on Social Sciences in general and History in particular, and that have even reached middle education through other subjects, such as structuralism in Language and Literature, have not been present in History teaching...”*<sup>20</sup>

Textbooks continued to focus on rulers and political and military events. In the few books that included information about economic or social aspects, this information was so brief that the processes were hard to understand or to relate with current social problems.<sup>21</sup> Arguably, the books lacked explanatory or interpretative logic and different views of a subject. While sections that dealt with political and institutional history were organised with a chronological axis, sections about economics and society were a mere arbitrary succession of topics. Texts had a fragmented narration of events that presented history as a set of disconnected incidents, a useless format for arousing an analytical spirit or critical thinking.

Another interesting aspect is that the regional scale was almost absent from textbooks, which was worse in the approach of contemporary periods. There was little space for Latin America, and contents were decontextualised and fragmented. *“... Apparently, Latin America stopped in the 19th century (...) since the beginning of the 20th century, events from Latin American history disappear from the text, for history, presidential successions begin (...) and are disconnected from international events; but mainly disconnected from the history*

<sup>19</sup> Nevertheless, the problem of outdatedness of contents transmitted by schools in the case of History is not a phenomenon that is exclusive of our country. As it happens with other aspects of textbooks, it is a more general problem, although it presents particular characteristics according to each national case. Berghahn and Schissler point out this gap for the case of countries in Western Europe and North America, where political and diplomatic history kept its influence in schools and textbooks at least until the 1960s (and in some cases even after that), although its importance in academic fields was declining since the 50s.

<sup>20</sup> Finocchio, S: “Programas y textos en la historia de cuatro asignaturas de nuestra escuela media: Historia, Lengua y Literatura, Educación Cívica y Física”, in *Propuesta Educativa*, Nº 1, August 1989 (page 53). For similar diagnoses, refer to Lanza H., “La propuesta oficial...”, Op. Cit.

<sup>21</sup> This diagnosis made C. Braslavsky state that *“If historians do not process their production and make it available to schools, and if politicians do not take an interest in programmes, how is the modification of textbooks in circulation meant to happen?...”* in Braslavsky, C.: “Los libros de texto en su contexto: Argentina 1975-1989” in Riekenberg, M. (comp): *Latinoamérica: enseñanza de la historia, libros de textos y conciencia histórica*, Buenos Aires-Madrid, Alianza, 1991, page 73.

of Latin America...”<sup>22</sup> Contents regarding the 20th century were limited to conflicts between countries of the region, without considering the origin and development of current problems, and preventing an understanding of some continental, regional and national problems.

In synthesis, since the arrival of democracy in 1983, changes in History teaching began to occur. These changes were materialised in the advance toward a conception that paid more attention to pedagogical issues of the text and the inclusion of topics related to citizen education or democratic culture. By the end of the decade, the incorporation –though at first limited, fragmented and with no articulation– of some topics and problems of economic and social history was added. These were areas that had been greatly expanded in the historiographic field in previous decades. These new contents reached books with a new group of authors who were strongly linked to university fields. The creation of these new works was a collective enterprise, involving various authors and with a strong presence of editors and publishing houses in the project.

## 2. Textbooks in the 1990s: the reform, the academy and the market

To the demands of updating textbooks from the academic field and of including meaningful knowledge for the development of a democratic civic culture of the educational system (arguably, of the whole society), in 1994 the need to renew the editorial proposal was added, in order to make it suitable for the new structure, contents and criteria of the educational system reform. All this happened in a context of a growing advance of neoliberal public policies and the market logic as a mechanism for regulation and profitability as dominant criterion.

In the 1990s, in a context of a textbook publishing market that was not regulated from within the state<sup>23</sup> and of a growing expansion in demand that resulted from the transformations in the system, various new publishing houses were incorporated to the market, and others that had been in the local market for a long time were acquired by multinational companies.<sup>24</sup> They all intended to occupy the niche that had been generated by the need of the new national and jurisdictional official curricular proposal.

The wide and varied textbook production by publishing houses allowed the circulation of the new contents, although there were complications during the first years after the reform. The differences in the rhythm with which it was applied and the possibility for each jurisdiction to organise its own curricular designs had consequences such as the fact that the contents for one year and level did not always coincide, which created difficult questions for publishing houses that tried to solve them in different ways. Generally, they made the decision of introducing for each year the contents included in the curricular designs of those jurisdictions with more presence in the market. Thus, publishing houses targeted the selection of contents made by

<sup>22</sup> Lanza, H., “La propuesta oficial”, *Op. Cit.*, page 77.

<sup>23</sup> Since the recovery of democracy in 1983, the State stopped selecting or even recommending textbooks to be used in schools.

<sup>24</sup> Kapelus publishing house, founded in the first decades of the 20th century, was sold in the 90s to Grupo Editorial Norma, which is part of Carvajal S.A., a business group of Colombian origin; Aique publishing house, founded in the 70s, was acquired in 2004 French group Lagardere; Santillana publishing house is part of the Spanish group Santillana, made up of other publishing houses such as Taurus, Alfaguara and Aguilar.



the Buenos Aires Province and the city of Buenos Aires, which concentrate more than 70% of the total number of students of the national educational system. However, this solution was not enough, because both jurisdictions had different stances regarding the reform, which meant that publishing houses had to create two different proposals for each year, which was even greater when, as it happened in some cases, the publishing house decided to make special books for other jurisdictions.

This process deepened by the end of the 90s, when the national Ministry of Culture and Education and later the General Directorate of Schools and Culture of the Buenos Aires Province began to buy textbooks from publishing houses in order to distribute them to schools for free. The volume of demanded books made many publishing houses guide the production of the book and the inclusion of certain contents they considered necessary in order for the book to be selected.

A strategy of the publishing houses for covering the partly uncertain contents that each jurisdiction would adopt was that one publishing house would present two texts for the same subject of the same year. Another strategy was producing History or Geography textbooks, or even Ethic and Citizenship Education textbooks and compile them with almost no changes in books per area, in this case, Social Sciences.

Another issue to consider is that the textbooks' useful life has been significantly reduced. All these changes and the speed with which they occur usually responded to the publishing company's need to compete with its own *used* product. That is, the short useful life of textbooks is usually not due to the need for updating contents in order to incorporate new advances of the discipline in the academic field, or to the need for adapting the product to the changes in the official proposal, but to increase sales. Profitability became the predominant criterion, determining the production of texts much more than issues such as censorship or ideological control.

Another important aspect is the incorporation of graduates from national universities in the teams of authors of most publishing houses, who work in teaching and investigations in their academic field. This activity, which was not considered part of the academic practice in previous decades, became an important part of their job of spreading knowledge produced in universities. This change responded to the intention of bringing transformations from historiography and from the role of history and historians closer to a wider public –in this case, students– but it also became a very profitable activity compared with the meagre salaries typical of the profession. Copyrights were a good complement for the salaries paid by university and investigation institutions.

This situation had its peak moment during the second half of the 1990s and in the first years of the new century, and it was attractive for these authors, but as the supply of these professionals became massive and the market no longer had the tremendous expansion of previous decades, publishing houses changed the rules. Relationships based on the buying of copyrights were generalised –which in some cases looked more like investigation reports

– on certain topics that publishing houses transform into book chapters and reformulate in later impressions.

Another important change was that during this peak moment, publishing houses provided from within their staffs pedagogical support to produce books that were aligned with the modern approaches of the discipline. This made the figure of the editor and the weight of the publishing house as creators take on greater importance.<sup>25</sup>

As a result of this set of transformations, not only have textbook contents and formats changed, but also the function of the textbook in the teaching and learning processes. The traditional use of textbooks made them basically study material, and consequently, books were valued in terms of the quantity and quality of the information they included. At present, textbooks are a daily work tool in the classroom.

Regarding this new role, different characteristics of textbooks are valued, such as the presence of sources<sup>26</sup>, transcriptions of fragments by specialists, the activities they propose, their illustrations, the inclusion of pull-down images, dossiers about special topics or atlases, images, statistic charts, maps, the activities proposed for them, investigation projects that go with the books, etc. Visual language plays an increasingly important role, trying to offer the same content in different languages.<sup>27</sup> Another innovative element in this period was the production of teacher guides, delivered for free and including mind maps, bibliographic references and teaching suggestions for each topic.

The technological transformations that occurred in the production of textbooks also contributed to changing the format of the books. Publishing houses invested in colour, design and images created with the latest technologies, cartographic atlases with satellite technology, computer graphics and, lately, DVDs. This was paradoxically combined with shorter books that had bigger letters in the text and in titles, double-page spreads and a larger number of independent texts in each unit, which significantly reduced the amount of the content.

In short, the processes that took place since the mid-1990s drove big innovations in Social Science/History textbooks. These books reflect the new conceptions of history in Argentine historiography during the past four decades. They present an evolving history where the protagonists are social actors, with almost no figures or anecdotes, where the idea is to address the problem of temporality and social change. The axes that articulate the account are no longer political history, but a variety of them: social, economic, cultural and ideas. In addition, there is an emphasis on presenting historical knowledge as a provisional, though not arbitrary, result, and on making the reader become familiarised with problems of historic

<sup>25</sup> A result of these changes is that now it is very common that both teachers and students know these books for the publishing house and not for the authors who wrote them.

<sup>26</sup> As stated by Miguez, the presence of sources is not new, but in each stage that he defines in the evolution of textbooks, sources have a specific function and relevance. Refer to Miguez, E., "Reflexiones sobre la enseñanza de la Historia y el uso de fuentes en la escuela media en Argentina", In *Propuesta Educativa* N°7, October 1992.

<sup>27</sup> Many times, the use of multiple languages has been criticised because it is responsible for an excessive fragmentation of contents, making it, in O. Landi's words, a kind of video clip.

operation and the role of the historian. There was also a special consideration of pedagogical and didactic issues, and an intention of making textbooks the support for teachers in the classroom.

Since then, these proposals have moved forward, they have deepened and they became widespread in the editorial proposal.

## What criticisms are made to the content of history and social science textbooks?

WILLIAM MEJÍA BOTERO

“Textbooks periodically receive fierce attacks regarding their content, their form, their alleged archaism, their “jargon”, their errors and even their weight in backpacks.”  
Michèle Verdelhan-Bourgarde (2007)<sup>1</sup>

“However, social science textbooks are the most difficult to produce because of their contents, the suspicions they give rise to, the illustrations they demand, etc.”  
Jorge Ochoa (1990)<sup>2</sup>

**H**istory and Social Science textbooks are –or can be– a battlefield<sup>3</sup>: their content is open to criticism and comments by many sectors.

Textbooks have so many different facets that they can be analysed from various angles and perspectives. Ministries of Education examine them when evaluating the fulfilment of requirements for a bidding contest; investigators scrutinise them, and not only their content; teachers study them in the process that leads them to decide on their use in the classroom; educational historians investigate them; they appear in the news, especially when a controversy or scandal may be created regarding what they say, show or hide; parents complain about them when their price is too high and students object them when they are too long or difficult to understand.

For editors, producing and publishing a textbook is a challenge, because they must face up to the demands of school curricula, their possible interpretations, the tradition some teachers want to keep and the change that others demand, the dilemmas that result from the tensions between a profitable product that can sell well and the educational service that requests quality in terms of teaching and content, the interests of different social groups and the careful treatment of genders, ethnic groups and political, religious and environmental movements, among others.

As educational products that remain in time –in public and private libraries, in schools or universities, in homes, in second-hand bookshops– textbooks can be approached from multiple dimensions: their content, their compliance with curricular guidelines, their methodology, their structure, their pedagogy, their topicality, their language, the competences they give rise to, their learning and evaluation activities, their design, their graphic material, their physical entity (paper, binding, size, weight, durability) and their historic entity, which remains in time when many other elements of the educational process have disappeared.<sup>4</sup>

For this exposition, I have chosen the topic of content in the case of History and Social Science textbooks, and the most widespread criticisms made about them in different continents, countries and times, with a mostly descriptive approach. Hence the extensive bibliography I have included in the sixteen dimensions at the end of the text.

### **WHAT TEXTBOOKS SHOW AND HIDE**

The authors and editors who write and publish textbooks carry out their activities within certain limitations: they must comply with a curriculum that may be inflexible, flexible, new or with a long trajectory, and by whose observance teachers put publishing houses' advisors "to the test"; they must consider the cognitive development and reading competences of their possible students, usually disperse in a wide national geography; they should take into account the teaching habits of teachers and educational trends; they have a specific timetable to teach the subject; they have a limited number of pages, because if they are too many the price of the textbook increases and it are not completed during the school year, and they must combine the state of the art with a dosage of the content, didactic rigour and comprehensibility of the text.

These limitations –a reality that cannot be avoided– make that during the selection and organisation of the information that will appear in a History or Social Science textbook there may be elements, events or processes that:

- are not included because there is no space to develop them properly;
- are simply mentioned in order to meet a curricular requirement by which they should appear<sup>5</sup>, or are superficially dealt with;
- are censored or self-censored to avoid disapprovals (when texts must be examined by an official educational authority), to evade controversies that may affect the adoption or sale of the books, or to avoid facing different pressure groups<sup>6</sup>;
- are hidden or silenced because expressing them is inconvenient<sup>7</sup>, or are emphasised because it is convenient to do so;
- are distorted<sup>8</sup>;
- are handled in the most "aseptic" possible way so as not to "step on toes", offend sensibilities or contradict generally accepted interpretations;
- are expressed through images or texts, depending on what is more convenient in each case<sup>9</sup>;

- are interpreted differently in one country or another<sup>10</sup> (a typical example is the way in which Israeli and Palestinian textbooks show their “enemy neighbour”<sup>11</sup>);
- are falsified or lead to deception.<sup>12</sup>

Some examples of these situations, which lead to a criticism of the content of school textbooks, are the “making up” of particular leaders of liberating deeds, the invisibilisation of women, the absence of particular social classes or ethnic groups and the way of presenting border conflicts and wars among countries.

In one way or another, due to the didactic transposition<sup>13</sup> they make, the answer they give to curricular programmes, the context in which they are used and the learning they aim to achieve in the development of skills for handling new information and acquiring a critical ability, History and Social Science textbooks cannot be expected to be thorough in their contents.

## IDEOLOGY

Ideology “is related to a certain way of seeing reality, to having a particular “view” of the world.”<sup>14</sup> Others define it as an extreme defence or attack of particular values or ways of seeing life, and even with a certain type of error or distortion of reality.

If there is an area of the school curriculum where ideology is or can be most present, it is the multiple area of History and Social Sciences, because of its nature and the contents it works with. Ideology makes a textbook be described as right-wing, centrist or left-wing, pro-government or anti-government, liberal or conservative, traditional or leading edge, pro- or anti- particular position or tendency, both at a whole-book level and in certain individual aspects.<sup>15</sup>

So as not to participate in the debate regarding the objectivity of Social Sciences and, consequently, the possible neutrality or lack thereof in History textbooks, criticisms of the ideological content of textbooks usually focus on social dimensions or representations<sup>16</sup>, such as:

- family<sup>17</sup>;
- nation<sup>18</sup>;
- school<sup>19</sup>;
- minority<sup>20</sup> or alienated social groups;
- workers<sup>21</sup> and unions;
- religious expressions<sup>22</sup>;
- values<sup>23</sup>.

Ideology leads to discrimination<sup>24</sup>, absences<sup>25</sup> (what is not convenient to mention or show), manipulation<sup>26</sup> and impositions<sup>27</sup>. Ideology tends to be aggravated in dictatorial regimes, in strong governments or extreme situations<sup>28</sup>, until reaching the point of indoctrination through school textbooks.<sup>29</sup>

## THE SATISFACTION OF CONFLICTING INTERESTS

Educational historian Diana Ravitch is probably the person who has touched a raw nerve the most with her criticism of textbooks in the USA.<sup>30</sup>

She makes extensive reference to a protocol quietly implemented by textbook publishing houses to control their vocabulary and contents, which operates as a strict code of (self) censorship, so their books are approved and do not offend anyone. “Anyone” means cultural, racial, religious and political groups; men and women, senior citizens and people with disabilities. Thus, each textbook must be completely balanced in terms of “gender, race, age and disability. Illustrations must include the whole variety of family units, including families led by a father and a mother, by one parent, by grandparents, by aunts or uncles, by elder siblings and by other adults. Illustrators must be careful with aspects such as skin tones, hair colours and textures, eye colours and facial features.”<sup>31</sup> In addition, there are numerous linguistic restrictions that state what cannot be said, for being considered sexist words or expressions, which results in “writers and artists telling lies about history”<sup>32</sup> and limiting freedom of speech.

According to Ravitch, editors have accepted these restrictions because “they want to sell textbooks and must respond to their market’s demands. In order to be successful in that highly regulated and politicised environment, it is critical for editors to avoid controversies.”<sup>33</sup>

To avoid potential setbacks, some publishing houses have a list of words and expressions that must be absent from their textbooks, images that must not appear, topics that is better to stay away from, food that cannot be seen and requirements that photographs must meet.

In the case of History books, the consequences of this situation are very worrying: “Forced by a political straitjacket, almost all History textbooks are an echo of other books, with no fresh interpretation, idea or anecdote, and not even with a good plot that arouses their readers’ enthusiasm. As books written by historians, History textbooks should have a point of view, but not all of them should have the *same* point of view. That stupefying consent ensures that there will be no sparks that will touch young minds, because it is a recipe for boredom.”<sup>4</sup>

In Latin America there has not been a similar situation, due to the freedom that authors and editors enjoy in our countries to write and publish textbooks (which in various countries do not have to go through an official screening of examination and approval) and to the absence of pressure groups that question the way in which texts present different historical and social phenomena.

## “DUMBING DOWN”<sup>35</sup> TEXTBOOKS

A consequence of books that everyone likes and no one is offended by (typical phenomenon of recent textbooks in the US) is the process of decreasing textbooks’ level in aspects such as their readability<sup>36</sup> or comprehensibility, so that their study does not involve too high a mental effort from students and makes teachers take the easy way out, and their adoption is made viable in the main North American states.

A way to help authors and editors was making “readability formulas”<sup>37</sup> that indicate, almost mechanically, the level of complexity and number of words and sentences for each school year, and state the difficulty level of a text. Their implications are adverse for an appropriate writing of History and Social Science books, because those formulas do not consider aspects such as nature and difficulty of the content, familiarity with it, organisation of ideas, students’ motivation on the subject and previous knowledge.

Fortunately, in our countries there has been almost no temptation to simplify the language and have lists of most frequently used words that authors have to resort to when writing textbooks for these subjects.

### **DIFFICULTIES ORIGINATED IN THE TEXTUAL AND ICONIC LANGUAGE**

History and Social Science textbooks should be easy to read and understand, so that students can be motivated and learn from their interaction with them. For Bonnie Armbruster, if these conditions exist, we can talk of “considerate” textbooks. But if they have problems in their organisation or writing, or if they have insufficient or inappropriate explanations, lack of coherence, inappropriate vocabulary or wrong or inconsistent information, then they are “inconsiderate” textbooks.<sup>38</sup>

In fact, there are textbooks whose language is difficult for their readers, due to their wording and handling of concepts, because they favour learning by memory and do not lead to the building of the concepts that are handled<sup>39</sup>, not to mention the difficulty young children have when working with history’s temporality and spatiality.<sup>40</sup>

A linguistic analysis of two Colombian Social Science textbooks for Year Eight<sup>41</sup> discovered that their authors made insufficient use of textual units – introduction, references (anaphoric, cataphoric and exophoric elements<sup>42</sup>), transition and conclusion – that could help to understand the organisation of the text and establish relationships with the real world; they had a thematic structure –which affects the clarity and coherence of the discourse– that was sometimes very demanding for the reader; they represented the social world in terms of events and classifications that had little to do with a teenager’s life; they had paragraphs with a very high lexical density and negative sentences that represent a cognitive challenge for those who read them.

In addition, the reading and interpretation of some illustrations, charts and maps<sup>43</sup> demands a certain level of “graphic literacy” that students do not always have.

### **THE CREATION OF CONTROVERSIES**

Whether or not History and Social Science textbook authors and editors want it, due to their public nature textbooks that circulate in the educational market of various countries are open to countless controversies and debates, because many people feel they have the right to give their opinion about them regarding the information that is present or absent,



the interpretations they make of historical facts or processes, the “ghosts of the past” that reappear, the approach of particular problems or a prevailing point of view.<sup>44</sup>

The controversy that a particular textbook causes can sometimes be so big that it can affect relations between countries, as it happened in 2005 between Japan (where a History textbook was launched) and China, that took offence at what was said and omitted.<sup>45</sup>

Sometimes, the controversy over a textbook reaches such a crucial point that it must be withdrawn from the market due to pressures of all kinds, as it happened in Greece in 2007 with a History textbook for 11-year-old students<sup>46</sup>, or it makes politicians demand the resignation of ministerial officials<sup>47</sup>, as it happened in Peru in 2008.

### **THE LEAST PLEASANT ASPECTS OF HISTORICAL AND SOCIAL REALITY**

Should textbooks addressed at children and youngsters show reality “exactly as it has been or is”? Going more deeply into this issue leads to a discussion that exceeds textbooks. However, it is convenient to address this problem.<sup>48</sup>

An interesting topic for investigation is the way in which textbooks present or hide the “ugly”, the “reprehensible”, the “politically incorrect”, what should not have happened, what can “set a bad example”, what does not contribute to educating students or what can be read as “anti-value”.<sup>49</sup>

This dimension includes the way in which textbooks represent a family that is more nuclear – father, mother and children – than extended, as a response to a traditional or idyllic conception of family, but separated from situations such as single-parent families, families with an only child, those where other people (aunts, uncles or grandparents) fulfil the roles of mother or father, or families where the children live with same-sex parental figures.

It also includes aspects such as the idealisation of some great men<sup>50</sup>, who are shown as being almost perfect, and the tendentious presentations made by governments of particular political tendencies regarding their opponents.

Elements such as the violation of human rights, corruption, influence peddling, smuggling, tax evasion, sexual exploitation or drug trafficking have recently begun to appear in some textbooks from my country (I do not know in detail the situation in other Latin American countries), but aspects like these are usually absent from school textbooks.

It is important to mention the appearance of particular topics or the way in which they are presented. An example are the seven articles published by Manuel Romero in *El Mundo* in 2007 about the “silent scandal that is undermining Spain,” regarding textbooks. They had to do, for example, with how textbooks from the Basque Country minimise or ignore ETA crimes.<sup>51</sup> Another example is the recommendation made by *USA Today* to textbook editors about how to present Bill Clinton’s scandal with the famous secretary.<sup>52</sup>

Textbooks' are not responsible for idealising reality or showing it straightforwardly. Textbooks have the challenge of taking students progressively, as they pass from one year to the next, to the knowledge of the national and international environment where they live, posing questions that they must answer and showing them that reality has various possible interpretations.

## STEREOTYPES

An aspect that has been criticised in textbooks is when they present historical and social realities as unchangeable. Apart from the traditional representation of one type of family that is less frequent each day, there are other stereotypes, such as:

- the representation of people from other countries<sup>53</sup>;
- the presentation of indigenous peoples<sup>54</sup>;
- classism<sup>55</sup>;
- the image of heroes<sup>56</sup>;
- the way in which the history of a country is presented<sup>57</sup>;
- the representation of specific historical events or processes<sup>58</sup>;
- the image of women, when they appear<sup>59</sup>;
- the mutual view between Arabs and Israelis<sup>60</sup>;
- those presented in Geography textbooks<sup>61</sup>
- marginalised social groups, such as gypsies<sup>62</sup>;
- immigrants<sup>63</sup>.

Other frequent stereotypes –sexism, presentation of ethnic groups and diversity and the presentation of disabilities– will be detailed below.

## SEXISM

Are History and Social Science textbooks “masculine”?

A Spanish investigation of 56 Social Science textbooks (as well as other subjects) for Years Seven and Eight (with a total of 4,500 pages), edited in 1996 and 1997 by the six publishing houses with the biggest market penetration, concluded that “three out of four figures (75%) that appear in those textbooks are men. In the case of people who are renowned for their contribution to history, the number increases to 95% (...) Publishing houses deny that there is deliberate discrimination in these works.”<sup>64</sup>

According to the author of the investigation, this phenomenon can be explained not because there are more male than female authors; “it has more to do with the conformist way of seeing the world as it is.” Although “the situation has changed in the past few years and an evident discrimination has given way to a more subtle one,” this gap has led to “an encouragement of sexist stereotypes during students’ development stage, girls are left with no incentive or references of their sex and boys find no reason to give more importance to women.”<sup>65</sup>

Sexism permeates our culture and probably that is why it is involuntarily reflected in textbooks (there being more female than male editors) and in other expressions of culture. It becomes more problematic in History textbooks, because the acknowledgement of women's value, importance and actions began to take place during the 20<sup>th</sup> century due to the feminist movement and the recognition of various laws, among other reasons.

The challenge for authors, editors and teachers is to eliminate this stereotype, which has been strongly criticised both in textbook contents and in their images<sup>66</sup>, as well as the treatment of homosexuality, which societies are beginning to accept as a life choice.

### **RACISM OR THE VIEW OF ETHNIC GROUPS**

Are History and Social Science textbooks racist because of their treatment of the diversity of ethnic groups? If the criticisms made by various investigations carried out in different countries during the last fifteen years were accepted<sup>67</sup>, we could conclude that textbooks continue to be racist, although not as extremely as in past decades or centuries.

Racism or the treatment of ethnic diversity is locked, to a greater or lesser extent, in the collective unconscious of some societies. In textbooks, it appears – by action or omission – more in images than in words. An investigation published in 2004 (“White, *mestizo*, black and indigenous men in textbook illustrations for primary education in Venezuela”) shows how a society that tends to define itself as accepting ethnic diversity, “paradoxically, still keeps racist and discriminatory features in the depths of its idiosyncrasy, which continuously emerge more unconsciously than consciously (...) as the result of a history of discriminations due to the colour of the skin, which dates back to the Conquest, the Colony and the republican period.”<sup>68</sup>

In the International Seminar on Textbooks (SITE 2006), two Chilean authors showed how textbooks in their country have also had this problem.<sup>69</sup> In other countries such as Argentina<sup>70</sup>, Brazil<sup>71</sup>, Colombia<sup>72</sup>, Spain<sup>73</sup> and Peru<sup>74</sup>, studies have shown that racism is still present. We still do not fully accept diversity<sup>75</sup>, a dimension that includes the acceptance of cultural<sup>76</sup>, multicultural<sup>77</sup> and intercultural<sup>78</sup> diversity.

In the treatment of diversity, it is critical to define who we are and who the others are, and on what historical memory we are based as foundation of our identity. Europeans who came to America brought very few women, which led to a forced miscegenation where indigenous people where “the others”, barbarians whose differences with Spaniards were seen as a negative sign: they were savage, idolatrous, ignorant, backward, immoral (they wore no clothes), poor, etc.

As time went by, that diversity became more complex, as different discourses were elaborated regarding indigenous people, black people, foreigners, neighbours and others, which can be seen in a historical inspection of 20<sup>th</sup> century textbooks.

## DISABILITIES

Do children and youngsters see in textbooks that the world in which they live is not as perfect as these teaching materials tend to depict it? And do people with disabilities find identification elements in textbooks?

In a random examination of textbooks in our countries, how many children with these characteristics would they show: blind, deaf, crippled, in wheelchairs, with one leg shorter than the other or with mental disabilities? And at a not so extreme level, how many dwarfs, obese people, rachitic people, left-handed people, people with glasses or sick people appear? And for those who do appear, what are they doing? What are their aspirations? What achievements do they show? What types of interaction do they have with non-disabled people? How do they deal with their limitations? What messages do they transmit?

Few critics address this dimension of textbook contents.<sup>79</sup> However, the treatment of physical and mental disabilities is an aspect that textbooks could improve.

## POLITICISATION, NATIONALISM AND PATRIOTISM

Maria Candida Proença states that textbooks reflect teaching influences and political intentions.<sup>80</sup> It is understandable that with a politicised perspective, textbooks are criticised due to their content.<sup>81</sup>

When analysing some textbooks of various subjects, especially History and Social Sciences, we can see the presence—explicit or implicit—of the current head of state and the invocations of the nation and nationalism.<sup>82</sup>

Textbooks are criticised because they are politicised, for nationalism or patriotism, or because they are linked to political parties or their factions, because they include certain contents and eliminate others, because they include distortions or half-truths, for manipulating information or because there are divergent interests.<sup>83</sup>

In the pre-Independence history of our countries, one type of textbooks—national catechisms—played an important role. Their function was clear: to give reasons for the expulsion of Spaniards. But when extreme-right or extreme-left governments use textbooks as a vehicle to support their positions, it is a statement in defence of power. Textbooks are even transformed into a defence mechanism for a particular government or for the values it supports<sup>84</sup> or States become editors,<sup>85</sup> which makes it easier to impose single texts<sup>86</sup> or particular views.

For example, in Chile Leonora Reyes states that “during the Dictatorship both the History curriculum and its textbooks were taken over directly by the State, adopting the form of military, nationalist and moralist discourse. Appealing to a memory that was typical of the more conservative sectors of the nation (State and Armed Forces), figures, concepts and even periods were omitted, and figures and battles of the history of the army were raised. When the transition process began, History teaching was re-intervened in order to deliver a “more

conciliatory” version that was coherent with the political goals proposed by the *Concertación* governments.”<sup>87</sup>

A Venezuelan author declares that “States with totalitarian regimes (...) have maximised their control over textbooks. Taking on the task of creating, producing and distributing textbooks directly allows them to guide their contents with no restrictions, introducing ideological and propaganda messages, raising the regime and its leaders, and avoiding any interpretation that might differ from the official interpretation.”<sup>88</sup>

### **COMPLIANCE AND INTERPRETATION OF THE CURRICULUM**

A common criticism of History and Social Science textbooks is the fact that they do not agree with what is prescribed in the curriculum.<sup>89</sup> Expectations are huge: some long for a complete alignment with the official programmes, which starts from those who expect unit or chapter titles to coincide verbatim with titles written by technicians of the Ministry of Education, as in Panama or El Salvador; others want no variation in the order in which topics and sub-topics appear in the curricular guidelines. Here, the perspective is different in primary education (where many teachers have no specific training in a social science) than in secondary education.

The analysis of History and Social Science curricula shows that they make a selection from what is teachable –which can be seen as a view of historical and social reality, which in fact many times changes when curricula are modified from one government to another of a different political tendency– and make an organisation of those contents, which Jorge Ochoa called “trimmed knowledge.”<sup>90</sup>

In the face of these curricular variations, which in some countries like Costa Rica occur every four years, textbook editors and authors must choose options to see what to emphasise and how to do it, if they consider that they must fill gaps (topics that are missing) or emphasise on social skills regarding the question of why learn History and Social Sciences.

Although some authors declare that “textbooks are the curriculum”<sup>91</sup> or that they depend on it in order to implement it<sup>92</sup>, others state the opposite.<sup>93</sup>

### **INSUFFICIENT INFORMATION**

The volume of information in the world grows larger every day. Since we belong to the society of knowledge, some teachers expect textbooks to include many events, data and elements, and they will always criticise what is missing.

However, the inclusion and dosage of information in History and Social Science textbooks depends on a curriculum that states what students should learn in a particular year. Considering what teachers manage to work with during one year, the content of History and Social Science textbooks should be concentrated on a few dozen pages.

Information must be complemented with other written, audio and visual resources. The textbook is only one element of what Carlos Vasco calls “the paratextual system”<sup>94</sup>, which includes readers, source books, workbooks and activity books, atlases, magazines, CDs, software and audiovisual material.

### THE OUTDATEDNESS OF INFORMATION

An expectation that users of History and Social Science textbooks have, and which is usually disappointed, has to do with the presence of updated information. Some teachers decide to adopt a textbook because of the presence or absence of recent information. They judge a textbook’s quality based on the novelty of its information, as if textbooks competed with newspapers.

This frequent complaint has a real foundation: from the moment when authors deliver their originals to be edited until the book is printed, many months go by, but there is confusion between history and journalism. Textbooks do not intend nor are they able to replace newspapers and radio and television news bulletins regarding information about the latest news or the analysis of leader writers.

Faced with this situation, various publishing houses have tried to solve the problem with their educational websites, including Internet addresses in textbooks (so that teachers and students can look up the most recent events), and with the design of various complementary didactic resources.

### ERRORS

Finally, another criticised aspect in History and Social Science textbooks, despite the fact that editors check the material submitted by authors, are the various types of error<sup>95</sup> that occur more sporadically than frequently.

- The most common errors are:
  - Chronological: typographic (two numbers are inverted: instead of 1789 it says 1798) and factual (an event is said to have happened in one year, when it actually happened in another).
  - Names of people, when there are spelling mistakes.
  - Inconsistencies between a text and the image (photograph, map, illustration, chart) that goes with it or in its corresponding caption.
  - Coherence in one piece of information in two different pages of the same book or in different books of the same series.
  - When a person is said to have done something he/she did not do.
  - When a statement is not true.

- When the explanation of a statement is incorrect.
- When a picture caption concludes something that cannot be inferred from it.
- Doubtful interpretations and lack of precision.

## CONCLUSION

The investigation carried out for the creation of this document showed that criticisms to the content of textbooks is more frequent in History and Social Science than in other curricular areas (Spanish, Maths, Natural Science, Foreign Language, Aesthetic Education, etc.).

Given this situation, there are many tasks that need to be performed: it is important that criticisms of History and Social Science textbook contents circulate among those who are interested in knowing about them, that they are processed and that they promote a constructive dialogue. Finally, it is important to ask ourselves how to improve textbook contents.

Some possible answers to this last point are:

- A definition of the basic positions that the textbook(s) will adopt regarding History and Social Science teaching.
- A clear definition of the work that will be produced and of the expected results, for which the content is merely a means.
- The study of the curriculum (both literally and in its spirit), in order to take advantage of what it includes and solve possible deficiencies.
- A discussion of the work plan with people from various positions.
- A reading of the originals by peers of a different political, ideological and historiographic trend, in order to tone down approaches and statements, identify omissions or exaggerated emphases and harmonise differences as much as possible.
- Consultations with specialists in specific subjects (although that may increase the cost and preparation time of the books).
- The presentation of two or more positions regarding a single event or process.
- An analytic view of aspects that are usually controversial.
- A presentation of information without conclusions, so that students adopt well-founded positions.
- A statement that says that what appears in the book is not a “revealed truth” or “the only word”, in order to progressively awaken students’ critical spirit.
- Mentioning, when appropriate, that there are various interpretations of a particular event, because specialists have not come to an agreement.
- A previous reading by teachers who will use the book(s) once printed.

- A reading of extracts of the book by real users (students) to check the comprehensibility of the text and its ability to interest them.
- One-dimensional readings of the text, once the subject content and the language have been edited but before it is printed, aimed at one purpose only. For example, eliminating sexism and other stereotypes.
- The correction of errata on the Internet, when they are detected during the book's use.

“Subconsciously, I am still in primary school,  
still getting ready for primary school.  
Maybe that's why I like textbooks so much.”  
Augusto Monterroso<sup>96</sup>

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