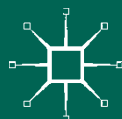


PALGRAVE
HANDBOOKS



THE PALGRAVE HANDBOOK OF TEXTBOOK STUDIES

Edited by
Eckhardt Fuchs and Annekatrin Bock



The Palgrave Handbook of Textbook Studies

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Editors

The Palgrave Handbook of Textbook Studies

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ISBN 978-1-137-53141-4 ISBN 978-1-137-53142-1 (eBook)
<https://doi.org/10.1057/978-1-137-53142-1>

Library of Congress Control Number: 2017964490

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Printed on acid-free paper

This Palgrave Macmillan imprint is published by Springer Nature
The registered company is Nature America, Inc.

The registered company address is: 1 New York Plaza, New York, NY 10004, U.S.A.

ACKNOWLEDGEMENTS

The idea for this *Handbook* originated at the Georg Eckert Institute - Leibniz-Institute for International Textbook Research (GEI). Located in Braunschweig, Germany, the GEI is home to a unique textbook library and is the only institution in the world that systematically conducts research on educational media, informed by history and cultural studies. With deep expertise, extensive experience in textbook research and disciplinary diversity, it seemed only natural for the Institute to tackle a *Handbook* of this kind. The GEI has built a reputation in Germany and far beyond for the originality of its scholarship and contributions to educational practice. On the one hand, its scholars explore how educational media represent societal change and depict society itself. Research in this vein examines the continuity and transformation of perceptions, identity constructs, norms, and knowledge in textbooks. On the other hand, the Institute is interested in the medium's production, use, and adaptation. Based on cultural studies, empirical work along these lines has led to new approaches in educational media research, contributing to the field's methodological diversity and strengthening its theoretical foundations. Such studies ask which kinds of media are employed in schools, how certain media are selected for use in the classroom, and how media are integrated into the school day. They also investigate how young people interact with specific content: how they accept, challenge, and internalize the interpretations provided.

The *Handbook* summarizes research on all of these questions, incorporating the expertise of widely respected textbook scholars from all over the world. It is the remarkable result of an international network established over many years. All of the authors participated in the *Handbook's* conceptual and substantive development and the editors are very grateful for their input and patience. The *Handbook's* main chapters were coordinated by members of the GEI staff and therefore special thanks go to Barbara Christophe, Felicitas Macgilchrist, Markus Otto, and Steffen Sammler, whose expertise played a tremendous role in ensuring the *Handbook's* success. Without the patient and constructive support of our experienced translators, the *Handbook* could never

have come into being; many thanks to Katherine Ebisch-Burton, Wendy-Anne Kopisch, Sophie Perl, and Nicola Watson for their work on this volume. The editors would also like to thank Linda Sandrock for her substantial editorial help and for putting together the comprehensive glossary.

We hope the *Handbook* succeeds in providing an overview of current textbook research and future trends and resonates positively with its audience. We wish you an enjoyable and intellectual read!

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Introduction

Eckhardt Fuchs and Annkatrin Bock

Textbooks matter. Their content, design, and educational aims and objectives have changed over time, as have the manner of their production, their role in the classroom, and the ways in which their users acquire the knowledge canonised in them. Today's textbooks coexist or compete with other forms of educational media and are themselves undergoing a process of transformation in the wake of the digital revolution. These developments notwithstanding, research shows that textbooks remain the most important educational medium in schools worldwide, created in negotiation processes at the societal level and delivering the knowledge these societies deem relevant enough to pass on to the younger generation.

Yet, textbooks are more than simply mediators of knowledge. They always contain and enshrine underlying norms and values; they transmit constructions of identity; and they generate specific patterns of perceiving the world. All this means that textbooks are frequently contested, within and between societies, among political, social, religious, and ethnic groups.

It should come as no surprise, then, that textbooks have attracted the attention of researchers for more than a century; these research findings have often generated the impetus for textbook publishers and, importantly, curriculum developers and continue to do so today. One may be more startled to learn that textbook studies, though its subject is immediately evident, appears itself to be a chimera; the field is far from having clear boundaries and remits, and it has not established itself as a distinct discipline at institutions of higher education.

Nevertheless, this dynamic field is evolving rapidly. In the initial decades of its existence, researchers focused primarily on textbook content; over the last ten years, a process of diversification has been underway, directing the atten-

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tion of the field principally towards the contexts in which textbooks are published. Alongside an examination of their embeddedness in their political, cultural, and societal surroundings, this entails research on processes of textbook production and reflection on their use in the classroom. Essentially, textbook studies has come of age, maturing into a field now approached from a broad range of disciplinary perspectives.

This spectrum of disciplinary loci means that most researchers whose work focuses on textbooks do not expressly consider themselves to be ‘textbook researchers’ but instead define themselves in line with their primary disciplinary orientation. This means that newcomers to the field and early-career scholars in particular often struggle with finding their voice and direction within this highly diverse field, a survey of which is a challenging undertaking. The field of textbook studies is crying out for a comprehensive introduction to its disparate landscape and a clear overview of its thematic emphases, theoretical approaches, and methodological procedures.

This *Handbook* attempts to respond to this need, although in so doing it is acutely aware of the challenge arising from the diversity characteristic of textbook studies. For this reason the conceptual focus revolves explicitly around textbook-related research questions informed by a cultural studies perspective. The *Handbook* therefore leaves cognitive research and research on teaching and learning to a future volume; instead, it centres on approaches from sociological and cultural studies, such as memory studies, sociology of knowledge, discourse theory, and media theory, alongside those drawn from the social and educational sciences, including socio-economic theory, neo-institutionalism, and curriculum studies. The methodological emphasis lies on contemporary procedures employed in the field of textbook studies, such as content analysis, visual analysis, discourse analysis, the comparative historical method, narrative interviews, participant observation, and ethnographic methodologies. In this way the *Handbook* maps the diverse and disparate theoretical and methodological approaches that have shaped textbook research.

HANDBOOK STRUCTURE

Progressing beyond content analysis, the *Handbook* takes a fourfold approach to textbook studies, exploring *history, theory, and methodology, contexts, content, and reception*. The *Handbook* aims (1) to provide systematic access to the diverse field of textbook studies and its key trends, theoretical concepts, and methodological approaches; (2) to stimulate the evolution of new research areas, to offer new methodological avenues, and propose innovative ways of doing research in this field; (3) to enable researchers to contextualise their approaches within the field and to engage in theoretical and methodological discussion; and (4) to address a spectrum of stakeholders including, but not necessarily limited to, researchers, advanced students, teachers, and educational practitioners.

The *Handbook* is divided into four parts: History, Theory, and Methods of Textbook Research (Part I), Textbooks in Their Contexts (Part II), Textbooks

and Their Contents (Part III), and Textbook Use, Effects, and Practices (Part IV). While Part I reflects on the historical, theoretical, and methodological dimensions of textbooks and thereby sets the framework for understanding textbook studies, Parts II through IV concentrate on textbooks and the manifold demands placed on them. This volume provides innovative ideas and inspiration for the field of textbook studies on three levels. Inspired by media studies, the *Handbook* differentiates between the *context* of media production, the *contents* or the product itself, and the *reception and appropriation* of media. This makes it possible to systematically map a research landscape in which it has thus far been difficult to gain an overview. The comparative analysis of research in the field, grouped into these three categories (production, product, reception), illuminates similarities and differences between individual theoretical and methodological approaches. The concluding chapter identifies gaps in the existing literature and elaborates new directions for future textbook studies. By collating outstanding research not only on textbook representations but also in the under-researched areas of textbook production and reception, it lays out potential directions for further theoretically sophisticated and empirically grounded research in this field.

PART I: HISTORY, THEORY, AND METHODS OF TEXTBOOK RESEARCH

The *Handbook's* opening chapter, History of the School Textbook (Chap. 2), traces the historical development of textbooks from the early modern period to the present, reconstructing the canonisation of knowledge imparted in schools within a specific medium and relating this medium to other formats and media in which such knowledge has been provided.

The third chapter, History of Textbook Research (Chap. 3), provides an international view on research illuminating the role of education policy in the production of textbooks and the knowledge they contain. It explores key trends in textbook research, ranging from research on minorities, gender, and national identities to Europeanisation and transnational perspectives. It also sheds light on the development of research on the impact and reception of textbooks and on didactic textbook research and studies on the quality and use of textbooks, as well as on textbook production.

It has often been postulated that textbook research is under-theorised. Further, the field consistently finds itself on the receiving end of claims that its strong focus on content analysis marginalises methods such as expert interviews or classroom observation as approaches with the potential to fruitfully explore practices of textbook production, distribution, and use. The chapter on Theories and Methods of Textbook Studies (Chap. 4) provides a systematic overview of the considerable yet disconnected body of conceptual work around the construction of theories of 'the textbook'. Highlighting both established and marginalised methods of textbook studies, it aims to provide new directions for future research.

PART II: TEXTBOOKS IN THEIR CONTEXTS

Textbooks are polyvalent objects of research that play specific roles in a range of societal contexts. They are subject to processes of negotiation in various arenas, processes that take place in line with the rules and logical frameworks dominant in these arenas. The chapters in this section therefore engage with research on the mechanisms by which specific functions and discursively constituted statuses are conferred on textbooks. They examine the ways in which textbooks, within their societal contexts, are frequently subject to processes such as the institutionalisation of school-based education, negotiations in the context of international relations, or political or ideological conflict. This part also looks at how textbooks have become objects of controversy in the public arena and/or the mass media or objects of economic endeavour or exploitation.

At the core of Part II are the societal conditions, stakeholders, and processes involved in the production of textbooks and the knowledge contained within them. It therefore discusses current research on authors and publishers directly engaged in textbook production and on the associated technological and media infrastructures and innovations. Further, it examines the role of curriculum development and decision-makers in this arena, institutional frameworks, and the range of societal contexts that influence textbook production in a broader sense. This section touches on a variety of theoretical approaches to research on textbook production, including organisation theories, neo-institutionalism, socio-economic approaches, discourse theory, and actor-network theory. In doing so, it explores the relevant stakeholders, networks, organisational structures and processes, forms of economic and market logic, state-controlled textbook systems, and public discursive arenas as reflected in and transmitted by mass media, in particular those around education policy.

Drawing on insights from subject-specific didactics to media linguistics, the chapter on Educational Publishers and Educational Publishing (Chap. 5) summarises research insights on textbook publishers across disciplines. The chapter takes a critical perspective on the issues, methodology, and theoretical approaches used in contemporary studies on textbook publishing, identifying future research trends.

The chapter on Textbook Authors, Authorship, and Author Function (Chap. 6) casts light on the specific situation of this group of textbook producers. It argues that being invisible to both the textbook reader and the researcher long influenced the authors' work on textbooks. The chapter presents promising current research that identifies different ways in which contemporary textbook authors interact with other actors or networks and exercise their authorship.

The chapter on Textbooks and Education (Chap. 7) gives an overview of the shifting role of textbooks for educational research, showing how the attributions and functions of textbooks have changed over time. It traces the entanglement of textbook production with processes of institutionalisation. It

provides examples of contemporary studies that theorise the production of textbooks and their role in institutional education.

The chapter on Educational Media, Reproduction and Technology: Towards a Critical Political Economy of Educational Media (Chap. 8) discusses contemporary research on textbook production within the context of textbook editing and publishing activities. It examines key aspects of the current discourse on cultural political economy, in particular the logic of (re)production, and addresses disruptive changes in the production of textbooks and educational media.

Textbooks are aids to processes of teaching and learning. They face the fundamental challenge of providing students with canons of age-appropriate knowledge and information in a manner that supplies them and their teachers with specific modes and forms of the communication of this knowledge and information. In the context of the methodical preparation, presentation, and communication of information that characterises ‘the textbook’, the function of educational media encompasses a number of different aspects: to inform, to reaffirm, to practice, to motivate, to test, and to coordinate. Trainee teachers do not, as a rule, learn to work with textbooks as a specific discipline or technique; issues related to textbooks are generally dealt with in courses devoted to learning how to teach the relevant subjects. The two chapters on Ideas and Concepts for Using Textbooks in the Context of Teaching and Learning in the Social Sciences and Humanities (Chap. 9) as well as science education, as discussed in Science and Geography Textbooks in the Light of Subject-Specific Education (Chap. 10) aim to bring together contemporary work on textbook use in these areas.

Drawing on the current debate over how to ensure the quality of educational material, the chapter on Textbook Quality Criteria and Evaluation (Chap. 11) summarises recent research on this topic in different countries. The authors outline common factors, methodological principles, and directions of textbook evaluation. They conclude by focusing on the functions of textbook evaluation in regard to educational policies, cultural trends, guiding pedagogical values, and potential applications.

The last chapter of this section tackles questions of Materiality and Mediality of Textbooks (Chap. 12). It discusses recent approaches which attend to how not only the content but also the language, multimodality, and physical materiality of textbooks participate in normalising particular ways of knowing, ways of being, and ways of understanding. The author sketches interdisciplinary dialogue, non-coherence, and digital (im)materiality as promising areas for future approaches.

PART III: TEXTBOOKS AND THEIR CONTENTS

Bearing in mind the textbook’s historical mutability, arising from its entanglement with discursive trends and societal power, it is a medium that facilitates both diachronic and synchronic comparative approaches to exploring representations of events and concepts. Against this backdrop, Part III of the *Handbook*

takes three different directions to research on the ways in which textbooks represent societally relevant issues and categories.

The first section of chapters in Part III (Chaps. 13–18) is concerned with cultural concepts, dealing with research on national, transnational, and regional identities as they are constructed in textbooks.

Chapter 13 introduces research on representations of The Nation, Nationhood and Nationalism in Textbook Research from 1951 to 2017, ranging from studies that theoretically conceptualise nationhood in textbooks to those that consider nations to be legitimate frames of reference. The chapter introduces approaches from beyond the field that have been fruitfully adapted to textbook studies, including historicisation, comparison, and deconstruction of national narratives, images, and semantics. The chapter on Transnational Identities and Values in Textbooks and Curricula (Chap. 14) considers transnational identities as new sites of affiliation and transnational values as the foundation for a shared moral responsibility. Carefully reviewing and systematising the existing literature on this topic, the chapter depicts key findings and debates that reflect the contemporary preoccupation with transnational identities and values in textbook research. Looking at ‘Regions’ (Chap. 15) as foci of textbook research challenges a long-unquestioned stance that textbooks are a core medium in constructing national and state identity. This chapter explores the significance of regions for textbook studies, reviewing the different kinds of textbooks available to research representations of regions and analysing the approaches applied so far to investigate this specific topic.

The chapters in this section also focus on studies investigating how models of identity that societal discourse deems relevant to school students, which manifest themselves on a number of different levels, are produced and reproduced in and through textbooks. Examining studies on the Representations of Class, Race, and Gender in Textbooks (Chap. 16) from different countries and school subjects, the chapter traces common connotations of methodological and theoretical approaches. Pointing to a research gap on the representation of class and to well-attuned yet less-inventive combinations of approaches, the author invites more research that concentrates on the unforeseeable conflict between context and textbook representations. Carefully reviewing the few analyses available that deal with LGBTI*, the chapter On Normativity and Absence: Representation of LGBTI* in Textbook Research (Chap. 17) focuses on the shortcomings of studies in this area. The chapter suggests concentrating on the intersectionality of identifications and studying biased, normative representations with open approaches rather than a singular focus on the absence of concepts such as LGBTI*.

Religion has been another key topic of interest. Research on textbooks and religion takes place across disciplines and school subjects, which makes it a difficult object of study. The chapter on Religion as a Subject of Textbook Analysis: An Exemplary Overview (Chap. 18) therefore concentrates on one specific aspect, emphasising tendencies and trends such as the uptake of religious diversity and politically motivated research.

The second section of chapters in Part III deals with concepts of the past (Chaps. 19–23), looking at analyses that have explored representations of pasts in history and social studies textbooks. The selection of aspects to focus on was guided by three specific questions: Which issues appear to be ‘hot topics’ in the field of textbook studies? Which pasts are seen as particularly relevant within today’s dominant discourses? And which pasts continue to pose a challenge to negotiating and stabilising cultural memory in a range of societal contexts? Reflecting on these matters, we defined the following issues as foci for single chapters: national socialism and the Holocaust, colonialism, and socialism. In the words of the US historian Charles Mayer, these issues represent the twentieth century’s key paradigmatic experiences of violence and trauma.

Analysing Research into Textbook Portrayals of National Socialism and the Holocaust (Chap. 19) between 1962 and 2015, this chapter reveals a wide range of theoretical and methodological approaches applied. The authors state a lack of reflection and articulation of research principles guiding the analyses. Looking at best-practice studies, they give recommendations for future research in the field. The following chapter reflects upon the increasing interest in topics affiliated with Colonialism (Chap. 20) in the last two decades. Identifying shifts and research gaps, the chapter pinpoints future research foci, such as considering visual elements when researching issues related to colonialism, widening the body of systematically comparative studies, or conducting more comparative analysis of textbooks and other media. Taking into account the ambivalence of remembering and reflecting on socialism, the chapter on Concepts of the Past: Socialism (Chap. 21) regards textbooks as a springboard to contemplate the societal debates surrounding this topic. In their analysis of studies on socialism and textbooks, the authors reveal an imbalanced concentration on Germany and post-Soviet countries. They also discuss the heterogeneity of theoretical frameworks and analytical results in this area, pointing to innovative studies that overcame these shortcomings.

Further chapters in this second section examine research on the concepts of dictatorship and war in textbooks, since these issues contain a potential for conflicting and controversial interpretations. Analysing key studies on works published in Latin America and Spain, the chapter on History Textbooks and the Construction of Dictatorship (Chap. 22) distinguishes two directions of research dealing with representations of dictatorship. The authors outline a discourse analytical perspective and an educational and sociological perspective, unfolding the underlying topics and theoretical and methodological approaches associated with each of them. The chapter on War in Textbooks (Chap. 23) focuses on history textbooks and their representation of wars. The analysis pinpoints the pervasive understanding of textbooks as containers of national narratives, explores changes in the representation of war over time, and names limitations of current research, such as a focus on twentieth-century wars in European countries, the United States, Japan, and Israel.

The third section of Part III (Chaps. 24–26) relates to research on representations of political and economic concepts in textbooks. The issues selected in

this section play a prominent role in societal discourse and debate on the one hand as well as in textbook studies on the other. This section details and discusses textbook analyses that have engaged with discourse in textbooks around diversity, human rights, and the environment.

The chapter *How Diverse Are Our Textbooks? Research Findings in International Perspective* (Chap. 24) looks at studies from around the world on the representation of migration, religious and cultural minorities, and racism in textbooks. The author concludes that diversity is still represented and perceived as a challenge to social cohesion and as being problematic in terms of containing a potential for conflict and debate. Human rights as a relatively common classroom topic is also a subject of textbook studies. The chapter on *Human Rights as Cultural Globalisation: The Rise of Human Rights in Textbooks, 1890–2013* (Chap. 25) reviews the debate on human rights education, provides an overview of the core issues and applied approaches, and concludes with promising future research trends. Focusing on *The Environment* (Chap. 26) as one issue of textbook research, this chapter appraises the theoretical and empirical relevance of textbook analysis for three fields of study related to environmental topics: environmental education, disaster education, and critical geopolitics. The chapter also pinpoints how textbook studies on environmental issues can enrich debates and research in other disciplines dealing with environment-related studies, for instance, on environmental governance or environmental security.

PART IV: TEXTBOOK USE, EFFECTS, AND PRACTICES

Part IV uses a classic division from media studies to systematically map current research on how textbooks are actually used by both teachers and students, in formal classroom teaching and other non-formal settings. The chapters focus primarily on quantitative studies of usage patterns, (somewhat) experimental work on textbook effects, and sociological and cultural studies approaches that look at the creative and occasionally subversive practices of engaging with the materiality and content of textbooks.

In the chapter on *Textbook Use* (Chap. 27), the author discusses research on the extent and intensity of textbook use in classrooms. This chapter concentrates on quantitative studies of how teachers and students interact with traditional (print) textbooks. The chapter reflects on innovative methodological approaches, weighs pros and cons of quantitative methodology, and introduces four mixed-methods designs to overcome the challenges posed by purely quantitative-oriented research on textbook use.

The chapter on *Textbook Effects and Efficacy* (Chap. 28) deals with research focused on the effects of textbooks in the areas of language; socio-cultural and socio-economic factors; visual textbook parameters; cognitive, affective, and behavioural effects; and new technological approaches.

Finally, the chapter on reception processes draws on practice theory. Turning to *Textbook Practices: Reading Texts, Touching Books* (Chap. 29), this chap-

ter develops an understanding of textbooks as materially shaped textual artefacts. The authors map studies in this area that ask how specific topics are enacted, interrupted, contested, and transformed in the classroom.

NEW DIRECTIONS

In the concluding chapter on New Directions (Chap. 30), the authors summarise theoretical, methodological, and thematic trends in textbook studies as they unfold throughout the chapters of the *Handbook*. The authors also point to research gaps and critically reflect on this volume's structural limitations. From these considerations, the authors conclude that textbook studies has evolved into an interdisciplinary field of research—one that has succeeded in applying, modifying, and further developing theories and methods from the social sciences and cultural studies. They also refer to issues in textbook studies beyond the scope of the *Handbook* that should be addressed by future research.

As a whole, the *Palgrave Handbook of Textbook Studies* provides a wide-ranging overview of contemporary research on textbooks. It includes cutting-edge chapters by leading experts and emerging scholars on the most relevant theories, methodologies, and topics in contemporary textbook studies. The *Handbook* traces the history of the field, surveys current thinking, and points to the future potential of textbook studies. It thus aims to generate novel approaches, perspectives, and debates in a field that transcends disciplinary boundaries. Its international and interdisciplinary scope is matched by the broad variety of topics and approaches it discusses. This *Handbook* acts as both a comprehensive and well-researched introduction, providing a synthesis of theories, methods, approaches, and practices for newcomers to the field and a unique reference resource for advanced students. It therefore fills a contemporary gap in the literature, supporting scholars, students, and educational practitioners such as teachers and textbook authors in their endeavours to engage with textbooks from a broad variety of perspectives.

PART I

History, Theory, and Methods of
Textbook Research



History of the School Textbook

Steffen Sammler

INTRODUCTION

The school textbook became the predominant medium of children's and youth education in Europe starting in the sixteenth century, combining canonical knowledge designed for the classroom with a specific material form derived from movable-type printing. At the beginning of the twentieth century, it served as an ideal foundation for didactic knowledge transfer based on memorisation and repetition. The authority of the printed text in book form provided a counterweight to the teacher's lecture, effectively ensuring the communication of a politically desirable canon of school knowledge. At the same time, particularly at the primary level, the textbook became an indispensable resource for teachers, who had often received an inadequate education.

In a broader sense, the history of the textbook is, of course, much older than the developments laid out in this chapter. The ancient civilisations of the Mediterranean, the Arab World, Africa, the Americas, and Asia produced canonised texts for school education on scrolls or accordion folds made out of papyrus, palm leaves, bamboo, or amate (Del Corso and Pecere 2010). Simple primers were published as hornbooks beginning in the late Middle Ages, and in numerous regions, block printing long competed with movable type in the production of textbooks (Tuer 1897; Chow 2007).

From the sixteenth century, the development of textbooks in Europe was shaped by the emergence of national written languages replacing Latin as the lingua franca. Textbooks soon became the central medium of national education, which was carried out through institutionalised national education systems starting in the nineteenth century. Even today the conditions of textbook production continue to be influenced by the same tensions as they were then:

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E. Fuchs, A. Bock (eds.), *The Palgrave Handbook of Textbook Studies*,
https://doi.org/10.1057/978-1-137-53142-1_2

between specialised knowledge and pedagogy, between state control and exemptions from approval requirements, between privilege, state monopoly, and the free market (Sammler et al. 2016). At the same time, the technical requirements of producing textbooks have undergone major changes. Since the first half of the twentieth century, textbooks have been forced to compete with audiovisual media (educational films, school broadcasts, and educational television) and shifts in young people's media experience—an aspect that has taken on a new quality since the advent of digitalisation at the turn of the twenty-first century.

This chapter sketches the textbook's evolution from the early modern period to the present, focusing on Europe. It begins by outlining the development of historical textbook research and reconstructing the etymological roots and conceptual history of the textbook in different cultures. It then examines how religious or state authorities shaped the textbook's development in these various contexts. It shows how textbooks were transformed by changes to subject-specific canons and how new understandings of school education for children and adolescents within society influenced textbook production. In the section that follows, the textbook's evolution is set against the backdrop of technical and artistic innovations in book production. The text then considers reciprocal influences between textbook developments and international cultural encounters. Finally, the chapter turns to challenges confronting textbooks since the beginning of the twentieth century through the changing demands of scholarship and technology, transformations in people's media experience, and their consequences for 'school'.

RESEARCH ON THE HISTORY OF TEXTBOOKS

Studies on textbook history have been part of more general research on the history of the book since the nineteenth century. Initiatives in this direction came primarily from the book sciences, for example, from the International Gutenberg Society, founded in 1901. Such research combined a wish to identify and preserve historical textbook material with a general interest in textbook research. Scholars quickly developed interdisciplinary approaches to the history of the textbook, an object they investigated as a source of both historical pedagogical knowledge and developments in book art.

Research on the history of the textbook experienced a significant upswing over the course of the twentieth century through the practice of textbook revision; above all, studies used examples of textbooks from history and language classes to analyse the emergence and development of nationalist, militarist, and racist depictions. In this respect, the transformation of the Georg Eckert Institute in Braunschweig from an 'institute for textbook improvement' to an international research centre for school-based educational media serves as a vivid example. Since the 1980s the institute has built a broad historical collection of primers and textbooks in the subjects of history, geography, and social studies while fostering research on textbook history.

During the twentieth century, overviews of textbook history were often inspired by discussions surrounding the (re)definition and shaping of national education systems, often initiated by national associations such as the National Society for the Study of Education in the United States (Venezky 1992; Woodward 1994). See also Peter Carrier's chapter in this volume on the notion of nation in textbook research.

In the socialist countries, historical textbook research was closely tied to the search for historical traditions and models on which to base a new concept of school education (see Barbara Christophe's and Lucia Halder's chapter on socialism in this volume). It took place at the national academies for educational sciences in close cooperation with textbook publishers, as part of more general textbook research. Textbook authors from the humanist period to the Enlightenment to democratic movements of the nineteenth century were identified as pioneers of the new concept and placed at the centre of research endeavours (Zuev 1983).

In Western Europe, discussions to reform education systems against the backdrop of the Cold War led to an institutionalisation of textbook research at academic centres and universities in the 1970s. Alain Choppin played a vital role in this development, forming a research group for historical textbook research at the Institut national de recherche pédagogique (since 2011: Institut français de l'éducation) in Paris to conduct systematic and interdisciplinary studies on the history of the French textbook since 1789 (Choppin 1980, 2002, 2008). The work initiated by Choppin led to the founding of several other centres for historical textbook research in the Latin European countries and Canada to investigate the history of textbooks in their respective national contexts.

Towards the end of the 1980s, the nationally based research groups began to form international networks, for example, through the Colloquium on Textbooks, School and Society, institutionalised in 1988; the International Society for Historical and Systematic Textbook Research founded in 1997; or the International Standing Conference on the History of Education, whose publications present findings from international textbook research.

Egil Borre Johnsen, a founder of the International Association of Research on Textbooks and Educational Media, published a synthesis on the state of textbook research in 1993 and devoted significant attention to historical textbook research (Johnsen 1993). Particular interest in the field came from researchers concentrating on the conceptual history of the textbook, studying the influence of education policy and the process of defining the canon of school knowledge. Impulses to link research on textbook history with research on childhood and youth came from scholars studying historical primers and readers. More recent studies have contextualised the historical development of the textbook within broader developments in printing and art. In light of discussions surrounding the digital revolution, they have taken a long-term historical perspective to emphasise the historicity of the textbook medium (Giesecke 1998).

These lines of inquiry in historical textbook research define the structure (the thread) running through the history of the textbook in the following sections. For a detailed overview on the history of textbook research, see Eckhardt Fuchs' and Kathrin Henne's contribution to this volume.

ETYMOLOGICAL ROOTS AND CONCEPTUAL DEVELOPMENT

The etymological origins of words for 'textbook' generally draw on the terms *schola* and *liber* (tree bark) or *Buch* (beech). With the invention of book printing in Europe in the fifteenth century, the form of a bound volume printed on paper, along with the medium's inherent functionality for use in the classroom, became central to the concept's development. Terms denoting textbooks in various European languages were either derived etymologically from the materiality of the medium (*cartilla*, *kniga*) or described its functionality in the classroom (see Choppin 2008). This functionality alluded to the object as a medium that children could easily handle (*manuel*, *manuele*, *Handbuch*) or described the central principle of teaching, based on the memorisation and repetition of the religious canon. Terms such as *primer* or *fibel* refer to this aspect. Since numerous works were written not only for the school classroom but also for home instruction, the conceptual attributions remained varied for a long time. An analysis of this terminological diversity thus provides insight into the respective state of institutionalisation, uniformity, and canonisation of school knowledge, as well as the didactic principles on which the transfer of this knowledge rested.

A more binding and uniform conceptualisation went hand in hand with the development of institutionalised school education systems. The concept shifted over the course of the nineteenth century from describing a book used in schools (among other places) to an educational medium produced explicitly for school education. Its purpose was to convey a clearly defined canon, and in most countries, it was required to undergo an approval process by the state. In addition to emphasising the medium's practicality in the classroom, the concept expanded from referring only to the canon of religious instruction to encompassing the entirety of canonised knowledge to be taught in the school classroom. These two aspects formed the basis for the designations still used today: *Schulbuch*, *Lehrbuch*, *libro de texto*, *textbook*, *yzebnik* (Stray 1997; Choppin 2008).

POLITICAL DEFINITION AND CONTROL OF TEXTBOOK PRODUCTION

The religious and/or political elite in a given society set the fundamental political conditions for the production of knowledge to be passed on to the next generations. For many centuries, however, the group of people in enduring societies who received this transfer of knowledge was restricted to a very small

circle, with the knowledge itself limited to a narrow canon. In the early modern era, the definition of school education began to change. As the Reformation sparked increased competition among religions and political systems, understanding creation began to be described as an explorative learning process rather than the unquestioning acceptance of indisputable fact, for example in the writings of Johann Amos Comenius (1658). From this perspective, education was understood as a requirement for gaining access to God. In the period that followed, the canon of knowledge underwent a continual expansion, extending during the Enlightenment beyond knowledge of creation to accommodate more general educational goals. In contrast to England, which issued the first copyright law with the ‘Act for the Encouragement of Learning, by vesting the Copies of Printed Books in the Authors or purchasers of such Copies, during the Times therein mentioned’ (Cornish 2010), elites in most European countries maintained control over educational content well into the nineteenth century by way of special privileges. They privileged the printing of specific educational works for schools of advanced learning (*Gelehrtschulen*) or granted religious or state institutions a monopoly on textbook production. The latter most often occurred in the area of elementary education. In some European territories, such as Bavaria or the Habsburg Monarchy, the absolutist states of the late eighteenth century took control of producing elementary-level educational material through the founding of a school (book) commission or a state-run publishing house (Kissling 1995; Manz 1966). After the elimination of these privileges in the eighteenth and nineteenth centuries, responsibility for textbook production was transferred to private publishers (see Christoph Bläsi in this volume for today’s condition of textbook publishing and publishing houses).

The development of national education systems in the nineteenth century led to the creation of binding curricula. From that point onwards, textbooks were written to conform to these national curricula, and the state exercised control via approval procedures. These differed starkly in terms of organisational form and scope. The idea of broad exemptions from the approval process established itself in France during the second half of the nineteenth century and spread to other countries over the course of the twentieth century (Choppin 1980; Matthes and Schütze 2016). To an increasing degree, control of the content took place by way of the curricula. At the same time, debates over the definition (control) of the canon of school knowledge and the costs to the state for its production also prompted stakeholders to reconsider producing uniform textbooks even after privileges were lifted in the nineteenth century. However, uniform textbooks only managed to establish themselves under authoritarian regimes (see Oteíza and Achugar in this volume). They were the default in education systems of the socialist states (Zuev 1983) and a few states in the developing world (Altbach and Kelly 1988). Uniform textbooks were seen as a valuable factor in fostering successful national integration. Their widespread use could be achieved in education

systems where school learning (‘grammar of schooling’; see Tyack and Tobin 1994) was defined as the transmission of a clearly delineated academic canon, rather than as a continual process of questioning and redefining the canon of knowledge.

In most European countries and the United States, the scientific community and progressive educationalists were able to assert competition between different textbooks, guaranteeing the constant redefinition of knowledge and its transfer.

DEVELOPING A CANON OF KNOWLEDGE

Following first-language acquisition with alphabet books, schoolbooks in the form of readers long formed the foundation of elementary-level teaching. In religious communities, they represented the basis of religious and moral instruction for children and adolescents. In territories shaped by Christianity, the selection of texts for readers in the early modern period revolved around the catechisms, which were often written by the same authors. Readers contained questions and answers about the Ten Commandments, as well as prayers and biblical texts written for use in schools. Beginning in the eighteenth century, the selection of texts for the readers extended beyond the catechisms to include secular content such as fables and stories, which also served to encourage conformity to socially recognised moral standards, obedience towards the authorities, and national patriotism (Hellekamps et al. 2012). The readers were expanded further in the nineteenth century with descriptive elements in the areas of history, geography, and the natural sciences, becoming broader works about the natural and social world that shaped elementary education into the twentieth century.

Through their selection of material, readers played an important role in the national integration of newcomers in societies shaped by immigration, such as the United States, Canada, or Latin American countries (Westerhoff 1978), starting in the nineteenth century.

In schools of advanced learning, editions of works by Greek and Roman authors—with few didactic modifications—formed the basis of teaching well into the nineteenth century. In advanced schools of Jewish communities (Yeshivas), the study of the Talmud and its commentaries was at the core of the educational concept, augmented by mathematics and history.

Starting in the nineteenth century, secondary-level education in the natural sciences took on an increasingly prominent role. Teaching materials reflected the development of the scientific method in their respective subjects, and didactic approaches (theorems, varied exercise formats) differed markedly from the descriptive depictions in textbooks for the elementary level. Textbooks for advanced natural science classes were written by leading scientists in many countries and produced by established scientific publishing houses that broadened their specialist reputations to include textbook production.

BECOMING A BOOK EXPLICITLY WRITTEN FOR CLASSROOM EDUCATION

As reflected in the development outlined above, the textbook as a work produced exclusively for teaching children and youth in schools underwent a long process of emancipation from its original form as general didactic literature used at home. In the early modern era, however, textbooks had already begun to incorporate images in order to address the learning needs of children and adolescents. Images were intended above all to help train children's memory. In Europe they took on a pedagogical function of their own from the seventeenth century onwards, with textbook authors inspired by Comenius's *Orbis Sensualium Pictus*. Authors of the Enlightenment advocated age-appropriate lessons that reflected the developmental level of the children. They introduced graded textbooks for each age group and promoted a child-appropriate format (octavo) with suitable typography (Haug and Frimmel 2015). Enlightenment-era textbooks also combined new ideas about childhood and learning with new techniques and forms of visual representation. For elementary-level education, illustrations became an important design element in textbooks and remain so today, being especially suited to stimulating children's curiosity and excitement to learn, according to pedagogical theory.

The progressive education movement inspired textbook authors and others at the turn of the twentieth century to design readers (in terms of their proportions and spatial standpoint) from the actual perspective of the child; the reader *Sörgården* by Maria Roos provides an illustrative example of this (Wille 1997). As subject matter broadened and textbook design changed to include an increasing number of colour images and photographs at the beginning of the twentieth century, the question arose of how heavy a textbook could be if children of a certain age were required to carry it. Consequently, the consensus crystallised that if possible, a textbook should not exceed 500 grams.

ARTISTIC DESIGN AND TECHNICAL DEVELOPMENTS IN TEXTBOOK PRODUCTION

The technology of paper manufacturing, which spread from Asia through the Arab World to Europe in the Middle Ages, along with the invention of movable type in Europe, laid the foundations for textbook production. They enabled the creation of a durable medium for school lessons that children could easily handle. Books were a precondition for communicating a set of knowledge that built on itself over time. In contrast to traditional copies of manuscripts, which were isolated from each other and only available in very limited number, books could accommodate changes to the canon of school knowledge.

The transition from handmade paper to mechanical paper production in the early nineteenth century corresponded to technical developments in typesetting

and printing such as the rapid printing press (*Schnellpresse*)—an evolution that later continued with the shift from mechanical to photographic to computer type. These developments not only improved the possibilities of cheap mass textbook production but also enabled an increase in textbook quality (Raven 2015). At the same time, textbook production benefited enormously from developments in the manufacturing of art books, borrowing artistic innovations in typography and image and graphic design starting in the late eighteenth century. Forward-thinking education scholars hired artists to advance the new pedagogical concepts of classroom learning through copperplate engravings and lithography.

REGARDS CROISÉS: THE TEXTBOOK AS A PRODUCT OF CULTURAL ENCOUNTER

Education in schools of advanced learning was traditionally based on the study of Greek, Latin, Hebrew, and Arabic texts, whose canon changed little until the nineteenth century. But the expansion of school education in the early modern period fostered textbook production in the respective national languages. Until the establishment of international copyright law in the nineteenth century, most textbook authors drew freely on texts by their more successful colleagues. Textbooks written in Latin by the humanists or Comenius, for example, were translated into numerous European languages (Lukas and Munjiza 2014). Developments in Europe from the sixteenth century onwards were also shaped by the practice of translating successful works from one national language into other national languages. Among other things, this practice aimed to constitute a common religious community or to strengthen the political and cultural cohesion of states made up of several nations, such as the Habsburg Monarchy or the Russian Empire (Rokitjanskij 1990; Kissling 1995).

While the translation of bestsellers into the respective national languages became an established tradition and produced a number of bilateral textbooks, works that tried to go beyond the national framework of educational regulation to shape school education in an international region or on a global scale have remained the exception (see Zloch in this volume).

Since the sixteenth century, the textbook has been refined as a product representing the ‘Western’ society of knowledge. Through the process of colonisation, it displaced alternative forms or traditions of conveying school knowledge. As missionaries from organisations like the Jesuit Order, the Frères des écoles chrétiennes, or the Society for the Promotion of Christian Knowledge transferred the school model to territories in Africa, the Americas, and Asia, the textbook spread to these places as well. They imported the idea of combining alphabet books and catechisms in elementary education into numerous Latin American, African, and Asian regions and translated textbooks into the languages of the indigenous communities (Üçerler 2000).

The Western model of school education in European societies and the United States increasingly appealed to educational reforms tied to modernisation

processes in Asia and Africa beginning in the late nineteenth century. During the Meiji Reform, Japan adopted the idea of teaching by subject and thus structuring textbooks according to the different subject areas. With the process of decolonisation in the twentieth century, the newly independent nation-states retained the Western model of school education. At the same time, they tried to emancipate themselves from the dominant influence of textbooks by the former colonial powers, establishing their own systems of textbook production (Altbach 1991). Further investigation on the conjunction of colonialism and textbook production can be found in Lars Müller's chapter in this book.

THE TEXTBOOK AND NEW APPROACHES TO MEDIA AND EDUCATION

Even in the early modern period, the textbook was used in conjunction with globes, hanging maps, and illustrations designed specifically for the classroom. But since the European 'grammar of schooling' long revolved around the memorisation and reproduction of a binding canon of knowledge, textbooks remained the best-suited and most dominant educational medium. At the turn of the twentieth century, the progressive education movement criticised this traditional 'book school' and paved the way for teachers and students to develop teaching and learning material independently. Advocates of this position were open to new media such as educational films and school broadcasts and integrated them into lesson design. Since then, the dominant role of the textbook has been repeatedly called into question through new media and pupils' constantly evolving media experience. Educational films, school broadcasts, and school television changed the design of textbook content and materiality without ever managing (or intending?) to replace it. In the second half of the twentieth century, the confrontation of systems between blocs led by the United States and the Soviet Union precipitated increased competition in the educational sector, producing a transformation in textbook content and the methodology of its communication. As a result, the traditional textbook lost its monopoly as the main conveyor of school knowledge; now, it had to compete with didactic films and school radio and television programmes designed especially for classroom use.

At the turn of the millennium, the digital revolution first created the necessary technological and cultural conditions for universal access to the canon of knowledge relevant to school education, as well as the ability to continually redefine and rewrite this knowledge together with the people learning it.

These new capabilities pose an immense challenge to the textbook as the traditional leading educational medium. At the same time, they spur scholars to investigate the ways in which school knowledge has been canonised over time; a long-term historical perspective will allow researchers to better understand the historicity of the textbook medium. Such analyses should look more intensively at the historical establishment of textbook knowledge and its transcultural interaction with other authorities and forms of knowledge transfer within the school context.

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History of Textbook Research

Eckhardt Fuchs and Kathrin Henne

A SHORT INTRODUCTION TO THE TOPIC

Generations of textbook researchers have wrestled with the question of precisely what makes textbooks and their specific methods of analysis so distinctive, without yet reaching a consensus on any definition. Yet this lack of delimitation is no reason for disquiet if one views textbooks and their associated research as contingent conditions that are subject to constant change and to wide-ranging definitions (see, e.g., Choppin 1992). A textbook is conventionally a tool designed for students or pupils to learn, be taught, or work from and which, according to school type or subject, is adapted to the respective curricula or standards and the specific aims, competences, and content defined within. It is generally employed for the duration of a school year or semester and used as the dominant medium in the classroom (see Stöber 2010).

From a didactic perspective, a textbook combines teaching, learning, and workbooks; it contains a range of tasks and assignments, is structured towards competence development and comprises a mix of media. According to Gautschi, this ‘media mix’, particularly in relation to history books, consists of teacher handbooks with complementary documents, descriptions, instructions, hints, and solutions as well as supplementary digital material with exercises and resources that are either available online or on CD-ROM (Gautschi 2010). Teaching materials should be relevant to the student or pupil’s living environment, provide guidance in differentiating and developing perceptions as well as constructions and co-constructions (learning through cooperation, joint research into relevance and meaning), offer help for independent study as well as for orientation and systemisation, support the construction of basic concepts, open multiperspective approaches, offer a combination of representative

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forms and represent a range of interests (e.g. gender specific), and aim to encourage and develop comprehensive, problem-oriented learning processes (reflection, appraisal, evaluation) (see Aeberli 2004; Handro and Schönemann 2011). Intrinsic to the role of textbooks are therefore structure, representation, regulation, motivation, differentiation, practice, and monitoring (see Hacker 1980). Recent research has added an additional classification to this list, namely, the role of innovation: textbooks are considered to be the most effective instruments with which to implement curricula and should therefore be the most suitable method of introducing didactic and methodological innovations and of implementing them in practice (see Bullinger et al. 2005). The textbook's role is to systemise and comprehensively reproduce the respective knowledge base of the subject matter to be taught, in adherence with the curriculum, and to present that information methodically and in a thematically ordered and educational manner. The textbook should motivate students and pupils while also providing differentiated access for a range of learning levels and enabling flexibility of study location (see Rauch and Wurster 1997).

Textbooks are viewed from a sociological or cultural studies perspective as a medium of social observation within a network of media. *Observation* is understood here in the sense of Niklas Luhmann, who identified the representation and/or construction of reality through media (see Luhmann 1991). Textbook knowledge, as knowledge both contained in and about textbooks, is distinct from other media due to its didactic structure, but it cannot be reduced to this alone. The textbook must be decoded by analysing its semantic structure, function, and form in order to determine the narrative modes and latent interpretive patterns of the socio-cultural knowledge it contains (see Höhne 2003). The function of such a discourse-analytical approach is not solely to examine what is and is not recounted in textbooks but also to explore how the information is related and which narrative strategies or discursive fractures are used to disseminate its content (see Handro and Schönemann 2010). The advantage of this cultural studies approach is that it allows us to also analyse the textbook as a medium that provides a 'complex insight into social debates and processes of self-conception' (Christophe 2014: 1).

More recent studies consider the instrumental and social role of teaching materials in terms of their significance within learning processes as well as their didactic function. The social role of textbooks is expressed in the selective and standardising choices made with regard to their content and represents society's educational mandate (see Heitzmann and Niggli 2010). Despite this observation, there has been little systematic critique of the position of textbooks within a social context. A volume published in 2010 titled *Schulbuch konkret* (Textbooks in Focus) attempted for the first time to examine all aspects of textbooks—social, academic, pedagogic, and economic as well as education policy-related—from the perspective of academics, educators, pedagogues, textbook authors, education policymakers, and publishers. The aim was to enable initial access to the field not only for prospective teachers but also political decision-makers and textbook researchers (Fuchs et al. 2010).

THE ORIGINS OF TEXTBOOK RESEARCH

Initial research into and about textbooks can be traced back to the end of the nineteenth century. Examinations of reading comprehension were among the first areas of research to incorporate textbooks. The earliest studies were conducted in the 1880s in the USA and explored the readability of technical manuals. As reading comprehension is a fundamental component of any instruction there was an inevitable connection with schools and textbooks. This twofold research focussed in part on a practical analysis of textbooks, reading primers, and so on with regard to their readability and comprehensibility, while also endeavouring to develop the theory behind the field. Both aspects were linked by the central development of relevant formulae at the beginning of the twentieth century. In addition, theoretical research into reading comprehension was associated with progressive developments in psychology as an academic discipline. Seminal works such as Edmund Burke Huey's *The Psychology and Pedagogy of Reading* (1908) and Edward Thorndike's *The Teacher's Word Book* (1921) provided a constitutive theoretical basis (Pearson 2009).

In contrast, readability studies were also developed that were not based on psychology but rather on the child-centred approaches of educationalists such as Pestalozzi, Froebel, or Herbart. Their aim was to develop texts that matched both the interests and developmental capacities of children (Pearson 2009). In 1928 Vogel and Washburne developed a more complex theorem in the USA: known as the *Winnetka formula*, it established a connection between the difficulty of text elements and various levels of reading competence. It also established a fundamental new theoretical approach: previous studies and formulae had been based solely on the vocabulary used but the *Winnetka formula* also considered prepositional use and simple sentence structures (Chall 1947). After the Second World War, similar research was conducted in countries such as Great Britain and Austria (Olechowski 1995). The formulae developed in the succeeding decades all followed the principles of the *Winnetka formula* in essence.

Research into textbooks first experienced an upsurge in the context of textbook revisions that followed the First World War. Textbook revision today is still governed by its objective to rid textbooks of nationalist, chauvinist, and one-sided interpretations in order to contribute towards international peace and understanding (see, e.g., Hübner 2000; Höpken 2005; Pingel 2008, 2010a; Bachmann 2009). A historiographic review reveals that textbook research has also been subject to political and therefore normative pressures and that these were particularly prevalent in the fledging phase of the discipline. The charged relationship between academia, politics, and educational practice came to characterise traditional textbook research and is still representative of much textbook-related research conducted today (see Pingel 2010b). The comparative analysis of textbooks has continued to shape the field since the initial work carried out in the interwar years by the *Norden* Association or the League of Nations and in the post-war period by UNESCO or the Council of Europe. Discussions relating to bilateral textbooks have similarly influenced the field.

The political agenda behind early textbook research consisted in the promotion of ‘international understanding’ and shaped textbook revisions during the 1950s and 1960s. Their core premise is reflected in the preamble to the UNESCO constitution: ‘That since wars begin in the minds of men, it is in the minds of men that the defences of peace must be constructed’ (UNESCO 1945). Democracy education was a central instrument at that time, especially in formerly undemocratic states, such as Japan and Germany. Other projects were also initiated that aimed to mediate between the countries and cultures on the world’s continents. Textbook revision, in most cases bilateral revision, provided a focal point in that sense and was not critically examined until 1966 when Western European activities at least were reviewed more closely (Schüddekopf 1966). The role of the international organisations involved, such as UNESCO, has however only become a focus of research in recent years. Their respective positions in relation to international education processes and associated projects and the subsequent implementation of those projects in various states and regions have since gained prominence in terms of research interest (see, e.g., Faure 2015; Fuchs 2014; Kulnazarova and Ydesen 2017). At the same time the history of international textbook revision has been attracting greater attention. Moreover, researchers are not simply examining aspects of peace education in a narrow school context (Bechet 2008), they are also studying international transfer processes and the role of transnational institutions (see, e.g., Lindmark 2008, 2010; Fuchs 2010a, b). Social conflicts concerning interpretations of the past and subsequent connotations can be traced back at a national level as far as the nineteenth century. In the USA, particularly, there are many studies examining the history of social debate surrounding textbooks (see, e.g., FitzGerald 1980; Giordano 2003; Moreau 2003). Amalvi (1979) had a similar epistemic interest when he examined the ‘textbook wars’ that stemmed from a conflict of political and religious interests in France between 1899 and 1914.

There was no systematic textbook research to speak of until the 1970s. Textbook analysis in the initial post-war period was subject to political and normative goals, with the exception of a few quantitative approaches by academics such as Göran Andolf (Johnsen 1993). The social changes that have taken place since the 1960s, characterised by demographic developments, the expansion of education, social movements, political crises, and an expanding global economy, have resulted in a more concentrated focus on the social and political function of textbooks. Movements for education reform contributed to a public discussion of textbooks led by politicians, textbook producers, and academics (see Hacker 1980; Wendt 2000; Pöggeler 2003). These debates centred primarily on the theoretical basis of textbook research and the social context within which textbooks should be placed.

Textbook researchers criticised the absence of theoretical discussion surrounding such a significant medium. There was no methodology for research nor was there a theoretical reflection of textbooks as a medium (Fritzsche 1992; Marienfeld 1976). They reasoned that this deficit resulted from textbook production and content being subject to economic interests and admin-

istrative authorities which consequently rendered the field unattractive to academia (Hacker 1980). The paradigm shift towards self-reflective textbook research that emerged in subsequent years did not, however, lead to a comprehensive theory of textbooks being developed. Nevertheless, textbook research began to expand beyond mere content analysis and gained a more systematic structure. Peter Weinbrenner (1995: 22), for example, distinguished between: ‘process-oriented textbook research’ that considered the life cycle of textbooks from their development to their implementation in classrooms; ‘product-oriented textbook research’ that examined textbooks primarily as a visual communication medium; and ‘impact-oriented textbook research’ that studied the role of textbooks as a socialising factor in the classroom and examined the effect of their use on teachers and pupils. A process of methodological expansion began, and continues today, which has taken advantage of theoretical approaches from a range of other disciplines.

For the last decade or more, discourse analysis, in all its variations, has been gaining ground within textbook research. One approach, which is uniquely suited to the specifics of the medium of textbooks, strongly focusses on the hybrid nature of the texts particularly when, and even because, they overlap and intersect different discourses. Höhne (2008) applied this reasoning to the analysis of textbooks in order to reveal incoherencies and friction between different discourse threads. While focussing on history textbooks, Klerides (2010) developed a relatively easy-to-use methodological instrument which enables researchers to trace discourse threads within textbooks. One of the aspects he investigated was the constellation of those groups creating the framework of historical narrative: Who is active and with whom do they interact, who is passive, who is visible and who is not? A series of studies have subsequently implemented such approaches in order to identify ambivalences and incoherencies in textbook content (Höhne et al. 2005; Christophe 2010, 2012, 2013, 2014).

MINORITIES AND GENDER

Academic criticism of textbook content, which began in the 1970s, primarily addressed ideological content and the intelligibility of teaching texts (see Mayer 2001). The textbook was now viewed as both a product of and a factor in social processes and as an object of political interest (see, e.g., Stein 1974, 1982). The Institute for Textbook Research in Duisburg (*Institut für Schulbuchforschung*) led the resultant ideological critique in Germany and Gerd Stein’s enduring definition of textbooks as objects of pedagogic, informative, or political interest continues to shape research. For the first time, researchers asserted that textbooks were not only disseminators of political content but were themselves a political medium, regardless of the subjects for which they were intended. Questions surrounding the social function of textbooks may have produced differing answers in the East and the West—ideologically critical versus affirmative—but there was extensive consensus with regard to their pedagogic role (Institut für Schulbuchforschung und Lernförderung 1994).

The most prominent proponent of such ideological criticism in the USA has been Michael W. Apple. The first studies to address themes such as national minorities, race, gender, or social class in textbooks were published in the 1960s. The depiction of minorities and issues of race in the USA were included in these early studies and the subject of sexual equality was first explored in the 1980s (see Woodward et al. 1988). However, Apple was the first to consider these themes as relevant factors in the production of legitimate knowledge in textbooks. He worked from the premise that due to both content and format, textbooks represent a specific construction of reality as well as the considered selection and organisation of knowledge. Textbook production is the result of complex negotiation processes and power structures and reflects differences in social class, race, gender/sex, and religious affiliation between stakeholders. Apple differentiated between these groups as well as between producers and recipients of textbooks. He was also keenly aware that textbooks are subject to economic pressures, especially in states with competitive markets for textbooks such as the USA, Great Britain, or Germany (Apple and Christian-Smith 1991). Further examination of the themes ‘class’, ‘race’, and ‘gender’ can be found in Linda Chisholm’s chapter in this volume.

These topics are no less controversial today (Fuchs et al. 2014). There are a series of new studies in German-speaking countries exploring representations of migrants, religious and cultural minorities, and the subject of racism in textbooks. In their pioneering study of the depiction of migration in social science books for both primary and secondary levels, Thomas Höhne, Thomas Kunz and Frank-Olaf Radtke (2005) demonstrated that textbook content in the social sciences highlights cultural differences and the ‘foreignness’ of migrants through dichotomous semantic juxtapositions such as us/them, German/foreigner, modern/premodern, and self/other. Béatrice Ziegler was also able to show, in her study of Swiss history textbooks, that migration was only referred to in the context of migrant labour and of being ‘swamped’ or ‘overrun’ with foreigners, and that pupils from families with a migration background were confronted with a narrative of migration that returned them to the status of ‘newcomers’ or ‘strangers’ (Ziegler 2010). A Spanish study also demonstrated that ‘new knowledge’ regarding migrants in Spanish textbooks reflected and confirmed the dominant social discourse surrounding integration and assimilation and allowed pupils little space for critical reflection (Van Dijk and Atienza 2011).

Studies from other multicultural countries reveal racist presentations and stereotypical depictions of black people in textbooks, while the subject of historic ‘white dominance’ is suppressed. Research on this subject includes a study on racism in Brazilian textbooks (da Silva et al. 2013) and the depiction of racist violence against black Americans in American social studies textbooks (Brown and Brown 2010). See also Bryan (2012) on the topic of race in American textbooks.

The portrayal of Islam and Muslims in textbooks is similarly essentialist and stereotypical. A study by the Georg Eckert Institute in 2010 examined history

and social studies books from five European countries and found overwhelmingly that mainstream textbooks do not provide pupils with a differentiated image of Islam or of Muslims. The Eurocentric perspective of the majority of the textbooks was found to be especially problematic as was the widespread practice of condensing the history of the Islamic world to episodes in the Middle Ages and in the twentieth and twenty-first centuries, rather than providing a continuous timeline (Kamp et al. 2011).

Despite concerted efforts over many years to develop gender-sensitive textbooks and educational media, an international comparative study conducted by UNESCO in 2008 revealed that although the majority of textbooks are not openly discriminatory, they still convey a wide range of stereotypes (Brugeilles and Cromer 2008). The UNESCO handbook was based on practical findings and on scientific textbook analysis and documented that the representation of women and girls in textbooks remains biased. They are depicted less frequently than men and boys and are portrayed in gender-typical roles. A quantitative analysis of character representations in Malaysian textbooks supported these findings (Othman et al. 2012). A study of 42 Pakistani textbooks in Urdu, English, and Pashto also showed that outdated gender identities were perpetuated by the dominance of masculine language that consequently reinforced social structures (Khan et al. 2014). Two studies exploring gender representations in Iranian (Foroutan 2012) and Ugandan (Barton and Sakwa 2012) textbooks reached similar conclusions. Even more concerning is the absence of female representation in history and civic education textbooks in Palestine and Jordan (Alayan and Al-Khalidi 2010). Academic studies examining other subjects in the humanities corroborate the above findings. Susanne Knudsen points out that her research into Swedish textbooks found scant representation of female authors, artists, or historical figures and advocates more intensive consideration of gender issues within textbook research (Knudsen 2005).

Research into classroom teaching and didactics is beginning to address general questions of gender. This includes investigations of textbooks for various levels of schooling linked closely to examinations of teaching practice (Mörth and Hey 2010). Jutta Hartmann highlights the challenges of translating fundamental criteria from gender research into a format that is suitable for the classroom (Hartmann 2010). Angela Pointner employed discourse analysis in her survey of lifestyles portrayed in primary school reading, language, and science books. The findings were unsurprising: textbook content was dominated by traditional norms. The representation of the father-mother-child family as the ideal, a clear distinction between the sexes and the traditional distribution of roles between men and women are equally determinant factors as the heterosexual matrix or stereotypical images of different ages (Pointner 2010). In her analysis of German textbooks for history, biology, and English at lower secondary school level, Melanie Bittner also demonstrated that the heterosexual norm is upheld throughout lower secondary years. Legal aspects of anti-discrimination are addressed yet there is no rendering of the range of sexual orientation (homosexual, bisexual, transsexual, and intersexual) or any

presentation of such as normality (Bittner 2011). The chapter in this volume by Marek Sancho Höhne and Dmitri Heerdegen explores this topic in much greater detail.

Current textbook-related research examines questions of inclusion and exclusion in the context of curricular analyses and the construction of cultural differences in textbooks (see, e.g., Banerjee and Stöber 2010; Chikovani 2008; Körber 2001). This involves how difference can be treated as a distinct topos in textbooks in terms of substantive complexity, didactic implementation, subject-specific orientation, and compliance with educational aims; that is to say how foreignness is constructed within textbooks and whether its representation could influence cultural integration (Helgason and Lässig 2010; Matthes and Heinze 2004). There is no doubt that education systems around the world are faced with the challenge of developing new concepts to address the increasing cultural, ethnic, and religious diversity in classrooms (see Schiffauer et al. 2002). For a more in-depth exploration of the current state of research and an overview of theoretical as well as methodological approaches, see Inga Niehaus' chapter in this volume.

NATIONAL IDENTITIES, EUROPEANISATION, AND TRANSNATIONAL PERSPECTIVES

Conventional research into stereotypes has been complemented since the 1970s by new themes such as multilateralism, Europeanisation, and transnational perspectives (Höpken 2003). The shifts in global political constellations since 1989, as well as the emergence of new ethnic and political conflicts, particularly in Europe, have provided new subject matter for content analysis, as have processes of Europeanisation and globalisation.

The majority of current textbook-related research has moved away from the normative political assumptions that dominated the initial periods of textbook revision, but these nevertheless continue to play a significant role in post-conflict societies and those still at war. In such instances, textbook research comprises the analysis of textbooks and teaching materials for stereotypical representations and images of the enemy with the aim of providing policy-relevant recommendations for the revision of such material. This currently applies predominantly to three regions: the Balkans, the Middle East, and, in terms of conflict concerning textbooks, East Asia. Recent research has been conducted into each of these regions with the ultimate goal of supporting political and social reconciliation processes and of improving the objectivity of textbook content (see, e.g., Dimou 2009; Helmedach 2007; Dorschner and Sherlock 2007). Research in the Middle East has attempted to provide support for the dialogue between Arab states and, in the case of Israel and Palestine, to contribute to the creation of a reciprocal understanding for different interpretations of history and the objective presentation of such interpretations (see Firer and Adwan 2004; Pingel 2004; Alayan et al. 2012). East Asia, on the other

hand, while not a post-conflict region, is an area that has been marked by protracted conflict surrounding textbooks. Textbook revision here focusses primarily on the academic expertise of historians and educational practitioners rather than on textbook analysis. The latest papers examining the region not only analyse the conflicts surrounding textbooks but also search for solutions (see Nozaki and Selden 2009; Richter 2008; Saaler 2005). Sylvie Guichard's chapter in this volume provides a comprehensive overview of the depiction of war and conflict, particularly in history textbooks.

Textbooks, and their associated research, are not only politically explosive when associated with revisions in conflict-laden social contexts. There have also been many textbook conflicts, in which history textbooks have proved particularly contentious, resulting from so-called History Wars that have been the subject of national debate within certain societies (see Liakos 2008/2009). At the heart of such disputes are factors such as the cultivation of national traditions, safeguarding a sense of identity, and constructing identities. Confrontations frequently follow similar patterns whereby an internal debate spreads and finds resonance within the wider public sphere and results, not uncommonly, in vehement discussion. In the USA in 1994, to give an early example, there was controversy surrounding the introduction of national standards and curricula for history teaching. The new standards were endorsed by experts in the field but encouraged a deeper consideration of the cultural emancipation movements and broke with the traditional *master narrative* of American national history (see Nash et al. 1997; Bender 2009).

In the last ten years, there has been a worldwide increase in this type of public confrontation where the interpretation of historical events in history books has been questioned, as has the selection of events to be included (see, e.g., Repoussi 2006/2007, 2008/2009; Popp 2008/2009; McIntyre and Clark 2003; Linenthal and Engelhardt 1996; Richter 2008; Saaler 2005). In general it appears that an increased separation of nations from their history acts as a catalyst for such debates. The experiences of an increasingly globalised world and the mounting calls for the 'unheard voices' of socially, religiously, and ethnically disadvantaged groups to be heard are leading to some national narratives to be called into question and for other national histories to be contextualised or even abandoned. The limitations of exclusively national historical narratives are being exposed by the challenges of multi-ethnic classrooms and attempts to construct supranational identities.

Textbook research is increasingly drawing on approaches used in European and transnational research. Questions of how textbooks contribute to national constructions of identity are being answered with reference to national identities (Furrer 2004; for a non-European perspective, see Rojas 2013) or to Europe (for an example, see the case of Cyprus, Philippou 2012). A detailed account of the construction and deconstruction of nations and of national identity building is provided by Peter Carrier's chapter in this volume. Although the idea of a uniform and unalterable European historical narrative has been met with scepticism by academics, the plurality of conceptions of Europe

appears to exclude a singular, binding historical narrative (Fuchs and Lässig 2009; Langer et al. 2009). Textbook researchers have seized upon this theme and are not only questioning the diversity of representations of Europe and ‘Europeanness’ in current textbooks, they are simultaneously using comparative analyses to study historic shifts in textbooks and therefore to identify convergent or concurrent perceptions in textbooks of the self and others in relation to Europe (Jackson and Iris 2002; Kotte 2007; Natterer 2001; Riemenschneider 2001; Schissler 2003; Stöber 2002). The contextualisation of research within the framework of European identity building and within the inconsistencies and diversity of commonly competing representations of Europe is, however, still in its infancy (Anklam and Grindel 2010).

A growing branch of textbook research is exploring perceptions of imperial and colonial history and of stereotypes or geographical borders, which is gradually enabling such research to be more receptive to transnational and postcolonial theories and concepts (Fuchs and Otto 2013; Grindel 2008, 2013; Hong and Halvarson 2014; Macgilchrist 2011a; Macgilchrist and Müller 2012; Müller 2013; Oetting 2006; Otto 2011, 2013; Poenicke 2002). In this context, there is a trend towards introducing a global or world history dimension to textbook research. Due to the growing demands by the groups mentioned above, who have suffered social, religious, or ethnic discrimination, for their history not to be ignored any longer, a shift in perspective based around world history is being discussed in numerous countries. While the most recent research has shown that national identity patterns, apart from local, regional, and global identity patterns, remain central to textbooks, it also demonstrates that national narratives are increasingly located in a global context (Fuchs 2005; Schissler and Soysal 2005). See Lars Müller’s chapter in this volume for a more detailed account of current theories, methods, and research perspectives.

The field of textbook research is also turning its attention more intently to aspects of cultural studies such as research into memory cultures. Textbooks are read as texts reflecting memory, through which commemorative cultural negotiation processes can be reconstructed. This typically culminates in two distinct approaches. Some studies accentuate the connection between memory and identity and ask, for example, which concepts of European, national, and religious identity can be revealed by synchronous comparisons of textbook narratives of the past (Christophe 2013). Other works concentrate more on finding traces of the present in narratives of the past and employ a diachronic comparative approach to establish how specific historical periods or events such as the Holocaust (see Stuart Foster’s piece in this volume and also Carrier et al. 2014; Christophe and Macgilchrist 2011) or socialism (see the chapter in this volume by Barbara Christophe and Lucia Halder; see also Christophe 2010, 2012; Handro 2011; Razmadze 2010) are represented in textbooks.

Macro-sociological studies also provide explanatory models for global textbook and curriculum development. Such international and comparative studies

that examine trends in textbook research and associated theory formation and that are firmly committed to a neo-institutionalist approach have convincingly demonstrated that curricular structures and textbook content align with one another when viewed from a global perspective (Bromley 2013; Bromley et al. 2010; Foster and Crawford 2006; Meyer et al. 2010; Ramirez et al. 2000; Ramirez and Meyer 2002). Findings from other global studies indicate the plurality and specific national characteristics of developments worldwide (Carrier et al. 2014).

IMPACT AND RECEPTION RESEARCH

A social science-oriented branch of textbook research has been developing since the mid-1980s, which, in connection with American mass communications research, has found that media content does not have a demonstrable impact upon recipients (Lange 1981). In terms of textbook research, this means that learning outcomes are not traceable directly to textbook content. Similar research into the acquisition and application of textbook content, based on the work of the textbook theorist Dmitri Sujew, was conducted in Eastern bloc countries (Johnsen 1993). Applied research had, until the beginning of the 1990s at least, focussed primarily on questions of content acquisition and pupils' actual achievements and did not consider the source of disseminated knowledge or the socio-cultural backgrounds of the students and pupils (Apple and Christian-Smith 1991).

Social studies approaches researching the impact and reception of textbooks in classrooms are currently gaining in significance. This field is still in its infancy and studies tend to be integrated into more general investigations related to didactics in history and geography teaching (von Borries 2005, 2006; Gautschi et al. 2007). Nevertheless, there is increasing interest in the way in which textbooks are employed in classrooms and the influence this may have on the development of historical awareness among pupils. Textbook authors and educationalists expect history teaching materials to play a guiding role in classroom teaching and to positively influence teaching quality (Schär and Sperisen 2011). However, the concrete effects of this medium are still relatively unknown, particularly in the context of other media and agencies of socialisation.

The question of quality occurs frequently in relation to teaching materials and is regularly—and often publicly—discussed, but the relationship between quality and learning outcomes has not to this point attracted intense interest from either academia or education policymakers. An empirical impact study into teaching materials provides answers to the question of how textbook content is transmitted by teachers and received by pupils (see Wiater 2005). Another study examining the introduction of an English textbook in Switzerland concluded that problems experienced were associated more with the reorganisation of foreign-language teaching and with the education policy framework in place at that time than with the quality of the material itself (see Criblez et al. 2010). Findings such as these reveal a supplementary layer of mechanisms, in

addition to factors related to teaching and to the school system, that influence how teaching materials affect the learning process. In order to estimate how the contents of teaching materials influence the attitude and actions of pupils it is necessary to consider socio-political and cultural contexts in addition to the relationship between the pupil and the teaching material. Factors such as social background, membership of social groups and associations as well as individual circumstances play a significant role (see Kalmus 2004).

Investigations into the effects of textbooks on learning outcomes, learning success, and motivation have also been moving closer to the spotlight as a result of the current media shift. It has been shown that pupils are less motivated by textbooks than by other teaching media (see von Borries 1995; Hemmer and Hemmer 2010). One of the few studies to examine the relationship between textbooks and learning success looked at American SAT exam results between 1963 and 1979. It found that an incremental deterioration in results could be attributed to reduced complexity in language textbooks and the subsequent negative effect on reading and oral skills (see Hayes et al. 1996). A study of university teaching materials asked whether textbook selection had any influence upon students' comprehension of a particular topic and concluded that there was no correlation (see Durwin and Sherman 2008).

Existing studies focus almost exclusively on mathematic and scientific subjects. And although they have drawn no conclusions on the contribution of teaching materials to learning success, they have prompted research in this area (see, e.g., Schmidt et al. 1997; Törnroos 2001; Haggarty and Pepin 2002), which has predominantly focussed on the analysis of textbooks in relation to proposed and implemented curricula, thus concentrating less on the realised curricula and more on the opportunities for learning, that is to say learning outcomes and learning successes. A study of mathematics lessons, in which the textbook plays a prominent role, demonstrated that while quantitative textbook analysis may allow inferences to be made about learning possibilities, this method does not allow conclusions to be drawn about the relationship between textbook use and learning success (see Törnroos 2001).

Comparisons of the effects of digital and non-digital media have dominated many recent studies: such as that by Merkt et al. (2011), in which the use of interactive videos is compared with the use of illustrated textbooks, or the study by Rockinson-Szapkiw et al. (2013), which compared the effectiveness of digital and printed textbooks. Neither study found significant differences in outcomes between printed and digital teaching material. In contrast, Song's (2014) study observed a noticeable increase in the knowledge of learners using digital media.

Recent studies show that teaching materials must satisfy the demands of a learning process that is based increasingly on cooperative and individualised learning. Newly developed teaching materials show a markedly stronger focus on relaying learning methods, independent learning, cooperative lessons where pupils have more influence on the form the lesson takes, an expansion of lessons to external locations, and a shift in teacher roles to that of advisor, moderator,

and organiser of group work (see Vollstädt 2002). For further exploration of textbook effects and efficacy, see Yvonne Behnke's chapter in this volume.

Although experimental or quasi-experimental studies have focussed more on the effects of specific elements of printed and digital textbooks in the last few years, relatively few have investigated the selection processes for textbooks and teaching materials or their practical implementation in the classroom by teachers (see Kahlert 2010; Sandfuchs 2010). Methodologically, existing studies have predominantly concentrated on questioning teachers on their use of textbooks (see Neumann 2014; see also Killus 1998; Jünger 2006; Hemmer 2010) or on lesson observations (see, e.g., Gautschi 2007; Janík et al. 2014). Pupils' perspectives have mainly been limited to studies evaluating textbooks themselves (see Knecht and Najvarová 2010), rather than how they are used (Neumann 2014). It is however worth mentioning the work by Rezat (2011), which used *Grounded Theory* to compare and analyse pupils' expected use of a mathematics book with actual use. Further studies on the use of textbooks by pupils frequently refer to electronic textbooks (see, e.g., Ditmyer et al. 2012; Baker-Eveleth and Stone 2015; Johnston et al. 2015).

DIDACTIC TEXTBOOK RESEARCH

Shifts in history teaching and new approaches in history didactics have been a further factor influencing textbook research. The transition from material-based lessons to those guided more by learning outcomes has raised new questions for textbook researchers, which, with regard to history textbooks, relate particularly to controversies and multiperspectivity (Höpken 2003; Schönemann and Thünemann 2010).

Subject-specific and specialised textbook research has lately seen a shift towards empirical and psychological teaching and learning research. Approaches based on the psychology of learning focus on cognitive construction processes; they require learning processes to be structured so as to encourage thought and to develop cognitive independence in learners. Teaching materials are viewed differently in this context; their role is no longer simply to disseminate knowledge but to 'support and encourage the development of learning and thinking processes' (Möller 2010: 98). In the context of innovation in teaching materials and new approaches to teaching and learning, Mike Horsley (2001) called for theories in textbook research to reflect the evolution and transformation of educational media (see Lässig 2009).

Bodo von Borries, for example, states that from a history education perspective history textbooks are too difficult for pupils to understand (von Borries 2006). Those historians involved with textbook preparation assume textbooks are committed to the principles of history as a discipline and to the transmission of 'solid knowledge'. History textbooks are also expected to support pupils' 'thinking and awareness' in addition to disseminating knowledge (Rüsen 2008: 177).

In foreign-language teaching the textbook is commonly acknowledged as the key medium and is used widely. Teachers use the textbook primarily to

ensure they fulfil curricular requirements (Kurtz 2010). It is also important for the teacher that teaching materials are suitable for independent learning by pupils—particularly in terms of repetition and self-correction outside school—and that they motivate pupils in the competent and appropriate use of language (Michler 2005). Teaching materials for foreign languages have generally become firmly pupil-oriented in the last ten or more years and designed to enable autonomous learning (see Nodari and Viccelli 1998).

Research has demonstrated that teachers of mathematics view the selection of textbooks used in lessons as a key factor in their teaching and that the type and scope of material offered by a textbook is central to their evaluation of it (Van Steenbrugge et al. 2013). These findings correspond with an American study that was able to show that mathematics teachers no longer restrict themselves to the prescribed textbook; rather, they use a combination of materials to suit their specific requirements (Taylor 2013).

Karin Bölsterli et al. found that there is a general lack of acceptance among teachers for competence-oriented lessons and particularly for competence-oriented teaching materials in the natural sciences. Science textbooks need to provide teachers with competence-oriented material that augments their professional competence in order to increase their receptiveness to reform (Bölsterli et al. 2010). Regarding the orientation of teaching materials to competence development, chemistry teachers have maligned texts for their lack of relevance to pupils and criticised the fact that textbooks do not adequately reflect pupils' previous knowledge or experience (Gräsel 2010).

A study of science teaching in Dubai demonstrated that for successful knowledge dissemination, it is important to have a combination of well-trained teachers and high-quality textbooks. The empirical study concluded that science teachers with adequate knowledge about the nature of the sciences, using textbooks that address these concepts, can successfully teach pupils the fundamental scientific principles (Forawi 2010).

QUALITY AND USE

Research emanating from the USA has focussed attention on textbook quality and evaluation. The first set of evaluation criteria for textbooks were created during a period of transition from a predominantly political and diplomatic research approach (1950 to 1970) that aimed to reveal distortions, images of the enemy, and prejudices (see Laubig et al. 1986) towards research more strongly founded in methodology and method (see Fritzsche 1992). The majority of these evaluation criteria, including those stemming from specific fields of subject education, address the general design and content of textbooks. However, the question of whether a truly objective evaluation of textbooks is even possible was heavily debated at the time and remains contentious today (see Kahlert 2006). Current research into teaching materials is based on the assumption that textbook evaluation must be underpinned by a wide range of evaluation criteria due to the numerous demands made of textbooks and the

diverse influences upon them (see Pohl 2010). There are currently many different evaluation criteria templates including the Bielefeld and Reutlingen patterns, the Vienna criterion catalogue, and the web-based Levanto evaluation tool. Further theoretical approaches and current research methods are explored in the chapter by Carl-Christian Fey and Eva Matthes.

Research into selection processes for textbooks and teaching materials and their practical implementation by teachers in the classroom remains at a rudimentary stage, and equally little is known about textbook use by pupils. Teaching materials remain largely neglected as a subject of research even by academic pedagogy and empirical psychology (see Mayer 2001), but their profile is gaining in significance, which is partly due to findings from international comparative studies. Textbooks have also been a focus of rather negative attention as a consequence of the sobering findings concerning the German education system in the PISA and TIMSS studies. They were particularly reproached for not sufficiently encouraging the understanding and application of knowledge (see Wiater 2005). The issue of how teaching quality should be improved and measured led to new empirical studies in this area. Cornelia Gräsel points out that empirical teaching research, in mathematics and the sciences especially, has gained in significance in the last ten years through close cooperation with the fields of educational studies and psychology (Gräsel 2010; see, e.g., Westwood Taylor 2010). But the humanities and social sciences are catching up: the number of empirical studies in these fields has increased in recent years. Hermann Astleitner has observed the positive effects of the combination of textbooks and ‘new media’ on learning processes demonstrated by research into education media. Combinations of media can be better adapted to pupils’ individual needs and can more easily interconnect the separate elements in learning and teaching systems; teaching materials can also be individually configured more easily (Astleitner 2012). Thomas Illum Hansen’s chapter details the current state of research in this area.

The design (Baumann 1971) and suitability of textbooks has also become a prominent topic of research since the 1980s (Institut für Schulbuchforschung und Lernförderung 1994). Beyond the appropriateness of the text, other design elements such as images, graphics, and tables have been explored as have overall concepts of textbook design. The design of teaching materials should adhere to common media design practice. This is based on principles of gestalt psychology and follows specific formal rules (gestalt law of organisation according to Max Wertheimer) that are applied to the parameters of form, colours, and letters (or script) (Pettersson 2010; Schellmann et al. 2010). Corresponding studies examine the interface between didactics, pedagogical psychology, media sciences, and design (see, e.g., Ballstaedt 1997; Schnotz 1994, 2011; Weidenmann 2006; Vogl 2005; Iluk 2014; Aprea and Bayer 2010).

By the 1990s Ballstaedt had developed general and media-specific design principles which are still employed today and which recent research has been able to expand upon (see, e.g., Schellmann et al. 2010). A study by Bao-Jing Chan, Wei-Ling Yeh and Li-Hua Chen (2012), for example, examined the

visual design of textbooks in terms of how layout and illustration can encourage the learning process. The authors compared American and Japanese social studies textbooks and suggested how layout can be relevant and conducive to learning and therefore encourage interest and critical thinking in the classroom.

Concepts of appropriateness and suitability shape the central principles of textbook design. Researchers in the USA first addressed this issue as far back as the 1920s through their investigations into reading comprehension (see Pearson 2009) and researchers have been exploring this concept in the context of the textbook as a whole since the 1980s (see Woodward et al. 1988). However, suitability not only applies to the design of textbooks but to their content too. Ernst Hinrichs, for example, questioned the academic suitability of history books (see Hinrichs 1992). Pupils have been complaining for 20 years that history books are incomprehensible and have consequently paid less attention to them in class (von Borries 1995; see also von Borries 2010). Branches of research such as linguistics are today providing new approaches to this area of research (see, e.g., Kiesendahl and Ott 2015).

Image analysis has been gaining increasing attention in recent years as a consequence of an iconographic shift. Pedagogy ‘discovered’ images a long time ago, but the media revolution has resulted in a barrage of images, especially visible in multimedia textbooks, which present new educational challenges. Traditional concepts of images in textbooks, which were sometimes restricted to simple illustrations in the text, are being called into question and analytical methods are also changing. Images are no longer analysed in terms of content; rather the construction of meaning created by the images and its function are combined with text analysis (Maier 2004; Heinze and Matthes 2010; Sauer 2000). ‘Image discourse’ is interwoven with text discourse and other social discourses. Researchers must then ask how well pupils are equipped to ‘unlock’ the images. The answer requires image didactics, which explores methods of visual acquisition in classrooms, particularly the complexity of images and their reception by pupils (Lieber 2008). An analysis of over 1300 images in eight geography and German-language books in the Czech Republic (Janko and Knecht 2013) demonstrated the importance of subject-specific image analysis.

TEXTBOOK PRODUCTION

In many countries textbooks are a commodity produced by commercial publishing houses. The production of textbooks not only fulfils education policy requirements but also serves an immense market with a high economic value. Production costs, which include author and consultant fees, editorial, advertising, printing, and marketing costs, depend to varying degrees upon the print run and lifespan of the textbook. Such costs are primarily carried by the publishers, who also carry the economic risk but within a *broken market* where the buyer and seller are not necessarily on opposite sides of the deal. At this point the book reviews historical research into textbook production;

Christoph Bläsi's chapter examines current research and production conditions in more detail, and the chapter by Thomas Höhne expands our insight into political and economic production conditions. Marcus Otto investigates textbook authors and their roles.

In Europe the role of publishers, authors, and other stakeholders in textbook production was not thoroughly investigated by researchers until the 1970s although in the USA this had been common since the 1930s (Johnsen 1993). The principle reason for this is that in the USA, education is the responsibility of the individual states and the textbook market is open to free competition without government regulations. Against this background, it was also in the USA that the first studies to investigate textbook selection and application in lessons were conducted. It was not until 30 years later that the first European study was published on this topic. In his dissertation, Carl August Schröder, who later became director of the Westermann Verlag in Braunschweig, Germany, explored the role taken by national and international stakeholders (both public and private) when textbook revisions are undertaken as a result of international cooperation. Taking examples from the Federal Republic of Germany, he illustrated the tasks, possibilities, and also the limitations of textbook revision when confronted with the conflicting priorities of national and inter or transnational interest groups and stakeholders (Schröder 1961). His work remained unique in Europe for many years, and it was several decades before the production conditions surrounding textbooks were again a subject of interest to researchers.

There is still very little existing research into the history of textbook publishers, their production mechanisms, social and public impact, or into authors and their interaction with educational institutions and practices. Prior studies into the history of textbooks have certainly addressed these aspects, but without systematically analysing the complex social position of textbooks (see Rommel 1968; Manz 1966; Nietz 1961). These questions were explored in a seminal German study exploring the nineteenth-century history of the *Verlag der Buchhandlung des Waisenhauses*, a publishing house that produced history and geography textbooks (Kreusch 2008; see also Jäger 2003). Ingeborg Jaklin conducted a comparable study for Austria in which she investigated textbook production by two publishing houses in the eighteenth century (Jaklin 2003). Cody's (1990) study provided an initial examination of the subject in the USA. The Swiss education historian Anne Bosche examined the introduction of newly available information and new teaching materials into primary schools in the Zurich canton in the context of the social and cultural changes that took place in the 1960s and 1970s (Bosche 2013).

A relatively large number of studies have examined the production and distribution of textbooks and the development of the textbook market, such as the study by Viñao (2002) addressing Spain in the early modern era. Emmanuelle Chapron demonstrated that the development of France's textbook market in the eighteenth century was by no means homogenous; that it was shaped, certainly at a regional level, by diverse administrative regulations,

family connections, and local retail networks (Chapron 2012; see also Titel 2002; Giordano 2003). In the nineteenth century, the textbook market in various countries was closely regulated by the state, and this was compounded by the introduction of approval processes, as shown in the study by Jäger of the publishing house B.G. Teubner (Jäger 2003). During the same period, powerful textbook publishing houses established themselves in most Western countries (Titel 2002). In Germany these were often closely linked with academic publishers (Keiderling 2002).

The history of textbook publishing houses for the period from 1871 to 1945 is comparatively well documented, particularly for Germany (Jäger 2003; Kreusch 2012; Blänsdorf 2004). The German textbook production system was uniquely organised until the early twentieth century: part of the revenue from textbook sales formed a type of social insurance for primary school teachers as the publishers were required to collaborate with teaching associations and with widow and orphan funds (Jäger 2003). Several existing studies focus on individual publishing companies (Tröhler and Oelkers 2001); some of these works present comprehensive overviews (Kreusch 2008) although others are less detailed (Jaklin 2003). Keiderling (2002) investigated the relationship between publishing firms and authors in the nineteenth and twentieth centuries and concluded that the influence of textbook publishers over text drafts gradually increased over this period. Using textbook analysis Julio Ruiz Berrio examined the hidden political agenda of the influential Spanish publisher Calleja. The firm started publishing textbooks in 1876, which proved highly successful but which subliminally advocated the modernisation of the country (Ruiz Berrio 2002). In addition to these works several biographies of publishers are available such as Mollier's (1999) profile of Louis Hachette or Schröder's (2005) work on Carl August Schröder.

The latest research describes publishing houses as *organisations of discourse production* (see Macgilchrist 2011b), which are able to not only reproduce and stabilise cultural knowledge systems, beyond economic considerations, but also to supplement, displace, and consequently destabilise them. Methods of textbook production incorporate *human* and also *non-human* elements. Textbook publishers not only follow the logic of profit maximisation but also act as *organisations of discourse production* as explained above, which reproduce the 'canonical knowledge' determined by the curricula yet simultaneously alter it (see Macgilchrist 2011b, 2012, 2015).

CONCLUSION

Textbook research is a broad and multidisciplinary field that is difficult to gauge or evaluate as there is considerable disparity on many levels between the various approaches. Authors bring many dimensions and questions to the texts written for textbooks, they derive their specialist knowledge from varying theoretical discourses, they position themselves within different disciplinary contexts, and they employ a range of methodological and analytical processes.

These many dissimilarities could themselves be used to link typological distinctions. ‘Textbook research’ does not exist as a clearly delineated research field; therefore, the term ‘textbook-oriented research’ is more appropriate to describe this discipline. On the one hand, the term emphasises the field’s immense thematic and methodological diversity, and on the other, it defines the interdisciplinary and multidisciplinary dimension beyond the academic university canon (Fuchs 2011a, b).

Textbook research has neither its own distinct theory nor a specific arsenal of methods; rather, it uses approaches from the humanities and from cultural and social studies most appropriate to the issue in question. The prevailing methods remain comparative, hermeneutic, and critical text analyses, which allow textbook content to be systematically analysed in order to explore a range of diverse questions. Textbook analysis has become progressively embedded within the cultural contexts of textbook production, use, and implementation. This positioning combined with the interrelationship between textbooks and other educational media has forged associations and revealed parallels between textbook research and current academic, didactic, and social developments. The field increasingly employs discourse-analytical approaches as well as methods from fields such as ethnography, media science, visual studies, and the social sciences, for instance, in the evaluation and impact analysis of textbooks in classrooms or for quantitative analysis. Textbook analysis is distinctive from other research fields in that it operates within the areas of overlap and conflict between academic knowledge production and education policy and practice.

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Theories and Methods of Textbook Studies

Annekatriin Bock

The increasing digitalisation and media saturation our societies are currently experiencing is changing textbooks. Like all changes, this is raising challenges which are impacting educational media research as a discipline called, in the light of the transformations taking place in the media landscape, to review its repertoire of theories and methods and to update it as needed. These challenges are proving particularly complex due to the multidisciplinary field of textbook studies and its repute, which has persisted since its inception, as an area lacking in theoretical robustness and methodological clarity (see, e.g., Höhne 2005a; Bamberger 1995; Fritzsche 1992; Marienfeld 1976; Weinbrenner 1995; Fuchs and Henne in this volume). As Nicholls (2005a) points out, ‘textbook research remains essentially under-theorised, the philosophical underpinnings of the vast majority of projects undertaken largely neglected’ (Nicholls 2005, 24). Pingel, reflecting on international textbook revision, echoes these sentiments (Pingel 2010a, 97). Weinbrenner points to the lack of theoretical substance in textbook research and emphasises ‘the necessity of a “theory of the schoolbook”’ (Weinbrenner 1995, 21) as a basis for sound empirical textbook research.

A look at the current work in the field and its disciplinary, theoretical, and methodological diversity should suffice to convince us that these assertions, as accurate as they may have been at the time of their publication, are now recognisably out of date. Accordingly, this chapter will not join those voices deploring the state of the field, but will rather seek to train a spotlight on the theoretical and methodological approaches this area of research has developed over the last decade before proceeding to map them and use them as a springboard for ideas for further research. The chapter will restrict itself to discussion of textbook research informed by historical or cultural studies and to work on

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E. Fuchs, A. Bock (eds.), *The Palgrave Handbook of Textbook Studies*,
https://doi.org/10.1057/978-1-137-53142-1_4

textbooks for humanities subjects that draws its theories and methods from the social sciences; in this, it draws a line of distinction between such work and research inspired by the natural sciences or psychology, or research dealing with textbooks for STEM subjects. The emphasis is thus on what Christophe has described as research which reads ‘textbooks as a relatively easily accessible mass medium’ giving ‘complex insight into societal debates and processes of the negotiation of knowledge’ (Christophe 2014, 1). In line with these intentions, the chapter will discuss research that conceives of textbooks as, so to speak, mirrors of societal debate which might help provide answers to a number of fascinating questions via which researchers in the humanities and social sciences are approaching the challenges and phenomena of our societies and our age.

TOPICS AND RESEARCH QUESTIONS AS STARTING POINTS FOR THEORIES AND METHODS

Research relating to textbooks (Fuchs 2011a) is a broad, multidisciplinary area, ‘an extremely complex, multi-dimensional and multi-faceted undertaking’ (Weinbrenner 1992, 52) encompassing a tightly packed plethora of theoretical and methodological approaches with a shared focus on textbook-related educational media. Since the field’s inception, a wide range of authors have repeatedly attempted to draw up summarising classifications of topics covered by textbook research (they include Wiater 2002; Bamberger 1995; Weinbrenner 1992). Weinbrenner, for instance, classes textbook research into three ‘types’, each of which goes hand in hand with specific methodological approaches. These are ‘process-oriented’, ‘product-oriented’, and ‘effect-oriented’ textbook research (Weinbrenner 1992, 34f.); Weinbrenner adds the observation that, thus far, the field has almost exclusively brought forth research of the product-oriented type (Weinbrenner 1992, 36). Wiater, meanwhile, identifies five ‘focal areas of textbook research’, describing textbook research ‘as part of research into the history of culture’, ‘as part of media research’, ‘from a subject-specific view’, ‘as text analysis research’, and ‘as part of research on historical sources’ (Wiater 2002, 13f.).

Every endeavour to create categories involves an attempt at abstraction and is never without its weak points. Categorisations in textbook research are no exception. The classifications described above might attract allegations of mixing of criteria by, for instance, comparing disciplinary with thematic or formal dimensions or through a degree of apparent arbitrariness in the categories into which they place particular approaches (Bamberger 1995, 80). Classifications might be lacking in other ways, such as in limitations on the capacity to describe genuine distinguishing features in individual pieces of research because such research may in principle, despite its labelling as distinct, be able to take place in parallel (Wiater 2002). This said, it would not be fair to condemn such efforts to systematise textbook research and its thematic approaches out of hand; the very difficulties of describing the field in a standardised way point to

the diversity of topics it covers. Researchers working on textbooks debate a highly diverse spectrum of research questions, each emerging from the author's disciplinary background and associated perspectives. In other words, research in this area tends to be located in a specific discipline and to draw accordingly on the theories and methods in use in that discipline. The diversity described above goes along with a corresponding multiplicity of theoretical and methodological approaches to the topics at issue, with specific ways of proceeding employed in accordance with a primary interest in, say, contexts of the production and reception of educational media as opposed to their content and the ways of interpreting the world they offer to their readers.

This chapter does not wish to engage in the potentially never-ending undertaking of listing topics and issues of research from the 'broad landscape of textbook research'. Instead, the discussion will attempt to summarise the state of play by touching upon two key points, each of fruitful potential for our further considerations, on the topics, theories, and methodologies that have shaped textbook research and on recent developments in the field. First, I will make reference to the process of reorientation currently in evidence in relation to the principal content of textbook research, as identified by Otto (2012): 'There evolves a shift concerning the major focus of research—from textbook contents to the actors, discourse, and practices which influence the production, transformation, and reception of textbooks and educational media' (Otto 2012, 90). This statement echoes to some degree Fuchs' claim that 'scientific textbook-related research has distanced itself from textbook revision', that is, emancipated itself from an exclusive or even primary concern with this field of action, and 'recently turned its attention to mechanisms of textbook production and approval, as well as their impact in the classroom' (Fuchs 2011b, 27). Second, in relation to a similar 'shift' in the theories and methodologies underlying work in the field, it is apparent that two types of survey of the current balance between theories and methods have emerged. Either researchers claim that there is a need for new or alternative theoretical approaches to reinforce the new methodological points of access (see, e.g., Otto 2012, 89) or they argue that new theoretical approaches and shifting focal interests in the field have forced researchers to look for new methodological approaches (see, *inter alia*, Christophe et al. in this volume).

In light of realignments that have taken place in the topics covered by textbook research and in the theories and methods used to do the work, it would be inappropriate to expect, or indeed realistically want, textbook-related research to generate a single standard theoretical and methodological repertoire to encompass the diverse research questions and disciplinary approaches the field contains. Our intent here is instead to survey extant work in the area of textbook studies, map the theoretical and methodological approaches currently available, and point to blank spots which future textbook studies might usefully tackle and which go beyond the calls for 'more' or 'new' approaches sometimes expressed in the literature.

OH THEORY, WHERE ART THOU?

The relative absence of theory attributed to textbook research from many sides (including Bamberger 1995; Fritzsche 1992; Marienfeld 1976; Weinbrenner 1992) since work in this area began has arisen, in the view of Höhne (2005), from factors including the lack of a need for such theory ‘because the academic experts themselves, with their rational criteria of [textbook] revision, vouch for the transparency of the process and of the medium’ (Höhne 2005b, 70). In the view of other authors, textbook research is a growing, yet still small field (Fuchs 2011b, 17), yet too rigidly divided into its constituent disciplines to provide for a comprehensive and, crucially, usable theory of ‘the textbook’. Textbook research, observes Pingel, ‘emerged from a need to supply academic foundations for the creation of textbooks that were to tell [students] about other countries and cultures in a manner as balanced and as free from prejudice as possible’ (Pingel 2010a, 93). One might be justified in asking why such a field, where work proceeded with great closeness to its specific object and to its application, would require grand theories.

A concomitant of the thematic shift experienced by textbook research and referenced above was a change in the need for theoretical approaches. In recent years, with the work of Höhne (2005) or Klerides (2010), for instance, effectively marking a turning point, textbook research has begun to occupy itself more closely with relieving the long-lamented theory gap. A summary survey of extent work tells us that, in general, the literature consists of (1) work putting forward a theory of the textbook (Höhne 2003); (2) research engaging explicitly with theories established in other disciplines, such as discourse theory or theories of media, or mapping existing theoretical approaches taken by textbook research (for instance, Weinbrenner 1992; Nicholls 2005; Otto 2012); (3) attempts to clarify terminology and in so doing to point to a theoretical location of the textbook as an object of research (Klerides 2010; Fuchs 2011b); and (4) writing which, while it does not necessarily enter into detailed explication of specific theoretical directions, can be linked to these via disciplinary points of intersection. Instances of this might include structuralist approaches stemming from sociological contexts, work on media practices from cultural studies, communication research, specifically on the effects of media, and constructivist learning theory with its provenance from education science. The extent and detail of this work means that close discussion of it would be beyond the remit of this chapter.

Work on (a) Theory of the Textbook

The ‘theory of the textbook’ developed by Höhne (2003) employs approaches stemming from discourse theory, media analysis, and the sociology of knowledge. Turning away from normative definitions of the textbook, Höhne describes it, after Stein (1979), Schallenberger and Stein (1978), as an ‘informatatorium’, a ‘pedagogicum’, a ‘politicum’, and a ‘construtorium’ (Höhne

2005b, 66). This constructedness of textbooks as media is a point Höhne is particularly keen to stress, commenting that the concept of construction ties ‘the ways in which societal cognition and knowledge is produced to the heterogeneous actors and social loci or arenas which function each according to the criteria of their own logic or rationale’ (Höhne 2005b, 66). This general observation of the constructedness of media, in Höhne’s view, is central to textbooks in particular due to their mediated use in the classroom via the teacher. It is from Stein, and from Höhne’s considerations, that textbook research draws its understanding of textbooks as possessing the specific qualities of sources of information, instruments for educational instruction, and objects of societal and political debate, alongside its awareness of them as constructed media. Fuchs, reflecting on and synthesising Stein and Höhne, comments:

In this sense, the textbook is regarded as a medium of social observation within a multimedial world. Textbook knowledge, defined as knowledge both in and about textbooks, can be distinguished from other media via its didactic structure, yet cannot be reduced to this feature. It must be decoded (analysed) in terms of its semantic structure, function and form in order to be defined in terms of socio-cultural knowledge. (Fuchs 2011b, 25)

It appears logical that from these insights on the theory of textbooks, in their perspective shaped by discourse theory and sociology of knowledge, a new focal emphasis in the field arose, on methodologies stemming from discourse analysis.

Work on the Transfer of Existing Theories to Textbook Research

One of the key pieces of work among those attempting to transfer existing theoretical approaches to textbook research is the discussion by Nicholls (2005) of ‘theoretical and physiological underpinnings of textbook research’. Nicholls draws distinctions between positivism, critical theory, postmodernism, hermeneutics, and neo-hermeneutics (Nicholls 2005, 25) as directions of thought and considers the points of departure they offer for research on educational media:

Where a positivist researcher considers subject/object relations to be neutral and passive, critical theorists argue that it is inherently oppressive [and] characterised by alienation and struggle. Alternatively, hermeneuticians are likely to consider the relationship to be circular, based on ever changing interpretations of meaning, while postmodernists might argue that it is necessarily contingent, fractured and multiple. More recently it has been possible to consider the relationship to be a dynamic combination of elements that straddle all of the above. (Nicholls 2005, 25)

There is additionally broad work in existence which tackles the task of transferring theories to textbook research. Researchers such as Tyack and Tobin (1994), Heinze (2010), and Tröhler and Oelkers (2005) employ the concept of the

‘grammar of schooling’ as a theoretical point of reference and as a centre of gravity for the historical contextualisation of the field, ‘locating the textbook within its relevant historical context of the school and instruction’ (Fuchs 2011b, 26).

Work on Terminology as a Basis for Theorising the Textbook

Alongside research explicitly seeking to posit a theory of the textbook (Höhne, Stein) and considerations of the adaptation of existing theories for textbook research (Nicholls 2005; Heinze 2010; Tyack and Tobin 1994; Tröhler and Oelkers 2005) stands work expressly concerned with the terminology of the textbook-related field, which in exploring this matter contributes to surrounding the textbook as an object of research with theoretical scaffolding (see, inter alia, Van Gorp and Depaepe 2009). In this context, it is fitting to regard discussion and negotiation of terms as a substantial part, if not indeed the very basis, of sound theoretical work.

An example of explicit use of a postmodern approach which draws together theory, clarification of terms and methodological procedure can be found in the proposal by Klerides (2010) of two perspectives for the theoretical treatment of the textbook. The first is a conception of ‘the textbook as discourse’ (Klerides 2010, 31), which, making reference to ‘systemic linguistics’ and especially its ‘concept that language in texts functions ideationally in representing experience and reality’, defines three discursive features of textbooks which follow this understanding: ‘textbook discourse as a multilayered medium, as an inter-discursive field, and as a multifunctional domain’ (Klerides 2010, 32). The second regards ‘textbooks as a genre’ (Klerides 2010, 31) and ‘refers to a particular conventionalized way of using language in connection with writers’ perceptions of their task, their view of the discipline of history and its constitution, and their perception of themselves and their audience’ (Klerides 2010, 41). Each of these ways of conceiving of textbooks connects to different research questions. Those viewing textbooks as a ‘discourse’ (or discourses) will seek to shine a light on the traces of discursive shifts in the text they contain. By contrast, an approach analysing textbooks as a ‘genre’ will be primarily interested in changes within the genre of, say, history textbooks, and thus in shifts within history teaching and their effects on the related textbooks.

In Klerides’ view, ‘textbooks constitute an instance of hybridity, ambivalence, dilemmas, and compromises, as an effect and manifestation of co-articulating diverse, and often competing and conflicting discourses and genres’ (Klerides 2010, 49). This understanding leads to methodological implications and gives ‘rise to a range of new analytical priorities for textbook research’ (Klerides 2010, 50).

General Thoughts on Textbook Theory

The debate so far around theories of the textbook might be summarised thus: first, as previously discussed, textbook research was long found wanting in

theoretical terms, yet in view of work done in recent years, it would no longer be proportionate to find it guilty as charged. Indeed, the reverse might now be considered true; the field has produced, as evidenced by the outline above and by the chapters in this volume, a diverse range of highly serviceable work on theories, the transfer of theories from elsewhere, and key terms as a basis for the development and conceptions of theory (Höhne 2003; Klerides 2010). Second, the close relationship to its specific object which is central to textbook research means that it will presumably continue to engage, by and large, with ‘middle-range theories’, as Otto (2012) puts it, while its essentially applied nature means it will have less call than other fields upon large-scale meta- or social theories such as Luhmann’s systems theory. Third, and of particular relevance in this context, an idea arises that has thus far found little delineation in the debate around the putative theory gap in the field. The textbook research we have considered here, with its disciplinary roots in history and/or cultural studies, tends to work qualitatively (Pingel 2010b, 67); qualitative research, however, counts its theory-generating capacity among its core elements. Accordingly, the studies discussed here, informed by their originary disciplines and by the theoretical models and concepts associated with them, examine societal phenomena and challenges which appeal to them rather than testing theories in the manner of the quantitatively proceeding research that takes place in disciplines such as psychology and the sciences.

Methodological Approaches to Textbook Studies

Wiater has provided a competent and concise outline of the history of textbook research (Wiater 2002, 17) which describes the primacy given in historical textbook research ‘at its outset [to] the hermeneutical, qualitative and content-analytical investigation of sources in the spirit of the pedagogy of the humanities’. In the ‘[19]70s, [this direction] was increasingly joined by data collection and analysis procedures drawn from social sciences and linguistic analysis and centring on empirical methods or critique of ideology; such were advocated by the pedagogies of critical rationalism, critical theory and communication theory’ (Wiater 2002, 17).

In the 1980s, Lange (1981) pointed to a lack of robust work on methods in textbook research (Lange 1981). His list of ‘relevant discussions of the methodology and methods of textbook research’ primarily encompasses chapters in edited volumes, including *Schulbuch-Schelte. Politikum und Herausforderung* (*Textbook Bashing: A Political Issue and a Challenge*) by Stein (1979), the *Studien zur Methodenproblematik wissenschaftlicher Schulbucharbeit* (*Studies on Methodological Issues in Academic Textbook Work*) issued by Schallenberger (1976), and *Schulbuchanalyse und Schulbuchkritik* (*Textbook Analysis and Textbook Critique*) edited by Stein and Schallenberger (1976). In addition, Lange called for the field to realign itself methodologically, turning from its then focus on content analysis of textbooks to research focused on comprehending processes of textbook production and reception: ‘Research on teaching

media needs to include the production and reception process equally—alongside content—in its approach’ (Lange 1981, 18). Lange also advocated for the taking into account of the ‘entire canon of methods from the social sciences’ (Lange 1981, 18) and for an internationalisation and disciplinary broadening of the field. He believed, for instance, that ‘a [discipline of] teaching media research including comparative analysis of production processes in various politico-economic systems [should be able to] establish itself as a truly international direction of research’ (Lange 1981, 18).

As early as the end of the 1980s and beginning of the 1990s, Gilbert (1989) and Johnsen (1992) identified a methodological transformation in textbook research. In their view, this was evolving from textbook revision with quantitative content analysis, via a focus on hidden meaning in the structure of textbooks that is uncovered by structuralist analysis, towards an understanding of textbooks in their contexts and towards text and classroom use approaches.

In the years that followed, a variety of methodological approaches emerged, to the extent that by the mid-1990s, Bamberger (1995) was able to identify six phases of the field’s methodological development: the ‘literary interpretation method’, ‘textbook interpretation supported by theory’, ‘sociological analysis’, the ‘development of sociological methods for specific forms of textbook analysis’, the ‘development of sets of interpretive criteria for textbooks [*Schulbuchraster*]’ and ‘content analysis driven by sociology and communication research’. During this period of time, textbook studies also faced a rise of macro-sociological studies being inspired by neo-institutionalism approaches. These studies using quantitative approaches, for instance, globally analysed issues such as human rights (Ramirez and Meyer 2002).

Subsequently, shortly after the turn of the millennium, Nicholls (2003) sought to record the contemporary state of methods in the field and suggest potential directions for its ongoing development. As Nicholls, who discusses methods of textbook studies used particularly in analysing representations of the Second World War in school history textbooks, points out, only a ‘few works are published focusing specifically on methods’ (Nicholls 2003, 8). Nicholls discussed Pingel (*The UNESCO Guidebook on Textbook Research and Textbook Revision*, 2010b), Stradling (*Teaching 20th-Century European History*, 2001), Mikk (*Textbook: Research and Writing*, 2000), Weinbrenner (*Methodologies of Textbook Analysis Used to Date*, 1992), Apple’s works *Teachers and Texts* (1986) and *Official Knowledge* (1993), and Sleeter and Grant (chapter in *The Politics of the Textbook*; Sleeter and Grant 1991, 78–110). Summarising, Nicholls observes: ‘Across the board, in key works by leaders in the field, methodological procedures and processes receive little attention and rarely anything close to an explicit and detailed description’ (Nicholls 2003, 9). In other words, the methodological gap has shifted; more recent studies, while they contain a multiplicity of methodological perspectives as impressively demonstrated by the chapters in this volume, generally tend to lack an explicit reference to and location of these methods within their specific theoretical frameworks.

While the use of the methodological approaches discussed so far is ongoing, and these approaches, taken collectively, essentially provide a good description of the repertoire of methods currently available to textbook research, there is a need to update and complete this description in light of emergent tendencies in the field. Fuchs has pointed to four overall developments in relation to the evolution of methods in textbook research done over the last few years:

Firstly, textbook analysis as discourse analysis is based on the assumption that textbook texts are hybrid texts containing a variety of subdiscourses that relate to one another in some way via tension, contradiction and/or competition, even though they are located within the same meta-discourse. Secondly, the analysis of images has gained a great deal of ground following the iconographic turn. [...] Thirdly, methods from the social sciences are becoming increasingly significant. [...] Finally, textbook-related research is being shaped by approaches from cultural studies. (Fuchs 2011, 21ff)

A summary of the methodological evolution of this field of research might usefully read as follows: over a long period of time, this area had the reputation of being methodologically one-dimensional (Höhne 2005b, 71), with its firm focus on content analysis earning it accusations of ‘methodological monism’ (Lange 1981, 20). In view of research published over the last five to ten years, observers of the field can now assert that it has responded to the call issued by Lange in the 1980s—and viewed then as possessing an innovative spirit—for a methodological expansion and a move into interdisciplinarity, and is currently consolidating its new-found position. Evidence bearing witness to this change includes the emergent shift from approaches determined by content analysis to those drawing on discourse analysis (Fuchs 2011; Christophe et al. in this volume) and the appearance, picked up on by many of the authors featured in this volume, of clusters featuring mixed-methods approaches and combinations of qualitative and quantitative ways of proceeding.

As late as 2005, Höhne denounced the tendency of conventionally proceeding textbook research to subject itself consciously and voluntarily to theoretical self-limitation and to one-sidedly concentrate on ‘(desk-bound) textbook revision within a field comprising unexamined normative assumptions and preconceptions’ (Höhne 2005b, 71). Since then, developments in the field’s theoretical and methodological alignment, as well as in its objects of interest and focal research questions, have brought about considerable change. Among the work bearing witness to the fact that textbook research, and textbook-related research, has acquired and established a diverse range of methods, and alongside the mapping of the field this chapter has attempted to undertake, stands, for instance, an exceedingly timely publication issued by the Georg Eckert Institute for International Textbook Research (Rath 2017). The volume references a number of interesting approaches published by the young scholars section and therefore gives a good example for future trends in textbook studies. Rath (2017a), exploring approaches from narratology, narrative

theory, discourse and dispositive analysis, compares qualitative methodological and theoretical approaches from humanities disciplines currently in use in the field. Annegarn-Gläß' investigation (2017) of historic educational film as an instructional medium links narrative analysis borrowed from literary studies with media research. Chapters on interview methods, alongside showcasing oral history as a method of research on recent and contemporary history (Springborn 2017), examine group discussion in research in school settings (Fischer 2017). Computer-aided methods of analysis (Bischewski 2017) and mixed-methods approaches (Fiedler 2017), also have their place in this volume in the context of the humanities, specifically digital humanities, and social science research. Completing the volume, two contributions from educational research discuss, respectively, an ethnologically inspired theoretical approach from education-related work on migration (Hagemann 2017) and power and agency in the education system (Yorulmaz 2017).

WHAT NEXT?

This chapter will conclude by offering up a few new potential directions and suggestions for theoretical and methodological approaches in future textbook studies. First, it would be commendable for textbook researchers to make their theoretical assumptions more visible, not only to the reader, who would then be in a much better position to understand, agree, or struggle with the postulated assumptions, but also to themselves. In so doing, researchers will need to connect with the theoretical underpinnings of their research and choose their methodology accordingly; this will enable them to achieve more focused and more sophisticated findings with greater potential to act as springboards for further work.

Second, it is beyond doubt that multi-method designs have an established place in the day-to-day business of research in this field, and the age of textbook-related research as a highly monomethodological arena is well and truly in the past. There remains, however, a missing link to whose provision very few researchers have thus far applied themselves: the fruitful fusion of various differing theoretical perspectives, such as the combination of structuralist approaches with actor-centred research, the use of praxeology and approaches from media theory in tandem (see, *inter alia*, Ahlrichs et al. 2015; Macgilchrist et al. 2017), or the appropriate linking of micro- and macro-perspectives. Third, a related research gap appears in relation to interdisciplinary work, very little of which has taken place with any degree of thoroughness (see Behnke and Carrier, both in this volume).

Fourth, this chapter has argued that sophisticated research questions and methods for textbook studies demand theory-based frameworks and has demonstrated that researchers' choice of method of investigation and theoretical framework is closely connected to the research questions guiding their endeavours and the thematic approaches taken. Bringing this to its logical conclusion, future researchers find themselves called, in the context of their theoretical and methodological choices, to foreground these connections more clearly and to seek more consciously to make them in the first place. One example might be the forging of close links between inquiry into historical memory and the

theory of memory, which might entail the analysis of how different people read and comprehend the accounts of events given in history textbooks (Christophe 2017a), the comparative analysis of textbook narratives and biographical narratives generated by people who experienced the events in question (Christophe 2017b), or an analysis of memory practices unfolding in the history classroom (Macgilchrist et al. 2015). This chapter's delineation of the work of Klerides (2010) has provided an indication of what such research might look like in practice. Future textbook studies would benefit greatly from research which consistently makes these connections between theories, methods, and themes.

Fifth, the iconic turn in textbook research and the needs of research on 'visual educational media' ensuing therefrom (Bock and Halder 2015) are highly relevant matters here. As Ide (in this volume), in reference to Heck and Schlag (2012) and to Janko and Knecht (2014), points out, 'awareness of the importance of visual culture in education and politics is well established. [...] But although these studies conceive of textbooks as multimodal objects, they do not (explicitly) draw on tools from multimodal analysis' (van Leeuwen 2005). In other words, the thorough, consistent, and theoretically consciously located structuring and evolution of a methodological repertoire for textbook research is still very much in its infancy. Particular methodological challenges are likely to arise for the analysis of today's educational media, which frequently appear in digital form and are increasingly generating audiovisual formats.

This brings us to the sixth and final aspect of future developments in the field on which this chapter will touch. The momentum unfolded by processes of digitalisation in the educational arena has opened up access to new objects of textbook-related research. The diversification of educational media, a concomitant of advancing societal digitalisation and media saturation, is on the rise, and as it progresses it is posing new challenges for the educational media research of the future. It remains to be seen whether the textbook will be able to defend its dominant position in the classroom (Fuchs 2011b) and thus remains a core focal point of the development of new research questions in textbook studies. The field doubtless has recourse to its plentiful experience in the investigation of educational media production processes; this notwithstanding, the transformations in the media landscape, and the related emergence of new actors and processes in the production and dissemination of digital educational media, compel researchers to keep on adapting their repertoires of theories and methods to a constantly changing world.

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PART II

Textbooks in Their Contexts



Educational Publishers and Educational Publishing

Christoph Bläsi

INTRODUCTION

Within the wider scope of school textbook research, this chapter will focus on the role of publishers and publishing houses, looking at the concept of production beyond the purely physical process. Typical functions of publishers include ‘upstream’ tasks (i.e., communication with authors) and ‘downstream’ tasks (i.e., steps in the marketing and distribution of textbooks). This chapter will not cover some aspects of production, for example, the authoring of textbooks (see Otto in this volume), and will mention at least some non-production aspects, for example, the marketing and distribution of textbooks or the publisher’s role in bringing textbooks through approval procedures.

Of course, it is important to generalise beyond ‘textbooks’ in the sense of a printed product. The term ‘educational media’ or ‘educational material(s)’ shall cover all self-contained, text-based, essentially non-interactive products; the latter criterion is meant to distinguish them from a separate category of e-learning products, which will not be covered here (on mediality as well as materiality of textbooks, see Macgilchrist’s chapter in this volume).

With respect to publishing activities, this chapter assumes a concept of educational publishing that is limited to primary and secondary education (up to 12th grade in North America and A-Levels in Britain), explicitly excluding publishing for tertiary or higher education. It is worth mentioning this, since tertiary education is included in the United States and Australian concepts of educational publishing. Despite this distinction, the chapter refers to a few instances in which research results on educational media publishing for higher education do shed light on educational media publishing for schools.

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E. Fuchs, A. Bock (eds.), *The Palgrave Handbook of Textbook Studies*,
https://doi.org/10.1057/978-1-137-53142-1_5

Since the area of educational media research branches off into different strands, it is important not to overload the exploration of production aspects ('producers', production processes, interactions, etc.) with an examination of the products themselves. With respect to the latter, product features come into play, in terms of both content (propositions and their didactic alignment) and 'quality'. Considering the difficulty of drawing a clear line between the two, this contribution includes 'product' aspects only if it seems indispensable because products and production processes are interwoven or because product aspects are grossly under-researched. In particular, the chapter mentions issues of how the text is produced and laid out.

Research on publishers specifically producing textbooks and their activities is only relevant if previous, more general, studies of publishers and publishing do not (fully) apply or if there is a need to exhaustively capture their particular case. Publishing in general is the focus of book/publishing studies,¹ whereas textbooks and textbook publishing in particular are typically, often marginally, covered by other academic communities, for example, disciplinary didactics, educational studies, and so on. At this time, the astonishingly impermeable boundaries between academic communities and cultures make it difficult to paint a picture of textbooks that is as general as possible and as specific as necessary.

According to a strong—but essentially unchallenged—claim by Robert Darnton (1982), the structure of book communication and the role of the publisher in this communication² is universal in its essentials, over time and across cultures. However, the publishing cycle as postulated by Darnton (and seen as a broken-up value chain by economists) has recently reached the limits of its explanatory power, due primarily to the emergence of digital products in the field. Janello (2010) therefore describes it as a more complex and flexible (value) network.

The main question for the remainder of this contribution is thus: What is different or specific about the case of (school) textbooks, especially regarding the role of the publisher?

INSIGHTS ON EDUCATIONAL MEDIA FROM A VARIETY OF DISCIPLINES

The following section presents insights on the production and publishing (in a broader sense: the origins) of educational media for primary and secondary education. It draws on a general view of publishing, informed by a book/publishing studies perspective on the one hand and relevant academic literature on school textbooks, ranging from publishing studies to educational studies to media business studies, on the other.

In spite of the huge economic significance of the market segment of educational publishing and its main players,³ accounts from the field of book/publishing studies do not adequately address specific aspects of educational publishing. In most survey texts about current publishing studies, school

textbooks are more or less just mentioned as a segment of the market and registered with a few market figures (e.g. about 5 per cent of the yearly overall title—not book copy!—production in Germany). Better coverage (for the German markets, see Kerlen 2006; for the Anglo-Saxon markets, see Clark and Phillips 2014; Guthrie 2011) explicates salient aspects of the segment, including the great influence of the state, the complexity of the products or product bundles (different media; different components, such as teachers' guides and pupil workbooks), specificities of the 'business model' (broadly foreseeable sales figures, fixed schedules, long-term perspectives, high investment), complex processes (essential contact with stakeholders, tests, approval), and, more recently, entirely new competitors in the marketplace and new practices in schools. This is illustrated by quotations from university textbooks on some of these aspects: 'The latest education minister can have a big impact on the curriculum and how schools are run' (Clark and Phillips 2014, p. 95), 'In any case, an economy of great patience is required. Lead times are long, because the educational works are planned with many authors, go through several test cycles and underlie approval by the cultural administration' (Kerlen 2006, p. 40, trans. C.B.), as well as 'They [the educational publishers] are impacted by the technology companies, increased use of tablets and of free internet content (including supply-funded Open Education Resources), and teacher-generated content' (Clark and Phillips 2014, p. 61). Greco (2014) presents the results of a rudimentary SWOT analysis of the segment and mention, apart from an overwhelming number of tables with figures, a lacklustre economic forecast for the United States, and, as a consequence, tax shortfalls as threats to textbook production.

With respect to work on educational publishing from beyond publishing studies, it is to start with Fuchs (2011), who touches on production and publishing aspects in his discussion of school textbooks. Referring mainly to van Gorp and Depaepe, he mentions the following conceptual points and research perspectives related to production and publishing: orientation towards content (the 'elementarising' and 'pedagogising' of the content), orientation towards style (age-appropriateness and learning motivation), and orientation towards materiality (child-appropriateness of design, cover, layout (across cultures)) (Fuchs 2011, p. 14).

Fuchs cites Lässig's account of contemporary research perspectives on educational media. Lässig underlines that research on textbooks and textbook publishing and production should always be explicitly contextualised within a specific research framework, and proposes the following foci:

the relation of school textbooks to other, particularly new media; ... the negotiation processes about school textbook content and the corresponding constellations of actors; the relation between state influence and school textbook production, approval and use; ... the economic dimension of school textbook production and the role of the market with respect to school textbook quality. (Lässig, quoted in Fuchs 2011, pp. 15–16, trans. C.B.)

Similarly, in Fuchs et al. (2010), production aspects are only some of the points covered. Textbook provision and financing in general, in particular the approval process in Germany, are presented, along with the conditions under which textbook publishers do their job and what that means for textbook authors.

Neumann (1989) gives another general account of publishing for schools in France, Germany, and the United Kingdom as examples of important developed countries. The author includes the structure of and selected figures from the supplier markets at the time of writing. According to him, educational publishing in these countries

is done by private companies and governed by a necessary but tangled web of laws, regulations, and customs. Under favorable conditions, the diverse interest groups that support, produce, and use textbooks work for a common purpose. A system of checks and balances ensures that schools receive an adequate supply of instructional materials and that these materials perform their assigned tasks. ... It is important for officials and others responsible for providing textbooks in developing nations to be aware of the complex socioeconomic systems required to initiate and sustain the process of publishing for schools. (Neumann 1989, p. 115).

An interesting and somewhat plausible—but hitherto not methodically substantiated—view expressed by Neumann is that

paradoxically, the publishing of school textbooks is more derivative than most other types of publishing because each successive textbook or series builds upon previously published materials, while radical departures in curriculum result in new materials that are quickly plagiarized. In fact, the exchange of rights, adaptations and translations, cooperative editions, and more or less outright imitations have long been common. (Neumann 1989, p. 118)

Now addressed are contemporary reasoning about school textbooks along a set of subtopics; starting with production aspects in a narrow sense and publishing houses as individual institutions, as well as the line-up and competition in national (educational) publishing industries. Next, the chapter tackles structures and processes within and beyond educational publishing houses, as well as aspects of external control specific to this segment of the publishing industry. In the case of educational publishing, control is typically exerted directly by the state or corresponding state institutions. After that, approaches that critically examine the role of publishing houses in presenting knowledge to teachers and students are explained before introducing new models beyond pure *ceteris paribus* digitisation of processes and products (but excluding e-learning proper, as explained earlier in this chapter). Textbook publishing in developing countries, with a special emphasis on publishing for English language teaching, will round off my portrayal of production and publishing aspects of educational media for primary and secondary education.

Production of Educational Material

In the book industry context, production aspects can be split into those independent of the output quantity, as they are applied to the so-called ‘first copy’, and material aspects concerning each single copy (even if the corresponding management decisions are made for all copies in advance).

With respect to production aspects concerning the first copy: even if the thematic advancing and presentation issues depend on the particular school subject, one would expect—at least for a certain point in time and a certain culture—reoccurring layout and text structure patterns in textbooks and other educational material. These would specify elements of the text compound ‘(school) textbook’ (e.g. introductory texts, exercises, summaries, and mnemonic sentences) and possible or typical layout solutions for these elements (e.g. fonts, arrangement on a double-page spread, coloured backgrounds). Surprisingly, this—and the use of various visual elements—has not been the subject of research with an adequate degree of generality, at least not in relation to textbooks. One very basic dimension to be considered along these lines, however, is expressed by Searle (1989):

[An] issue that is rarely raised is the suitability of the instructional strategy embodied in the textbooks under consideration. Some books are prescriptive, with highly structured text, exercises, and activities. Others are more loosely constructed, on the assumption that the teacher will use the book as a resource to be fitted into his or her own instructional program. (Searle 1989, p. 21)

In a more operationalised fashion—but not (yet) focused on educational media—such issues are being researched by the developing discipline of media linguistics, informed mainly by media studies and linguistics, where issues of text structure and layout are generally the focus. Replacing earlier representational semiotics analyses with an action-theoretical one, Bucher (2007, 2011 for the following) posits the need for a quasi-interactive construction of meaning not only with digital hypertexts (where such a view is commonplace) but also with multimodal texts as typified by printed texts consisting of various smaller text portions and images—as they constitute most current school textbooks. In this view, the task of applied communication design (as part of production in the sense applied here) should be seen as the operational expansion of a non-linear structure (e.g. consisting of portions of text and images), which poses specific challenges to the reader. Since the standard indicator ‘sequence’ of a ‘natural’ communication design (for purely linear texts) is not at the reader’s disposal in such cases, it is the task of the communication design to indicate or suggest the correlations: Should the reader look at an image to the right of a portion of text after reading it or before—or both? On the other end, the reader has to call on an extended arsenal of communication principles (based on the original principles by Grice) when dealing with such a multimodal text, for example, adjacency or similarity.

With this, Bucher lays a basis on which design aspects of educational media can be researched methodologically, hermeneutically, empirically, and not least by way of intervention, by giving sound recommendations to typographers, layout artists and communication designers.

With respect to the outright materiality of educational media, especially format, paper, printing, and binding, criteria common to the genre as a whole (e.g. durability) do not appear as an explicit subject of research. However, research has occasionally covered aspects such as single copy costs, particularly for the case of developing countries (see later in this chapter).

Miesenberger and Ruemer (2006) bridge the gap between the products at the focus of this chapter and e-learning products, as well as non-self-contained content streams for use in e-learning products. They describe a systematic, human-supported conversion of conventional textbooks (or rather, their print-ready digital files from desktop publishing programs) into XML files according to document type definitions (DTDs), to be used in learning environments for people with disabilities, particularly to include braille output for visually impaired people.

Educational Publishing Houses and the Publishing Industry

Like publishing houses in other segments of the market, educational publishing houses can be studied as institutions with individual histories. An individual history is influenced not only by specific aspects of policy control or the prevailing value creation structure in the educational segment (see later in this chapter) but also, for example, by publisher personalities; aspects of the wider national economic, technological, cultural, and political context; and, of course, chances and contingencies. Such aspects are covered in accounts about the history of publishing houses. Examples of such histories, in which the educational publishing activities are mentioned explicitly, include the Oldenbourg Verlag (Wittmann 2008, taking reading and writing primers as examples) and Oxford University Press (Fraser 2013).

Similarly, the position of various educational publishers in national or supranational supplier markets (typically competing with each other in the case of market economies) is influenced by overarching developments, for example, by conglomeration as observed in most segments of the publishing industry over the last decades. For the case of Australia, Hargrave (2012) traces developments of this kind over two centuries: a dominance of British textbooks in early settlement years was followed by a phase of predominantly local content in local textbooks (partly published by local subsidiaries of British publishers) that served to build a national identity until the 1950s. A dominance of multinationals has largely taken over Australian independent publishers since then. It is Hargrave's hypothesis that low-entry barriers (e.g. through web-offset lithographic printing supplanting letterpress printing in the post-war period, or as a possible future consequence of the digital transformation, see later in this chapter) favour local small and medium-sized enterprises (SME) and that we can observe a differen-

tiation between multinationals for ‘big books’ in broader subject areas (economies of scale) and independents for niche areas. This, according to Hargrave, is good news for small publishers in the future: ‘With the digital environment of the twenty-first century, in which the creation, communication and delivery of content are cost-effective and immediate, small and emerging publishers experience a more even playing field. Once forbidden [sic] markets are becoming unlocked. The status quo is no longer’ (Hargrave 2012, p. 247). Rix (2008) has also observed a development in the direction of conglomerates in Britain in the post-war period. According to him, not least as a consequence of increasing state intervention, the number of textbook publishers has decreased from about 40 at the beginning of the 1950s: ‘By the mid 1980s [sic], the number of educational publishers was down to fifteen or sixteen’ (Rix 2008, p. 176). Cases of foreign or colonial power influence on the textbook markets of the former colonies are also mentioned in the World Bank report *Textbook and School Library Provision*: in Francophone African countries, French and Belgian publishers play an important role importing textbooks, but there is also regional publishing in the sense that textbooks are published for a number of countries together (see Zloch in this volume to investigate on cross-border processes of educational media publishing). By contrast, because of higher populations and higher GDPs, in Anglophone African countries, local subsidiaries of British publishers have a long tradition (World Bank 2008, pp. xx–xxi).

Several other publications cover the textbook development process in a general and purely descriptive way. One example is Crossley and Murby (1994) in the context of textbook provision in developing countries (pp. 104–107).

Apart from the fact that school as a social system (with the state behind it in one form or another) influences educational publishing in a specific and direct manner, the ‘inner workings’ of educational publishers and their relations to other actors along the value chain or across the value network have specific characteristics compared to other segments of publishing. The same is true for what is often referred to as the business model: steps taken by a publisher in order to gain back the money it has spent upfront.⁴ Aspects like this are explicitly covered by current research, for example, in Rollans and de la Chenelière’s (2010) extensive account of the Canadian educational publishing sector, where they mention as advantages of the educational media market the direct contact with well-known customers, low to no discounts, and low to no product returns. As its risks—partly specific to the current Canadian market—they mention increasingly decentralised buying decisions, market fragmentation, increased use of alternative resources, rising buyer expectations paired with falling sales, and a hard-to-predict future requiring heavy investment now (Rollans and de la Chenelière 2010, pp. 21–24). With respect to the actors involved in the textbook value chain, Jablonska-Stefanowicz (2014) limits her study of the Polish market between 1970 and 2012 to just authors, publishers, and recipients (teachers), despite explicitly elaborating on the state’s censoring and rationing role before 1989 and its tendency to circumvent publishers as a consequence of the 2012 digital school programme.

Particularly in the business-to-business (B2B) segment, publishing houses are currently observing a sometimes significant shift in their activities, not only from printed to digital content (this has been going on since the 1990s) but also towards events like seminars, conferences, and fairs—and increasingly towards software. A similar development is occurring in educational publishing, where the software share in the products available has increased significantly. This, of course, has consequences for the structures of the companies involved and the processes within those companies, as well as for their interactions with other actors along the value chain. This has been outlined conclusively by Tian and Martin (2013). They investigate the case of higher education publishing in Australia, but their findings can be transferred to primary and secondary education in a straightforward manner. Following a contemporary view in media business studies and putting value creation centre stage, Tian and Martin describe the challenge to publishers under the given circumstances as follows:

Fundamental to the nexus between technology, e-Learning and publishing is the search for value and for new means of creating and leveraging value in a turbulent higher education marketplace. ... moving from the more or less homogeneous delivery of packaged content towards the provision of truly customised learning services combining use of the latest technologies with access to high quality content. (Tian and Martin 2013, p. 12)

An account of this transition solely as one from a public good-oriented industry to ‘a model of rapacious capitalism’ would be under-complex, they say: ‘As in other industries ... things were not nearly so simple and what happened, and is still happening, is a much more complex interplay of business, technology and market forces’ (Tian and Martin 2013, p. 13). In transitions like this, they write, not only are value steps lost (disintermediation) but others may appear (remediation):

Educational publishers are already using their expertise and networks to migrate across a series of experience curves to become providers of integrated technology, content and learning packages. In the process they will engage with new partners in the co-creation of value and in all likelihood will act ... in value chains within which their presence will be greatly enhanced. (Tian and Martin 2013, p. 21)

The authors conclude with an optimistic and potentially generalisable statement concerning the core of publishing and opportunities for publishing in the future. In doing so, they implicitly refer to a resource-based view from business studies, which capitalises on core assets and core competencies:

Educational publishers have a number of advantages when it comes to competing in the e-Learning market. They have the contacts and experience built up over the years, as they have metamorphosed from being producers and suppliers of books to becoming providers of integrated learning and technology services.

They also have the contacts with authors, universities and other relevant institutions to maintain access to a steady supply both of content and course design expertise. (Tian and Martin 2013, p. 22)

Although Tian and Martin are talking about higher education publishing, much the same can be observed in the production of educational media for schools. The authors also mention the contribution of brand value to a publisher's position of strength 'at a time where self-publishing and the use of web-based publishing platforms is in vogue (or at least reported to be so)' (Tian and Martin 2013, p. 22). 'Allied to growing expertise in the design and delivery of digital learning packages and global marketing reach', they go on, 'these advantages could turn out to be decisive in the turbulent ... education market. There is every likelihood that in responding to such opportunities, educational publishers will thrive and in the right circumstances emerge as dominant players within their value chains' (Tian and Martin 2013, p. 24).

Broich (2015) opines that educational media are different from other media sectors; he only sees computer gaming (as an extension of board games) as comparable:

In other content-based sectors, technology has vastly improved the value chain and user experience without fundamentally altering the content of music, film, or books. Education is different, however. Education technology must transform the very nature of the educational process. In learning, the relationship between the student and learning content must be interactive, and differentiated. (Broich 2015, p. 237)

This is compatible with Tian and Martin's value network-oriented account insofar as such a proposition requires not only a repackaging of existing educational content but also further interventions, potentially in close cooperation with other players in the field. In this, Broich also sees an important future role for publishers. Compared to Tian and Martin's statement, his argument cites aspects of content and target group needs rather than managerial priorities:

It is important to note ... that beyond the algorithms and data mining that drive the technology of adaptive learning, the actual content used in the system remains a key differentiator between more or less effective learning tools. ... It is well worth remembering that the expertise to serve different students effectively is not an aspect of technology itself—rather, it needs to be provided by authors, instructors and publishers. Only a skillful integration of both content and technology will lead to a better learning experience for students. (Broich 2015, p. 241)

With a slight variance in argumentation, Broich fundamentally agrees with Tian and Martin in their view that educational publishers have a good chance of keeping or even expanding their role in the changing value network as a consequence of new digital learning and other school-related products; they might even be in a position to command the evolving value network.

Freedman (2005) conceptualises the current development of educational publishing as going from a traditional model to a transformational one ‘where learning materials are constructed with faculty members for their particular circumstances’ (p. 188), to an information model ‘further toward the end-users, assisting in their success’, decoupling content from delivery and purely customer driven (p. 200). He is not worried about the future of business in educational media—provided the publishers retain an ‘abstract’ enough self-conception:

As the information age has its effects on textbook publishers the question arises, what business is the publisher in? In the past, that was easy to answer: they produced books, something that was specialized and a trade. The editorial and producing functions were bound together in a single service. In the information era, the manufacturing capability can be purchased easily and at a high level of sophistication, but it is separated from the acquisition and editorial functions. Textbook publishers have delivered, as their primary product, a level of authority, a guarantee that the materials they are delivering are of a uniform high quality and are approved by those who assign them to students. That role is likely to continue no matter what the form or forum delivered by the publishers. (Freedman 2005, pp. 202–203)

Educational Publishing and Content Control

In a paper about the allegedly decreasing quality of US school textbooks and the assumed reasons for that, Tyson-Bernstein (1989) describes what she calls ‘concepts’—aspects of business models—in textbook publishing, considering a specific condition in the United States, namely, the selection of textbooks for whole states. A key concept, she writes,

is that the typical idea of free enterprise does not apply to the production and sale of textbooks. ... With textbooks, pure market capitalism is distorted by the state monopoly. ... Instead of pleasing many individual teachers [as customers], the companies must please a political committee which has been given the power to choose textbooks for an entire state. (Tyson-Bernstein 1989, p. 73)

Moreover, she adds another salient aspect of school textbook business models—at least for countries with a federal structure—by saying that ‘publishers cannot afford to produce a separate edition for Texas and California and Florida [for example]. They operate on a thin margin of profit and must sell in as many markets as possible. They produce one textbook designed to please as many states and localities as they can’ (Tyson-Bernstein 1989, p. 73).

Some rather obvious consequences of these trends have not yet been critically assessed by academia. Focusing on Pearson, one of the leading educational media companies internationally, a business magazine article (Reingold 2015) suggests that the issue of industry concentration, line-up and competition, the value network issue, and arguments brought forth by critical analysts and activ-

ists (see later in this chapter) might be alarmingly related. In the author's view, 'Pearson is bent on controlling every element of the process, from teacher qualifications to curriculums to the tests used to evaluate students to the grading of the tests to, increasingly, owning and operating its own learning institutions.' Because Pearson is a UK-based company, some 'despise the idea of foreigners shaping U.S. education. "We feel like Pearson is an alien enemy and they are propagandizing our children"' (Reingold 2015, p. 76).

In constitutional market economies, state influence on the general book market is typically limited to measures designed to foster the book as a merit good with positive external effects, among other things through tax relief, fixed book prices, or subsidies of different kinds, for example, for authors or for publishers. In the educational market, however, the influence of the state is typically much more direct. This influence is exerted by state control of the curricula that educational media are geared towards (with or without explicit approval procedures) and often by the fact that the state is the provider of funds for or the buyer of the materials. Not only does this particular situation have a latent influence on processes, structures, and business models in educational publishing (see earlier in this chapter) but state influence often decides whether a certain educational medium will be designed, produced, and distributed in the first place.

This reality—and its procedural details and consequences—is researched widely, especially with respect to its bearing on publishers and publishing. An even more extreme case of state influence occurs if, in a constitutional market economy, the state owns educational publishers or acts as an educational publisher itself. The former applies, for example, to Switzerland. Grunder and Wuelser point to the fact that the intended effects of state ownership in Switzerland are to make sure that the same books are used throughout the canton, that production is cheap, and that the development of educational material can take place in close cooperation with teachers (Grunder and Wuelser 1996, p. 230). Whereas state publishing representatives—according to Grunder and Wuelser—mention that typesetting, reproduction, printing, and so on, are typically subcontracted to the private sector in Switzerland, arguing that state involvement is thereby appropriately limited, private-sector publishers think that the state could practice its legitimate influence on textbooks sufficiently through curricula, for example, and thus does not necessarily have to act as an entrepreneur as well (Grunder and Wuelser 1996, p. 234).

The prospect of saving scarce public money, together with a rather naive approach to transformations in digital educational material (believing that everything will be easier and more direct since there are fewer intermediaries), has recently led several states with healthy school textbook industries to take on a more active role in the provision of educational material. Jablonska-Stefanowicz mentions the Polish government's 'Cyfrowa Szkoła' (Digital School) programme, 'in which ... sums of money were allocated for both equipment and content, that is textbooks in the form of computer files. Such files are to be

commissioned by the Government and made available for free' (Jablonska-Stefanowicz 2014, p. 72). As a result, Jablonska-Stefanowicz considers the balance of power on the market distorted and sees 'a risk that the changes will ultimately lead to the limitation of the range of textbooks in the market, which, in turn, will force teachers to search for new educational resources or to prepare them by themselves' (Jablonska-Stefanowicz 2014, p. 74).

The degree and form of the complex interaction between state, society, and textbooks—beyond its immediate bearings on publishing—is subject to a wide discourse beyond the scope of this contribution. At its heart, however, analogous to ideology-critical inquiries on publishers in other genres, is the question to what extent educational publishers themselves 'voluntarily' exert undue influence on the content, possibly in anticipatory submission to the interests of stakeholders in education and educational media.

Based on an overview of the Canadian textbook industry according to which three publishers were producing over 90% of textbooks for Ontario secondary schools at the time of writing, and the typical textbook development process, Pinto maintains:

There are features of the publishing industry and of the textbook development process that can result in a situation that filters out depth of content and controversies in favour of conventional values, concepts and thinking. ... This filtered view has two characteristics: a hidden curriculum (i.e., implicit values that reflect dominant and hegemonic ideologies) and a presentation of information (i.e., explicit content) that is superficial and limited. (Pinto 2007, p. 99)

This, according to Pinto, leads to what she considers indoctrination. And, Pinto reckons, it has a manifest effect: for reasons related to their own professional education, comfort, and resources, such as an ability to rely on curriculum conformity, teachers would prefer textbooks that follow the resulting dominant or negotiated approaches as opposed to those taking oppositional positions that encourage critical thinking (cf. Pinto 2007, pp. 101–102). To explain why the textbook development process supports this trend, Pinto lists the following reasons: '(1) aggressive timelines; (2) the need to adhere to curriculum expectations; (3) impact of "marketability" and profitability as they relate to content and length; and (4) varied influence of publishers and other individuals on content' (Pinto 2007, p. 108). Responding to Apple's question, 'How does the political economy of publishing itself generate particular economic and ideological needs?' and tying in the aspects mentioned above to her initial industry structure argument, Pinto concludes that 'the oligopolistic structure reinforces a development process that results in textbooks that contain a filtered view ... that is contrary to the promotion of democracy in the classroom or as a way of life' (Pinto 2007, p. 112). For a detailed exploration of the political economy of textbook production, see also Thomas Höhne in this volume.

The approval and adoption of school textbooks are not the focus of this contribution. However, these processes can also be seen from a publishing

perspective: publishers can be held responsible for the quality of the books, especially if they show signs of preemptive submission to—possibly dysfunctional—anticipated committee verdicts. Tyson Bernstein criticises top-level committees, especially in a time when ‘textbooks have become part of the national struggle over cultural identity’ (Tyson-Bernstein 1989, p. 74). Focusing on the case of so-called adoption states in the United States, in which textbooks are selected for the entire state, the author sees the deteriorating quality of US textbooks as a direct and indirect consequence of several factors: the ‘scientific management’ of curricula, leading to a long list of requirements and hence the superficial coverage of too many topics; the orientation towards ‘readability formulas’ based on word count and sentence length, creating hard-to-understand, ‘choppy, stilted, and extremely monotonous’ texts (Tyson-Bernstein 1989, p. 79); and the readiness to give way to pressure groups, which leads to ‘contriving happy, bland, empty stories that have no conflict, no sadness, and no imperfect people. But it is clear that children do not like to read such stories’ (Tyson-Bernstein 1989, p. 84). The limited time that committees have to judge the textbooks is particularly fatal for cases in which material contains ‘manual, workbooks, maps, slides, sample letters home to the parents, tests, and all kinds of other supplementary material’ (Tyson-Bernstein 1989, p. 81). For the question on how to assure and evaluate the educational quality of textbooks, see Christian Fey’s and Eva Matthes’ contribution in this volume.

In contrast to Pinto and Tyson-Bernstein, Downey (1980), using the example of US history textbooks rather exculpates publishers from such shortcomings. He concedes that ‘publishing a textbook is in reality a commercial venture and an exercise in interest-group politics’ with ‘pressures from private interest groups, from state adoption committees, [and] from the publishers’ marketing departments’. As a result, ‘on the scale of publishing priorities the pursuit of truth appears somewhere near the bottom’ (Downey 1980, pp. 61/62, partially attributed to Fitzgerald). Still, Downey argues against making ‘textbook publishers into scapegoats’:

The publishers are hardly to be blamed for responding to pressure from textbook selection committees or for paying attention to their own marketing departments. A new textbook represents three or four years of effort and a substantial financial investment. If the publishers do not produce textbooks that are intellectually adequate, the reason may be that they feel no corresponding pressure to do so. (Downey 1980, p. 62)

New Models Through Digitalisation

It is not the goal of this chapter to cover general aspects of the transition from printed textbooks to digital textbooks (and e-learning proper). However, there are to be included a few fundamentally new models in the provision of learning materials that transcend a change in media form. DiMaria (2012)—for tertiary

education, but clearly transferable—presents Flat World Knowledge, an initiative that engages leading scholars to write textbooks. These textbooks are then made available under a free (creative commons) licence so that professors/teachers can change the content as desired; this content is then made available for free online once again, and for a small fee in other formats from printed to e-book, potentially value added. Flat World Knowledge also ‘provide[s] various editorial resources, such as peer reviewers, editors, illustrators, and designers who apply technology and automation to keep the cost of its textbooks down’ (DiMaria 2012, p. 52).

In a similar manner, but with a stronger political and societal impetus, Rodríguez encourages the development (and adaptation) of learning materials by teachers to support ‘socio-cultural diversity in marginalised communities and contexts’ (Rodríguez 2011, p. 100). He addresses the insufficiency of the available content and discusses learning and teaching conditions, formulating factors to consider when developing learning materials along these lines. This can be seen as a response to ideology-critical accounts of school textbooks and textbook production processes.

The intention to provide or achieve open, free access to resources without undue copyright barriers, as well as dissatisfaction with the existing content in educational materials, are just two reasons why open educational resources (OER) have seen an upturn in recent years. A further reason is the goal of providing more up-to-date content, to a degree that does not seem achievable in the traditional framework of value creation in educational publishing. Digitalisation and the web have made the development, discovery, and distribution of such materials much easier, even if the use of learning and teaching material beyond textbooks is not a recent development as such (see the chapter by Hansen on textbook use included in this volume, the use of digital textbooks, and OER). OER, with all of their advantages and problems (e.g. the questions they raise regarding the overt or covert interests of their originators), certainly affect the business of educational publishers and the educational publishing value chain or network.

Educational Publishing in Developing Countries

Educational media in developing countries represent a specific case. In such countries, the educational publishing segment tends to be the largest and most progressive part of the whole publishing industry; in other cases, it has to be (re)established from scratch—often with important and far-reaching objectives: ‘In countries such as Malaysia and Indonesia where cultural identity and integrity have been ravaged by the colonial past and by contemporary cultural neocolonialism, the publishing industry [not least the educational publishing industry] is a vital aspect of cultural recovery and nationalistic sentiment’ (Farrell and Heyneman 1989, p. 65). Farrell and Heyneman describe the situation in many developing countries as follows:

The most significant sources of subject information for students were: (a) copying from the blackboard, (b) teacher dictation, and (c) low-cost pamphlets, often in the form of notes plagiarized by teachers from textbooks and sold to students. These pamphlets are generally very poorly written and edited, and equally poorly produced, but they are affordable and are thus in demand. Cases were reported of teachers forcing students to buy teachers' notes as a means of income supplement. (Farrell and Heyneman 1989, p. xix)

Especially in studies that focus on the establishment of a school textbook 'culture', authors tend to cover many different aspects of the educational media system, with inevitable but potentially productive generalisations and simplifications (beyond the expected idiosyncrasies). Two particularly comprehensive examples of such studies—most of them connected to corresponding intervention measures taking place before or after the composing of the document—are Farrell and Heyneman (1989) about a seminar of the Economic Development Institute of the World Bank, and the World Bank report *Textbooks and School Library Provision* (2008). Farrell and Heyneman set out by describing the textbook world as a complex system of interrelated aspects:

The immediate objective ... was to help the participants make economically and pedagogically sound policy decisions about their own national textbook programs. ... All aspects of textbook provision were examined, from obtaining raw materials for paper production to delivering tested texts to remote schools and from training teachers to establishing a system for evaluating, revising, and resupplying books. At each step ... participants and consultants examined alternatives and their consequences and drew upon their own experiences and the background papers. (Farrell and Heyneman 1989, p. ix)

For the countries covered, the authors discuss many different aspects: from the underlying rationale of the national programme all the way to top-level decisions on importing books, publishing them locally and printing them locally, to the management structure of the programme and issues of paper supply and copyright. Issues of readership size, the fundamental macro-economic choice between a predominantly state and a private-sector solution, the question of who pays in the end, and not least the future of the (printed) textbook are identified as key issues and choices (Farrell and Heyneman 1989). Referring to sub-Saharan Africa, the World Bank (2008) reports

that the still relatively small secondary roll numbers in most countries, particularly at senior secondary level, combined with widespread low parental purchasing power and a lack of sustainable government/donor funding for secondary textbooks doesn't add up to a market, which is likely to attract investment in new title development for specific countries. (World Bank 2008, p. 12)

The report goes on to mention possible financing and supply options under the given circumstances, from parents to sponsorships to government, but also

textbook rental schemes and textbook revolving funds. According to Crossley and Murby, ‘increased access to textbooks that are, in the words of the World Bank, “pedagogically sound, culturally relevant and physically durable” is currently recognised as one of the most cost-effective ways of improving the quality of education in developing countries’ (Crossley and Murby 1994, p. 111). Drawing mainly on a case study from Papua New Guinea, the authors point out that ‘textbook development must be closely aligned to local needs and the specific characteristics of differing national contexts’ (Crossley and Murby 1994, p. 111), especially when it comes to what they consider policy options, namely, adoption (use of externally produced textbooks), adaptation, publishing within ministries of education, and local publishing in collaboration with external agencies (regional, with foreign publishers, or NGOs) (cf. Crossley and Murby 1994, pp. 107–111). For further investigation on the impact of the colonial past of developing countries on textbook production, see Lars Müller’s chapter in this volume.

HOW DO THEY KNOW? METHODS AND THEORIES USED TO OBTAIN THESE INSIGHTS

If a scholar presents insights into educational publishing in some part of the world in his or her professional role, this was taken as an academic contribution for this chapter, particularly if aspects of that part of the world have not yet been presented to the target academic community. This was also done in cases in which no formal academic tools and procedures seem to have been used or followed beyond describing a situation, typically based on desktop research and conversations with people closer to the situation in focus. Ideally in a scholarly context, however, statements describing a situation are methodically reflected and processed—in the case of an expert interview, for example, by doing a methodologically sound content analysis. This culminates in a hypothesis or a theory which is based on solid data about the specific part of the world and attained by employing one of the set of scholarly transitions from preceding statements (i.e., using methods), for example, by way of induction (cf. Balzer 2009).

Since school textbook research is a vast and still developing pursuit, also a few contributions for this chapter were consulted that do not even implicitly claim to be academic, because the author is either not working for an academic institution or he or she is publishing in a non-academic setting, for example, in an industry or management magazine. One extreme case that severely challenges the central scholarly quality criterion of impartiality is Broich (2015): he is the executive of the company whose activities are the subject of the text. Broich nonetheless makes an interesting contribution. If done well, it can be considered worthwhile and potentially relevant academically to bring hitherto unknown aspects of a field in different parts of the world to the attention of a scholarly community. The contributions assume

that new and intelligent—and therefore valuable—insights can indeed emerge from non-scholarly contexts, even if they are biased.

When it comes to the existing body of knowledge about educational publishing, contributed by experts and academics from a wide range of professional backgrounds and disciplines as it has been accessible to me, some of the most relevant sources are studies by national or supranational bodies, in many cases rather ‘lightweight’ papers on single aspects of educational publishing and accounts by non-academic players in the field.

Approaching the work being reviewed for this chapter with a critical perspective on scholarly ‘procedures’, it is to say that the vast majority of even the academic works do not explicitly refer to a defined body of knowledge or pre-established terminologies and do not culminate in a proper hypothesis. With respect to methods, it should be noted that Pinto, for example, talks about potential detrimental developments in educational content without pinpointing those alleged instances, not even through examples. Instead she writes: ‘I will not attempt to perform content analysis of textbooks but will instead draw historical data on changes in the industry and on my experience as an author to describe the publishing industry and provide an account of the textbook development process’ (Pinto 2007, p. 100). This cannot exactly be considered sound academic procedure. Nonetheless, Pinto makes a point that is worth following up. Moreover, she—in contrast to many others—shows a certain degree of problem awareness that can also be interpreted as pointing to the necessity of more thorough investigations going forward.

Unfortunately, it can be observed that a number of studies in current textbook research—seen here as an aspect of publishing studies—fail to apply state-of-the-art thinking (e.g. business informatics), for example, around digitalisation, and changes in the creation of value to educational publishing (notable exception: Tian and Martin 2013). In addition, many studies also fail to reflect on their own methodological approach or to work explicitly with theories (notable exception: Hargrave 2012, who formulates a hypothesis based on data). By contrast, positive academic examples include the sound hermeneutical work (at times supported by empirical evidence) of Bucher (2007, 2011) and—featuring a completely different asset and with this different choice from the philosophy of science—the intervention-based contribution of Miesenberger and Ruemer (2006).

Having said that, it would not be just to apply stricter standards to educational publishing research than to other areas of research on current issues in publishing studies, where theoretical work is also rather scarce. An increasingly virulent proposal of a theory of publishing—attractive because it intelligently discusses most relevant previous approaches—is put forth by Bhaskar (2013). Bhaskar’s theory likely does not, or does not productively, cover educational publishing,⁵ but it would be a worthwhile and mediating task for educational publishing research to find out to what extent his theory around concepts like

‘framing’ and ‘amplification’ can be applied directly or need to be adapted in order to be useful for educational publishing.

CONCLUSION

According to the metalexigrapher Herbert Ernst Wiegand, the existence of at least one consistent theory in a field of study is a necessary condition for this field to be called an academic discipline.⁶ If this criterion is taken, it means that publishing studies is not (yet) an academic discipline, at least not when it comes to the present book/media system. This result is reflected in the situation of a sub-field of publishing studies research: textbook/educational media studies, where the apparent under-theorised nature of the extant research on educational publishers and publishing, as pointed out in this chapter, explicitly demonstrates the validity of this assessment.

It should be noted, however, that in its study of the central social system of institutionalised education, this field is extremely complex and multi-faceted. It encompasses, for example, the situation in industrialised nations as well as that in developing countries; purely print-oriented approaches and fully digitised ones, as well as everything in between; highly regulated, state-influenced systems, as well as free-market ones; and so on.

The publishing-related arm of educational media research, as depicted in this chapter, has produced a plethora of enlightening contributions about a wide variety of aspects of school textbooks (and related products) in different countries. It cannot be expected that the research community will come up with a comprehensive theory of educational publishing any time soon. It is both desirable and inevitable, however, that educational media scholars reflect upon their methods and, by doing so, transcend the purely descriptive to make sound generalisations and formulate hypotheses on educational publishing (or publishing in general) worth opening an academic discourse about. Facing the challenge of serious theoretical work, the fascinating and intellectually rigorous task of bringing facts to the attention of the community has to go on—the more reflection goes into it from the start, the better. Together with efforts in other areas of educational media studies (beyond publishing), or in studies of other text-based media genres, or indeed with general theoretical efforts in publishing studies, this will hopefully elevate the discourse to a higher level of scholarly accountability soon.

As in other areas, interesting aspects of such an endeavour may quickly transcend the developing discipline of publishing studies. For example, scholars might extend a hand to media linguistics when it comes to aspects of the *mise-en-page*/*‘mise-en-hypertexte’* of educational material, or to business studies when it comes to aspects of value creation and business models. Located at the intersection of business and cultural and political studies are issues related to state influence on educational material. And the digital transformation of educational media, alongside the changes and shifts taking place in response to the requirements of an open world, is a complex area of its own.

NOTES

1. The field of book/publishing studies typically focuses on aspects of mediality and ‘materiality’. For some salient segments of the book market, this works, since content aspects are at the focus of other disciplines (literary fiction, for example, is covered by literary studies). For other segments of the market, however, the situation is more complicated: considerable research gaps exist, for example, for popular non-fiction, genre fiction, and, of course, textbooks. The area of book/publishing studies is increasingly ready to take on some of the content-related issues.
2. A manuscript (whether commissioned by the publisher or not) is written by an author, submitted to a publisher, evaluated, and, if the publisher is interested, accepted. The publisher remunerates the author for the subsequent use of his or her intellectual property. It then takes care of the text, possibly making it better and/or more marketable (editorial department), turns it into a physical artefact (production department, with the help of a printer and a binder), and markets the resulting book, including feeding it into the distribution channels, which include book wholesalers/distributors and booksellers. At the bookseller, customers buy the book—whether they became aware of it outside or inside the shop—and, in doing so, state that they judge its prospective benefit as greater than or equal to its price. What customers pay for the book goes ‘upstream’, in the opposite direction, from the bookseller to the book wholesaler/distributor to the publisher, diminished at every step in return for these actors’ contributions along the value chain (and possibly by taxes, but we will not go into this here). Generating revenue—that is, getting back more money than has been spent in the course of providing the product—pleasing the shareholders, and making the business sustainable are major drivers of this process, also for publishers as entrepreneurs.
3. Three of the five largest German publishing houses are educational publishers, and the significance of the sector is even greater in less-developed parts of the world.
4. Like Janello (2010), the contingency theory view is preferred, in which the revenue model is only one part of a larger business model, which also covers the entirety of the ‘product architecture’ and the activities within the enterprise and along the value chain.
5. The case of the increasing share of software products in publishers’ product portfolios, for example, cannot seamlessly be covered by Bhaskar’s theory. See Bläsi (2016), p. 255, footnote 13.
6. Wiegand, quoted in Bläsi (2016), pp. 145–146.

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Textbook Authors, Authorship, and Author Function

Marcus Otto

INTRODUCTION: THE CONCEPT OF THE AUTHOR, AUTHORSHIP, AND AUTHOR FUNCTION IN RELATION TO TEXTBOOKS

Led by the question ‘What is an Author?’, Michel Foucault has considered the ways in which society, specifically society in the modern age since the eighteenth century, has discursively constructed the culturally prominent figure of ‘the author’ and the concept of authorship, along with the effective exercise of the ‘author function’, which is linked but not exclusively confined to this figure and concept (Foucault 1998). Foucault’s essentially rhetorical question ‘What does it matter who is speaking?’ references the thesis, voiced from a number of quarters, of the disappearance of ‘the author’; yet Foucault then goes on from here to raise the further and yet more persistent question of the ways in which the author function is exercised in the societal and discursive spheres. His starting point here is an exploration of the relationship of the author to ‘his’ (or her) texts and, linking to this, the exercise of the author function in modern society. Moving on, he points beyond this notion of authorship in the narrower sense by turning to the corresponding yet further-reaching formation of authorship as a subject position or positions within discourse.

We can state against this backdrop that authors of textbooks, and their specific form of authorship, or the manner in which they exercise the author function, represent a veritable blind spot of textbook and educational media research. This is entirely in line with a widespread premise of the discipline which evidently appears to arise out of certain of its core tenets and which suggests that the societal relevance and discursive constitution of textbooks as media and the knowledge they contain and transport exist and are given, at

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least on face value and from an overarching perspective, relatively independently of their authors. This position is essentially the result of a historical shift: previously, until well into the nineteenth and partially into the twentieth century, the knowledge transmitted to pupils and students in textbooks was quite literally author-ised through the author-ity of the work's author. Additionally, it is a position that in no way excludes the possibility, in the modern age, of textbook authors attempting, via emphatic exercise of their author function, to embed specific interpretations in the canon of textbook knowledge and to therefore establish them as the societal norm. This said, this process has a particularly high chance of success where the apparent evidence of the factual objectivity of the knowledge contained in textbooks obscures the personal figure of the author to the extent of his or her disappearance or, at the least, pushes him or her into the background. In this way, we see a process of the discursive 'invisibling' of textbook authors both in their works themselves and in textbook research, which latter tends overall to present the author more as a sort of bibliographic supplement to the textbook than as its originator. This 'invisibling' of textbook authors, making them into a 'blind spot' of research, affects their author function in relation both to textbooks as an object and medium and to their subject position in the overarching 'societal' discourse.

Historically, the author function in relation to school textbooks appears overall to have undergone, beginning in the eighteenth century, a development that is the reverse of that observed with other significant societal figures of authorship which have emerged since that time. Beginning with emphatic, authentically authorising authorship, the author function of textbook authors has found itself successively obscured at an institutional, discursive, multimodal, or structural level. This process corresponds to a characteristic shift in the formats via which textbooks transmit their knowledge, from an authorial narrative style, continually dominant well into the twentieth century to the emergent specificity of what Germans call the *Autorentext* in relation to and alongside other increasingly prevalent, significant formats of the depiction of textbook content. A further relevant shift in relation to textbook authorship consists in the move from individual authorship towards collective forms of authoring, such as group authorship, editorial teams, and cooperation between subject-specific specialists.

A SURVEY OF CURRENT DISCIPLINE-BASED, THEORETICAL, AND METHODOLOGICAL APPROACHES TAKEN BY RESEARCH ON TEXTBOOK AUTHORS

The diversity and heterogeneity of the issues relating to textbook authors which research in this area has explored mirrors that of researchers' disciplinary and methodological approaches to the subject, which, when surveyed, appear highly disparate in parts. This research supplies us, particularly in light of our focus on the role of textbook authors in the processes of textbook production, with a range of divergent contributions whose relevance and significance are no less diverse.

An attempt to systematise extant research on textbook authors might usefully divide it into a number of more or less corresponding aspects which are observed, and observable, from a number of discipline-related, theoretical, or methodological perspectives. From the point of view of social history, or the study of social structures, textbook authors can appear as a relatively specific group and profession working in particular societal conditions which have changed during the course of history. In this context, textbook authors, according to the specific questions driving research on them and the approach taken, might attract research interest as members of a specific profession, academic or scientific culture, social group or societal formation, as—more or less—individual subjects and authors of particular textbooks or textbook series, and/or as influenced by ‘ideology’ or conditioned by specific discourses. Some research in this subfield, for instance, explores, on a number of levels, the societal and cultural conditions within which textbook authors exercise their author function and institutional factors determining their agency. Existing research places particular emphasis on the political, ideological, and economic relationships of dependency and limitations imposed on authors within the process of textbook production (Rohlfes 1992; Horio 1988; Nishino 2008; see also Thomas Höhne’s chapter on political economy in this volume). Nishino, for example, taking a neo-institutionalist perspective on the political and economic conditions within which textbook production takes place, examines the influences, each institutionalised to a greater or lesser extent, exerted by the state on textbook authors’ work, influences which effectively form the framework within which author agency unfolds.

Other studies have sought to carry out fundamental surveys of the academic and disciplinary influences and orientations of textbook authors and, in the context of prosopographical approaches, of their social and geographical origins. Additionally, some researchers have undertaken qualitative surveys and studies of the ways in which authors perceive their role and their work. Taken together, the perspectives brought to bear on this object of study by research are disparate in nature as well as approaching the subject on a range of different levels. To cite an illustrative example: while Adick (1994) links a fundamental survey of textbooks for educational studies, based on content analysis, with an additional focus on their authors, whom she places as more or less prominent in her analysis and on whose discursive author function she casts particular light, Amalvi (2001) presents a study of the authors of French language textbooks between 1660 and 1960 which is more prosopographical in nature. Primarily on the basis of the forewords of German history textbooks since the eighteenth century and some albeit limited biographical data on their respective authors, Jacobmeyer (2011) analyses the authors’ contributions to the ‘Gattungsgeschichte’ (genre history) of the history textbook.

There are instances of studies on structures of cooperation and competition among textbook authors and on their recruitment by publishing houses (Rothmund 2005). Other work revolves around biographical factors and influences in relation to textbook authors in their work. Alongside the examination

by Langström (1997) of the authorial voice in textbooks, the biographical study of a specific textbook author and his work produced by Graves (2016) might serve here as an exemplary case.

Other work, taking place in a more specific context, has located and investigated textbook authors within the complex structures and polymorphic processes of textbook production. This research generally foregrounds the issue of the scope available to textbook authors in their task. In this context, most researchers focus on the diverse societal influences to which textbook authors are exposed and on the issues to which these influences give rise, traditionally with central emphasis on the relationship between authors and their publishers and also, more recently, editorial and layout teams. The author-publisher relationship in particular has been the subject of various historical case studies. With regard to this issue, processes of professionalisation or specialisation are generally the principal focus of interest for researchers. Keiderling (2002), for instance, has investigated the historic shift that took place in the relationship between authors and publishers in the nineteenth century, pointing specifically to the processes of professionalisation and specialisation undergone by the authors. Current developments towards professionalisation among textbook authors are the key concern of the relatively actor-centred studies by Heilenman (1993) and Nixon (1999).

For some time now, research in this area has been engaging with the broader discursive and societal positioning of textbook authors and, in a successively emerging research focus, the scope for autonomous action that corresponds to these positions. In this context, de Baets (1994) has examined the role of textbook authors as, from his perspective, ‘mediators’ between academia, or historiography, and society. A study by Lars Müller (2016), in its exploration of textbook authors and their political attitudes in their interactions with publishers and other actors in the field, uncovers the extent to which authors and their networks, as possessed and capable of agency in the process of textbook production, have at their disposal their own discursive resources and leeway for action. Meanwhile, the analysis by Perlmutter (1997), based on qualitative research and author interviews, casts light on the manifestations of textbook authors’ societal visions and perspectives in the works they produce.

The study by Baquès (2007) focuses via exemplary instances on the exercise of the author function by textbook authors in light of competition on the textbook market and the advent of new media technologies and in the context of the polyvalent interrelations and interactions among authors, publishers, and editorial teams. Further, it approaches its subject in awareness of the diversification of the landscape of actors in this field and reversals in power relations between authors and publishers as well as authors and textbook designers in terms of their influence on the textbook, reversals with direct consequences for the exercise of the author function. To a certain extent, Baquès proceeds somehow rather implicitly from Bourdieu’s theoretical approach on the various forms of economic, cultural, social, and symbolic capital in order to illuminate the structural relationship between publishers (economic capital) and authors (cultural capital)

and its evolution or historical transformation in the course of the twentieth-century's second half. In so doing, she is able to trace the ways in which the author function, and its effective exercise, have increasingly transferred their locus from the author to publishers, editorial teams, and layout specialists (Baquès 2007). For a broader view on the role of publishers in the process of textbook production, see the chapter by Christoph Bläsi in this volume.

We have recently seen the appearance of initial studies on the interaction among authors, editors, and layout designers in the process of textbook production, informed by ethnographic and discourse-analytical approaches. This research, proceeding from a praxeological perspective, seeks to reveal the complexity and, on numerous occasions, the contingency of selection and decision-making processes in textbook production which include and involve the authors as actors within complex actor networks. The ethnographic discourse analysis, underpinned by discourse theory, presented by Macgilchrist (2011) casts light on the complex and diverse processes of negotiation within the editorial teams of textbook publishers, which she defines as 'organisations of discourse production', out of which the knowledge contained in textbooks emerges. Again taking a praxeological point of view, Macgilchrist focuses on the conditions and effects—in their evident contingency—which unfold in the processes by which the knowledge to be transported by textbooks is established and produced. Overall, her work indicates that authors, within processes of the production of textbook knowledge and discourses, are neither independent of other actors nor determined in their actions by societal or institutional constricting factors, but hold a contingent role, particularly in their interaction with the manifold networks of actors in the field.

REMAPPING THE FIELD: TEXTBOOK AUTHORS IN NETWORKS OF TEXTBOOK AND DISCOURSE PRODUCTION

We have discussed earlier in this chapter the various extant studies on textbook authors and the specific form of authorship they enact and represent, despite the fact that authors and authorship have thus far failed to assert a central position in textbook research. Bearing in mind the matters that most interest us here, we should be seeking primarily to differentiate between, on the one hand, the greatly diverse studies that have focused on a range of different aspects of the matter and the corresponding research questions that have been posed in relation to textbook authors and, on the other, research, particularly that done in recent years, on the specific role of textbook authors in the process of textbook production. Discussion of this research might eventually lead to a systematic and focused remapping of the field of research on textbook authors in networks of textbook production.

While the predominant perspective taken by research so far here focuses primarily, therefore, on the various (external) influences on authorship and the actual constraints on its exercise, we might consider it conducive to further research to redirect, indeed to tentatively reverse, our perspective here by perceiving and

exploring the networks and conditions within which textbook authorship takes place not so much as constraints than as productive and constitutive conditions enabling the specific exercise of authorship in relation to textbooks. Progressing on from here, a key challenge in the attempt to pinpoint the particular authorship and author function of textbook authors within these networks consists in the need for a programmatic shift from the currently broadly predominant focus on constraints upon textbook authors and the structural, institutional, and discursive conditioning to which they, and their potential exercise of an imagined ‘authentic’ authorship, are subject to a perspective which perceives the effective exercise of authorship and the author function as taking place under precisely these complex conditions governing textbook production. This implies the concomitant exploration of any evident shifts between the figure of conventional authorship and the discursive author function as it relates to textbook knowledge. Finally, if we are to identify the specific conditions governing the discursive constitution and exercise of the author function within the process of textbook production, we will need to cast a closer eye on the other specific actors, bearers of societal agency, economics, and media which are likewise involved in this process.

Using the notion of the network appears particularly expedient for effecting a shift in our view of actors’—in this case textbook authors’—agency from the ‘ability to actually produce intended effects’ (Stichweh 2005, p. 119) to the possibilities open to them to exercise agency within networks, which are to a considerable extent disconnected from any notion of intentions due to their constitution through communicative attributions.¹ This perspective, brought to bear on textbook authors and their exercise of the author function in a range of societal contexts and within polyvalent networks, points to the plethora of aspects and practices through and in which textbook authors contribute to the production of textbooks and educational media for schools and the knowledge they contain and transmit.

From a further overarching point of view, linking directly to this perspective, research might proceed to train a closer spotlight on the interconnections between textbook authors, textbook production, and the emergence of what we might call authentic ‘textbook knowledge’. In its complementarity to the question, which must be implicit in such analysis, as to the extent of textbook authors’ actual influence on the content of ‘their’ books, the issue of who holds effective responsibility for the knowledge in textbooks—of who author-ises it—is a highly interesting one, which as yet largely awaits systematic academic exploration.

Research in the field has, at least via the showcasing of examples, pointed to the ways in which textbook authorship has changed during the course of history; however, it has thus far largely failed to systematically explore the transformation of authorship as exercised in textbooks and educational media in the light of the digital age’s advent.² Another research gap appears in relation to the exercise of the author function with regard to the knowledge in textbooks, or, in other words, the role of textbook authors in the authorisation of this knowledge or in responsibility for it. The case is similar with respect to

research into authors and networks and historical transformations in their constitutions and the practices and scope for agency to which they give rise, although the gap here is ameliorated by the existence of initial explorations of the matter (Macgilchrist 2011, 2012; Müller 2016; Sammler et al. 2016). This work, and as yet hypothetical follow-on studies, is and would be ideally placed to turn textbook authors from a ‘blind spot’ of educational media research into a fruitful facet of research into the production of textbooks and educational media and thus make them into a highly relevant subject for the field. Promising developments in this regard appear in work which seeks to identify ways in which textbook authors exercise or can exercise agency, how their author function actually plays itself out, and how they simultaneously interact with a range of other actors and networks. This context incidentally permits the examination of various processes, determined or influenced by societal, technological, or economic factors or media, of change in the production of educational media for schools, and the effects of these processes on authors and on the specific practices by which they exercise their authorship.

NOTES

1. Cf. the detailed discussion, albeit focused to a certain degree specifically on individual forms of human agency, in R. Stichweh (2005) ‘Individuum und Weltgesellschaft. Handlungsmöglichkeiten in einem globalen Gesellschaftssystem’ in E. Böhlke (ed.) *Montesquieu. Franzose – Europäer – Weltbürger* (Berlin: de Gruyter), p. 117ff.
2. For a general discussion of the form of digital authorship, see F. Hartling (2009) *Der digitale Autor. Autorschaft im Zeitalter des Internets* (Bielefeld: transcript).

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Textbooks and Education

Eugenia Roldán Vera

Research on textbooks, in general, is a scantily theorised field. The first section of this chapter will show how research into textbooks has historically been intertwined with processes of educational institutionalisation, through which textbooks have acquired different attributes and assumed new functions. In the recent past, as the role of textbooks in school has appeared to decline, textbooks have been displaced from their central role within educational research: as shown in the second section of this chapter, the power attributed to textbooks as sole sources of knowledge in the classroom has diminished and scholars have shown how contingent processes of their production have been made visible. These processes show how the ‘legitimate knowledge’ textbooks convey is constructed through contingent processes involving many different actors. At the same time, textbooks are no longer viewed as national constructs but research has begun to pay attention at the supranational dimension of textbook design and publishing. The third section of this chapter discusses the few attempts there have been to theorise the production of textbooks and their role in relation to institutional education: cultural politics, neo-institutionalism, grammar of schooling, and actor-network theory. The chapter concludes with a summary of the lines of research that appear more promising for future studies of textbooks in the context of education systems and educational policies.¹

HISTORICAL RESEARCH INTO TEXTBOOKS IN EDUCATIONAL CONTEXTS

A range of methodological approaches have been implemented in the study of the textbook’s role in education and these have been influenced greatly by the characteristics of the individual historical periods in question and the values

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that were ascribed to textbooks in those periods. This overview examines the interrelationship between textbook research and the history of educational institutionalisation.

Historians agree that books have been used in education as long as schooling in any form has existed, but their function has changed over time. Primers and the so-called *textbooks* of the Middle Ages and early modern period were ‘a mixture of grammatical rules and popular maxims designed to lead to literacy’ (Wakefield 1998, p. 5); however, they did not cover all course contents, and the main explanations would be provided by the teacher.

Historians have noted that the word *textbook* was coined in the English-speaking world early in the nineteenth century and referred to a newly attributed educative function of books within a rapidly expanding school system (Stray 1994; Johnsen 1993, p. 24). Under a notion of education that predominantly involved the memorisation of knowledge and in the absence of sufficient well-trained teachers for all schools, the development of this new genre was aided by a publishing revolution brought about by cheaper printing techniques and textbooks came to contain all that had to be taught and learnt in a class. A textbook was ‘both book and teacher’ (Stray 1994, p. 3), an essential object of learning for both pupils and master. Textbooks rapidly spread in those parts of the world where elementary schooling was growing. At that time, textbooks were not exclusively made for school use; they could also be read outside of school, by both children and adults.

Scholars have noted that before the creation of national education systems in the second half of the nineteenth century, textbooks were not necessarily produced to suit specific homogeneous content or pedagogic guidelines prescribed by political or educational authorities. Certain aspects of content may have been prescribed locally, and there may have been competition to be selected, but textbooks varied more widely, authors had greater freedom of design, and publishers were more influential in shaping contents (Elliott and Woodward 1990; Watt 2007). This goes some way to explaining why research into textbooks in the nineteenth century has largely employed methodological approaches taken not from the history of education but from the history of the book, where emphasis is placed more on production and circulation than on the relationship to institutionalised schooling. Scholars have shown how textbooks were written and published by a range of different stakeholders with varying agendas. Among them were religious congregations or leaders for whom education was a way to spread the word of God (Fyfe 2004; Topham 1998); philanthropic organisations interested in the moral improvement of the working classes (Ressler 2010); individual publishers trying to profit from a rapidly emerging market, often working beyond national borders (Roldán Vera 2003); and individual teachers trying to develop aids to their daily practice that could be of use to other teachers. Those individuals and organisations were key figures in the diversification of the textbook market resulting in books for a wide range of subjects, from arithmetic to biology and from history to astronomy. Their contribution helped shape the school as we know it today. When textbooks became a secure source of profit for publishers, sequential, graded

books tailored to different levels and ages began to be produced (Stray 1994, p. 5). This in turn may have contributed to organisation of schools into separate groups according to the age and advancement of the pupils, at least in some countries.

In the nineteenth century, textbook content was not necessarily a didactic transposition of well-established knowledge from outside the school. Textbooks, certainly those for national history, were often the first books to offer an overview of the subject matter (Chartier 2008) or they were one of the platforms used by scientists and academics through which to debate the accepted facts of a science (Simon 2011). Indeed, scholars have begun to pay attention to André Chervel's suggestion that the school disciplines that were consolidated in the nineteenth century did not reflect the popularisation of specialised knowledge but that they were created and shaped by the dynamics of school teaching itself (Chervel 1988).

Much historical and sociological research into the emergence of Western mass education systems in the second half of the nineteenth century addresses the relationship between universal schooling, nation building, and state formation, whereby the state became the main stakeholder in the provision, control, or supervision of institutionalised elementary education. Textbooks became a crucial tool in providing pupils with common representations of their past, uniform methods of measurement, and knowledge of their geography and political systems; this aimed to create a unified view of the nation, a sense of national awareness as well as homogeneous forms of teaching (Rosanvallon 1990; Carretero 2007; Weber 1976; Green 1990). Most textbook research for this period has focused on the content of books for elementary schooling: images of the national past, the construction of a pantheon of heroes, and the different elements that promote a national identity (Johnsen 1993). Few studies examine the mechanisms of textbook provision or approval by state authorities (Woodward et al. 1988; Watt 2009), even though they were as important an element of education systems as the establishment of a homogeneous curriculum for elementary schools, school inspection, institutions for teacher training, and mechanisms for teacher certification. Moreover, it was the establishment of mass education systems that lead to textbooks being written to suit specific curricular demands in accordance with officially prescribed pedagogical requirements.

The traumatic experiences of World War I led contemporary politicians and intellectuals, especially in Europe, to reflect on education's role in the promotion of conflict. In the interwar period, the theory emerged that textbooks displaying excessive nationalist stereotypes and values could fuel international conflict, and thus a series of international efforts were promoted by the League of Nations and bilateral commissions to revise the content of history textbooks. Recent comparative and international research on these enterprises (Fuchs 2005) has suggested that the international discourse on textbooks that originated during that period (Fuchs 2010) has subsequently influenced the way in which textbooks are written. Further investigation on the impact of conflict and war on textbook production is given by Sylvie Guichard in this volume.

The idea that (history, geography, and civics) textbooks can lead to international conflict persists today and has shaped much of the qualitative, quantitative, long-term, and comparative content-focused research investigating representations of national topics and information about other countries (Pingel 2016). Furthermore, much recent textbook research also examines representations of marginalised groups within national boundaries (Hickman and Porfilio 2012; Johnsen 1993). One assumption underlying this type of content-oriented research is that changing textbook content may contribute to a resolution or avoidance of conflict, within or beyond national borders (indeed, history textbooks are invariably at the centre of so-called ‘history wars’ all over the world) (Fuchs 2010). Another assumption is that textbooks have such immense power because they are unproblematic transmitters of knowledge: ‘if the content of a textbook is unambiguous, all students would understand it in the same way’ (Pingel 2016, p. 54). The treatment of textbooks as vertical conveyors of knowledge has tended to overlook the contingent processes of their production, and certainly, of their reading and appropriation. However, this is changing in recent research.

After World War II, national states around the world, faced with accelerated demographic growth, developed strongly regulated education systems. Within that major expansion of schooling, textbooks were considered to have a central role in the transmission of knowledge and states invested significantly in their production or regulation, especially in developing and socialist countries. In the former, for example in Latin America, textbooks were often considered more central to teaching than the curriculum or even the teachers (Ossenbach and Somoza 2000). In some countries, textbooks were produced and distributed by the state, whereas in others, the state simply approved a list of textbooks that met the official curricula. Influenced by such views of the power of textbooks, research between 1950 and 1990 has therefore tended to primarily examine the role of the national state in the definition of textbook content under the assumption that textbooks were the prime conveyor of knowledge and innovation. The gap between textbooks and curriculum was often researched, the expectation being that educational progress would result from high-quality textbooks being paired with an improved curriculum (Abbas 1993). Although textbooks in the developing world, especially the former Western colonies in Africa, Asia, and, to a lesser extent, Latin America, were largely provided by foreign publishing houses (see Bläsi in this volume), the role of these enterprises has been largely neglected when compared with the intense focus on national educational policies (Altbach and Kelly 1988; Altbach 1991).

CURRENT TRENDS

In the recent past, the introduction of a range of educational materials in schools, especially (but not limited to) digital technologies, has been a contributing factor in the reduction of the protagonist role assigned to textbooks in the education system. Textbooks are now perceived as one among many

sources of knowledge in the classroom (UNESCO 2014) and they have been decentred within educational research. Moreover, under a new understanding of reading as a cultural practice (Bourdieu and Chartier 1985), scholars have begun to systematically study processes of mediation and appropriation regarding textbook use by both teachers and students. At the same time, researchers are questioning the notion of textbooks as conveyors of neutral, up-to-date knowledge and have started to reveal the contingent processes by which textbooks are produced and the interplay between publishers, state agencies, and educational authorities that this involves (Apple and Christian-Smith 1991). This area of research questions the view that textbooks are a response to the needs of prescribed school curricula and instead suggests that they partly shape a more conflictive, negotiated curriculum that finds application in the classroom.

Since the 1990s, what scholars have conceptualised as a supranational sphere has emerged in educational matters. International organisations such as the Organisation for Economic Cooperation and Development (OECD) and the World Bank, who have powerful education agendas, have promoted guidelines for school policies as well as standardised programmes of assessment for educational policies, school systems, pupil and teacher performance, teaching policies, and practices (for the exploration of textbook assessment, see also Christian Fey and Eva Matthes in this volume). In relation to this, the fields of education research dealing with international issues, such as comparative, international, and supranational education research, are beginning to examine textbooks in a different light; often taking OECD categories as normative standards for the analysis of textbook policies. For example, under the assumption that it is beneficial for schools to have greater autonomy in certain educational decisions, researchers have examined the role of schools in the selection and purchase of textbooks (Uribe 2006). UNESCO recommendations on the writing of textbooks (Pingel 2016; UNESCO 2014), although less authoritative than OECD standards, may also be considered part of that international sphere.

The rise of this supranational sphere is both a consequence of and a catalyst for widespread policies aiming to reduce the role of the state in the provision of education. There are currently numerous political and scholarly debates on the role the state should have in the production, design, approval, or distribution of textbooks. Many of these debates deal with state intervention in determining the contents of social sciences textbooks and the involvement of other parties (local education boards, schools, teachers, parents) in societies undergoing processes of democratisation, yet there is also pressure from (often transnational) publishing companies attempting to secure a greater share of the textbook market. These issues have been particularly vigorously debated in regions where the state intervention in textbook provision was traditionally stronger, such as Latin America, Asia, and Eastern Europe (Rajagopalan 2001; Chen 2002; Uribe 2006; Williams 2014). Some studies claim that less state control on textbooks and more democratic participation by other parties may lead to better education outcomes: measurable, for

example, by PISA results (Wilkins 2011) (such studies have, however, proved inconclusive). Existing studies have investigated teacher autonomy, discussing whether teachers are, or should be, organising their classes freely or relying on good textbooks to ensure the quality of teaching (Ouyang 2003; Anderson-Levitt 2003). This discussion takes on different dimensions around the world: whereas in some countries (e.g. in Asia or Eastern Europe) teacher autonomy is seen as aspirational when faced with an authoritarian or dictatorial state, in others (such as Latin America) the fact that the state remains a procurer of textbooks is perceived as a guarantee of teaching quality and equality (Barriga Villanueva 2011).

THEORIES OF TEXTBOOK IN EDUCATIONAL CONTEXTS

As mentioned earlier in this chapter, there have been few attempts to theorise the study of textbooks in an educational context. What follows is a summary of some of the theoretical approaches to textbook research developed from the 1990s to the present. This chapter excludes research focused on textbook uses and appropriation in the classroom because that is the subject of entries of Part IV in this handbook.

Cultural Politics

In the 1990s, researchers rejecting the idea that textbooks are merely conveyors of ‘official knowledge’ began to analyse textbooks from the perspective of cultural politics. Textbooks were viewed as ‘the results of political, economic, and cultural activities, battles and compromises [...] conceived, designed, and authored by real people with real interests, [...] published within the political and economic constraints of markets, resources, and power’ (Apple and Christian-Smith 1991, pp. 1–2). The aim of this new approach was to shed light onto how ‘legitimate knowledge’ is made available in schools, to examine who makes decisions regarding textbook contents, how publishing houses operate, and how schools decide which textbooks to use. This perspective has yielded notable studies about the American textbook publishing industry (Apple 1991; Marshall 1991) and work on language education textbooks (Curdt-Christiansen and Weniger 2015). One of the ways to operationalise Apple’s proposal has been by means of ethnographic studies, for example, on the way publishing houses work (Macgilchrist 2017). Moreover, as the work of Macgilchrist (2017) suggests, recent developments in media studies based upon an understanding of communication as cultural practice, involving both technological forms and their associated protocols (Gitelman 2006), may also prove very useful for the understanding of the writing, manufacturing, and use of textbooks in educational contexts. Thomas Höhne’s chapter in this volume provides a detailed account on the cultural political economy of textbook production.

Neo-Institutionalism

On a global scale, the widespread use of textbooks in classrooms throughout history can be considered one of the characteristic elements of what neo-institutionalist education sociologists have called the ‘world culture of schooling’, that is, the set of ‘common educational principles, policies, and even practices among countries with varying national characteristics’ that has developed globally in the past two centuries with the institutionalisation of education (Chabbott and Ramirez 2000, p. 173). Neo-institutional theories can also explain the symbolic power of this ‘world culture’, which acts as a ‘script’ for many nations in order to bring their educational policies and norms to an international standard (Ramirez and Meyer 2002). Some studies use this perspective in order to confirm the existence of such a world culture when examining the treatment of certain topics in large numbers of textbooks all over the world, for example, the rise of human rights topics in social science textbooks (Meyer et al. 2010; Bromley 2014; Bromley and Lerch, in this volume).

Grammar of Schooling

Other scholars consider that textbooks should be studied as part of a ‘grammar of schooling’ (Tyack and Tobin 1994), that is, a series of structures developed over the years which regulate the teaching process and have been proven particularly stable and resistant to reform attempts. Tröhler and Oelkers (2005) have suggested that teaching materials should be understood as part of this grammar of schooling, whereby they only acquire their meaning through integration into the full teaching structure. Following Depaepe and Simon (2003), Heinze (2010, 2011) further suggests that textbooks should be analysed within the educational context in which they are used and textbook knowledge understood as resulting ‘from a social process of selection, legitimation, and adaptation’ at the national level (Heinze 2010, p. 125). He outlines four dimensions of the grammar of schooling for the study of textbooks: (1) ‘Grammar of educationalisation’ (*Pädagogisierung*), or an understanding of the differences between generations and a definition of what each new generation requires; (2) ‘Grammar of instructional institutionalisation’ (*Verschulung*), or the institutional framework through which textbooks are implemented; (3) ‘Grammar of knowledge acquisition’ (*Wissenserwerb*), or the processes of mediation and appropriation of textbook content; and (4) ‘Grammar of regulation’ (*Steuerung*), or the instruments, processes, and legal conditions implemented to regulate and maintain the school system (Heinze 2010, 2011, p. 34).

Actor-Network Theory

Finally, another relational approach for the study of textbooks is what is known as actor-network theory (ANT). Developed originally in the early 1980s in the field of science and technology studies, only in the last 15 years has ANT had

an impact on educational research (Fenwick and Edwards 2012). This has primarily been related to studies of technological innovation and has only seen limited implementation in the study of textbooks. ANT views social reality as an assemblage of constantly changing interconnections between human and non-human entities in which nothing exists prior to its performance or enactment. It attempts to examine the different connections created between things or ‘entities’, the ends they serve, and the new objects they produce. Those entities can be as diverse as knowledge, curricula, teachers, behaviour, identities, policies, routines, classrooms, pupils, and, of course, textbooks. These ‘entities’ are all *actants* but when they come to perform a certain role in the network (working upon other actants), they become *actors* and appear to have intentions, morals, or subjectivity. ANT does not focus on what objects, for example, textbooks, *mean* but rather on what they *do* within that network (Fenwick and Edwards 2012). The network of entities into which textbooks are inserted can extend from things in the classroom, to the world of publishers, educational policies, and pedagogical discourses. In an illustrative study about the teaching of religion in Scotland and Northern Ireland, Conroy et al. look at how textbooks ‘act in the classroom’, mediated by the transactions between classroom participants: teachers, students, and school management, and advancing the interests of other powerful stakeholders, especially the commercialised examination companies (Conroy 2013). Textbooks themselves are ‘mediators’ in the network. Paraphrasing Bruno Latour, Conroy asserts that ‘rather than merely “determining” and serving as a “backdrop for human action”, [textbooks as] things might “authorize, allow, afford, encourage, permit, suggest, influence, block, render possible, forbid, and so on”’ (Conroy 2013, pp. 143–144).

CONCLUSIONS

The historical institutionalisation of education and the evolution of the different values ascribed to textbooks affect the ways in which we look at textbooks in the present. An advantage of the lack of concrete theorisation in textbook research is that the variety of empirical studies available can better account for the specificity of the role and functions of textbooks in the past and present. Moreover, studies on textbooks grounded in the social and educational context of different historical periods may suggest novel ways of thinking about textbooks and produce methodologies which are useful for textbook research in general. On the other hand, theoretical approaches to textbooks in educational contexts, although they have not resulted in sufficiently consistent empirical findings, are useful tools with which to focus on different aspects and to draw analytical categories. On balance, the approaches that appear most promising for future research on textbooks in educational contexts are:

- Research on the fundamental and changing role of educational policies, publishers, authors, state agencies, and schools can give a better overview

of the contingency of textbook production and question its position as an unproblematic transmitter of knowledge. In particular, media studies may offer a good venue to operationalise textbook research as it brings together all elements and structures of the communication processes.

- A more thorough consideration of the textbook publishing industry, exploring the specificities of different times and places, trying to determine how it has contributed to the way schooling has developed may allow us to think of textbooks in the present not as a mere response to school curriculum demands but as active shapers of school disciplines and of the curriculum that is actually taught in schools.
- Textbooks can no longer be treated as national products of national education policies dealing with national issues. Not only the role of the international publishing industry needs to be researched but also the ways in which the supranational sphere of education policies lead to the standardisation of textbook production and affect the values given to textbooks in institutionalised education.
- The most promising theoretical frameworks for the study of textbooks are those that propose a relational approach. It is important to operationalise the idea that the meaning of textbooks is not taken from what is printed on their pages but is constructed through context. It may also be fruitful to drop the quest for ‘meaning’ altogether and research instead how textbooks ‘act’ in education as part of a network that includes (and transforms) both producers and users. However, more studies are needed in order to assess whether these innovative ways of viewing textbooks do indeed generate a different understanding of their significance within education.

NOTES

1. I analyse general trends on the study of textbooks in educational contexts with only slight references to different national studies and traditions. Whereas most of my revision is based on English literature, I also refer to a handful of works in German, French, and Spanish. Moreover, although I often discuss individual contributions, where possible, I refer to works revising the state of the art of the issues discussed. I do not consider research on textbook uses and appropriation in the classroom, since that is the subject of other chapters of this handbook.

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Educational Media, Reproduction, and Technology: Towards a Critical Political Economy of Educational Media

Thomas Höhne

INTRODUCTION

The relationship between state/politics, economy, society, and education has undergone a radical structural transformation since the 1990s. Among these changes are alterations in educational policy governance, new forms of marketisation and privatisation, and the increasing influence of private and transnational actors in the field of education. The main research field in this respect is the critical cultural political economy (Bourdieu and Passeron 1977; Bourdieu 2004; Jessop 2008) and the affiliated educational research field is the ‘political economy of education’ (Ball and Junemann 2012; Whitty et al. 1998). This critical approach also considers the significance of knowledge and cultural resources for society as a whole, which assumes central importance in this global restructuring. Not only technology and instrumentalism have been introduced to the education sector as monitoring tools (e.g. in the form of statistical evidence and output) but systematic differences and new hierarchies have also been created between good/bad schools, successful/unsuccessful countries and educational winners/losers, transforming knowledge and societal as well as cultural resources such as ‘competencies’ or ‘skills’ into a medium of differentiation and inclusion/exclusion (see Robertson 2006).

As agents of knowledge and its dissemination, textbooks and educational media are intrinsic to these developments and are in turn affected by them in different ways. Changes to curriculum frameworks and educational governance are interlinked with digitisation and new digital markets on many different

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levels. These developments have resulted in the creation of barely manageable amounts of privately created online teaching materials and a shift which has seen traditional textbook publishers embarking on the process of becoming ‘service providers’, developing a wide range of digital educational services and offering digital online material for textbooks, interactive digital products, and materials for preparing tests and for private tuition.

These complex transformations are evidence of the workings of a comprehensive *system of reproduction* which includes, and always has, knowledge and societal as well as cultural resources, the means of their production and transmission, as well as the media used in that transmission. The steadily increasing use of technology since the 1990s is a new and key redefining factor in this reproduction cycle. The following discussion will provide a detailed examination of the changes that have occurred within the framework of the cultural political economy, while also considering new technological, political, and economic transformations and their implications for educational media. Firstly, some of the central theoretical characteristics of the cultural political economy, especially the logic of (re-)production, will be outlined in the first step. Secondly, the fundamental changes in the production of textbooks and educational media, including some empirical findings, will be presented. Next, the expansion of technology on three planes (digitisation, political regulation, subjectivation) will be discussed, including the effects on educational media and the conditions of their production. In the conclusion, the dimensions for further research will be outlined.

THEORETICAL APPROACHES AND CURRENT STATE OF RESEARCH

Perspectives on Reproduction Theory

The term ‘reproduction’ encompasses the structural cohesion between the three planes of cultural, social, and economic reproduction (Bourdieu and Passeron 1977; Giroux 1981; Jessop 2008). The relationship between the different planes is created and mediated through the modern state and forms of political regulation (Farnen 1994, p. 344) which also incorporate influential stakeholders and the field of power (Bourdieu 1996, pp. 261 ff.). The distinctive role played by the state originates from its powerful position of monopoly, as it provides the central authority of legitimate physical and symbolic power and force (police, laws; see Bourdieu 1999). The state possesses the power of definition in the field of education and can determine a specific, selected knowledge to be the official knowledge which is disseminated in schools (Apple 2004). Through this it controls cultural production, to a certain degree, by specifying a ‘selective tradition’ (Apple 1993) and similarly influences the transition from cultural reproduction to ‘cultural capital’ (Apple 2004, p. 182). This power of definition is, however, not absolute; rather, it is correlative with the powerful social elites and interest groups who collaborate with the state in the production of textbooks—also described as an ‘arena of discourses’ (Höhne 2003).

Modern education systems fulfil several reproduction functions. The socialisation/integration function refers to the plane of *cultural reproduction*, in which knowledge, meaning, ideology, and specific and multiple identities are front and centre (Bourdieu and Passeron 1977, pp. 194–210; Apple 1993). The qualification function and the creation of employability are located in the plane of *economic reproduction*, whilst selection, differentiation, individualisation, distinction, and allocation represent different forms of *social reproduction* (Giroux 1981). Education processes are thereby always overdetermined and are intrinsically linked in a variety of ways with other social fields and agents (Bourdieu and Passeron 1977, pp. 186 ff.); this applies equally to curricula design, textbooks, and other educational media.

Education as cultural capital is not distributed evenly and this contributes significantly to the reproduction of social disparities (Bourdieu 2004). There is reciprocity between education and other forms of capital, which have been identified as economic capital (money, property), social capital (networks, contacts, and connections), and symbolic capital (reputation, prestige) (Bourdieu 2004; Sullivan 2002). The fundamental societal agent in the acquisition of cultural capital and the primary requirement for a successful educational trajectory is the family, which represents another central component of social and cultural reproduction (Bourdieu 1996, pp. 290–299, 1984).

This is important for our perspective of educational media, as the habitual and social distinctions acquired before school are then confronted by very selective knowledge or by a specific culture within the school, that is to say, a further form of selection. It is above all the determination of official knowledge and the methods of transferral in the case of curricula and textbooks, which lead to the legitimisation of selection, and the acceptance of differences and disparities (Bernstein 1975).

The various planes of reproduction and their interaction characterise, historically and systematically, a specific mode of reproduction, dependent upon forms of political regulation and different curricular frameworks. In the field of educational media, this does not simply involve the control and approval of textbooks but also the political control of the textbook market (Jiménez and Campos 2010). The historical relationships between state/politics, education, society, and the economy have fundamentally changed since the 1980s and with them also the overall conditions and forms of cultural and social reproduction. The next section will illustrate how this is reflected in the changing conditions of textbook and knowledge production.

Changes in the Production of Textbooks and Educational Media: Tendencies and Empirical Findings

Although heterogeneous agents are involved in the production of textbooks and ‘textbook knowledge’ (Höhne 2003), in most countries around the world it is still the state that controls and approves them (see Heyneman 2006). From an economic perspective, there are a multitude of national textbook markets, which

are politically controlled to varying degrees (Jiménez and Campos 2010). The aforementioned changes in framework conditions are reflected in the radically changed production forms of textbooks and the corresponding shifts in textbook markets (Forman 2005, p. 1398). It is possible to identify several general tendencies and characteristics surrounding economic and cultural conditions of production and reproduction which are closely associated with the educational policy reforms of the 1990s. The following are economic determinants:

1. *An increase in monopolies and oligopolies*: in the economic sphere, there has been an observable tendency since the 1990s towards accelerated market concentration and oligopolies in the national textbook markets of Germany, the USA, and Canada (Macgilchrist 2015; Watt 2007, p. 11; Pinto 2007, p. 105). The German textbook market has seen a significant development since the beginning of the twentieth century which has seen the number of publishing houses drastically decrease from 288 in 1906 to only 80 in 1925 and further diminish to the point where the market was dominated by only 3 companies in 2012 (Macgilchrist 2015, p. 52).
2. *Diversification and new hierarchies*: in response to increased international competition in the publishing world as a result of globalisation (Sewall and Cannon 1991), publishing houses are implementing strategies aimed at diversifying their products and production methods. Many traditional textbook publishing companies are in the process of becoming general service providers, offering a broad and extremely diverse range of digital services (Höhne 2015; Jiménez and Campos 2010; Watt 2007). Mergers, takeovers, and the rise of oligopolies ‘within the textbook publishing industry affected the international dimensions of publishing, the costs and gains of restructuring in terms of financial and human resources, and the relationship between textbook and test products’, as ‘mergers led to restructuring into more efficient and competitive companies’ (Watt 2007, pp. 13–14). Simultaneously, new hierarchies are emerging in the new education markets, characterised by an increased ‘horizontal differentiation among booksellers and a vertical relationship between publishers and bookshops’ (Jiménez and Campos 2010, p. 71).
3. *Economisation*: the sinking profits from traditional educational materials have been met with intensified efficiency drives, economisation, shorter production cycles (Squire and Morgan 1990), and increasingly ‘aggressive timelines’ for producers/writers (Pinto 2007, p. 108), the effects of which have extended to the micro-level of knowledge production for textbooks (Macgilchrist 2015). This also includes the rising number of sector-specific subsidiaries belonging to large publishing companies. They are known as ‘imprints’ and create ‘multiple brands’ (Pinto 2007, p. 105) through which products can be marketed more effectively.
4. *New digital market-actors*: in addition to the ‘real market’ for educational materials, the digitisation and expansion of digital markets and private suppliers have created a more significant ‘digital and virtual market’ (Fey

et al. 2015), in which large numbers of new and heterogeneous agents such as toy and game retailers, private foundations, and NGOs compete (Fey et al. 2015, p. 25).

5. *Differentiated professionalisation*: risk minimisation strategies more closely assess the needs of future users and customers (Squire and Morgan 1990; Young 1990). This involves increased differentiation and labour specialisation in production, such as outsourcing, virtual teams, reduced core workforces, and expanded cooperation with freelance workers (Pinto 2007, p. 105), although the entire field is becoming more dependent upon innovations and the ability of publishing houses to adapt to a changing environment.

For further discussion on textbook publishing and the role played by publishers, see Christoph Bläsi's chapter in this volume.

The following points illustrate political regulation and cultural reproduction:

1. *Increased flexibility of control*: market expansion has gone hand in hand with education reforms which have been characterised since the 1990s by the liberalisation and deregulation of the approval process for educational materials (Höhne 2015, p. 12; Pinto 2007, pp. 107 f.). This has rather derailed the established framework which had long consisted of closely controlled curricular input, a textbook market strongly regulated by politics (Jiménez and Campos 2010, p. 73) and curriculum-oriented guidelines regarding mediated knowledge. In this respect 'many of the core conditions of the system' have fundamentally changed and the balance between the various actors has been disrupted (Forman 2005, p. 1398).
2. *Standardisation and isomorphism*: the priority for publishing organisations in the future will be to create strategies to effectively apply standardised output guidelines in the field of educational media. The main issue is not simply the attempt 'to satisfy the preferences of pressure groups' but the fact that textbook content is being homogenised in the process (Watt 2007, p. 14; Sewall 2005). These observations are confirmed by ethnographic studies of textbook production which reveal how the expectation to conform to curricular requirements is coupled with the increased interpretive freedom afforded to authors as a result of the absence of guidelines for substantive implementation that 'output logic' dictates (Macgilchrist 2015). Standards 'constrict' production to mainstream and supposedly 'verified content/modules' (Pinto 2007; Watt 2007). As a result, the (market) success of textbooks is measured primarily in terms of their ability to prepare pupils for exams and tests and to align their attainment to educational standards ('teaching-to-the-test'). This development affirms the theory of a 'transition from a general education concept towards a minimal education concept' (Steiner-Khamsi 2000, p. 124), which is characterised by a pragmatic literacy concept, minimal standards, and a core curriculum (Steiner-Khamsi 2000, p. 125).

The ability to verify content through testing goes hand in hand with a ‘basic provision’ of cultural competencies. A new development has acted as a catalyst for this transformation since the end of the 1990s. The aforementioned changes to the economic and cultural conditions of production, and to regulation through education policy, have been driven by the *increasing use of technology*, which will be addressed later in this chapter.

Expansion of Technology

Textbooks and educational media are a part of the curricular order and can therefore be classified as *curricular media*, representing an important aspect of cultural reproduction (Apple 2004). The term ‘curricular media’ describes the comprehensive and structural connections between education policy, curricula, educational media, and forms of teaching and learning, which together comprise the essential elements of the curriculum framework’s social construction (see Nohl and Somel 2015; Hiller 2012; Waks 2003; Höhne 2003; Apple 1993).

Since the education reforms of the 1960s, this regulatory framework of cultural knowledge production has demonstrated increased flexibility globally. This development relates to societal changes such as individualisation, new perceptions of autonomy, changes in forms of work and qualifications, and not least to new discourses on education and learning (competence, self-directed learning) (see Bernstein 1975; Hartong 2012). The expansion of new media and technologies has also contributed to this increased flexibility (Höhne 2015; Waks 2003). However, existing research has often neglected to investigate these aspects of increased technology as factors of change, although they are currently gaining importance in the field of education due to the dominance of the internet and new smart technology such as mobile phones and tablets. For it is not only the production, reproduction, communication, and mediation of knowledge and the forms of its acquisition and reception that are fundamentally changing but also temporal and spatial structures and formats of knowledge generally (see Lyotard 1984). The complex transformations in reproduction mentioned here comprise fundamental structural changes across three different levels of technology:

1. Political *controlling and regulatory technology* has since the 1990s been seen as a push towards rationalisation which is embodied by standardisation, benchmarks, empirical evidence, monitoring systems, test regimes, and output orientation. These factors have established a culture of visibility which is symptomatic of rationalised perceptions of education as a system of causally attributable and controllable outcomes. This transformation can be theoretically explained as the adoption of strong technologies (i.e. reduced models of variables and clear interrelated connections between quantitative indicators) by institutional actors which normally rely on ‘weak technologies’ (social norms, fuzzy goals of action), such as educational organisations seeking to gain more legitimacy (Meyer and Rowan 1977).

2. At the *media technology* level, the material structures of sociality, interaction, knowledge, and discourse are increasingly being combined with virtual versions of themselves—as a sort of real-virtual ‘augmented reality’ and a transformation of knowledge. This structural change takes place through the use of smart technology, digitisation, and the internet, whereby new sociotechnical configurations are established between actors and objects, progressively involving a more concentrated ‘sociality with objects’ (Knorr-Cetina 1997).
3. At the level of new forms of *subjectification and technologies of the self* (Foucault 2010), the concept of technology refers to the rationalisation of forms of self-regulation and self-control. New technologies of subjectivity are increasingly dependent upon virtual social networks, forms of expression through media, and individual access to knowledge. This demonstrates both the close interconnection between power and subjectification as well as new forms of exclusion that can be associated with them as the digitisation of knowledge and communication makes ‘media competence’ an important and distinctive social characteristic. The three-fold technological transformation presented here is therefore based on a broad concept of technology which

[incorporates] technical artefacts as well as social technologies and technologies of the self; it relates equally to arrangements of machines, media networks, writing and visualisation systems [...] and to sanctioning, disciplining, normalising, empowering, reassuring, preventative processes and so forth, with which people influence their own behaviour or that of other people. (Bröckling and Krasmann 2010, p. 27¹)

Besides economisation, the unifying characteristic behind these different technologies is their potential for individualisation and differentiation—whether in the focus on the individual school in the context of school autonomy policies, in the emphasis on individualised learning through new media, or in the forms of subcultural differentiation and distinctions which are made possible by social networks and virtual sociality. Jewitt places the *changing relationship between power and knowledge* associated with this transformation above the constitutive significance of new technologies in transforming communication, interaction, and subjectivity in education:

The use of new technologies in the classroom is important in thinking about pedagogy as design precisely because it can reconfigure what is done and who does what. This reconfiguration can reshape the relationship between power and knowledge in the classroom in significant ways for pedagogy. (Jewitt 2006, p. 143)

CONCLUSION AND INNOVATIVE PERSPECTIVES

The conclusion can be summed up in three respects: the importance of a cultural political economy for textbook and educational media research; economisation, which is a main tendency of the current educational reforms; and digitisation as part of a comprehensive technological transformation.

Most educational theories and empirical investigation in textbook and educational media research focus on reception and new forms of teaching in classrooms. They neglect the fact that educational media are always products which have undergone a long and complex process of production and reproduction of knowledge, practices, and discourses. The outlined theories of the cultural political economy of educational media shift the focus to the changing (re-) production conditions of educational media. The innovative thrust of the expanded reproduction approach lies not only in the relationality it reveals between economic, cultural, and political changes but also in its delivery of the concept of increased technology on the three levels mentioned earlier in this chapter. For empirical research, a correspondingly complex multilevel analysis design (Nohl and Somel 2015) is necessary, in which the different levels of political regulation (curriculum reforms, political approval of educational media), the changing production and market conditions, and the cultural transformations (social media, new identities, and modes of communication) can be related to each other. To capture the relationality with a mixed-method approach combining quantitative and qualitative data would be an important theoretical ‘surplus’ for the field of textbook and educational media research. The changes in the production of textbooks and the educational media market outlined here clearly demonstrate a tendency towards the increased flexibility and economisation of textbook production and the curricular media framework. The significance of principles such as ‘lean’ and ‘just-in-time’ seems to have grown equally in the areas of textbook production and curricular restructuring—an indication of the economisation of learning time and content. Yet, whilst this economisation does not signify an unremitting adoption of economic logic in the field of education, it does however bring with it normative shifts and new prioritisation, as shown by an emerging subject hierarchy with its central concentration on scientific, mathematical, and technical subjects (STEM). This makes clear the ways in which the different levels are interwoven in the transformation process and, moreover, the fact that economisation is a crucial factor. In this respect, the reproduction approach is linked with the discussion of the economisation of education (Verger et al. 2016).

Economisation processes affect not only the mode of production and supply of educational media but also refer to knowledge production. The multifaceted and profound political restructuring of mediated knowledge (competence orientation, standardisation, education plans, etc.; see Hartong 2012) is compatible with the digitisation of learning because of its spatial and temporal flexibility through the synchronicity and ubiquity of the internet. This enables much more rapid synchronisation of the political production of knowledge, as well as swift adaptation and adjustment to education standards or to changes in qualification standards in the employment system, as well as facilitating prompt modification to test formats.

All this is enabled by the digital infrastructure (internet, smart devices, data collection, etc.), which is a central element of a comprehensive technological transformation. The described processes are thereby leading to the increased use of technology, which also contributes to changes in reproduction because, in response to a range of logistic and functional demands, increased technology

use in curricular media is associated with improved flexibility and connectivity in education. Digitisation is not merely a singular phenomenon—as often assumed in the literature—but rather digital technology goes along with a new political technology of educational regulation (evidence- and data-based) and changing self-technologies (digital self, social media).

The connecting element of all these technological levels is knowledge or rather the transformation of knowledge. For traditional boundaries between economics, politics, media, and education are being deconstructed, partly through a ‘new corporatism’ (Wexler 1997, p. 1148) but also through new networks and constellations of actors that breach these former divisions, creating new interfaces that lead towards changes in regulatory and reproductive formats.

What new research questions emerge from these conclusions? On one hand, the shifting barriers, reorientation, and hybridisation associated with the concept of increased technology use can be analysed and examined empirically using the previously mentioned multilevel analysis. Different aspects can be examined in relation to educational media, such as an analysis of the influence of educational policy reforms or changes to the curricular framework, or an investigation into how publishers are changing the production of mediated and textbook knowledge. This new emphasis on the political economy of educational media highlights the changes in the conditions governing the production and reproduction of educational media and mediated knowledge and places them within the all-encompassing framework of cultural, economic, and social reproduction, which includes forms of political regulation.

NOTES

1. ‘... sowohl technische Artefakte wie Sozial- und Selbsttechnologien [umfasst]; er bezieht sich gleichermaßen auf Arrangements von Maschinen, mediale Netzwerke, Aufschreibe- und Visualisierungssysteme [...] wie auch auf die sanktionierenden, disziplinierenden, normalisierenden, ‘empowernden’, versichernden, präventiven usw. Verfahren, mit denen Menschen auf das Verhalten anderer Menschen oder auf ihr eigenes Verhalten einwirken’ (Translation N. Watson).

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Ideas and Concepts for Using Textbooks in the Context of Teaching and Learning in the Social Sciences and Humanities

Peter Gautschi

INTRODUCTION

Textbooks play a central role in the teaching of social sciences (Backhouse and Fontaine 2014) and humanities (Bod 2014). They are frequently the cornerstone of classroom teaching because they ‘enable lessons to be clearly laid out, reduce the complexities of themes, establish the chronology of events and present the stages of learning content as well as defining the structure of tasks and activities’ (Oelkers 2004, p. 1).

The relevance of textbooks in social science and humanities teaching is, however, reliant upon several factors (Fuchs et al. 2014, pp. 9–20). The use of textbooks for teaching and learning is primarily dictated by their subjects. The diversity of disciplines within the academic fields of the social sciences and humanities and the broad range of school subjects based upon them present correspondingly wide-ranging possibilities for textbook use. There are substantial differences, for example, between history, geography, political education, economics, law, ethics, religious studies, philosophy, languages, and the arts. Further, cultural variations shape teaching and textbook implementation. Finally, the importance attached to textbooks varies greatly between primary and secondary education or even within levels of secondary education. In addition, the role of textbooks naturally changes over time, as revealed by their material aspects and design.

The aim of this chapter is to illustrate the pivotal issues confronting teachers and students in their use of textbooks for social science and humanities subjects

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and to uncover the methodological diversity with which researchers address these issues as well as the array of theories and models available for the methodological examination of social sciences and humanities textbooks.

THEORETICAL APPROACHES AND FINDINGS

Today a considerable corpus of empirical research on textbooks is available, particularly in the areas of modern languages and social studies. The extensive research into textbooks which has already been conducted has given rise to methodological diversity (Beck and McKeown 1991) and an array of theories concerning the use of this key medium in classroom teaching and learning. This section examines these in more detail.

Methodological Diversity

Textbook research in the humanities and social sciences encompasses explorative and descriptive studies, and studies incorporating contextual and causal analysis (Mayring 2007; Nicholls 2003). The research subjects are the textbooks themselves or the people who work with them and learn from them. In the latter case, researchers investigate people either as individuals (such as selected pupils) or collectively (school classes, for example), or combine the two in the case of less common ‘multi-level studies’ (Diekmann 2007, p. 194; Mikk 2000). Particularly elaborate research designs incorporate comparative groups or control groups which learn with a different textbook or without a textbook at all. Textbook research in the social sciences and humanities is conducted through non-experimental, quasi-experimental, and experimental projects (Diekmann 2007, p. 192), designed as longitudinal or cross-sectional studies.

The diversity evident in the aspect of study design is also reflected in methods of data acquisition. Some textbook research in the fields of social sciences and humanities uses quantitative methods, that is to say procedures such as observations, questionnaires, experiments, or content analyses, to capture quantifiable attributes. The data are analysed in a variety of different ways, for example, using descriptive statistics (with medians and variance) or multivariate statistics (such as factor analysis and cluster analysis) (Thünemann and Zülsdorf-Kersting 2016).

Qualitative methods are, however, more common in textbook research in these fields (Pingel 2010, pp. 67–72). According to Flick (2006), qualitative methods allow verbal or visual data to be captured. Verbal data is frequently gathered when studying interaction with textbooks, through guided interviews, for example, or through personal accounts or group assessments, although visual data can also be collected through observations with or without active participation, ethnographic processes, or photograph and film analysis. Such data can be evaluated using methods such as coding and categorising (theoretical coding, thematic coding, qualitative content analysis, global evaluation) as well as through sequential analysis (conversation analysis, discourse analysis, narrative analysis, and objective hermeneutics) (Weinbrenner 1992).

If we wish to survey this considerable corpus of empirical research with its multiplicity of different study designs, it is helpful to divide textbook analysis in the field of social sciences and humanities into four branches of research (Wilson 2002; Gautschi 2007), each characterised by their shared objectives.

Descriptive textbook research aims to obtain a description and analysis of the facts as possible, that is to say, of the manifestations and production designs of textbooks; examining them as media, but also investigating timetables, curricula, and other factors that influence and describe how textbooks are implemented (v. Borries 2006; Foster 2011). Gathering information on the visual lesson structures of textbook use is just as important as ascertaining indicators of the quality of specialised teaching and learning (Blömeke et al. 2006). Descriptive textbook research investigates processes such as the development, marketing, and use of textbooks but also examines the textbooks themselves (Matthes and Heinze 2003). Historic textbook research is an especially well-established branch of descriptive textbook research, in the course of which a range of research questions and designs is applied to textbooks from the past (Moreau 2003; Fitzgerald 1979). Another central branch of descriptive textbook research is international textbook research, which conducts comparative analyses of contemporary and historic textbooks from around the world (Pingel 2000).

The objective of outcomes research is to evaluatively record and measure learning results (achievement, specialist interests, thematic approaches, and skills) after pupils have engaged with the textbook. Investigation of learning outcomes becomes evaluative when groups are compared or when defined standards or objectives are introduced (Doll et al. 2012).

Impact research conducts causal analysis of the connection between conditions of textbook use and subsequent impact, combining these with other aspects such as learning outcomes or teachers' interpretations. Impact research is used to identify factors responsible for the success or failure of textbooks (Schreiber 2008). Such studies combine descriptive textbook research with outcomes research and search for correlations between product and process. In contrast to the descriptive approach taken by outcomes research, impact research attempts to identify and determine conditions of success. One particularly well-established branch of this area of research is the analysis of media impact, which investigates the effects of design on pupils' learning.

Textbook researchers in the fields of social sciences and humanities also attempt to generate outcomes through experiments, that is, to systematically observe effects and measure them. Intervention research is one such process (experimental, with various degrees of control). This branch of research develops, implements, and evaluates the effectiveness of specific teaching sequences, units, or scenarios based around textbooks. The aim of such processes is not to describe the reality of existing teaching but rather to identify factors that positively or adversely affect teachers and pupils, or to point to practical, process-oriented improvements. In an ideal methodological research environment, intervention research is simultaneously experimental research. According

to Atteslander, intervention research requires ‘a high measure of control over the social situation’ and ‘encapsulates the most rigorous form of hypothesis testing’ (Atteslander 2003). Intervention research acts as an experiment ‘to examine an existing theoretical statement according to specified conditions’ (Atteslander 2003, p. 196). A core component of intervention research in the fields of social sciences and humanities is the degree of theorisation required on textbook implementation.

Due to the extensive amount of existing research into textbooks in the fields of social sciences and humanities, there are many theoretical approaches to classroom teaching and learning using this key medium (Rüsen 1992; Herber and Nosko 2012). Many are based in pedagogics, educational theory, and teaching methodology. There is also increasing influence from disciplines such as communication and media studies and from sociology and economics.

The Didactic Triangle as a Basic Model from Pedagogy

A range of techniques enable the research subject to be delineated and characterised. Textbooks can be defined from an administrative, didactic, or sociological perspective (Fuchs et al. 2014, p. 10). ‘Sample analysis’, a methodology that uses selected examples to investigate the subject from a range of perspectives, is another established process, which reveals questions and hypotheses to the researcher. Klaus Prange demonstrates this technique in his publication *Bauformen des Unterrichts* (Teaching Design) using examples from Plato’s ‘Meno’, from which he derives the didactic triangle as the ‘basic dimension of teaching’ (Prange 1986, pp. 34–45). The model of the didactic triangle can be implemented in textbook research to describe and investigate the diverse manifestations of textbooks. The three corners of the triangle are the subject to be taught, the student, and the teacher. These are important structural elements of textbook research.

Researchers focus firstly on the matter of the subject. Theoretically, for every textbook produced for social sciences and humanities subjects, there is almost unlimited data available to be collated and incorporated. The treasury of knowledge held by and in our society is continuously expanding, and finding an answer to the question of precisely which knowledge young people should absorb from the mass of information available is becoming increasingly challenging. When developing textbooks, the selection of material is therefore one of the principal tasks, arguably the core of the development process. A textbook can never communicate the ‘whole’. Choices must be made, and these individual details, arranged, ordered, and selected, must ‘showcase’ and represent the whole (Furrer 2004). The process of textbook development does not follow a purely academic or didactic logic. Political and practical factors play a decisive role in the procedure (Gautschi 2006, pp. 117–48). The material is reduced, structured, and formulated, an undertaking that produces a succession of questions for object-oriented or content-oriented textbook researchers.

Secondly, textbooks are recipient-oriented (Knecht and Najavarova 2010). They are aimed at a very particular user group, namely, pupils and students, whose interaction with the textbook is intended to enhance their knowledge, skills, and outlook (Barricelli 2005). These clearly defined recipients and objectives generate further questions for textbook researchers (Gautschi and Binnenkade 2006). Thirdly, textbook researchers focus on the role and the behaviour of teachers using textbooks in the classroom (Günther-Arndt 2008). Depending on their own perception of their role, teachers may act as disseminators of information, managers, or coaches (Gautschi 2000, p. 21).

Following these three core aspects, there are then three further important structural elements of textbook research: fourth, the culture of interaction and relationship between teacher and students; fifth, the learning culture that allows the encounter of students with the subjects (Foster and Crawford 2006); and sixth, the relationship between the teacher and the subjects. What kinds of objectives does the teacher choose? How are student tasks formulated (Fink et al. 2009)? On which materials are the tasks based?

As a seventh aspect, it is evident that the environment shapes lessons in general terms and more specifically, determines textbooks (Lässig 2010). Lessons and textbooks are directly and indirectly governed by society; the subject matter taught reflects the prevailing culture. Textbooks can be viewed as a society's communal memory or as the result of a process of negotiation in the 'discursive arena' (Höhne 2003). Politicians naturally attempt to gain access to textbooks in order to sculpt society to their own way of thinking. But parents also take great interest in textbook content.

Finally, the textbook itself can, of course, be the subject of research. Such investigations may include design or examine how the different elements within the textbook refer to one another and whether the textbook forms part of a comprehensive teaching and learning environment. How many components does the textbook incorporate? How are the specific textbook elements designed? How does the textbook compare with others? Is it a political, informative, or educational object? (Stein 1977).

Teaching Models from Educational Studies and Teaching Methodology

A series of complex teaching models to facilitate discourse on classroom teaching and further its research have been developed in recent years in the area of educational studies and teaching methodology, specifically for application in the fields of social sciences and humanities. The aim of these models is to demonstrate how individual aspects of the classroom setting are connected and how they mutually strengthen or weaken one another. Fend (1981) was responsible for introducing economic concepts to pedagogy, such as applying the concept of supply and demand to teaching. Helmke and others adopted these ideas and developed them further. Helmke's structure model is based on the 'rationale that teaching should be viewed as a product; whether or not it is effective depends upon its use' (Helmke 2006, p. 43). The model suits the systematic

character of lessons and has an important advantage: ‘it specifies the parameters that can be adjusted by teachers and pupils in order to increase the success of the learning outcome’ (Andreas Helmke in an interview with Hilbert Meyer and Ewald Terhart in Becker et al. 2007, p. 62).

This model explains that teachers play a significant theoretical role in the classroom implementation of textbooks. In many places and in many subjects of the social sciences and humanities, teachers determine the role played by textbooks in their teaching practice. They can implement textbooks as the guiding medium and can design their lessons around the textbook, or they can use the textbook as a source of teaching material and exercises and can select excerpts for use in lessons. Teachers can also use the textbook as a device for connecting lessons and providing pupils with reading assignments for preparation or revision. Alternatively, they can refer to the textbook for their own preparation but not implement it directly in class or they can choose not to use it at all (Gautschi 2011).

Other factors may also determine how teachers and educators structure their use of textbooks. Fröhlich (1997) defines three types of textbook use: presentational textbook use involves the teacher presenting the relevant material from the textbook and implementing it in the form of declarative knowledge instruction. A teacher using an instrumental and heuristic approach uses the textbook as a source for material and assignments that will enable pupils to acquire knowledge independently. Critical textbook use, meanwhile, allows the instructor to build their pupils’ procedural knowledge, for example, through comparing different textbooks’ depictions of the same topic. Teachers’ textbook use can also be analysed according to the phase in which they implement the material (introduction, development, consolidation, reinforcement; Teepe 2004) or for what purpose (motivation, visualisation, knowledge transfer).

Recent studies have revealed the importance of focusing on the teacher when analysing textbook use. In their study of the use of history textbooks in lessons, *‘Hinschauen und Nachfragen. Die Schweiz und die Zeit des Nationalsozialismus im Licht aktueller Fragen’* (Look closely and enquire: Switzerland and the National Socialist era in the current context. Bonhage et al. 2006), Bernhard Schär and Vera Sperisen (Schär and Sperisen 2010) demonstrated that teachers mould history textbooks to fit their own views. In practice, they are not simply transposers of history textbooks, rather they are interpreters of the suggested material and the associated task management.

Hans-Jürgen Pandel is therefore correct when he writes that history textbooks primarily satisfy the requirements of the instructor and are consequently ‘teacher-friendly books’ (Pandel 2006, p. 36). He is, however, incorrect when he maintains that history textbooks ‘provide the methodology for lesson design and demand no methodological imagination from [teachers]’ (Pandel 2006, p. 36). Teachers develop their own lesson plans and use textbooks as a repository of information. They select a text from the book that fits their concept, then a source text or an image that they regard as stimulating. They change the material as presented in the textbook by copying it, dissecting it, and presenting it to their pupils to reassemble. Teachers use textbooks as a

‘collection of individual elements’ (Pandel 2006, p. 18), from which they select building blocks to either construct a comprehensive whole themselves or allow their pupils to find the relationship and create the context.

Models from Communication Studies

According to theories from communication studies, the teacher’s main tool is not the textbook at all; rather it is communicative action (Hausendorf 2008; Hecht 2009; Schelle et al. 2010). In the mid-twentieth century, linear perceptions of communication predominated (Krendl et al. 1997), but this changed in the decades that followed with the increasing influence of psychology within communication studies. Communication, it was postulated, is ‘not merely the means through which people purposefully receive information or attempt to direct others [...], rather communication is also invariably the method through which humans determine identity, relationship, society and reality’ (Pieper et al. 2014, p. 23). Communication in this sense is more than simply the conveyance of informative facts and figures; rather it is the way in which this is done and how the information is explained or interpreted. This reading of the concept is best depicted by cyclical as opposed to linear models.

Two points can be deduced from such models and theories: first, transmission does not occur along a linear chain of impact consisting of input—process—outcome. On the contrary, learning is a multifactorial process in which communication is of central importance. Alexandra Binnenkade describes a ‘discursive node’ (Binnenkade 2015, pp. 31–34) and explains how many strands from a variety of ‘social arenas’ influence classroom teaching and that many factors merge during the teaching and learning process. Secondly, it is important to pay particular attention to the people involved in the communication. In addition to the person teaching, those learning are of central relevance. Only through them can the teacher extract meaning from the material, and the extent to which this is possible depends fundamentally upon the elements brought to the communication process by the pupils: What opinions shape their communication in the classroom? How accurately do they communicate? And how do they implement textbooks in their learning and communication?

In their definitive work on history textbooks, Bernd Schönemann and Holger Thünemann (Schönemann and Thünemann 2010) describe four different ways in which textbooks can be used by pupils:

- Information extraction through reorganisation,
- Knowledge acquisition through exploitation of material,
- Judgement formation through problem solving,
- Ideology critique through synchronous and diachronic textbook comparison.

Another way of categorising pupils’ possible textbook use is by employing the competence model, which provides theories for subject-specific learning. Do pupils use the textbook in their perception of new phenomena? Do they

use the textbook to develop what they have learnt? Does the textbook facilitate pupils in their interpretation? Does the textbook call for subject analysis, evaluative judgements, or value judgements (Gautschi 2009)?

It is also possible to theorise on the role played by textbooks in classroom communication: Is the role of textbooks: (1) structuring, (2) representative, (3) guiding, (4) motivating, (5) one of differentiation, or (6) of practice and control (Hacker 1980)?

Further Models of Textbook Theorisation

It is not exclusively models from pedagogy, the education sciences, teaching methodology, and communication studies that are suited to textbook theorisation. Many other academic fields have models that can be applied to textbook research according to the relevant epistemic interest in each case. Researchers who seek to explore in the economic aspects linking production context, application, and interaction can find constructive basic principles in the field of economics and business administration, which provides models depicting value creation, for example (Fuchs et al. 2010). Becker (2013) uses his model to combine the analysis of value creation processes with strategic environmental analysis, a model employed, for instance, by Anna Julia Heym in her (2014) study *Digitale Bildungsmedien. Welche Faktoren beeinflussen die Strategien der Schulbuchverlage?* (Digital Educational Media: Which factors influence the strategies of textbook publishers?)

The centre of this model features five supporting pillars which can be applied to textbook publishing. The key performers are the publishers, authors, and editors of the textbook, as well as graphic designers and picture editors. Systems that play a role in textbook creation are primarily the publishers' internal data systems, which differ depending on whether a printed book or an online resource is being produced. Stakeholders in the process include the directors and employees of the publishing companies as well as competitors, curriculum planners, education policymakers, and local purchasers of teaching materials for schools. Relevant regulative institutions for the textbook market are the state, local government, and schools, as well as teacher associations and parent organisations. Service providers related to textbook production are the manufacturers, printers, and other suppliers. Many questions can be asked about each aspect of production and the associated input and output factors; they might include enquiry into who is responsible for innovation in textbooks or who has the power to define their content or didactic approach.

RESEARCH PERSPECTIVES AND DEVELOPMENT OPPORTUNITIES

Textbooks have been widely and extensively researched in the fields of social sciences and humanities. The attention paid to textbooks and their digital forms is undoubtedly justified, as they remain the fundamental medium behind teaching (Schönemann and Thünemann 2010, p. 7; Pandel 2006; Gautschi 2006).

Design experiments (Burkhardt and Schoenfeld 2003, p. 4) appear highly promising in view of the changes textbooks for the social sciences and humanities are currently undergoing in terms of digitisation and internationalisation (Hiller 2012; Matthes et al. 2013). Such experiments enable cooperative collaboration between stakeholders from a range of environments, such as educational practice or academia, and between actors from diverse backgrounds, such as history didactics, education, and media studies, or collaborations with historians (Hollenbach and Tillmann 2009). Pupils can also increasingly be incorporated as research partners. Design experiments develop, test, and improve theoretical prototypes for textbook chapters. The teaching and learning environments developed through this process are implemented in various classes and studied. The level of interaction provided by design experiments is instrumental in maintaining dialogue between academia and practice, especially in school settings where studies typically require highly complex designs (Schön 1987). Ultimately, design experiments also present ideal learning opportunities for use in teacher training. They advance pupils' knowledge and the subject-specific and pedagogical knowledge of teachers, knowledge that has been proved to be a central psychological component of professional teaching competence (Bromme 1992, 1995). The form of knowledge determines how certain teaching topics, content, or assignments are selected, presented, and adapted to pupils' differing motivational and cognitive requirements (Shulman 1991). Design experiments build bridges between textbook research and teaching practice and offer immediate practical benefit, enabling education practice to make methodological progress. They are an ideal teacher-training tool and, as ascertained by Shulman, they connect a range of research disciplines: 'A design experiment is typically a marriage of experiment and ethnography, of adaptive experimentation and thick ethnographic description' (Shulman 2004, p. 300).

Design experiments also present an ideal opportunity for textbook research to make an impact because they connect pragmatism with theory and empiricism. The development of a textbook therefore becomes an example of the much-pursued circular process incorporating research, theory, and practice. Academic research provides new and relevant knowledge, which can be refined according to new didactic theories—on developing competences and lesson planning, for example—and made accessible for young people. Textbook chapters developed in this way are tested, examined, and improved in the classroom, which in turn produces new theories and leads to revisions in teaching practice. These revisions can themselves be studied through further design experiments, keeping the circular process flowing.

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Science and Geography Textbooks in Light of Subject-Specific Education

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INTRODUCTION

Textbooks are essential tools for science and geography education, which is why there is a rich tradition of academic research dedicated to them. However, academic interest in textbooks often waxes and wanes and the research itself is frequently descriptive with its methodologies lacking in innovation. What are the reasons for this lack of continuity? What methods are used in textbook research? What is the main theoretical foundation for textbook research and what methodologies does it contribute to? This chapter seeks to answer these questions by examining the content, level, and methods of selected studies dedicated to biology, chemistry, physics, science, and geography textbooks and by including examples from those studies. Given the heterogeneity of educational resources used in mathematics, engineering, and technology, the focus remains on science and its satellite subjects rather than targeting STEM education in its entirety. In addition, research into geography textbooks adds the perspective of a subject that unifies perspectives from science and social science.

BIOLOGY

Research on biology textbooks remains primarily located within national settings, focussed on one level of education and displaying limited methodological innovation. Most studies seem to explore similar issues, such as genes, cells, or the nature of science (NOS) solely within national frameworks. Only a few comparative studies (see Gericke et al. 2014) make a greater contribution to the overall progress of biology education.

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Content is the most explored aspect of biology textbooks. While a few studies discuss the representation of selected biology content in light of broad societal discourse, the main emphasis remains on subject-specific aspects. Central topics are genes, race, and Darwinism/evolution. The comparative study carried out by Gericke et al. (2014) identified an overall international textbook discourse on genes, which contained ontologies of genetics and molecular biology, but separated them from their respective epistemological underpinnings during the process of didactic transposition. In a similar vein, Martínez-Gracia et al. (2003) found that textbooks featured unclear definitions of genetic engineering, poor explanations of the processes involved, and disrupted references to protein expression, the common genetic material (shared by all species), and the universal genetic code. In addition, most books limited their examples to fashionable topics (e.g. human cloning) and only introduced the repercussions of genetic engineering in general and selective terms. Other studies explored the representation of race in biology textbooks (Donovan 2015) and concluded, mindful of psychological essentialism, that understanding human genetic variation would deconstruct prejudice-laden racial beliefs. Another topic of biology education that is met with resistance by non-scientific sources is evolution. Borenstein (2008), for example, argues that textbook stickers providing disclaimers about evolution are neither beneficial nor welcome additions to the biology classroom. In contrast to evolution, the topic of digestion has a long tradition in biology textbooks. However, as Carvalho et al. (2007) found in a sample of textbooks covering the period from 1920 to 2005, inadequate images in Portuguese biology textbooks prevented students from comprehending the digestive function. Cells are another core topic of school biology and Clément (2007) explored pedagogical, historical, and sociological explanations of the persistence of two-cell prototypes, while Cohen and Yarden (2010) concluded that textbooks generally introduce cells from an anatomic and morphologic rather than a physiological point of view.

Given its importance for overall science education, issues related to the NOS require special mention. Chiappetta and Fillman (2007) analysed the five most recently published US biology textbooks and concluded that the four themes of science literacy enjoyed a more balanced representation than that found in previous studies conducted 15 years ago; specifically that students learnt how scientists work. In contrast, Turkish textbooks were found to depict science as a body of fact instead of introducing the process of explaining nature (see Irez 2009).

Research on biology textbooks also reached beyond mere content and explored conceptual (in)consistencies. While Clément (2007) explored the depiction of concepts of cells throughout history and Carvalho et al. (2007) analysed the ways digestion was introduced, Flodin (2009) focussed on genes in order to explore visible concepts with multiple meanings. Unlike much research on textbooks in other fields, at the heart of these studies were classroom observations and contemporary challenges of teaching and learning that are intimately connected to biology textbooks.

Similarly, research on biology textbook usage often explores issues of classroom teaching and learning practice. While Ge et al. (2017) used a quasi-experimental setting to understand how explicit visual cues influenced the ability to read biological diagrams, Hay et al. (2013) explored the influence of textbooks and experience on the ability to draw brain cells. Kloser (2016) followed a multivariate experimental design to evaluate student outcome based on their use of either traditional textbooks or more epistemological texts. Given the nature of biology education, a number of studies analysed the role of textbooks in laboratory settings. The work of Hand et al. (2004) explored whether the use of a science writing heuristic enhanced learning outcomes. These studies all examined secondary education, as did Tan's study (Tan 2008), which aimed to identify tensions in teacher-student interactions. Despite their clear contribution to research into textbook usage, most studies prioritised the understanding and improvement of subject-specific skill acquisition and subject-based teaching and learning.

In an assessment of the education levels covered by studies, the majority of research into biology textbooks was found to mainly focus on secondary education. Some selected studies do explore textbook-related issues at primary or tertiary level but papers connecting different levels of education are still an exception. Similarly, longitudinal aspects of developments in textbook content and usage could offer valuable insight into the process of teaching and learning biology; continuing the work conducted by historical studies (e.g. Clément 2007; Carvalho et al. 2007).

When examining methods used by researchers, the majority of studies into textbook content were found to use variations of content analysis; ranging from criteria-based absence/presence studies to ethnographic content studies. In contrast, textbook usage studies mainly relied on (quasi-)experimental and multivariate designs. Mixed methods are yet to be widely adopted. The sample size varied greatly ($n = 1\text{--}63$ textbooks) with rather smaller values in experimental usage studies and varying numbers of textbooks in content-related projects.

CHEMISTRY

Research on chemistry textbooks remains strongly tied to content, tends to employ already tested and validated methods, and is dominated by studies on higher education.

A number of studies offer historical perspectives on the representation of content, such as the atomic structure (Rodríguez and Niaz 2002) and the covalent bond (Niaz 2001). In most cases, the papers adopt a (meta-)reflective perspective on theories and their application over a certain period of time. Unlike research into other subjects, content-related studies in chemistry often contextualise textbooks within the specific process of teaching and learning chemistry. For example, Han and Roth (2006) explored how chemical inscriptions in Korean textbooks fostered the process of learning and found that

different processes of semiosis between models based on microscopic particles and the inscriptions depicting them, generated difficulties in students' understanding of the nature of matter. Talanquer (2007) analysed the role and nature of teleological explanations using the example of chemical phenomena and reflected on specific conditions that can warrant a teleological perspective in chemical education, but might also lead to alternative conceptions and over-generalisations. Work presented by Furió-Más et al. (2005) on acid-base reaction theories contrasted textbook content with information delivered by teachers during chemistry classes and concluded that classroom teaching failed to emphasise the presentation of acids and bases and introduced concepts in a non-problematic manner.

Similarly, Croft and de Berg (2014) explored the teaching of chemical bonding and its development from common sense to a scientifically conditioned concept. Kaya and Erduran (2013) focused, within the framework of epistemological perspectives, on concept duality, chemical language, and structural explanations. Overman et al. (2013) adopted a double perspective (content versus learning activities) to evaluate tasks and questions in selected content and found that even context-based chemistry textbooks feature the same amount of traditional chemistry content as their traditional counterparts. Kahveci (2010) took a closer look at Turkish textbooks to analyse the implementation of reforms at content level in chemistry and science textbooks and identified the main shortcomings to be gender representation, few inquiry-based approaches, and dense scientific terminology.

Despite this impressive variety of content-related research, there is little information on the variables of chemistry textbook usage. One of the exceptions is the study by DiGiuseppe (2014) that contextualised the NOS within the framework of textbook production, design, and usage. The results showed that factors significantly influencing the development of its representation were accuracy, consistency, appropriateness, alignment, marketability, and workplace resources.

College and university textbooks were the main focus of most researchers interested in chemistry textbooks. In addition, a number of studies explored content and usage-related aspects of chemistry texts for secondary schools, but few studies analysed educational media designed and produced to teach chemistry as part of primary education. However, this is unsurprising given the relatively late introduction of chemistry as an individual school subject and the emphasis on general science education during the first four years of compulsory schooling.

Most studies followed a content-analytical approach of some sort. Works that emphasised the scientific accuracy of textbook content mostly developed categories based on theories, models, and concepts from different sub-disciplines of chemistry. Other studies amended previously published sets of criteria. Authors interested in textbook usage and development combined content analysis with semi-structured personal interviews or opted for convergent experimental designs (e.g. Furió-Más et al. 2005). Overall, the studies seem

rather conservative in terms of the research methods employed; however there is a slight tendency towards methodological plurality in an attempt to obtain a more thorough exploration of learning and teaching chemistry which seems to have percolated scholarly work on chemistry textbooks. The sample sizes range between 1 and 37 textbooks, with experimental studies generally displaying smaller sample sizes.

PHYSICS

Scholarly work on physics textbooks is dedicated to improving the teaching and learning of physics. While much of the content-related work merely aims at increased scientific accuracy, there seems to be an evolving movement exploring the usage of textbooks (compared to other educational media) primarily for purposes of skill development. The primary focus remains, legitimately, on the subject-specific particularities. Similarly to research into chemistry textbooks, research on physics textbooks has only recently explored methods other than content analysis and, again in common with chemistry, most studies concentrate on secondary and higher education.

A large body of research into physics textbooks has explored the accuracy of their content. Niaz et al. (2010) focused on how the photoelectric effect was introduced in general physics textbooks for higher education and found that the history of this particular concept was largely ignored or distorted in the textbooks. The analysis of textbooks used in Israel showed a conceptual distinction between weight and gravitational force and that the gravitational definition of weight was frequently replaced by the operational definition (Galili 2001). Other studies explored content-related aspects, such as the atom (Rodríguez and Niaz 2004), the theory of relativity (Arriasecq and Greca 2007), heat and temperature (de Berg 2008), circular motion (Stinner 2001), metamodelling in mechanics (Niss 2009), and electromagnetism (Pocovi and Finley 2003).

Reaching beyond the realm of content analysis aimed at boosting scientific accuracy, some studies analysed textbooks in order to improve the process of teaching and learning physics. Thinking experiments in the theory of relativity served as a case study to explore the contribution of textbooks and popular science books to a better understanding of content (Velentzas et al. 2007). The authors found that knowledge of the terminology of popular science books enabled easier comprehension of concepts and theories in physics. Another study (Pol et al. 2005) compared the relationship between the acquisition of problem-solving skills and the choice of educational media. Using a pre- and post-test design, the study compared the achievements of two lower-secondary pupil groups. The authors concluded that the group that was taught with both the textbook and a computer-supported tool achieved better results than the control group that worked solely with the textbook.

The third string of research on physics textbooks is dedicated to the role of textbooks during teacher training. In a study carried out in Cyprus, Zacharia

(2005) compared the quality of explanations delivered by student teachers. While the control group was required to use the textbook, the second group of student teachers had the opportunity to combine textbook information with interactive computer simulations. The second group was found to generate more accurate and elaborate explanations and to follow much stronger cause-and-effect reasoning.

As with chemistry, research on physics textbooks mainly focusses on secondary and higher education. Studies exploring college and university textbooks often explore aspects of content, while textbook usage seems to be the main focus for scholars interested in secondary-level physics education (see, e.g., Pol et al. 2005; Dimitriadi and Halkia 2012; Arriasecq and Greca 2007).

In terms of methodology, content-related research generally employs qualitative content analysis. Analytical categories and criteria range from empirically validated categories to point-based criteria evaluation (e.g. Niaz et al. 2010) and conceptual categories developed on the grounds of theories, models, and concepts. Normativity is inherent in almost every content analysis. Studies exploring textbook usage in different settings opted for pre- and post-test designs (Pol et al. 2005), semi-structured interviews (Zacharia 2005), and (quasi-)experimental settings. Operationalisation generally follows the paths of previous studies and strives for instrument validation. The sample size fluctuates between 1 and 41 textbooks. In some cases, samples cover seven decades (e.g. Niss 2009) offering insight into historical and development aspects.

SCIENCE

Research on science textbooks focuses on both content and usage. In addition to subject-specific skill development and conceptual accuracy, scholars seem to be interested in ways to improve the teaching and learning of science. Good language skills are therefore essential. In terms of scale, most studies limit their analysis to national samples. However, the variables explored are rarely connected to specific national curricula. Existing studies examine textbook content and usage at all three educational levels and employ a multitude of research methods.

The studies examined that conducted content-related research explored three main aspects of science textbooks. The first aspect is strongly tied to the representation of theories, concepts, and subject-specific factual knowledge. In this context, Talanquer (2007) found when analysing magnets that ceramic magnets were omitted, despite the great variation of concepts displayed, and that a number of frequent misconceptions occurred when magnetic poles were explained. The study by Link-Pérez et al. (2010) focused on illustrations of plants and animals in science textbooks and concluded that animal photographs were three times more likely to be comprehensively labelled, whereas labelling on representations of plants was often limited to selected organs (leaves, roots) or life forms (e.g. shrubs, trees).

The second aspect explored by scholars interested in content is more strongly tied to the overarching concepts and forms of knowledge. Against the background of postcolonial theories in general, and essentialism in particular, Ninnes (2000) compared the representation of indigenous knowledge in Canadian and Australian textbooks and concluded that, despite the alternatives being well represented, Western science is still considered to be the only science. Other studies reflected on environmental education (EE) and analysed the representation of nature in Greek science textbooks (Korfiatis et al. 2004) or the relationship between humans and nature in US science textbooks (Sharma and Buxton 2015). While the Greek textbooks described the delicate balance of nature and that much of it was under human control, exploited as a resource for raw materials and food, their US counterparts offered outdated representations of the role of human agency. In addition, Morris (2014) found when analysing the representation of reproductive genetic technology and climate change that socio-scientific aspects included in textbooks barely covered the perspectives provided by social science curricula and were in essence not multidisciplinary. Another conceptual aspect was examined by Elgar (2004) who explored how genders were represented in selected science textbooks from Brunei and found an imbalance in favour of men in both discontinuous (pictures and drawings) and continuous text (pronouns and nouns).

The final aspect of research into content in science textbooks is dedicated to the representation of science and scientific thought. One study of South African textbooks found inconsistent descriptions of the development of scientific knowledge (see, e.g., Ramnarain and Chanetsa 2016). Similarly, the analyses of ideologies in Norwegian science textbooks revealed flawed depictions of scientific process. According to Knain (2001), individual scientists were depicted as having discovered the truth solely by means of experimentation and without any discussion of their results with peers.

In addition to content, research on science textbooks also explores skill acquisition and development. Morris et al. (2015) examined opportunities to reason with data in textbooks and supported their argument with information derived from evidence-based instructional strategies. The results showed that science textbooks provided limited support for reasoning with data. The work presented by Stylianidou (2002) focused on skills required to decode and interpret pictures and images. Similar work on discontinuous text was carried out by Pozzer-Ardenghi and Roth (2005) in Brazil. In addition, Hatzinikita et al. (2008) found an alarming mismatch between tasks featured in Greek science textbooks and PISA test items.

Overall developments and advances in science education are yet another focus of textbook research. Lee (2010) explored how visualisations in US textbooks had changed over time and found that schematic and explanatory images were progressively replaced by photographs; however, no alternatives to the schematic and explanatory images were introduced. Dunne et al. (2013) examined Irish primary textbooks and concluded that there are still improvements to be made in their support of inquiry-based learning. Several studies suggested

that the implementation of a historic perspective when teaching science could be productive. According to Lin et al. (2002), embedding content into a history of science setting increased problem-solving abilities. Similarly, Lin et al. (2010) registered improved learning outcomes when pupils used a historical episodes map when compared with mere textbook work.

Reading comprehension in native and second-language speakers is another area of growing interest among science educators. Using the example of photosynthesis and respiration, Ryoo (2015) reflected on the effect of teaching science through the language of students and observed that English language learners (ELL) acquired both content and the language of science much easier when using English. Similarly, Sørvik et al. (2015) found that integrated science-literacy instruction enabled the emergence of multiple literacies, where parts of students' informal literacies became resources in the dialogic process of inquiry. Nigro and Trivelato (2012) set an emphasis on gender-related aspects in the reading of popular scientific texts. Hsu and Ou (2013) further explored reading tools for science texts to improve skill acquisition for English language learners, while Miller (2009) worked with refugee children whose education had been disrupted to explore strategies aimed at improving the learners' vocabulary.

Lastly, some of the scholarly work on science textbooks is dedicated to the process of enquiry itself and explores research methods and instrument development. Some of these studies developed and validated checklists to reveal differences among the textbooks with regard to the historical scientific context (Leite 2002) or to evaluate enquiry-based tasks in science textbooks (Yang and Liu 2016).

In contrast to the individual subjects of biology, chemistry, and physics, research on general science textbooks includes all three levels from primary to higher education. The fact that primary textbooks are more likely to be scrutinised in such studies might be explained by the fact that science education is part of K-4 as opposed to the individual science subjects (i.e. biology, chemistry, physics) that are normally taught in secondary schools. Despite this, the main research focus is still on science textbooks for secondary education, although studies addressing content and skill acquisition are equally well represented at primary and secondary level. Research on college and university textbooks tends to be limited to content.

Scholars analysing science textbooks use a variety of methods. While different types of content analysis (checklists; criteria based on theoretical models; category construction and validation) still prevail, other methods, such as design-based approaches (Ryoo 2015), covariance analysis (Lin et al. 2002), (critical) discourse analysis (Sharma and Buxton 2015; Ninnes 2000; Knain 2001), observational video and interview studies (Sørvik et al. 2015), questionnaire-based surveys along with interviews (Stylianidou 2002), and intervention studies (Viiri and Saari 2004) have been employed to explore textbook content and usage. Across these studies, sample sizes are extremely heterogeneous. Overall, textbook research in the area of science education

seems to be transitioning towards processes of teaching and learning and to adopt a diversity of methods to explore its variables.

GEOGRAPHY

Research into geography textbooks is predominantly content-focussed and centred within regional and national frameworks. It tends to be conservative in terms of methods and to enjoy episodic scholarly interest. Bagoly-Simó (2014) carried out a meta-analytic study to examine the development of topics, methods, and sample sizes of research on geography textbooks. A total of 102 studies published over the course of the last century in international and German journals were subjected to software-assisted content analysis. The main findings are summarised later in this chapter.

Research on geography textbooks has a long tradition of content analysis. Both international and national publications have focused on the representation of groups of people (immigrants, ethnic minorities, indigenous groups, etc.), processes (globalisation, post-socialist transformation, climate change, etc.) as well as regions and spatial entities. While the international literature primarily focuses on structures, publications in German often explore the representation of processes. Additional differences emerge when examining choice of scale as articles published in Germany were frequently unbound in scale as opposed to their international counterparts which focus on a continental scale or unit (e.g. Appalachia, Sahara). Furthermore, studies printed in international journals drew attention to issues of geography education, such as task and exercise assessment, acquisition and development of map skills and standard implementation. This is not the case in German publications. Geography education has traditionally displayed strong ties to environmental education and subsequently to Education for Sustainable Development (ESD). As a result, since the 1970s, a number of papers have explored issues related to the environment, its protection, and sustainable development.

Scholars interested in geography textbooks explored all three levels of the education system. While papers published in German maintain their emphasis on secondary education, international publications primarily focus on higher education.

A variety of methods are used to examine geography textbooks. Most studies used some type of content analysis, but interviews, surveys, semi-quantitative historiographies, experimental settings, space analyses, and interpretative readings are also employed. International publications predominantly used qualitative methods from the 1960s until the 1990s. Quantitative methods became popular in the early 2000s and mixed-methods approaches replaced qualitative studies. The popularity of quantitative methods was not reflected in Germany, however, where they remained the exception whilst qualitative and mixed methods became popular. The sample size has decreased progressively over the decades. During the 2000s and 2010s, both qualitative and mixed-methods studies used similar sample sizes (one to five textbooks).

THEORETICAL AND CONCEPTUAL FRAMEWORK

Content-oriented textbook research in science and geography utilises a multitude of subject-specific theories. In addition, a range of theories originating in sub-disciplines of education sciences and psychology of education have influenced a number of papers. The richness of textbook research in subject-specific education originates from the challenge of bridging subject-specific aspects with wider aspects of teaching and learning. However, this can lead to other challenges, specifically in terms of theories. Along with an emergent general theory on textbook research, studies exploring specific subjects must also consider theoretical aspects from both education sciences and the respective academic subjects (e.g. chemistry, physics, biology, geography, etc.). Therefore, textbook studies in subject-specific education often explore a multitude of theoretical aspects and tend to contribute to theoretical progression in the specific subject field. As a result, the, albeit slow, transition from a content-only perspective towards textbook usage in various teaching and learning situations has greatly contributed to the emancipation of textbook research. Whether this shift will be enough to maintain the momentum of textbook research in and across the various subjects remains to be seen.

In terms of theories of teaching and learning, general science education, and the four separate subject educations (biology, chemistry, physics, geography) display a strong affinity towards moderate constructivism, psychological essentialism, theoretical frameworks based on critical discourse analysis as well as general semiotic and discursive approaches.

In more specific terms, within the framework of moderate constructivism, science education has explored a variety of fields by falling back on heterogeneous theories. First, research on modelling competencies and skills relied heavily on research from the field of psychology of education. Second, student misconceptions and conceptual change play an essential role when exploring challenges and accuracy of scientific literacy. Third, experimental knowledge and visual culture of neuroscience underpinned research exploring the nature of scientific literacy. Fourth, textbook-related work with emphasis on language acquisition and the language of science considered theories of experience-based learning, text processing, personal epistemologies, reading comprehension, vocabulary learning, and language acquisition. Fifth, studies on visuals in textbooks and visual literacy fell back on theories of cognitive overload and design. Sixth, work on conceptual variation and diversity often considered didactic transposition as its main theoretical framework. Seventh, general scientific literacy and the nature of science explored a multitude of perspectives from philosophy and history of science. However, in most cases, textbooks are viewed as means to foster the acquisition and development of competencies and skills and are therefore not at the heart of research on learning and teaching science subjects.

Nonetheless, the great majority of papers follow a positivist approach by revisiting previous research relevant to their research question. This often leads to the identification of under-researched areas or to adaptations of existing

research instruments. General theoretical frameworks are, in consequence, rarely part of papers on science textbooks.

The same is true when one considers research into textbooks as a whole. While many papers discuss recent textbooks studies, to greater or lesser degrees, they rarely discuss the paper's own findings in the context of the latest textbook research or in terms of theoretical progression in the field.

CONCLUSION

Research on science and geography textbooks is rich, heterogeneous, disrupted, and constantly oscillating between analyses of content and teaching/learning. There are a number of explanations for the nature of textbook research in STEM subjects.

The richness of textbook research stems from its coverage of a great variety of topics ranging from content to classroom usage. Unlike research in education science, subject-specific education remains closely tied to classroom activities and to the learning challenges presented by each specific subject. In consequence, myriad research questions require a closer examination of textbooks and educational media.

Theoretical frameworks and concepts are heterogeneous and rarely contribute to overall theoretical progress in the field of textbook research. Overall, studies conserve a positivist glance and strive for evidence-based knowledge accumulation to improve the teaching and learning of science.

The choice of methods is yet another aspect that reflects the rather marginal role research on textbooks plays within the field of subject-specific education. While other fields, such as conceptual change and competency modelling, exhibit methodological cohesion and progression, studies on textbooks remain, with the exception of content analysis based on checklists and validated categories, disrupted and less creative in terms of methods. Instruments are often developed and validated but only within national or regional settings. While science education research contributes significantly to methodological discourses in research into STEM education, methods of text and content analysis widely used in social science and humanities education research are rarely taken into consideration.

Research questions connected to textbooks are heterogeneous. There is a gradual transition in analysis from content-related aspects towards textbook usage, which means a stronger focus within subject-specific research on teaching and learning. While this trend is welcome, research on textbooks needs to continue to concentrate on general and subject-specific theories of the textbook.

The discontinuous nature of research on textbooks could be reduced by increasing the number of comparative and contrastive studies as such studies bring us closer to the phenomenology of textbooks and their usage. Comparative and contrastive studies should connect subjects (specifically across disciplinary boundaries between science, social science, and humanities), geographical entities (e.g. countries and regions), and levels of education (primary, secondary,

and higher education). In this way, both theories and methods could work in synergy to contribute to an overall theory of the textbook. Lastly, longitudinal and historical studies could offer additional explanations and support with regard to classroom challenges and theoretical issues.

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Textbook Quality Criteria and Evaluation

Carl-Christian Fey and Eva Matthes

INTRODUCTION

It is not a particularly new contribution to discussion of textbooks and other educational resources to raise the question of ‘quality’, but the emphasis and focus on this question within the field have increased significantly since the beginning of the twenty-first century. This recent development has occurred in the context of an emerging notion of ‘quality education’ or ‘educational quality’, which is linked to a strong focus on the outcome, on the effects of education and schooling. The institutional counterpart to this notion manifests itself in the development of national core curricula, educational standards, and the attempt to measure and evaluate the defined effects of education through both national and international large-scale assessments, with PISA arguably the most prominent and most dominant of these (cf. OECD 2009, 2012). From this point of view, the discursive career of the concept of ‘quality’ in the educational context is impressive. To assess, attempt to regulate, and improve the quality of textbooks is a logical and evident consequence of a focus on quality, simply because, phenomenologically speaking, textbooks and other educational media play an important role in learning scenarios (see Oates 2014; Oelkers 2010). This is true with regard not only to content but also to function, as they structure the knowledge being taught and learned and guide the process through a macro- and micro-didactical outline of teaching and learning. When Ivić et al. (2013, p. 23) state that ‘by improving the quality of textbooks, we can make a significant contribution to the improvement of education as a whole, because the quality of textbooks is a very important component of the general quality of education’, the authors are following this same train of thought: that textbooks

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can positively (or negatively) influence the process of education—though, as one might argue, not in a simplistic or deterministic manner but as part of the complex web of educational policy, teaching activities, actors, and content providers that make up the process of ‘education’ (cf. Ivić et al. 2013, pp. 63–64). In this sense, Oates (2014) stresses the importance of textbook quality for educational systems and its crucial role for national educational policy. He further discusses the *supportive* role of high-quality textbooks for teachers as well as for students (Oates 2014, p. 4). One might also add parents to this list because they are also potential textbook ‘users’ and their understanding of the education their children are receiving can benefit, for example, from the structured layout of subject-specific content in textbooks.

In this context, quality criteria and evaluation play a role in several areas: (1) in the process of textbook production and development (authors, publishers), (2) in the process of officially approving or recommending textbooks (government administration), and (3) in the process of selecting high-quality textbooks for educational purposes (schools).

In the area of evaluation design, it should be noted that strong efforts to develop quality criteria for the educational sector and for textbooks in particular are particularly evident in the Eastern European countries and the Baltic states. This is connected to political change and the societal task of democratisation: the ideologically biased content of previous textbooks did not meet new pedagogical challenges and therefore required revision.

THEORETICAL APPROACHES IN AN INTERNATIONAL CONTEXT

This chapter will present a set of examples developed and published in recent years to address the need to assess the quality of textbooks and other educational media from an international perspective. References are made to textbook assessment strategies developed in the Czech Republic, Germany, Hong Kong, Kenya, the Republic of Kosovo, Slovakia, and Switzerland. Because of the wide range of attempts to answer this need—normally conducted from a specific national and not an international perspective—the examples presented cannot be regarded as comprehensive (or even extensive) in a global perspective. What their comparative analysis can achieve is to demonstrate and elaborate on similarities among the approaches, concerning both their theoretical foundations and their methodological obligations and guiding principles.

This analysis shows that contemporary quality assessment strategies derive and pragmatically combine certain categories and concepts from the following areas: (1) various academic disciplines and schools (e.g. pedagogical and educational theories, general and subject-related didactical theories and principles, cognitive or educational psychology, aesthetics, and so on); (2) textbook theories that concentrate on the functions of textbooks in their educational setting (e.g. Mikk 2000, pp. 17–20), the media in which they are delivered, or structural and organisational components (e.g. Ivić et al. 2013, pp. 53–58); (3) political, educational, ethical, or religious normative concepts, with either a positive or

negative connotation (the setting of a specific concept as a norm or the refusal to represent such concepts in textbooks); (4) linguistic perspectives that either follow disciplinary research questions or rely on the accentuated usage of linguistic methodologies for interdisciplinary or superordinate research questions (cf. Aamotsbakken 2014); and (5) pragmatic and administrative needs.

In this regard, the development of quality criteria is predominantly deductive, although other approaches are also possible, namely, empirically founded inductive research on quality factors or criteria (cf. Knecht and Najjarová 2010; Gräsel 2010). At the same time, it is important to remember that the overall concepts and ideas referenced repeatedly within work on textbook quality criteria have also been—at least partially—empirically researched and evidenced (see Brophy 1999, 2010; Hattie 2009), which means they are not *purely* deductive.

Czech Republic

Sikorová (2002) analyses 11 existing textbook evaluation concepts and selects the ten most frequently used, namely, (1) sufficiency of additional materials, (2) sufficiency of exercises and questions, (3) structure of units and their interconnection (logical order, lucidity, final summary, test section, and so on), (4) variety of texts and exercises, (5) graphic and typographical parameters (type of binding, appearance, paper quality, and so on), (6) correspondence to curricular materials, (7) financial availability, (8) professional (subject field) degree, (9) motivational elements and overall level of motivation, and (10) language standard.

Germany

In Germany, the 1980s saw extensive approaches to evaluation, namely, the so-called Bielefelder Raster (Bielefeld Manual) (Laubig et al. 1986), which includes about 450 questions to be answered following a content-analytical approach to textbook evaluation, and the ‘Reutlinger Raster’ (Reutling Manual) (Rauch and Tomaschewski 1986), consisting of more than 120 items that textbook evaluators can analyse and rate.

A recent approach, the so-called Augsburg Raster (Augsburg Manual) (Fey 2015), is based on a review of newer (mainly post-PISA) publications on educational quality and proposes eight dimensions that describe the different aspects of textbooks and other educational media in general. Each dimension comprises between 7 and 12 items to be analysed and assessed. These dimensions are (1) normative-discursive positioning/critique of ideology (e.g. the problem of reduced or one-sided perspectivity; appeals to follow opinions of the author or publisher, advertising, interest-guided topic selection, and conceptualisation; gender, anti-discrimination); (2) picture and text composition (e.g. thematic coherence, language and sentence length, functional visualisations, textual focusing, advance and post organisers); (3) cognitive structuring,

knowledge and processes (e.g. taxonomic structure, alignment of cognitive concepts and processes, cumulative knowledge concept, relation to prior knowledge/experience, clarity of terms and concepts, scaffolding); (4) design of tasks (for instance, task sequencing, clear functions of tasks, coherence of tasks with the knowledge presented and learning objectives, situated problems, differentiation of difficulty, multiple ways of problem-solving); (5) micro-didactic implementation (e.g. phasing, diversity of methods, method learning, differentiated learning arrangement, media support, media competence); (6) macro-didactic foundation on and implementation of educational theory (e.g. activity orientation, multiperspectivity/controversy, affective elements, clarification of relevance, relatedness to social environment, metacognition/reflection, encouragement of independent judgement); (7) practical applicability (for instance, transparent learning goals, didactic concept, target competencies and skills, framework conditions); and (8) compliance with curricula and subject-specific educational standards (e.g. relatedness to defined competencies, standards or model tasks, curricular goals, topics, didactic and methodic principles).

Hong Kong

The Education Bureau of the Government of the Hong Kong Special Administrative Region has developed and published guiding principles for quality textbooks (for printed as well as electronic resources; see Education Bureau 2014). These principles or criteria cover the following areas:

- Content (e.g. alignment of aims, targets, and objectives with the curriculum; correct concepts and coherent ideas; current content; multiple perspectives and balanced viewpoints)
- Learning teaching (including development of basic skills, balanced coverage of cognitive skills at all levels, content arranged in suitable learning chunks, clear instructions)
- Structure and organisation (e.g. logical sequence of content, clearly apparent structure of content, overview of learning targets)
- Language (for instance, coherent passages, familiar and interesting language, precise language)
- Textbook layout (printed resources only—criteria include logical and consistent layout; accurate, appropriate, effective, and suitably annotated illustrations; use of lightweight paper) Pedagogical use of e-features (electronic resources only—e.g. multimedia content is accurate and appropriate and serves the instructional focus; glossary/free online dictionary)
- Accessibility and operational design (electronic resources only—e.g. content accessible with various electronic devices, appropriate interface and navigation features, consistent and intuitive layout, tools for annotation; digital rights management is employed and free of charge)

Kenya

The Kenya Institute of Education, which was established after the country gained independence, uses a group-based assessment of textbooks for each curricular subject (see Chebutuk Rotich and Musakali 2006). The evaluation panels, consisting of several members, rate textbooks independently according to a set of criteria, followed by a moderated discussion and the calculation of a total and average score. Criteria are conformity to the curriculum, content (e.g. relevance to subject-specific objectives, accuracy and correctness of the subject matter, appropriateness to the level of the learner), language (e.g. accuracy/correctness of language), exercises and activities (e.g. appropriateness to the level of the learner; adequacy, variety), and illustrations and design (these include variety, adequacy, clarity, colour, proportion). Special attention is paid to the function of the teacher's guide. Criteria for assessing this area are diagnostic assessment exercises, provision of additional content for the teacher, suggestions involving the use of low- or no-cost materials, clarity of writing and presentation of text, clear methodology, and support for pupils with special learning needs or difficulties.

Kosovo

The catalogue of quality criteria for textbooks developed by Schader et al. (2008) consists of comprehensive criteria based on four main categories: (1) formal aspects, layout, and so on (compatibility with the curriculum; layout, design, transparency; illustrations), (2) methodological-didactical aspects (quality with regard to content and subject matter, relevance, and topicality; age appropriateness; didactic approaches; questions and task instructions; linguistic aspects), (3) pedagogical aspects (relation to social, historical, and political realities; relation to aspects of education, maturity/autonomy, education for democracy, and peace; relation to gender; relation to important additional pedagogical concerns), (4) aspects related to practice (commentary/assistance for teachers; manageability; additional materials for the textbook; use and evaluation in practice), and an additional category for (5) subject-specific standards, such as for languages or sciences.

Slovakia

Nogova and Huttova (2006) derive evaluation criteria from six previously identified key evaluation categories. These were further refined into 24 defining criteria, and after testing their reliability with test evaluators using 15 textbooks (observed agreement among evaluators), six criteria were removed, resulting in a total of 18 remaining criteria. The six key evaluation criteria are (1) compliance with principal pedagogical documents (e.g. compliance with the curriculum, logical structure of the subject matter), (2) degree to which the textbook benefits personal development (values,

competencies, skills), (3) content selection (e.g. development of students' basic skills, integration into the broader community, usefulness of subject matter in everyday life), (4) methodological approach (e.g. content assessment methods, system and formulation of questions and tasks), (5) graphic layout (e.g. graphic presentation of text, matching pictorial material and text), and (6) social correctness.

Switzerland

The ilz (*Interkantonale Lehrmittelzentrale*) has developed an online tool for aiding teachers responsible for the selection of textbooks (see Wirthenson 2012). The tool is structured in three areas: (1) pedagogy/didactics, (2) topic/content, and (3) formal/design. Each area of evaluation consists of several dimensions that each includes several defined items, resulting in a three-tier system. The pedagogical/didactical area is represented by the dimensions of curricular congruence (including objectives, content, competencies), learning process (e.g. objectives, process aspects, strategies and techniques), lessons (e.g. diversity of methods), individualised learning (e.g. different approaches, autonomous learning), internal differentiation (e.g. learning at different difficulty levels), and external differentiation (e.g. inter-year groups). For the topic/content area, the authors propose the criteria of balance (e.g. gender, religion, ethical norms), selection of content (e.g. correctness, structure, authenticity, basic and additional information), and target group orientation (e.g. language, heterogeneity, relationship to reality). For the formal/design aspect, the authors describe as relevant reference parameters the aspects of arrangement (including structure and clarity), design and layout (e.g. target group adequacy, design that supports content), external form (e.g. environmental aspects, quality of print material, price), and usability of electronic resources (including handling, orientation, support).

COMPARISON

It is noteworthy that several of the examples presented show an attempt to arrange the quality criteria systematically into meaningful and differentiated dimensions and to develop sub-aspects for each of these dimensions with regard to the phenomenology and/or function of the textbook in the process of education (e.g. Schader et al. 2008; Wirthenson 2012; Fey 2015). It also becomes clear from the diverse criteria reviewed here that the 'quality' of textbooks and other educational media is not a simple 'global' variable. Quality or lack of quality can be observed in a variety of areas, aspects, and functions, which each attest to the textbook as a complex learning and teaching medium in its educational context. Therefore, it seems appropriate and more accurate not to talk about the *quality* of a textbook, but about the *qualities* of a textbook—and thus to acknowledge that textbooks can have various and different strengths as well as various and different weaknesses.

Recent scholarship has tended to focus on the discursive construction and the discursive function of textbooks (see Höhne 2003; Lässig 2010; Höhne, in this volume)—that is, the cultural, political, societal, and economic conditioning, and influence of textbooks—and to relate this to the pedagogical mandate of education. This perspective has strongly influenced the development of the ‘*Augsburger Raster*’ (Fey 2014, 2015), but it is also visible, for example, in the approaches in Kosovo (Schader et al. 2008) and Hong Kong (Education Bureau 2014).

With regard to most of the recent approaches, it is important to note that they reflect the changes that the textbook as a teaching and learning medium is undergoing because of digitalisation (e.g. the approach of the *ilz* in Switzerland or the ‘Guiding Principles for the Quality of Textbooks’ of the Hong Kong Special Administrative Region (2014), which comprise quality categories for printed textbooks and add the two areas ‘Pedagogical Use of E-Features’ and ‘Accessibility and Operational Design’ for e-books only).

METHODOLOGICAL APPROACHES

While all approaches presented here define more or less complex sets of criteria or standards, some of them renounce the definition of a process dictating the methodological application of these criteria or standards (for instance, Sikorová 2002; Education Bureau 2014). Those that do define their methodological application generally follow an itemised approach, repeatedly applying rating scales commonly used in the social sciences (4-, 5-, 6-, or even 7-degree Likert scales). Nogova and Huttova (2006, p. 336), for example, use polar 7-degree scales to rate individual criteria. They describe the polar positions (total absence and total fulfilment of an attribute) and the middle/neutral position of each scale using indicator descriptions intended to guide the judgement of the evaluators and thus to achieve higher agreement among different evaluators. Some examples apply predefined numerical weight to the constructed scales, a practice again observable in approaches like that of Nogova and Huttova (2006), but others opt to not weight criteria or to let the evaluators define the weighting of each category or item themselves. The latter approach is reflected in the online assessment tool LEVANTO (see Wirthenson 2012), where evaluators can define and alter the weighting dynamically, according to the textbook’s subject or intended use.

Among the approaches described, a quantitative paradigm is dominant (expert ratings preferably using more than one evaluator). It is evidently appealing when evaluating textbooks to have ability to express judgements in numbers and on a scale, the potential of using statistical methods and measurements, and to attempt to conduct research that complies with guiding empirical principles of the social sciences such as objectivity, reliability, and validity. Having judgements available in numbers (scale positions) makes statistical procedures such as computation of inter-evaluator reliability and observer agreement a viable option. This yearning for the benefits of using a quantitative approach is

visible and dominant in the work of Mikk (2000), for example, who focuses on the communicative part of textbook composition, namely, language and readability, through experimental designs and formula-based computational approaches.

At the same time, the possibility of applying a qualitative paradigm should not be ignored—an approach that uses (probably fewer) defined analytical questions to identify, for example, certain subject-specific teaching methods or the appropriateness of content and concepts. It is important to consider the possibility of combining both approaches as represented by the attempt to ‘quantify qualitative elements’ (Johnsen 1992, p. 88) or in an approach reflecting the idea of a dialectical synthesis of different but convergent viewpoints (triangulation). The ‘Augsburger Raster’ has tried to reemphasise this line of thought through the complementary integration of an analytical component (content analysis) and an item-based rating system into the process of assessing textbooks and other educational media.

POTENTIAL BENEFITS AND NEW DIRECTIONS OF TEXTBOOK EVALUATION AND DEVELOPMENT OF QUALITY CRITERIA

It can be argued that textbook evaluation plays a crucial role in the development and strengthening of quality education (cf. Oates 2014; Ivić et al. 2013; Fuchs et al. 2014). Several key areas either underline the functional effects that textbook evaluation can have or else indicate current and future potential for further processes of development and refinement. These areas are:

Educational Governance

Here, textbook evaluation plays a role in helping to uphold and establish the existence and use of crucial guidelines for learning content, target competencies, teaching methodology, and the general educational norms that make up a national (or perhaps in the future an international) education policy. It therefore has steering potential, which we should see in the context of other functional institutions of educational governance that empirically shape the educational reality of a country, such as educational standards and centrally defined testing. Textbooks in this sense are ‘policy tools’ and need to align and be linked to the other key functions of educational policy (cf. Oates 2014) in order to be most effective. This also includes a responsible and reflective discussion about normativity (political, educational, ethical, or religious normative concepts) in textbooks in the process of selecting and validating textbook content.

Digitalisation

It is important to understand that the development (or trend) towards the digitalisation of educational resources does not redefine the basic needs of an ‘education system’. It does not necessarily change the principles of ‘good’ teaching and ‘effective’ learning, but these principles may require special adaptation

within the context of the new digital construction of textbooks and other connected or complementary educational media. This development poses a challenge to existing textbook theories and raises several questions that probably need more refined answers than those currently existing: How do digital textbooks and accompanying digital materials and tools differ from printed textbooks? How does digitalisation change learning processes and the functions of textbooks within these processes? What are the effects of digitalisation on the educational settings in which textbooks are integrated? How does it affect and change the processes related to textbook construction, distribution, and usage, and so on? As discussed earlier in this chapter, some authors of quality criteria have already started to adapt to this—but it is still unclear to what extent new and separate criteria are necessary and what exactly those criteria should be. For further reading on digital media, see also the ‘New Directions’ chapter.

Systematisation

The analysis above has indicated that, although there are similarities and intersections between the different approaches to textbook quality assessment, there is still room for improvement in the selection of quality criteria that comprehensively focus on specific educational functions (in other words, the educational phenomenology) of textbook use. Such improvements could make sets or dimensions of criteria more meaningful (especially with regard to a non-academic use) and enable a better differentiation among the areas in which textbook quality can be monitored and enhanced, thereby allowing better assessment of the ‘qualities’ rather than the ‘quality’ of a textbook within a practical educational framework, based on the actual use of this medium in teaching and learning scenarios. Every approach mentioned before has elements and categories that fit such a purpose to a certain degree. The examples provided from Germany, Hong Kong, and Switzerland—being also the most recent approaches—arguably are following this guiding principle the most consequentially.

Research on Effects

Research on the effects of textbooks on students, teachers, and parents is currently marginalised. More research in this direction will help identify criteria that have a strong influence on the reception process. This could help discern more important from less important criteria in terms of textbooks’ effects on teaching and learning. Additional empirical validation of criteria guided by and initiated with respect to the academic disciplines and the underlying theoretical concepts they are referring to may also be necessary and helpful. As indicated earlier in this chapter, quality assessment of textbooks should and can be grounded in concepts of ‘successful’ education, in effective teaching and learning (cf. Hattie 2009). Further theoretical approaches on textbook effects are explored by Yvonne Behnke in this volume.

Criticism

Examples of textbooks that have been ideologically instrumentalised are disturbing, especially considering the emancipatory ideals of modern education. Establishing a critical perspective reflecting on the social, political, and economic discursive construction and conditionality of textbooks is a necessary task everywhere, not only in countries that have undergone repressive political phases. This is the constant and recurring duty of a responsible educational policy rooted in a pedagogical ethos founded in the tradition of the Enlightenment. (Re)establishing a critical perspective on educational media based on the pedagogical concept of controversy and multiperspectivity is therefore crucial to avoiding instrumentalised education that disrespects the value of emancipatory development for the generations to come.

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Materiality and Mediality of Textbooks

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What does it mean to consider the ‘materiality’ and ‘mediality’ of school textbooks? Textbooks and other educational media are generally thought to shape society through the content they provide for readers: the information, issues, topics, and assignments they contain. Textbooks’ salience lies, however, not only in *what* they include but also in *how* they normalise ways of knowing, ways of being, and ways of understanding as common sense and/or as desirable. This chapter first sketches the concept of mediality and then describes three different methodological/theoretical approaches to exploring the mediality of the textbook. The approaches attend to the (1) linguistic, (2) multimodal, and (3) material dimensions of the medium. The chapter concludes by pointing to areas for further research, focusing on interdisciplinary dialogue, non-coherence, and digital (im)materiality.

MEDIALITY

Drawing on cultural studies, media theory, and socio-material analysis, the field of textbook studies has begun to conceptualise textbooks as material elements within larger interwoven assemblages of heterogeneous human and more-than-human entities, which collaboratively enact ‘ways of knowing’ in conventional and/or surprising ways (see Ahlrichs and Macgilchrist 2017; Höhne 2003; Röhl and Kolbeck 2018, in this volume). This research aims to explore the productivity and performativity of (im)material assemblages. It thus attends less to the *content* of textbooks and more to the *mediality* of textbooks, where ‘mediality’ refers to the shift in focus from ‘what’ a medium is, to a focus on the ‘how’ of mediation, on ‘media’s material way of being’ (Have and Pedersen

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2016: n.p.; see also Jäger et al. 2014; Krämer 2004). The concept of mediality highlights the insight that our social world is thoroughly entangled with media; we live ‘in’ media, not simply ‘with’ media (Bird 2003; Couldry and Hepp 2016; Deuze et al. 2012; Livingston 2009). The guiding assumption for textbook studies is that ideologies, practices, or socio-political-cultural orders are not only shaped by the textbooks’ ‘text’ but also by the ways in which words, images, and materiality are choreographed into instances of ‘mediation’ (see also Apple 2000; Friesen 2013; Provenzo et al. 2011).

METHODOLOGICAL AND THEORETICAL APPROACHES TO MEDIALITY AND THE TEXTBOOK

To date, empirical studies have analysed three key dimensions of mediality: language, multimodality, and materiality (see also Macgilchrist 2018). To describe current methodological/theoretical accounts of textbook mediality, this chapter briefly introduces a range of studies in each of these dimensions, examining a small number of studies in further detail, before highlighting lacunae and the potential for new directions in scholarship.

The Linguistic Dimension of Mediality

Educational media can rarely be thought outwith language (Dang-Anh et al. 2013). Drawing on discourse theories, and constructionist or post-structuralist theories, studies on the linguistic dimension of mediality assume that language does not merely describe or represent the world, but that language constructs and produces the world. Discourse analyses inquire, for instance, into the production and circulation of knowledge. They tease out the way in which specific linguistic resources such as nominalisation, causality, or authorial voice have an epistemological ‘effectfulness’ (Krämer 1998: p. 14) in history (Coffin 2006; Gu 2015), STEM (Zhao 2012), and medicine (Macdonald 2002). Or they ask how knowledge is constructed about particular socio-political issues such as migration (Beauftragte der Bundesregierung für Migration 2015; Kotowski 2013), the environment (Xiong 2014), war (Mitchell and Lachmann 2014), fascism (Pinto 2013), nationalism (Bolick et al. 2013), gender (Barton and Sakwa 2012), and race (Rezai-Rashti and McCarthy 2008).

While most studies in this field focus on textual analysis, a small number also consider how textbooks are used in schools. Martin et al. (2010), for instance, combine videoed classroom observations with analysis of classroom talk, textbooks, other teaching materials, and curricula. Interested in how students are apprenticed into specific subject thinking, they explore the function of ‘-isms’ (e.g. colonialism, nationalism, socialism) in history education. The analysis demonstrates, for example, how the figure of Hồ-Chi Minh is primarily linked with positively connoted words such as ‘freedom’, ‘independence’, ‘focus’, ‘enthusiasm’, ‘clear-sightedness’, ‘inspiring’, and ‘liberate’. French colonialism in Vietnam is primarily associated with negatively weighted terms, such as

‘slavery’, ‘poverty’, ‘discrimination’, ‘the chase for the dollar’, ‘brutality’, and ‘torture’ (Martin et al. 2010: pp. 452–454). Martin et al. argue that when it comes to the mediation of ‘-isms’ in educational settings, ‘both epistemology (definitions and oppositions) and axiology (values and attitudes) matter’ (Martin et al. 2010: p. 450). Students need to learn not only about accurate periodisation and about which factors led to war or who fought against whom, they also need to adopt the ‘right’ values—in this case, ‘left-of-centre’ values—to become a legitimate ‘knower’ in the field of history (Martin et al. 2010: p. 459).

This type of analysis is led by the indivisibility of language from mediality. It enables a closer look at how language and media are interwoven through, for example, the entanglement of epistemology and axiology. The analysis picks up the perspective that textbooks as media do not simply transmit information and it shows *how* these media enact worlds, realities, and knowledges, that is, how the language used by different media develops what has been called an ‘effectfulness’ which shapes the modalities of our thought, perception, experience, memory, and communication (Krämer 1998: p. 14).

The Multimodal Dimension of Mediality

Important as language is, contemporary textbooks are complexly designed multimodal entities. An increasing number of studies thus analyses not only language but also further ‘modes’ such as colour, images, or typography (van Leeuwen 1992). These multimodal analyses consider the different modes as semiotic resources which are intertwined with the specific communicative needs of socio-cultural configurations (Jewitt 2009; Kress 2010). Images in current textbooks, for instance, are now rarely understood as simply ‘illustrations’ of the accompanying written text. In multimodal analyses, images are seen as an integral part of multifaceted multimodal configurations, in which the individual elements work together to create, firstly, content knowledge about people, places, and things but also social, expressive, and attitudinal relationships among these people, places, and things. In focus are sometimes very subtle, apparently mundane practices, for instance, the compression of elaborate and ambivalent historical narratives into a simple diagram with linear arrows, embodying a simple, linear, causal theory of history (Ahlrichs et al. 2015). Multimodal analyses have examined the maps used in textbooks (Grindel 2009) as well as the textbooks in history (Binnenkade 2008), biology (Guo 2004), English (Yassine 2014), science (Jones 2009), and mathematics (Alshwaikh 2016; O’Halloran 2017).

Examining multimodality over time can identify broader changes in the social relations between textbook authors, teachers, and pupils. Bezemer and Kress (2010), for instance, provide a multimodal account of historical changes in secondary school textbooks for English, science, and mathematics in England. Comparing textbooks from the 1930s, 1980s, and 2000s, they draw on social semiotics, discourse analysis, and graphic design to analyse how modes have changed over time and to identify the social significance of the transformations

in how those modes, such as typography, image, written text, and layout, work together in the textbooks. Analysis demonstrates how the primarily verbal, linear organisation of text has mutated into a more graphic, modular composition with less linear reading paths. Bezemer and Kress argue that the shift towards more visual content is not, as others have suggested, an over-simplification or ‘dumbing down’ of textbook content. They suggest that the written texts of the 1930s and 1980s are indicative of vertical power relations with a clear social hierarchy, whereas the visual design of contemporary textbooks reflects more horizontal, open, and participatory social relations.

Overall, multimodal analysis is able, as Bezemer and Kress illustrate, to link specific shifts in the multimodal organisation of textbooks with social changes to power relations or notions of hierarchy and authority. Rather than lamenting the demise of verbal language, this approach tends to highlight the complex design competencies that should be fostered by contemporary education and to suggest that today’s students no longer simply ‘consume’ texts offered by authority figures but participate more actively as sign-makers, co-producing meaning.

The Material Dimension of Mediality

A third approach draws, as noted earlier in this chapter, on debates concerning materiality in cultural studies and the social sciences, including those from actor-network theory, new materialism, posthumanism, or activity theory. Studies are emerging which investigate how the materiality of inscription becomes relevant for textbooks. Central to these studies is a focus on the textbook as a material artefact embedded in a heterogeneous network of human and non-human entities (architecture, texts, films, things, etc.) which act in concert and which ‘intra-actively’ (Barad 2007) co-produce one another. Materiality, in this view, ‘is not merely an inert collection of physical properties but a dynamic quality that emerges from the interplay between the text as a physical artefact, its conceptual content, and the interpretive activities of readers and writers’ (Hayles 2004: p. 72). Kolbeck and Roehl refer (in this volume) to this epistemological shift from language to material artefact as a shift from an interest in the *textbook* to an interest in the *textbook*.

The novelty of this approach is that it draws attention to aspects of the textbook medium which have been hitherto neglected. The goal is to include materiality as a dimension of the multimodality of educational practice (O’Halloran 2017) and to explore how relations and practices change when a thing, such as a textbook, is ‘paper, digital or plastic, heavy or delicate, mechanical or organic’ (Fenwick and Edwards 2010: p. 8). Since a major critique of new materialist work is that it neglects important socio-political issues such as race and gender, the challenge for textbook studies is to attend to the material dimension without losing sight of the textbook as a social product and *politicum* of its time. By combining the material and political dimension, empirical studies have begun to explore how the segmentation of textbook knowledge

into chapters, subchapters, and sections is entangled with the reproduction of a colonial logic in high school history (Macgilchrist et al. 2017) or how the materiality of the textbook constitutes reality, social order, and relationships (Ahlrichs *forthcoming*; Mohn and Amann 2006). Beyond this focus on the materiality of specific socio-political orders, a vibrant debate over the materiality of thought has ensued, with mathematics seen as a paradigm case (de Freitas 2013; Greiffenhagen 2014; Sørensen 2009; Verran 2001). ‘Surfaces’ (blackboards, smartboards, textbook pages, iPads, etc.) operate, in this sense, as the ‘enabling technology’ for mathematical thinking, with ramifications far beyond a specific medium or classroom (Rotman 2000: p. 44).

Materialist scholars such as de Freitas argue that the prevailing focus on language and signification banishes abstract thought to the immaterial/disembodied realm, and neglects that mathematical thinking is a ‘radical asignifying creative act’ (de Freitas 2013: p. 129), which ‘can be seen as an ontological reassembling and reconfiguring of the world’ (de Freitas and Sinclair 2014: p. 88). Mathematicians do not simply ‘think’ and then ‘translate’ inner thoughts to language. Instead, in this perspective, mathematical thinking is seen to emerge publicly, through writing and physical movement. The diagrams presented in a textbook or on a blackboard, for instance, become integrated in embodied and mobile ways of writing. De Freitas describes a student, Colin, as he moves across the room, with a ‘pointer-thinger’, speaking and gesturing towards a diagram. De Freitas concludes that the device and physical movement, together with Colin’s ambiguous use of indexical language (‘this one’), decentre language from its authoritative position as ‘legislator of truth’ and ‘vehicle of explanation’. The author considers how language becomes just one element in a material assemblage alongside the diagram and the pointer-thinger, in which each possesses agency in expressing what counts as mathematics (de Freitas 2013: p. 136).

Overall, a focus on materiality shows the textbook ‘as a media practice rather than semiotic practice’, that is, as a practice which ‘partially eludes the semiotic orders and the rules of representation’ (Krämer 2004: p. 25). Textbooks are embedded in practices in which their materiality can be felt. In terms of mediality, the difference in the materiality of print and digital textbooks may be one of the most significant: where the representation of particular issues does not differ substantially between printed and digital textbooks (Bolick et al. 2013), the media practices with a tablet are potentially very different to the media practices with printed materials.

NEW DIRECTIONS

While the breadth of studies cited here indicates the emergence of a scholarly interest in mediality, it must be conceded that only a minority of those cited refers to overarching conceptualisations of ‘media’ or ‘mediality’. Although individual studies provide richly theorised accounts of how they understand the

textbook (as discursive nexus, multimodal practice, or material assemblage), a first lacuna in this field is the lack of interdisciplinary dialogue on broad concepts. Vibrant discussions can be observed among discourse analysts, among multimodal analysts, or among new materialist scholars. The debates tend, however, not to spill over from one disciplinary ‘silo’ to another. A degree of consolidation and exchange among perspectives—including the perspective of media theory—would potentially lead to interesting cross-fertilisation as well as a multidimensional examination of the mediality of textbooks.

A second issue is the interest taken by most studies to date in coherence and overarching patterns. Texts which explicitly discuss the mediality of textbooks tend to see these media as reproducing dominant knowledge; as ‘a primary indicator of social consensus’ (Höhne 2003: p. 45). While this is certainly a fruitful line of inquiry, textbooks have also been considered media in which *conflicting* discourses co-exist (Klerides 2010; Macgilchrist 2014). Since it takes a good deal of effort to bring non-coherent perspectives together in a way that makes them appear cohesive (Law 2007), textbooks can be seen as media which make an effort to ‘cover over the tears and ruptures so that the fragile system of meaning is stabilised’, even if only for a short period (Baier et al. 2014: p. 3). Understanding textbooks as ‘seismographs for discursive ruptures’ (Baier et al. 2014: p. 3) and for ambivalences, interruptions, and non-coherence means drawing on them as a unique medium in order to analyse not only social reproduction but also social change.

A third new direction highlights textbooks in the digital world. If materiality is conceptualised as ‘the interplay between a text’s physical characteristics and its signifying strategies’, then instantiation (printed textbook, digital textbook) and signification are entwined from the outset (Hayles 2004: p. 67). Currently, as noted earlier in this chapter, the discourse in print and digital textbooks does not differ substantially (Bolick et al. 2013). However, the rapid development and diffusion of interactive digital textbooks, in particular the possibilities for a critical digital pedagogy or ‘open pedagogy’ offered by open educational textbooks (DeRosa 2016), suggests this is a field in which materiality and mediality will become ever more important.

CONCLUDING WORDS

This chapter has outlined three dimensions to the ‘mediality’ of textbooks. In each of these dimensions, contemporary research aims to overcome the invisibility of the medium. Whether focusing on words and verbal structure, on layout and design, or on physical and embodied relations, studies operate on the hypothesis that the linguistics, the multimodality, and the materiality of a textbook are not simply transparent aspects underlying more important narrative or informational functions. These apparently banal and mundane aspects of media are performative: they ‘do’ something to the contents, the politics, and the practices of the textbook.

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PART III

Textbooks and Their Contents



The Nation, Nationhood, and Nationalism in Textbook Research from 1951 to 2017

Peter Carrier

Selecting examples of textbook research about nations and nationhood is particularly challenging because almost all studies of textbooks either explicitly address nations or are implicitly contextualised in relation to national education systems in and for which educational media are produced. In order to acknowledge the broad range of approaches to nations at any one time, and to show how approaches change over time, it is therefore necessary to quote not only research which explicitly addresses representations of nations in textbooks but also that which obliquely refers to nations while conveying assumptions about nations and nationhood which characterise researchers' own national self-understandings. People who write about textbooks are not only external observers of nations but also members of one or another or even several of the nations about which they write.

In order to assess a coherent body of works in this field in spite of their huge number, this study draws primarily on the publications of the Georg Eckert Institute and on the holdings of its library. The corpus was selected by reading the contents pages of three successive journals and by initially categorising articles according to their epistemic approaches. These were either instrumental (assuming that textbooks are political instruments of nation-building or international negotiation regardless of their content), descriptive (dealing with linguistic and visual presentations of nationally significant events), or analytical (comparing or historicising presentations of nations, or deconstructing national semantics and narratives). In addition, I selected articles according to their categorisations of relations between one nation and another, whether these be unilateral (focusing on a single nation), symmetrical and bilateral (dealing with

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representations of one nation in textbooks of another nation), asymmetrical and bilateral (dealing with representations of one nation in a region or vice versa), or nested (dealing with depictions of one nation or minority occurring in another). The drawback of this selection of works is that it provides a potentially nationally biased ‘German’ assessment of research about the treatment of nations in textbooks; this emerges in the recurring references in these works to European integration, post-war national reconciliation, and migration, topics which do not necessarily dominate textbook research elsewhere, in particular outside Europe. Notwithstanding this caveat, since successive generations of researchers and editorial committees at the Georg Eckert Institute instigated and gathered results of research internationally, we may assume that the evolution of research in the publications produced between 1951 and 2017 in or in connection with this institute and its forerunner, the International Institute for Textbook Improvement, reflects the evolution of research in this field on a broader scale, beyond the national horizon of its members or its political mission.

TOPICS

The Georg Eckert Institute has issued three academic journals: the *International Yearbook for History and Geography Teaching* (*Internationales Jahrbuch für Geschichts- und Geographie-Unterricht*) from 1951 to 1978, *International Textbook Research* from 1979 to 2008, and its successor the *Journal of Educational Media, Memory and Society* from 2009. The contents of these publications suggest that topics addressed by textbook researchers underwent several shifts over time. Works published before the 1960s, for example, were characterised by a dearth of analytical studies alongside a preference for studies of the political expediency of textbooks within national peace and reconciliation negotiations, in which textbooks were qualified instrumentally in national terms as essentially ‘American’ or ‘Japanese’, for example. Further, while the number of unilateral studies of textbooks from a specific nation dwindled in the mid-1960s, a consistently high number of authors devoted studies to bilateral relations, addressing representations of one nation in the textbooks of another country. Another shift taking place since the 1960s entailed increasing interest in content analyses which emphasise representations of nations within textbooks. Surprisingly, in spite of increased migration into Europe from the 1960s, authors only began to address nested relations between majority and minority nations only in the 1980s.

In the 1950s, shortly after a period of war and chronic misuse of state ideology, most textbook analyses concerned with nations were devoted less to representations of historical topics of the recent past such as war and peace than to political means of overcoming their causes and effects by creating and putting to use expedient textbooks. Unilateral reviews of new textbooks or reports on domestic textbook reforms or revision appeared alongside assessments of one nation’s textbooks from the ‘viewpoint’ of another, albeit without indicating whether this meant the viewpoint of a nation’s researchers or of its entire

populace (see ‘Amerikanische Schulgeschichtsbücher’ 1953). Writings about one nation’s schematic view of the textbooks of another nation, or about the representation of one nation or its people in the textbooks of another nation, or reports about binational textbook negotiations designed to revise textbooks, dealt with textbooks largely as instruments of national policy rather than as complex media of information, knowledge, and understanding (see Foster 2011, 5). The initial task of textbook research in the periods following the First and Second World Wars appears to have been not to develop concepts and methods for the analysis of historical, geographical, or social representations of nations but largely to identify and correct bias with the social and political aim, defined by such organisations as UNESCO, of ‘improving and revising curricula and textbooks in the interest of better international understanding’ (‘Die Behandlung des Westens’ 1959/60, 140). At this time, UNESCO presided over textbook research more exigently than it does today.

Only gradually, from the 1960s onwards, did researchers apply themselves to content analyses of social, geographical, or historical issues in a given country’s textbooks. These early works included studies of representations of the historic events of one country in the textbooks of another country, such as ‘The History of Hungary in German History Textbooks’ (Bak 1965/66) in order to expose mutual understandings and the transformation of national historiographies in the educational materials of another country. The 1960s also witnessed the rise of analytical approaches, which included international textbook comparisons or histories of textbook representations over time (Burdon 1970/71; Passon 1968/69). Moreover, studies of representations of international relations within textbooks dealing with such topics as ‘German Textbooks and the Representation of German-Norwegian Relations during the Second World War’ (Vigander 1961/62) added a metahistorical dimension (by addressing textual representations during the war period) and a metapolitical dimension (by addressing representations of international relations) which remains a model to this day. In spite of these innovations, the dominance of historians among textbook specialists and in editorial committees ensured that priority was given to representations of historical events while studies of spatial and social representations were marginalised, even though the latter had been no less a cause of the former conflicts and therefore were equally in need of revision.

Studies with a bilateral emphasis, devoted to comparisons of textbook contents, continue to this day to flourish in the context of binational Polish-German and Israeli-German textbook commissions, but also in the context of cultural diplomacy between Europe and Eastern Asia and between formerly belligerent Asian countries (see Griesse and Paffenholz 1994; Riemenschneider 1994; Podeh 2003). By the 1980s, however, the focus on textbook revision, bilateral reconciliation, and textbook historiographies had been partially displaced by single-issue topics relating to the social fabric of nations, such as women, men, gender, ecology, textbook production processes, and human rights. In the wake of new migrations, textbook researchers also began to

address linguistic and visual images of national minorities as well as values and religion. This research blossomed from the late 1980s, over two decades after migrants from formerly colonised countries or from Turkey arrived in Europe in the 1960s (see Bastien-Schmit 1995; Calzadilla 1995; Cajani 2008). In spite of these manifold new single-issue topics, continuing interest in ‘textbook work’, dealing with national reconciliation, Europe, minorities, democracy, human rights, and international textbook commissions and controversies, sustained the ‘instrumental’ approach to textbooks.

THEORIES AND CONCEPTS

One of the striking consistencies of writings about nations in textbooks is their tendency to conceptualise ‘the nation’ as a uniform whole. Studies about such topics as ‘Germany in South Korean Geography Teaching’ (Dege and Kim-Park 1983) and ‘The United States in Mexican Textbook Controversies’ (Trillo 2009) characteristically conceive of nations as elementary units while blurring distinctions between state and nation. In spite of this consistency, changes in theoretical conceptualisations of the nation have taken place in this field. These conceptualisations are inextricable from notions of the functions of textbooks in relation to the nation, which appear to evolve chronologically from (1) instruments of international relations to (2) vehicles of national prejudices and stereotypes which likewise foster nationalism and from there to (3) objects which lend themselves to the study of alterity and processes of inclusion and exclusion in the wake of migration. This section will summarise these changes in the form of a tentative chronology while acknowledging that some conceptualisations used in the 1950s or 1960s reappear, often legitimately, in later studies.

A Conceptual Void: Textbooks as Instruments of National Policy in Early Textbook Research

The political goals of early textbook research carried out in the wake of the Second World War prompted researchers who addressed nationhood to conceive of textbooks as instruments of national policy and international reconciliation and thus largely to debar theoretical precepts. From the 1950s, research most frequently focused less on the ways in which textbooks addressed the idea of the nation than on the ways in which textbooks functioned or should function within and between nations and whether policy advisers agreed with their content. Studies in this period obviated conceptualisations of the nation by either assuming what a nation is or by implying (but not defining) a national framework of analysis. Nations and national qualities were, for example, typically used to qualify textbooks on the assumption that textbooks in use in a given nation belonged to or were an inherent expression of that nation’s self-representation. Early studies devoted to such topics as ‘Italian Textbooks from a German Viewpoint’ (‘Italienische Schulbücher’ 1956) risked entrenching

binary understandings of nationhood rather than uncovering self- and mutual perceptions conveyed via textbooks. The second most frequent type of study was devoted to reports on textbook negotiations and ‘international textbook work’ or ‘textbook problems’, in which authors discussed differences of opinion about national histories without referring to a theoretical concept of the nation. It is in a similar vein that, over two decades later, David Wright chose to analyse English textbook distortions of Africa and African history without questioning the implications of such distortions for the mentality of the British educators and authors who had produced such a vision of the African continent. Indeed, Wright couches his work in the affirmative and normative political (rather than analytical) framework of UNESCO’s declaration of 1974 devoted to promoting ‘Education for International Understanding, Co-operation and Peace and Education Relating to Human Rights and Fundamental Freedoms’ (Wright 1981).

In sum, early (and some later) textbook studies assumed the significance of nationhood without defining it or adopted or borrowed an extant concept of nationhood without defining or questioning it. However, the failure to apply a thoroughly reasoned concept of the nation in early research into textbook representations of nations and nationhood has largely been a consequence of historical circumstance. For textbook research traditionally flourishes in the wake of its institutionalisation, which has almost invariably followed political conflict and ensuing controversies concerning the representation of nations in the public and educational spheres. The foundation of the International Textbook Institute in 1953 and the Georg Eckert Institute for International Textbook Research in 1975 in Germany, or of the Korea Textbook Research Foundation in 1992 and the Institute of Textbook Research in Hungary in 2006, for example, created circumstances in which researchers focused less on the understandings and representations of nations in textbooks and more on the utility of textbooks in national and international reconciliation processes.

Analytical Concepts, from Prejudices to Stereotypes, from the 1960s Onwards

As indicated, following the political functionalisation of textbooks in the 1950s, the 1960s saw the rise of analytical content analyses. These conceived of nations not as states or as monolithic units but as objects of study contingent on their relations with other nations and on textbook authors’ interpretations. Haakon Vigander’s innovative study of textbook representations of German-Norwegian relations (Vigander 1961/62) characteristically presented textbooks not as mere objects of international negotiation or as vehicles of national histories but as media of interpretations of international relations whose contents were contingent and open to debate. Some studies historicised textbooks by assessing their narratives in relation to one another over time, as demonstrated in Helga Passon’s study of ‘Nationalism in German Language Educational Literature’ (Passon 1968/69). A series of studies devoted to representations of nineteenth-century

national movements in German textbooks, or to representations of nineteenth-century European history in Czechoslovakian textbooks, similarly demonstrated that textbooks are contingent media of historical interpretation; while they reproduced or denoted images of nations, they also reflected or connoted the national self-understanding of textbook authors (see Otto in this volume for further investigation about authorship).

Sociological research of the 1950s into social bias and prejudice within and between societies by such figures as Gordon Allport and Bruno Bettelheim later found expression among textbook specialists in their analyses of ‘images’ and ‘stereotypes’, which referred to the imagined perceptions, concepts, and literal images of one nation as they are transmitted in textbooks of another nation. Jörg Lehmann shows how the emergence of stereotypes of Germans as ‘barbarians’, ‘vandals’, or ‘huns’ in French history textbooks following the Franco-Prussian War of 1871, for example, may have conditioned not only the belligerent attitude of a later generation of textbook authors in the 1910s but also contributed towards popular consent to entering the First World War (Lehmann 2015, 63; on textbook and war see also Guichard in this volume). Rainer Riemenschneider even unearths how prejudices and national clichés find their way incidentally into grammar exercises contained in language textbooks, where they might be least expected. Riemenschneider points out that language teaching is plagued by the reproduction of dichotomous cultural comparisons and even entrenches differences and similarities. However, the dichotomous prejudices contained in these materials inadvertently impinge on the categories of analysis he establishes when he describes them metaphorically as the ‘expression of positive and negative attitudes towards other groups’ (Riemenschneider 1980, 37). Moreover, by appealing, at the end of his article, to purge language teaching of such dichotomies by focusing on its true aim, ‘to convey a culture in its innermost form of expression, that is, in its language’ (Riemenschneider 1980, 38), Riemenschneider effectively reproduces a notion of national essentialism. This is an idea to which Maria Todorova refers in an enlightening analysis of alterity as a category of analysis, published in 1999. Although deconstructionist approaches to textbooks successfully demystify the concepts of ‘nation’ and ‘tradition’, she claims, they often revert to other essentialist concepts such as ‘identity’ (Todorova 1999, 163) or, in Riemenschneider’s case, to ‘language’ and ‘culture’ as the nation’s ‘innermost form[s] of expression’, a viewpoint which echoes the ideas of Johann Gottfried Herder. It is in keeping with this narrow conceptualisation of the nation that unilateral studies of ‘The Image of the German’ (Labuda 1972/73), suggesting an essence of Germanness in the abstract notion of ‘the German’ and ‘The Formation of the Japanese Mind’ (Karasawa 1959/60), have repeatedly echoed an anachronistic understanding of essential Germanness or Japaneseness, via which research arguably became complicit in cementing the association between ethnicity and nationality.

*Nations Within Nations: Alterity and Processes of Inclusion
and Exclusion in the Wake of Migration*

One of the first mentions of the concept of ‘the other’ in textbook research about nations occurred in 1982 in reference to relations between Japan and the USA (Goodman et al. 1983). In this article, Nagayo Homma explains this concept in terms of ‘how others see each other’ with respect to—pursuing the visual metaphor—‘the image of America held by foreigners’ (Goodman et al. 1983, 543) and in relation to textbooks as a corrective of ‘the formation of a vague and confused image of a foreign country’ (Goodman et al. 1983, 545). Yet Homma rapidly falls back on traditional precepts of textbook revision by defining ‘images’ of the other in terms of bias, imbalanced emphases, missing information, and inaccuracies (Goodman et al. 1983, 547).

In European studies, surprisingly, the concept of ‘the other’ entered usage in the context of neither post-war détente nor the Cold War, but in relation to the integration of migrant minorities in school environments. A first mention is found in Christine Kessler-Theil’s article about ‘Teaching Materials about “Being Foreign in Germany”. Foreigners, Ethnic German Immigrants to Germany, Asylum Applicants’ (Kessler-Theil 1993). Later studies sustain this concept of alterity, albeit not in political or strictly national terms but in terms of ethnicity (Shlapentokh 2009; Eid 2010; Drake and McCulloch 2013) and ‘cultural recognition’ (Gaul 2014). Although none of these studies underpin the notion of ‘otherness’ with reference to the theoretical foundations of this concept in the works of Emmanuel Lévinas or Stuart Hall, the naïve usage of this term to refer initially to social and political antagonisms between nations, and then to ethnic and cultural differences, generally meant that textbook research developed a political and cultural semantics of its own which rested on the assumption that peace and mutual recognition via the dissipation of notions of alterity were the desired goal of textbook research.

METHODS

When historians work on nationally significant events, or when geographers work on national spatial and social representations, their methods invariably borrow concepts and approaches from sister disciplines, as this section will demonstrate. Moreover, the necessarily interdisciplinary and therefore complex nature of textbook research and the politically determined demand for case studies explain why textbook researchers have shied away from defining methods.

In spite of, if not as a consequence of such complexity, textbook researchers have regularly stated that their work involves a combination of quantitative and qualitative enquiry. This entails study of a representative collection of comparable numbers of chapters or images from different textbooks in one or more countries, whose texts and images are then subject to closer scrutiny in order to establish and compare the ‘styles’ and ‘undertones’ expressed by authors, as

well as the accuracy, suitability, and the degree of historical empathy contained in their works ('Die Behandlung des Westens' 1959/60, 133). A similar approach was advocated by Christoph Kleßmann, who defined the purpose of textbook research as the exploration of 'all the subtextual aspects and unexpressed intentions of texts' (Kleßmann 1976, 64f).

Ruth Firer and Sami Adwan succinctly summarise the history of textbook research about nations as a progression from quantitative research in the 1970s to a combined application of quantitative and qualitative research in the 1980s and subsequently to the application of purely qualitative research from the 1990s. To this sequence we may add the restoration of dual quantitative and qualitative research with the aid of digital hardware from the 2000s (Muhammad and Brett 2015). The dual method has provided the backbone of successive bilateral textbook commissions which typically collate statistics about the numbers of references (in what Kleßmann 1976 calls a 'frequency analysis') or of pages in a textbook (in a 'spatial analysis') devoted to a specific topic as a proportion of the total number of references or pages, figures then used 'to validate results of the qualitative analysis' (Firer and Adwan 2004, 20). Having collated such data, bilateral comparison typically involves scholars appraising the textbooks of their own country before meeting with scholars from another country in order to compare and discuss results and then jointly compile recommendations for revision.

Although these declared methodologies have improved our understanding of the presentation of nations and their interrelationships in textbooks, other, largely undeclared but no less effective methods have since been applied in innovative ways in order to enhance our understanding of nations, but also of the subtle symbolic and related mental representations which underpin the concept of the nation as a social group. This section therefore explores some of the existing methods which specifically foster understanding of the presentation of nations in textbooks.

Historicisation

One of the most common and fruitful methods of textbook research is the historicisation of representations, which lends itself to deconstruction and comparison as shown later in this chapter. Characteristic is the attempt to define given epochs in which specific types of textbook representation dominate or change (Sulstarova 2017). A particularly interesting example appears in relation to the two Germanies between 1948 and 1990, whose distinct but interrelated self-understandings were assessed in terms of evolutionary phases by Karl-Ernst Jeismann in 1981. According to Jeismann, the varying intensity of the Cold War and measures addressing détente were reflected in the distinctions made in textbooks between the German state and the German nation. While East German textbooks of the 1960s presented separate eastern and western states while maintaining the idea of a united German people or nation, from the 1970s, they increasingly legitimised separate

states and separate nations (Jeismann 1981). Jeismann's study thereby exposes the connection between types of political regime and notions of state and nation and their interrelation.

Comparison

Comparative methods constitute perhaps the richest approach to textbook research into nations and nationhood. These include single textbook studies, the comparison of disciplines, bilateral and multilateral comparisons but also symmetrical and asymmetrical comparisons of nations and regions or nation-states and nations within nations. In addition to distinctions between political and social ideas of nationhood, as illustrated by Jeismann in 1981, structural comparisons of textbook presentations of nations also reveal pronounced and persistent differences. Sylvie Durando and Pierre Guibbert's comparative study of the contents pages of history textbooks in five countries over a 100 years is particularly fruitful. The authors show that 65.8 per cent of German textbooks print details about the dates of revised editions of textbooks, while merely 6.9 per cent of Spanish textbooks do so. British textbooks, meanwhile, stand out on account of their authors' use of a literary, 'non-scientific' style of writing (see Durando and Guibbert 1999, 143). A similar source of comparison is provided by representations of maps, whose various applications of colour, arrows, borders, and names in neighbouring and distant countries also tend to reveal national distinctions rather than commonalities (see Mittag 1999). However, comparative textbook researchers face a consistent challenge. How do they establish samples of textbooks which are representative of a nation or which provide comparable selected data from a nation's educational materials? The endeavour to use nationally representative samples is even more challenging in multilateral or asymmetrical comparisons of nations and regions or nation-states and nations within nations. By contrast, some authors have unearthed interesting national repercussions in comparisons of successive editions of a single textbook or in the works of single authors (see Bodo 2003).

Deconstructivism

One of the most prolific forms of the content analysis of textbooks since the 1970s has been deconstructivism, a term borrowed from the field of architecture but which lends itself to textbook criticism insofar as it is designed to expose the foundations of rhetorical assumptions about nationhood by criticising explicit and implicit reproductions of identities, self-understandings, or stereotypes in educational media. The most frequent targets of the deconstructivist approach are stereotypes. David Wright's identification of British textbooks' presentation of Africans as labourers, or as people carrying spears or else idle, furnishes further proof of the dichotomous foundations of national mindsets (Wright 1981). In a similar vein, Kuno Rinke breaks down the rhetorical

architecture of textbooks which ‘culturalise’ or ‘ethnicise’ nationhood by reproducing notions of inclusion and exclusion when employing the personal pronouns ‘we’ and ‘they’ (Rinke 2006, 397), when using pairs of concepts in combination with definite pronouns in order to denote ‘the Germans’ as opposed to ‘fellow pupils’ (*Mitschüler*) (Rinke 2006, 398), and when indicating that ‘fellow pupils’ might be in need of help as a result of their ambivalent status ‘between worlds’ (Rinke 2006, 399).

Narrative Text Analysis

The systematic exploration of analytical narrative techniques in the field of literary studies in the 1960s occurred concomitantly with the rise of narrative analysis in historiography more generally, as applied by such writers as Hayden White. Initially, neither historians nor textbook researchers heeded this innovative approach. ‘Narrative’ in the field of textbook research merely signified analysis of the organisation of information within texts, as practised by Christoph Reinprecht and Hilde Weiss in their study of antisemitism in contemporary Austrian textbooks. The fact that Austrian textbooks treat the fate of Jews separately (in distinct paragraphs or chapters) from the treatment of the Austrian nation in order to sustain the impression that Austria was a ‘victim’ of National Socialist aggression is less a narrative technique than one pertaining to the layout of texts and images on the page (Reinprecht and Weiss 1990). The narrative approach has only recently been applied to textbooks in a structured scientific fashion, by such authors as Rafael Valls Montés and Jörg Lehmann. Lehmann explores the literary qualities of textbook historiographies in terms of the ‘topoi’ they employed at a time when the discipline of history was in its infancy at the end of the nineteenth century (Lehmann 2015, 56). At that time, textbook authors organised historical information temporally, placing nations at the end of a narrative of increasing civilisation as if they represented the culmination or ‘endpoint of the civilising process’ (Lehmann 2015, 58). UNESCO’s study of *The International Status of Education about the Holocaust* similarly compares national narratives on the basis of the categories of historical times and geographical spaces, interpretative paradigms, narrative points of view, and didactic methods (UNESCO 2015).

Semantics

Exploration of the ‘undertones’ of textbook texts called for in 1959 (‘Die Behandlung des Westens’ 1959/60, 133) has been pursued more systematically in recent studies of national semantics. The presentation of the relationship between the German nation and the National Socialist regime from 1933 to 1945 in German textbooks of the 2000s, for example, is regularly conceived in spatial terms in which the status of the nation is not denoted but connoted metaphorically in terms of its position ‘under’ political regimes or ‘between’ democracy and dictatorship (Carrier 2013, 57). Similar studies compare

terminologies used in different countries to refer to the same event. Politically charged references to the war between Zionist forces and Palestinian Arabs in Palestine in 1948 as the ‘War of Independence’ by the Israeli state and as the ‘Catastrophe’ (Al-Nakba) by the Palestinian Authority constitute one example of such comparative textbook semantics (Firer and Adwan 2004, 152).

Textbook Production and Usage

Since the 1990s, increasing numbers of researchers have turned their attention to the national repercussions of the conditions in which textbooks are written, produced, and read or used. Falk Pingel’s report about a workshop run for textbook writers in 1995 in post-apartheid South Africa offers unique insight into the role of educators in state-building (Pingel 1995). Héctor Lindo-Fuentes’ exploration of the clash between authors’ values and those of successive parties in power in El Salvador similarly highlights the political and didactic constraints placed on textbook authors (Lindo-Fuentes 1999). Conversely, the effects of textbooks on their nationally defined readers, that is, on the ways in which the textbook formulates its concept of readers’ subjectivity, were the subject of Christer Karlegård’s study of experiences of narrative history in Sweden (Karlegård 1996).

Metanational Analysis

The fact that the nation provides the or part of the framework of almost all textbook work, and since the pervasiveness of this framework often leads researchers to overlook its contingency, as noted earlier in this chapter, textbook studies which explicitly address modes of representing nations or international relations within textbooks act as useful reminders, enjoining researchers to revise frameworks and refine methods. Moreover, in light of the complexity of interdisciplinary textbook work, ‘metareflection’ on its tools and techniques provides indispensable support to future scholars, as manifest in Robert Maier’s recognition that ‘textbook historiography’ is a genre in its own right or Rainer Riemenschneider’s comparative study of the patterns governing binational (French-German and Polish-German) textbook discussions (Maier 1998; Riemenschneider 1998). In this respect, Maria Todorova’s warning that analytical concepts designed to deconstruct national narratives found in textbooks often lead to the legitimisation of the very concepts they intend to expose, such as ‘the other’ and ‘alterity’, provides further confirmation of the utility of reflection on the conceptual tools of research about textbooks and about nations in general.

* * *

The methods outlined here have generally been applied in combination with other methods. Ruth Elson’s study of ‘Germany and the Germans in American Textbooks of the Nineteenth Century’ (Elson 1959/60) is one such example. Elson notes that value judgements underpinning prejudices towards the national ‘character’ of a ‘people’ found in textbooks make an ‘impression on a child’ and

on its ‘thinking’ (Elson 1959/60, 51). Textbook authors applied the values ‘degenerate, bigoted, superstitious, immoral and listless’ (Elson 1959/60, 53) to Southern European people, for example, while classifying German people as ‘superior’ and ‘industrious’ (Elson 1959/60, 54ff.). Elson thus effectively applies a descriptive content analysis, followed by deconstruction of the rhetoric of nationality and of the misleading reduction of individual characters to a putative collective character, followed by an appeal for constructive research into national stereotypes (Elson 1959/60, 57). Jocelyn Létourneau similarly combines methods by tracing the historical evolution of narratives in Quebecan textbooks, which shifted from telling the story of a marginalised group of underdogs in French-speaking Canada of the 1960s to relating that of a nation of assimilated resisters who had nonetheless made a home in Canada in the 1990s (Létourneau 1996).

An alarming trend among contemporary researchers who feel bound to emulate the ‘scientific’ character of research familiar to those working in the field of natural sciences is the announcement of methods which are not, or cannot be, upheld in the presentation of research results. Christiane Hintermann, Christa Markom, Heidemarie Weinhäupl, and Sanda Üllen’s assessment of the status of migrants and migration in recent Austrian history textbooks adopts the guise of social science enquiry into the ‘production of scientific knowledge’ (Hintermann et al. 2014, 79) based on ‘real-life practices’ (Hintermann et al. 2014, 82), but concludes, in the convincing but conventional mode of content analysis, that the space or ‘weight’ devoted to migration and migrants in these textbooks requires readjustment (Hintermann et al. 2014, 84). A similar gulf between stated and implemented methods pervades textbook research about nations. Elizabeth Steding’s study of textbook narratives of the German Democratic Republic, for example, addresses ‘grand narratives’. However, it does this not with reference to narrative methods developed in the fields of literature or historiography outlined earlier in this chapter. Instead, Steding carries out a traditional descriptive content analysis of the relative space devoted to East and West Germany in school readers used in the united German state, on the basis of which she concludes that East Germany has been unjustifiably marginalised in textbooks since 1990, that is, presented in terms of state communist ideology rather than as a complex social and political system (Steding 2014). Although the arguments are enlightening and convincing, they are based not on the narrative approach as declared but on descriptive content analysis.

TRENDS

Textbook research into nations, nationhood, and nationalism has, as demonstrated by the publications outlined in this chapter, elicited a limited but growing range of topics and largely neglected conceptualisation or theoretisation while developing innovative methods. The *concept* of nationhood has traditionally been tacitly defined in terms of politically expedient stereotypes and alterity against a background of conflict. However, having been begotten by politics

and raised by historians and geographers, this field of scholarship has since been adopted by media and cultural analysts. *Topics* have therefore included war, peace, conflict resolution, and ‘images’ of external or internal ‘others’ but also textbook production and reception, linguistic and visual representations, and issues such as national languages, gender relations, ecology, and human rights. As suggested at the beginning of this chapter, it would be less appropriate to ascribe these topics and concepts to the national (German) institutional context of their publication than to label them as the aggregate of their authors’ concerns over six decades, which largely arose in response to challenges facing international relations within post-war Europe.

This overview has shown that theories, concepts, and methods applied to understanding the nation, nationhood, and nationalism in textbook research evolved according to a loose chronology. The general trend has been from a Manichean instrumental understanding of nations to a highly complex interpretation of symbolic systems exposed to multiple interests and contingent on textual and visual communication supported by the medium of the textbook. This trend corresponds to a shift from the ‘descriptive analytical method’, which measures the degree of ‘accuracy, fairness, worth, comprehensiveness and balance’ of textbooks (Kleßmann 1976, 61), to what we may call, with deliberate tautology, an ‘analytical analytical method’ which aims to assess processes of the symbolisation of nations over time (within a nation) or in space (comparing nations or regions). This shift clearly emerges in two studies of textbook representations of nations from 1968 and 1996, each of which applies startlingly different canons of analytical concepts to assess textbook contents. In the first study, Helga Passon addresses nationhood in textbooks on the basis of ‘love of the homeland and patriotism’, ‘the meaning of the mother tongue’, ‘the preference of homely values and customs’, ‘emphasis on descent’, and ‘emphasis on history, tradition and culture’ (Passon 1968/69, 59–65). By contrast, Constantin Angélopoulos and Christina Koulouri’s study, published 28 years later and no less attuned to the task of understanding nationhood, focuses on ‘historicity’ in terms of the organisation of the past in relation to the present and future within textbooks, ‘language’ as a mode of thought and as a national symbol, ‘religion’ as a means to defining outsiders and appealing to the divine providence or provenance of the nation, ‘territory’ as a symbol of the putatively deterministic permanence of the nation, and the rhetoric of ‘us’ and ‘them’ which underpins dichotomies of belonging and not belonging (Angélopoulos and Koulouri 1996, 331).

Surprisingly, textbook research about nations has evolved in tandem with but ignorant of studies of nations and nationalism carried out by historians, sociologists, and political scientists. Renouncing established concepts and theories, textbook research has failed to address the concerns of specialists of nations and nationalism and rarely incorporated findings from such journals as *Nations and Nationalism*, *Nationalities Papers*, or *National Identities* concerning ethnonationalism, ethnosymbolism, primordialism, or modernism (see Özkirimli 2000). Moreover, textbook research has generally focused less on

nationhood, that is, what constitutes a nation as a social group and the bonds between its members, and national identities, the symbolic expressions and experience of this social group, than on nationalism, in other words the drive towards national self-determination and its excesses in encounters with other nations, and how to overcome it.

In spite of its shortcomings, it would be presumptuous to disqualify textbook research into nationhood; the validity and legitimacy of a field of scientific enquiry depend not only on the conceptual but also on the methodological rigour its advocates apply when exploring specific objects of enquiry. Does, therefore, this field of research address topics in combination with methods which help us to understand nations and nationhood in ways which are peculiar to textbook research and therefore distinct from other approaches practised by historians, geographers, or sociologists, for example? Over six decades of institutionalised research, as demonstrated by the writings outlined earlier in this chapter, the objects of textbook enquiry have crystallised into (a) the impact these media have on communication processes at play between people in different nations who use these materials in educational contexts (the formal aspect) and (b) ways in which educational media build, manipulate, or undermine or reconcile nations (the political aspect). In sum, textbook research provides considerable insight into our understanding of nations and nationalism in two respects. First, it explains the apparently inscrutable rhetorical, narrative, and visual techniques by which language and images connote meaning associated with nationhood. Second, since textbooks almost invariably connect states with their citizens via learning, every analysis of a textbook is by definition an analysis of the contingency of the messages it conveys. Thus, the combination of early textbook research in which textbooks were tools of international reconciliation and subsequent exploration of the verbal and visual forms they use constitute the specificity of textbook research about nationhood.

In spite of calls to abandon the concept of the nation as an analytical category and framework of textbook research, this concept has been a surprisingly tenacious paradigm of textbook research, even in studies which deconstruct linguistic and visual representations or which claim to go 'beyond' the concept by focusing on international or transnational issues (see the chapter on transnational identities in this volume). This tenacity is reflected in the consistency of scholars' criticisms of nationalism in Europe, which range from Henri Brugmans' appeal for a revision of the concept of the nation with respect to advancing European union in 1970 (Brugmans 1970/71) to Magdalena Telus' argument that the nation is not a 'necessary category' of analysis but a historical (and therefore transient) category which served a purpose of dwindling validity in the context of collaboration between European states (Telus 1996, 384f). However, the national category continues to make sense *de facto* as long as researchers continue to use it, regardless of whether they adopt or challenge it. And they are likely to continue using this category as long as textbooks represent national histories and geographies and depict national symbols, as long as textbook research serves as a corrective of educational nation-building processes and of

mutual international perceptions, and as long as state and suprastate institutions preside over mechanisms of textbook approval and curriculum planning. Luigi Cajani is right to warn us that substituting the national with a European or even Eurocentric framework introduces a no less biased vision than that of the nation, in which non-European nations and groups continue to be presented as objects rather than subjects of history (Cajani 2013, 84). In short, attempts to rid textbook research of the concept of the nation might encourage what Todorova calls a Hegelian drive towards the voluntaristic harmonisation of national conflict in such ideal supranational frameworks as Europe. Todorova's pragmatic alternative involves the acceptance of national, subnational, and supranational groups and polities and their 'others' as a constellation of forces held together in a 'hermeneutic relationship', that is, one subject to a constant process of interpretation (Todorova 1999, 171).

Instead of arguing in Brugmans' and Telus' terms, with reference to the excesses and dysfunction of European nationalisms, either in favour of or against the nation as a category of textbook research, more work is needed which accounts for changes of the concept of the nation in line with its changing political and symbolic status. The nation does not face extinction today. Its fragility is a consequence not only of conflict and the shifting balance of state powers within Europe but also of divergent conceptual traditions leaning towards differing degrees of statism or liberalism. This chapter about textbook representations of nations produced primarily by researchers in Germany and Europe has addressed understandings of nationhood conceived under the influence of national conflicts or post-conflict reconciliation processes after 1945. The topics, theories, and methods used here to assess textbook representations of nations are therefore the product of a specific history of a state and interstate system. Yet outside of Europe, where curricula are less frequently guided by national interests with the popular concurrence of local communities, and increasingly impinged upon by voluntary (non-profit) and corporate (industrial) sectors which call for increased attention in education to vocational skills and qualities geared towards global citizenship (see Standish 2012, 66f), textbook researchers must be vigilant towards shifting representations of nations whose textbooks (and their contents) are not only products of but also reproduce expedient notions of subnational and supranational community beyond state control.

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Transnational Identities and Values in Textbooks and Curricula

Simona Szakács

INTRODUCTION

Recent developments in the social and academic worlds have prompted textbook researchers to engage with new questions which contain the potential to change the way we conceive of (and conduct) textbook research. First, the post-1945 world has experienced broad historical and societal changes through intensifying economic and cultural globalisation, the increasingly visible experience of transnational migration, and the post-war growth of supranational economic, political, and regional integration projects such as the EU. These developments have been accompanied by an increasing awareness of cultural, ethnic, religious, and related diversities in our societies (on diversity in the context of educational media, see Niehaus in this volume).

Second, these changes have prompted us to reconceptualise some of the key notions of modernity: nation (see Carrier in this volume), citizenship, and identity. The world's growing structural and discursive interconnectedness (Appadurai 1990; Sassen 2006) has rendered purely ethnic conceptions of nationhood and nation-making increasingly illegitimate (Meyer et al. 1997). With the rise of a human rights regime based on principles of universal personhood, claims and rights to citizenship have become increasingly decoupled from exclusivist national identities, leading the way, in the early 1990s, to a post-national turn in the study of citizenship (Soysal 1994). The theorisation of identity has likewise shifted: no longer understood as a 'natural given', but instead as a highly situational, multidimensional, multilayered, and fluid social construct, identity has given way to 'identities' plural. In a post-constructivist

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E. Fuchs, A. Bock (eds.), *The Palgrave Handbook of Textbook Studies*,
https://doi.org/10.1057/978-1-137-53142-1_14

move, it is now increasingly seen as a category of practice to be explored, as something that people do rather than have (Brubaker and Cooper 2000; Brubaker et al. 2006).

Third, the 2000s witnessed growing interest across disciplines in transnationalism and transnationality, transnational processes, actors, and networks. This has not only brought scholarly attention to transnational identities, transnational publics such as migrants and diasporas, and transnational or entangled histories but has also given rise to a key methodological shift. The nation state as the default logic of compartmentalising the world has encountered the challenge of prominent calls for ‘methodological cosmopolitanism’ across the social sciences and humanities (see Beck and Sznaider 2006; Wimmer and Glick Schiller 2002), with the concomitant emergence of various ‘transnational turns’ in different strands of research into education and educational media (Dale and Robertson 2009; Fuchs 2014; Lässig 2009).

This chapter reviews some of the most prominent directions of study on educational media stemming from these developments, focusing on two inter-related aspects of the topic: (1) *transnational identities*, understood as novel loci of affiliation, particularly in the European context, and (2) *transnational values*, understood as building blocks of a universalising ethos which promote the projection of transnational identities. What this chapter does *not* do is review research into cross-national links, networks, and associations in textbook production, such as transnational reconciliation commissions (see, for instance, Faure 2011), nor does it dwell on interdisciplinary research into the (re)presentation in textbooks of transnational processes, actors, or concepts, such as migrants, diasporas, or refugees (see, for instance, Falaize 2010; O’Connor and Faas 2012; Schissler 2009).

I will commence by briefly introducing the thematic clusters, questions, and areas this chapter will cover; after proceeding to give an overview of theoretical and methodological choices, I will present the key findings that structure current preoccupations with transnational identities and values in textbook research. In the concluding section, I provide an evaluation of these trends and offer suggestions of future directions for the field.

THEMATIC CLUSTERS, RESEARCH QUESTIONS, AND AREAS COVERED

Despite earlier acknowledgement of transnational reconceptualisations across the social sciences, a definite preoccupation with transnational identities only appeared on the agenda of textbook studies around the turn of the millennium. Echoing the peace-related, anti-nationalist rationales of the early years of textbook research in the immediate aftermath of the Second World War, one of the first steps in this direction took the form of an increased interest in shared histories and heritages, particularly after the fall of the Iron Curtain and the geopolitical reconfiguration of Europe. The promotion of a European dimension in education, which has been organised and funded by the Council of Europe

since the 1980s, has dominated these preoccupations both in academic and policy terms. The potential of history teaching to defuse the national bombs in the spaces left empty by the end of the Soviet Union has been a key theme emerging from this agenda (see Christophe and Halder in this volume for the question of textbook concepts in post-socialist societies).

Research projects aimed at developing multiperspectivity in history teaching (Stradling 2003) through the promotion of regional and European perspectives that would transcend national animosities have been among the first to address the normative ideals of transnational history-writing (see Zloch in this volume on the notion of region). In a classic comparative study of 14 European countries, Falk Pingel (2000) explored the presentation of Europe in twentieth-century history textbooks and curricula and sought to identify, *inter alia*, the balance they contain between local/national, European, and world history, the links between these histories, and the ways in which educational media might promote a European dimension. Another comparative project on images of Europe in French and German history and geography textbooks from 1900 to 2010 has similarly explored the relationship between transnational and national perspectives on European history in the twentieth century (Sammler et al. forthcoming). Several volumes have emphasised regional histories in textbooks and their potential to transcend conflicting pasts; these have included Koulouri (2002) and Helmedach (2007) for Southeastern Europe, and Müller (2011) for East Asia. Preferred sub-themes include the relationship between self and other (for instance, Vogrinčič and Čepič 2009), between minorities and majorities (see Lässig and Pohl 2009), or between national and European identities (see later in this chapter).

The most prominent thematic sub-cluster involves the symbolic projection of Europe as a (new) *trans*national identity marker. With the increasing regional integration promoted by the European Union and its unprecedented successive enlargements post-1989, we find a flurry of work focusing on (re)presentations of Europe in its manifold determinations: as cultural space, historical legacy, discursive/symbolic resource, or (supranational) political integration agenda. Questions researchers have asked include: How do textbooks and/or curricula construct or symbolically evoke 'Europe' (Banjac and Pušnik 2015; Bozec 2010; Challand 2009; Sakki 2010)? What does Europe connote, mean, or conjure up, and how do these meanings change over time (Anklam and Grindel 2010; Elmersjö 2011; Pereyra and Luzón 2005; Soysal et al. 2005)? What historical periods, events, or persons are used to give weight to the idea of a shared European culture and identity (Araújo and Maeso 2012; Sénécheau 2006)? In applying the logic of dichotomising 'self' and 'other' which is common in the construction of national identities, other authors focus on Europe's 'other' (Challand 2009; Malatesta and Squarcina 2011). Lastly, another favourite topic is the relationship between global, European, regional, tribal, or national identity projections, both in relation to post-1945 developments for Western Europe (Schissler and Soysal 2005) and to post-1989 'transitions' for

Eastern Europe (Banjac and Pušnik 2015; Georgescu 2007; Michaels and Stevick 2009), or postcolonial experiences for Africa (Holmén 2011).

The second prominent thematic cluster concerns post-national or supranational understandings of citizenship. Much work focuses on European citizenship and the role of European integration in changing curricula across Europe, for instance, Philippou (2009) and Philippou (2012a) on Cypriot textbooks and curricula, Keating (2009) on Irish curricula, or Keating et al. (2009) on curricula in Europe.

Other authors focus on global or cosmopolitan citizenship and draw on a wider pool of countries and world regions. This strand is skewed towards the study of values, skills, and notions of citizenship that evoke a universalising ethos, such as human rights, diversity, or active and participatory democracy. Several case studies address, for example, the thorny relationship between local (often understood as national, but also regional, continental, or religious) and global values. Chisholm (2008) asks whether new South African history textbooks represent the nation and citizenship as broad/cosmopolitan or narrow, while Han (2007) interrogates Asian values and democracy in Singaporean history and social studies textbooks. The volume edited by Grossman et al. (2008) focuses on citizenship curriculum reform across the Asia-Pacific region in the context of globalisation, addressing perceptions of transnational values as counterweights to the Western/globalising set, such as Islamic values in Pakistan (Ahmad 2008), 'de-localised' Chinese values in Hong Kong (Lee 2008), and Confucian values in Taiwan (Doong 2008). Western cosmopolitan citizenship models in contexts marked by nationalising or democratising tendencies are explored for Eastern European countries by Szakács (2013) and Gross (2010), and for Latin-American cases by Suárez (2008) and Astiz and Mendez (2006).

Finally, a mushrooming set of sociologically informed studies explore worldwide trends involving global values and (re)presentations across space and time in social studies, civics, and history textbooks. Bromley and Cole (2016) focus on representations of the international arena; Ramirez and Meyer (2012) consider environmental, human rights, and diversity emphases, while Bromley (2009) examines cosmopolitan citizenship values. Such studies implicitly address transnational identities because they explore values that arguably project a post-national sense of belonging.

THEORETICAL AND METHODOLOGICAL LENSES

The theoretical landscape marking this field appears to be as skewed as its thematic range. While it is clear that the vast majority of research reviewed here proceeds from the premise of social constructivism, very few studies make their theoretical position clear or even explicit. Historians often adopt a position of multiperspectivity (e.g. Pingel 2000) and sometimes use the concepts of entangled histories, narratives, or myth (e.g. Lässig and Pohl 2009; Sammler et al. forthcoming). Much sociological and comparative education work relies on

concepts such as diffusion, scripts, or convergence, borrowed from neo-institutionalist thought to account for the post-war emergence of transnationally authorised reconceptualisations of national projections in textbooks and curricula (Ramirez 2012; Ramirez et al. 2016; Soysal 2002). Researchers grounded in political science, political sociology, or educational sciences often draw on Foucauldian or Gramscian critical perspectives (for instance, Araújo and Maeso 2012; Banjac and Pušnik 2015; Malatesta and Squarcina 2011), whereas social psychologists (see Sakki 2010) prefer social representations theory, which is less radical in its social constructivism. Interdisciplinary studies such as the eight-country comparison reported in Philippou (2012b) draw on several research traditions, which in this case range from the sociology of education and sociology of the curriculum to sociolinguistics, which all consider textbooks and curricula as socio-political texts permeated by power relations. Yet others draw on notions of myth or narrative in relation to the visual turn in cultural studies (see Anklam and Grindel 2010; Challand 2009).

In terms of research designs and samples, single case studies or two-country comparisons predominate. Studies comparing three or more countries with relation to specific issues are rare (they include Anklam and Grindel 2010; Challand 2009; Philippou 2012b; Pingel 2000; Sakki 2010), while large research designs involving statistical analysis of large cross-national samples are the exclusive purview of neo-institutional work looking into global trends (see Bromley and Russell 2015; Buckner and Russell 2013; Lerch et al. 2017). The vast majority of studies sample history textbooks because they are deemed of most relevance to identity-related topics, while civic education and citizenship textbooks are preferred in studies on global/cosmopolitan citizenship values such as human rights, diversity, or environmental concerns. Language textbooks make very rare appearances (one is Kämmer 2007, on Chinese literature textbooks in Taiwan). While geography textbooks sometimes undergo analysis in conjunction with history and civics books under the umbrella term of social studies, there is a marked dearth of studies using only geography to explore issues of transnationality (Malatesta and Squarcina 2011 is one exception). Chronological sampling often follows major historical ruptures, such as 1989 for analyses of post-socialist countries (Dierkes 2005; Gross 2010; Szakács 2016) or the Franco dictatorship for Spain (Pereyra and Luzón 2005).

Methodologically, most research on transnational imagery in textbooks draws on qualitative data and primarily proceeds using some form of thematic content analysis on either text, visuals, or both. In some cases this is supplemented by quantitative content analysis (Challand 2009; Elmersjö 2011; Pingel 2000; Sakki 2010; Uguz 2004). A more critical approach to content analysis is found in Araújo and Maeso (2012), who drew on Michael Apple's work to consider not only inclusion but also omission, 'that which was made absent' (Araújo and Maeso 2012, p. 3). Malatesta and Squarcina (2011), meanwhile, explored the narratives contained in visual imagery read as texts. Anklam and Grindel (2010) employed visual and narrative interpretation and contextualisation techniques for images; Sammler et al. (forthcoming) used

historical image analysis, while Challand (2009) analysed the ‘narrative sequences’ embedded in imagery to reveal commonalities and differences between textbooks from different countries. A smaller number of researchers make explicit use of mixed methods, either on single-case studies (for instance, Gross 2010, on Polish textbooks) or in combination with longitudinal data (see Moon and Koo 2011, on South Korean instructional materials). A major EU-funded eight-country project on constructions of ‘Europe’ in schools (PAM-INA) combined quantitative with qualitative content and discourse analysis of educational media but added an attitudinal measure by conducting surveys among pupils (Philippou 2012b). Others have incorporated data from ethnographic observations and interviews with teachers, pupils, curricula reformers, or textbook authors to triangulate their findings from thematic analysis of textbooks and curricula (examples include Pilbrow 2005 and Szakács 2018). Exclusively quantitative analysis of cross-national data is a characteristic of the neo-institutionalist strand of work in this field.

KEY FINDINGS AND ONGOING DEBATES

European or National Identities?

The presence of transnational narratives is often seen to mitigate against nationalistic discourses and exclusivist (potentially belligerent) national identities, reminding us of what has been called the ‘worldisation’ of national history (Schissler 2005, p. 235). In particular, research focusing on Europe falls within this category. We can distinguish between two main camps among those who look for traces of Europe in textbooks and curricula. The first equates Europeanism with anti-nationalism and deplores the lack of ‘European’ unity or shared history projected in the educational materials analysed. They usually focus on single cases and tend to find no reference to Europe at all (see the volume edited by Genovesi 2000, on pre-war Italian, Spanish, and Portuguese textbooks), or too few references to Europe (see Pereyra and Luzón 2005, on Spanish social science textbooks; Uguz 2004, on Turkish history textbooks) in the objects of their analysis. The other camp comprises those following more nuanced comparative research designs, working either diachronically (an example is Elmersjö 2011) or synchronically (for instance, Philippou 2012b) or uniting both approaches (see Challand 2009). These studies find ‘Europe’ in its manifold guises in the content of textbooks but they also find its inextricable paradoxes.

European Identity Through the National Lens

Most researchers would agree that in all the countries covered by their cumulative work, ‘Europe’ as a symbolic category enjoys similar meanings, encompassing notions of peace, economic prosperity, democracy, human rights, and celebration of diversity projected either onto the past (mostly in history textbooks) or towards the future (mostly in citizenship education).

Differences, however, emerge in these meanings' embedding in national narratives. For example, Sakki (2010), exploring social representations of the EU, found that French textbooks project a 'French Europe', British textbooks an 'ambivalent Europe', German textbooks an 'influential and unifying Europe', Finnish textbooks a 'threatening and enabling Europe', and Swedish textbooks a 'sceptical Europe', while a Franco-German textbook projected a world model of European integration. Soysal et al. (2005) and Sammler et al. (forthcoming) also found variations in how textbooks project a transnational ethos: Europe is equated with Frenchness (French Europe) in the French case, whereas in the German case, the future can only be envisaged as a European enterprise (European Germany). Lässig and Pohl (2009) found intriguing differences between textbooks from different disciplines; the world and Europe are still considered from a German perspective in history but not in social studies, even though historical events are presented in a 'deliberately unpatriotic undertone' in almost all textbooks examined (Lässig and Pohl 2009, pp. 128–129). In a study of Swedish history textbooks, Elmersjö (2011) found that Europe's manifold meanings change over time: from the second part of the twentieth century onwards, accounts of Europe's impact on Sweden replace those regarding Sweden's impact on Europe, a trend matched by a shift from national history to a focus on Europe as an entity with a shared culture, economy, political context, and history.

Even within a single country, Europe's meaning is not unequivocal. Philippou (2011) found five different discursive representations of Europe—spatial-locational, economic, political, historical, and cultural—in Greek Cypriot secondary school curricula, additionally observing that these had variously positive or negative connotations depending on the perspective taken. It thus appears that Europe can be discursively mobilised in different ways, to different ends, in relation to different national self-definitions.

National Identities Through a European Lens

While Europe, as we can see, receives different meanings in various national frameworks and educational media, it also gives meaning to the national in different contexts. Recent research suggests that the association of Europe with national narratives gives rise to nation-making and not Europe-making sentiment; thus, rather than serving to transcend nationalising tendencies, Europe lends them additional legitimacy in a post-1945 pattern. Interestingly, this phenomenon has been documented primarily for post-socialist contexts. The educational media of Eastern European nations post-1989 often advanced these nations' Europeanness as a transnationally validated, national identity-making pattern and as a legitimate way to distance the nation from its Balkanic or aberrant communist past; see Georgescu (2007) and Szakács (2015) for Romania, Michaels and Stevick (2009) for Slovakia, Pilbrow (2005) for Bulgaria, and Banjac and Pušnik (2015) for Slovenia.

But there seem to be similar tendencies on both sides of the former Iron Curtain. In Cyprus, Europe has served to assert both national and global neo-liberal ideologies, albeit at different points in time (Philippou 2012a). Zambeta has argued that in Greece ‘ethnocentricity and Eurocentrism are the Janus face of the school curriculum’ (Zambeta 2005, p. 177). In German history textbooks, while European and global developments are portrayed from a German perspective, association with Europe appears as the only way in which Germany can function as a valid nation after the horrors of war (Lässig and Pohl 2009; Sammler et al. forthcoming). Spanish textbooks and curricula glorify Spain’s role as ‘savior’ of Europe from the Islamic threat (Pereyra and Luzón 2005, p. 169). These findings show that positive evaluations of the nation vis-à-vis a European ideal are common beyond the East/West divide.

The ‘Other’ of Europe and Europe as the ‘Other’

Constructing ‘others’ in opposition to Europe is another way of projecting a sense of (European) we-ness. Malatesta and Squarcina (2011) discuss how Turkey is constructed as Europe’s other in Italian primary geography textbooks, Challand (2009) has shown how communism served the same role in French, (West) German, and Italian history books during the Cold War, while Kisby Littleton (2017) found that the presentation of the Crusades in English textbooks constructs Islam as ‘other’ to ‘civilised’ Western and Christian Europe.

The danger of Eurocentrism looms large in these depictions. The Western European model particularly, becomes in Maria Todorova’s terms (Todorova 2005), an unmarked category, while Eastern European experiences are excluded from common European narratives (Lässig and Pohl 2009; Pereyra and Luzón 2005). There further arises the danger of reifying Europe just as the nation state has been reified in ethnonationalist accounts (Araújo and Maeso 2012, p. 10).

Europe itself has been constructed as ‘other’ in non-European contexts where a transnational identity either counterbalances or emulates Western hegemony. For example, Turkish history textbooks present Europe as ‘culturally remote’ and ‘politically antagonistic’ (Uguz 2004). Despite a recent return to Asian/Confucian values cast as an alternative to the Western model (Lee 2008), Chinese textbooks still give a privileged position to Europe in world history (Yan 2014). In the absence of unifying national narratives, Kenyan textbooks resort to Pan-Africanist identities based on the common experience of aggressive European colonialism (Holmén 2011).

Cosmopolitan Imaginations

In debates dealing with cosmopolitan imaginations, we find similar rivalries as in those on Europe. Some emphasise rising transnational (global, regional, local) imaginations, while others find more impetus in nationalising agendas or

point to entanglements between both. Moon and Koo (2011) and Moon (2013) found depictions of diversity and human rights in South Korean textbooks to be symptomatic of the globalisation of the citizenship curriculum, while Soysal and Szakács (2010) identified diversity as one aspect of post-war transnational normativity in textbooks and curricula from England and France. In contemporary French textbook, a distinctly post-1945 universalistic stance connecting the nation to the global world in textbook and curricular content has been noted by Sammler et al. (forthcoming) and by Bozec (2010). Bromley and Mäkinen (2011) found that despite being one of the most ethnically homogenous nations, Finland displays a more pronounced valuing of diversity in its civic education textbooks than more ethnically diverse countries, revealing a broader sociocultural shift towards a globally aware citizen. In his comparison of Costa Rican and Argentinian citizenship textbooks and curricula, Suárez (2008) found that despite some historically bound differences, both countries embrace aspects of global citizenship through an affirmation of human rights. Linda Chisholm's (2008) study on cosmopolitan notions of citizenship in history textbooks and curricula in South Africa argued that new books foreground broader notions of South Africanism, incorporating inclusionary, Africanist identities, but teachers rarely, if ever, use this approach in class. The volume edited by Grossman et al. (2008) reveals tensions but also entanglements between national and regional identities, and global citizenship agendas in different locations across the Asia-Pacific region (see Lee 2008, on Hong Kong).

Findings from comparative research on history and civics textbooks from several European and Asian countries (France, Germany, UK, Japan, and China) point to the emergence of a new citizenship model that is more transnational in outlook. This trend is substantiated in Europe through the project of regional integration (EU), while in Asia more through a narrative of the active individual (Soysal and Wong 2006). Empirical evidence for emerging supranational models of citizenship has been found in increasing emphases in textbooks worldwide on human rights, the environment, student-centredness and diversity (Ramirez and Meyer 2012), world issues and membership in a world community (Ramirez et al. 2009), or individual agency, particularly after 1995 (Lerch et al. 2017).

In reviewing current research on European, Asian, and Middle Eastern (Arab, Muslim/Umma) collective identities as an intermediary level between the national and the global, Pingel (2017) identifies limits to the promise of supranational and/or global identities in textbooks, particularly in Asia, which lacks an regional integration project similar to the EU. Similar conclusions emphasising how the national lens prevails in relation to the cosmopolitan imagination find expression in the studies by Zimenkova (2016) on the Russian curriculum in relation to the national agenda of citizenship and by Gross (2010), who found that educating Polish youth about the Second World War continues to focus on reclaiming Polishness rather than on global understandings of citizenship. For the Asian region, the volume edited by Nozaki et al. (2005) uncovers a clash

between global/Western and local/regional values (e.g. Asian, Confucian) in chapters on textbooks and identities in Thailand, China, and Korea. Christine Kämmer's (2007) analysis of values in Chinese literature textbooks in Taiwan concludes that projections of the 'ideal' person involve a pronounced emphasis on Chinese traditions, Confucianism, simplicity, spirituality, family life, and a dual movement towards Taiwanisation meant to counteract both globalisation and the nationalising tendencies of mainland China.

As we have seen, the transnational and the national frequently find themselves pitted against each other as contradicting imaginations or mutually exclusive poles of identity-making. Soysal considers this an unproductive debate characterised by confusion between levels of analysis and unnecessary dichotomisation. Instead, she argues, there is a need 'to reconceptualise the transnational as integral to the very structuration of the national' (Soysal 2002, 273). Unfortunately, as this overview has revealed, this reconceptualisation is yet to take place.

EMPTY SPACES AND DIRECTIONS FOR FURTHER RESEARCH

The field of academic preoccupation with transnational identities in textbooks and curricula is decidedly Eurocentric, and Western-Eurocentric at that. Only a handful of studies approach the topic from a critical perspective, aiming either to decentre Europe (a pertinent example is Araújo and Maeso 2012) or to reveal its lack of uniqueness (see Soysal 2002).

Conversely, work involving world regions other than Europe, likewise longitudinal studies of cross-national trends, are more inclined to address transnational values than identities. Nevertheless, we find here a higher frequency of studies involving Asian or East Asian and Pacific rim countries (Grossman et al. 2008; Müller 2011; Nozaki et al. 2005; Soysal and Wong 2015) and much fewer African and Latin American cases—an obvious gap in research that has been addressed by neither single-case nor comparative approaches.

Even where they do engage with non-European cases, studies touching on the projection of identities in textbooks beyond the national frame still cite Europe as their reference point. Curiously, with some notable exceptions (Anklam and Grindel 2010; Dierkes 2005; Pingel 2000), there is very little in the way of attempts to transcend the symbolic geography of Cold War Europe by comparing textbooks from both sides, let alone any decentring of the field's Eurocentric bias through truly cross-regional comparative designs. The edited volumes by Schissler and Soysal (2005) and by Philippou (2012b) have made initial steps in the first direction by including separate case studies of new and old, 'core' and 'peripheral' European countries, while Gotellind Müller's (2011) volume has progressed in the second direction by examining East Asian transnationalism in textbooks through implicit comparison with European experiences. However, a unitary research programme covering several world regions in terms of transnational imaginaries under one theoretical

and methodological umbrella, with findings comprehensively published in English, is yet to take place.¹

Whether advancing notions of transnational subject formation (Millei and Imre 2016), spaces of global relevance (Macgilchrist and Christophe 2011), or transnational normativity (Soysal 2002), it is clear that research into the universe(s) of imagination presented to children through educational media has reached a critical juncture. It no longer suffices to describe or explore these increasingly variegated loci of imagination; we need to reflect on what they mean, what they do, and what they might effect, from a wider conceptual perspective. Moreover, we are called upon to engage critically with our own positionalities when we choose cases, select samples, and formulate research questions.

NOTES

1. A bilateral research project on conceptions of good citizenship has compared European and East Asian materials from 1945 to 2010 using a transnational design; findings on Chinese, Japanese, French, German, and English textbooks and curricula are reported in Soysal and Wong (2006), on French and Japanese textbooks and curricula in Soysal and Wong (2010), on English and French textbooks and curricula in Soysal and Szakács (2010), and on Chinese and Japanese citizenship curricula in Soysal and Wong (2015).

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Regions

Stephanie Zloch

INTRODUCTION

Choosing regions as subjects of investigation calls into question a long-accepted axiom in textbook research, namely, that textbooks are a central medium in the construction of national and state identity, that they convey officially sanctioned normative standards, systems of meaning, and values with which the state hopes to foster social cohesion, pass on cultural traditions, and strengthen its political legitimation.

It is true that the development of curricula and approval of textbooks are organised by the state in most countries. Even activities that cross state borders, such as international negotiations on textbook revision or bilateral textbook commissions, normally begin with nationally predetermined content to be reflected upon and revised in a way that reduces conflict. Thus, it took a complex, long-term culmination of political, societal, and academic motives to increase awareness within the field of textbook research of the existence and relevance of alternative spatial frameworks, which in this case consist in regions. For the interrelation of the notion of nation and textbook production and research, see Peter Carrier's contribution to this volume.

Interest in the phenomenon of 'regions' is volatile: it often fluctuates over time and varies significantly from country to country. Over recent decades, however, interest has grown stronger. Especially in Western Europe and North America, regions and regionalism have been 'rediscovered' with the new social movements that have been emerging since the 1970s. Central to this development are values such as participation and subsidiarity, with the region standing in opposition to the central state and the nation. This approach has proven immensely attractive to civil society activism in Central and Eastern Europe.

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Born of the political turn of 1989–1991, these movements saw regional narratives and memories, especially in their rediscovered multi-ethnic dimensions, as a chance to democratise and decentralise memory culture. Such narratives and memories were also an important resource in the search for a new—in this case, regional—identity. Over the course of Europe’s unification process, the idea of a ‘Europe of regions’ has circulated from time to time. There is hope that strengthening regions will better protect values like authenticity and citizen empathy, especially in an increasingly globalised world. But beyond that, the idea has gained traction that especially regions long considered ‘difficult’ for their multi-ethnic composition and, in some cases, their reach beyond state borders could in fact stand as role models for everyday life in the European melting pot.

Later and more tentatively than the expectations articulated by politics and society, a theoretical, systematic discussion of regions began. It accelerated over the last 15 years with the cultural turn in the field of geography and the spatial turn in the humanities and social sciences. Against this backdrop, transnational approaches aiming to open ‘new spaces’ beyond the lenses and logics of nation states (Werner and Zimmermann 2002, p. 630) have fallen on fertile ground. One of the most important and exciting methodological postulates so far is the push to analyse cross-border processes through a constant and reflective navigation between global, national, regional, and local scales.

Textbook research has only taken small steps towards participating in this discussion. In order to determine the significance of regions for textbook research, two fundamental questions must be addressed: What are the different kinds of textbooks available to investigate representations of ‘region’? And which approaches from more general academic discourse have existing textbook analyses applied so far? In principle, a broad plurality of methods exists with which to investigate the representation of ‘region’. However, as this chapter will show, the selection of a particular sample and theoretical framework is often linked to the preferred use of certain methodological approaches in textbook research.

SELECTION OF A STUDY SAMPLE

The first basic issue is determining a study sample. In terms of thematic scope, normative content, and degree of dissemination, there are significant differences among three types of educational media available to explore the representation of ‘region’. The first are textbooks and didactic material whose content explicitly and exclusively refers to one specific region. Within this category, there are major differences between the subjects of geography and history. While a discipline involving geography-based regional studies is common in many countries and normally situated in primary education, regional representations of history are rarer, usually conceived for secondary education. The region portrayed can either lie within present-day state borders (e.g. Lüneburgischer Landschaftsverband 2010) or span them (e.g. Beckers 2002;

Deutsch-französisch-schweizerische Oberrheinkonferenz/Conférence franco-germano-suisse du Rhin supérieur 2006; Lewandowska 2011/12; Zloch 2015). Particularly characteristic of the cross-border examples is that they are often multilingual. Among the disadvantages of region-based educational media is that they are frequently marginalised within the curriculum and relegated almost exclusively to the role of supplementary material, thereby achieving only a limited degree of dissemination.

Two exceptions stand out. In Russia in the late 1990s, an impressive programme began to regionalise education, with the intention that every region develop its own textbook for history and geography (Sečenikova and Koložvari 1998; Zavališin 1999; Vinogradov et al. 2001; Galin et al. 2008). Many areas abandoned this plan in the 2000s, but in the Republic of Tatarstan, heated competition endures between textbooks in Russian and textbooks in the Tartar language, with each communicating different interpretations of the region's history (for an overview, see Gibatdinov 2010). The second example is South Tyrol, where a three-volume history textbook in German, Italian, and the Ladin language has been mandatory reading for all secondary schools in this autonomous province since 2013 (Kustatscher et al. 2010a, b; Kustatscher et al. 2011a, b; Lechner et al. 2013a, b; for further material, see Pichler 2013; Kustatscher 2013).

Because of their content and, for the most part, inherently normative approach to portraying the region as a source of identification, these region-based educational media provide scholars with easily accessible material through which to analyse the representation of 'region' in schools. Several of these studies come together in a dossier on textbooks and textbook projects on the history of Germans in different European countries (Seewann and Maier 2015). In an extension of this approach, the analysis of cross-border, region-based educational media could make important contributions to innovative work on multilingualism and cultural translation, subjects that have recently received much attention in the field of textbook research (Wiater 2013; Lässig 2012). However, scholarship in this direction has not yet been initiated.

A second category of educational media is particular to states that maintain strong federalism in the area of educational politics and publish different textbook editions and didactic material for each province or federal state.¹ At issue are educational media on general history, geography, or social studies with separate chapters on the history, geography, or social studies of the specific region or sometimes simply with scattered regional references (e.g. a paragraph in the authorial text, an exercise, a source, or a map). Their degree of dissemination within the relevant province or federal state is high. In some countries, the editions for individual provinces or federal states are entirely independent works, in terms of language as well as of other features (examples can be found in Québec, Canada or in Flanders and Wallonia, Belgium); in other countries there are broad overlaps among the editions for different provinces and federal states (e.g. in Germany; Spain, including Catalonia; and English-speaking Canada). The educational media for specific provinces and federal states are

mostly based on current administrative borders. Historically, varying—or indeed, competing—constructions of regions are rarely or only selectively addressed.

In the field of textbook research, educational media for individual provinces and federal states have often been the subject of study, but rarely with the focus presented here: the representation of ‘region’. Scholars rather devote their attention to general topics of history, geography, or social studies (e.g. migration and integration, international relations, the World Wars and the Holocaust), and regional textbook editions serve to convey the range of different interpretative possibilities and narratives. A targeted examination of region-specific representations, however, can reveal explosive findings for memory culture; an example might be a multimodal analysis of the final phase of World War II in history textbooks for the German federal state of Saxony, which revealed a strong emphasis on the bombing of German cities, especially Dresden (Ruchniewicz 2008; Strobel 2008).

Finally, the most comprehensive group of educational media through which to investigate the representation of ‘region’ are those that take a national or centralised state perspective. Here, regions are only mentioned occasionally in text passages, sources, or illustrations, and even these references may have only found their way into the textbooks by coincidence. However, many of these fragments offer researchers interesting, even surprising insights into memory culture trends and mental maps, specifically because of their unintentional character. This became the path taken recently by a German-Polish research team, which used textbooks from four countries (Germany, Poland, Lithuania and Russia) to investigate the construction of one specific region in Northeastern Europe since the beginning of the twentieth century. This region is characterised by diverse, multi-ethnic traditions as well as competing claims and tight borders (Zloch and Lewandowska 2014). In addition to a classical qualitative content analysis, the study used synchronic and diachronic comparisons as well as a multimodal analysis that included maps and illustrations as particularly productive tools to capture the sometimes disparate and contradictory representations of the region. One important finding was that central state textbooks are indispensable to the investigation of representations of ‘region’—and not only in places where no region-specific educational media exist. They also serve as an important corrective in understanding and explaining a region through perspectives other than inward-oriented self-representation.

CONCEPTS AND APPROACHES

An early, important examination of ‘region’ in textbook research can be found in the proceedings of a conference on the ‘small scale’ (Hinrichs 1990), but this volume has remained largely isolated and failed to spark any subsequent debate. Its contributors assessed the concept of region and its educational use, at times with a degree of contention, directing special criticism towards the term *Heimat* (homeland). The authors shared an understanding of regions, common at the time, as ‘historically developed territorial units’ (Wehling 1987,

p. 7) below the level of the nation state. Accordingly, regional or state history oriented itself to political, administrative borders or dynastic continuities, while regional geography and regional studies considered environmental, economic, or socio-spatial markers.

In the first empirical studies on the representation of region, which began around 2010 in the field of textbook research, several different theoretical frameworks came into play. The following three studies or groups of studies will provide examples of the various approaches. The first of these looks at the tension between regionalism and national identity in Spain (Clemen 2011). The author compares Catalan editions of history teaching material with their equivalents from other regions of Spain. Without explicitly acknowledging it, the author's research questions tie in to the debate shaped by nationalism research in the 1990s and early 2000s on the relationship between region and nation, which saw the two as 'somewhat opposing, somewhat complementary concepts' (Lottes 1992, p. 36; for further examples, see Applegate 1999; Haslinger 2003). The regional can stand in opposition to the national, but it can also serve to crystallise and convey the national; thus, it is seen as a relational entity. The author defines 'region' according to mostly political and administrative criteria (Catalonia and other autonomous communities in Spain), but she also hints at a constructivist approach by analysing in detail the linguistic and semantic divergences between the Catalan and other regional textbook editions.

In the second example, the comprehensive study mentioned earlier in this chapter on a region in Northeastern Europe (Zloch and Lewandowska 2014) draws on a concept of 'region' inspired by recent theoretical discussions in human geography (for a variety of views, see, for instance, Werlen 2000; Gregory 2009; Henderson 2009; Knox and Marston 2010) as well as research on nationalism and transnationality (see Szakács in this volume). Here, regions are seen as spatial entities that do not have strongly defined outer contours but, precisely for this reason, are able to transgress supposedly fixed state borders. At the same time, their makeup is seldom homogenous; they incorporate a range of economic, societal, cultural, or religious influences to different extents over different periods of time. A region's coherence thus depends on its strength as a construct: a region can be described as an 'imagined community', drawing more heavily on shared experiences and knowledge than on political institutions (Molik 2007; Traba 2007; Ellis and Eßer 2009; Pernau 2011; Van Langenhove 2011; Núñez 2012; Paulmann 2013; Blevins 2014).

If a new entity only emerges through the interplay of different perceptions and bases of knowledge, it might be reasonable to suggest postponing the precise definition of a specific region to the end of a scholarly analysis (Bavaj 2006). For the German-Polish research team's textbook study, topological analysis thus presented itself as the method of choice. The analysis placed a conscious emphasis on structural-historical perspectives through seven central topoi: 'the Pruzzen', 'Grunwald/Tannenberg/Zalgiris', 'migration', 'religions', 'personalities', 'economy and society', and 'landscape'. This allowed the team to better recognise relationships and influences beyond nation-state borders and to

reflect upon the fact that many historical phenomena only influence the construction of a region through their effects on memory culture.

A third way for textbook research to draw on theoretical considerations from the discussion of 'region' is to focus on the encounter between global processes and regional or local living environments. Over the course of these processes, denoted with concepts like 'glocalisation' or 'transregionality', regions often provide more fitting points of reference than nation-state frameworks for the construction of hybrid and multiple identities. The regional perspective has thus garnered increased interest in current research on migration, ethnicity, and belonging, as well as on historical-political and global learning in societies shaped by immigration. In North America, the idea of studying 'region' and 'diversity' together is nothing new (see, e.g., MacGillivray 2006). Canadian textbook researchers who looked at the portrayal of the Holocaust or Islam in the educational media of individual provinces explicitly described the present-day societies in these provinces as being fundamentally affected by issues of religious and cultural diversity and minority rights (Oueslati et al. 2011; Hirsch and McAndrew 2014; Triki-Yamani et al. 2011). These studies, however, based on qualitative textbook content analysis or discursive analysis of semi-structured teacher interviews, maintain their focus on the topic of investigation in its global dimensions without a closer examination of connections to regional points of reference or regional identities.

A study on Islam in Catalan textbooks presents a similar constellation, namely, that the investigation of regional textbook editions shows little correlation to the representation of a multi-ethnic region (Samper Rasero and Garreta Bochaca 2011). By contrast, a lively discussion has begun in Central and Eastern Europe on how to translate society's recently rediscovered interest in the region's historical multi-ethnicity into the classroom and into education policy (Awramiuk 2009; Nikitorowicz 2009; Kossak-Główczewski 1999; Wiatr 2011; Seewann and Maier 2015). However, a comprehensive analysis on the region of Upper Silesia, based on around 80 Polish history textbooks published since 1989, showed that currently dominant educational media oriented towards the central state have neglected to use the region's present and historical multi-ethnicity as starting points for new democratic narratives (Wiater 2013).

RESEARCH POTENTIAL

Since there are still very few textbook analyses on the representation of regions, this area offers enormous potential for future scholarship. This section will briefly introduce four promising approaches. First, international comparative studies could expand to explore the different mechanisms at work in the construction of regions. This kind of comparison could apply to either a cross-border region or multiple regions (within a continent or across multiple continents). It would be tremendously valuable to study the representation of regions in Asian, African, or South American textbooks, since most findings in textbook

research have concentrated on the situation in Europe and North America. A second approach relates to the research trends of visual history and cartographic history. Multimodal analyses of textbooks so far have used illustrations and maps almost exclusively to look at national motifs (Schrout 2011; Kamusella 2010; Bode 2015); it would be interesting to know whether regional visual and cartographic languages also exist. Third, even in the most rapidly expanding field of textbook research, which studies interaction with, use and adoption of educational media (see Part IV of this volume), regional distinctions have hardly played a role. Depending on cultural or socio-economic factors, a country's regions may take different positions on the value of textbooks in the school classroom, or textbooks may stand in stark competition with other regionally available or distributed media. Finally, a theoretically and methodologically far-reaching approach could be applied to representations of regions in the context of interrelationships, multilingual settings, and cultural translation. In this context, a question for future textbook research might be: In an era of globalisation and increased migration, to what extent is the construction of regional identities changing? This question ties in to the educational policies of several European countries, which see new opportunities in regional didactics through their power to offer material that strengthens identity and provides orientation in heterogeneous societies shaped by immigration (see, for instance, Georgi and Ohliger 2009; Schiersner 2011). Choosing regions as the object of textbook research therefore fundamentally opens up the possibility of investigating new spatial perspectives beyond the usual, nationally laden narratives and of discussing their importance for the construction of identity.

NOTES

1. Some federally organised states do not develop special textbook editions for each province, canton, or federal state; examples are Austria and Switzerland.

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Representations of Class, Race, and Gender in Textbooks

Linda Chisholm

Social movements in the 1960s and 1970s gave rise in many parts of the world to an uneven but intense effort to address racism and sexism in textbooks. Subsequently, textbook research has increasingly analysed the representation of race, class, and gender in textbooks. The following chapter examines studies on class more generally as well as specific case studies of race and gender representations in various countries.

REPRESENTATIONS OF CLASS

Studies of textbooks in relation to class have taken three main forms, each united by the view of textbooks as both shaping and being shaped by broader processes of social inequality and injustice.

The first approach concerns the presence or absence of different classes, such as the capitalist and working classes, in textbooks and the political implications of such inclusion and exclusion. Thus, for example, Michael Apple has argued that ‘all too often, “legitimate” knowledge does not include the historical experiences and cultural expressions of labour, women, people of colour and others who have been less powerful’ (Apple 2004, p. 185). Such exclusions of less powerful classes and specifically of working-class history are also observed as playing a particular role in legitimating the authority of the powerful and in negating the experiences and therefore the working-class’s consciousness of its own history and role within it, thereby assisting in the social and cultural reproduction of inequality. In her study of ‘working-class’, ‘middle-class’, and ‘elite’ classrooms in the United States, for example, Jean Anyon observed that

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textbooks in use in middle-class and ‘elite’ schools devoted far fewer pages to labour history than those used in working-class schools (Anyon 2008, p. 192).

This inequality of representation in the manifest content of textbooks is often set alongside a broader understanding of the workings of class ideology provided by the latent content of the ‘hidden curriculum’, which is the second approach in this area. In *Ideology and Curriculum* (Apple 1979), Apple shows how the treatment of conflict in social science texts, for example, can lead to political quiescence and an acceptance of the existing distribution of power in society (Apple 1979, p. 85). Such class ideologies work by attempting to show that societies are structured by consensus rather than conflict; indeed, they ignore the role of conflict in the development of science. In his later work, Apple argued against reductionist analyses which view all official knowledge as the knowledge of dominant groups (Apple 2004, p. 187). Instead, he emphasised the ‘continual remaking and relegitimation of the culture’s plausibility system’ through conflict, compromise, and negotiation (Apple 2004, p. 187). Frameworks and content can and do change, contradictions can be evident in the text, and new items can be included. But often this is through ‘mentioning’, a process of selective and limited incorporation of previously excluded knowledge.

The third approach is less concerned with the legitimacy role of overt and hidden textbook content than with the different kinds of knowledge made available to students. The argument here is that what counts as knowledge in different schools varies depending on the social class predominating among the pupils. Jean Anyon’s study of social class and school knowledge, for example, shows that the texts chosen for children in schools predominantly attended by working-class children generally ‘contained less information, fewer inquiry[-] or independent research-based activities and more of an emphasis on social science knowledge as facts to be remembered [...]’ (Anyon 2008, p. 191). In contrast with schools dominated by middle-class, affluent, and elite children, working-class schools taught a more restricted knowledge of facts isolated from context, emphasising behaviour and procedures rather than academic or conceptual knowledge (Anyon 2008, p. 193). These differences between schools play a part in preparing children for unequal futures. In colonial contexts, the nineteenth-century adaptation of British working-class curricula for new converts in the colonies, designed to teach them the habits and values expected of subordinated colonial subjects, has been extensively researched since the 1970s (e.g. Hunt Davis 1973/4; Zimmerman 2010).

REPRESENTATIONS OF RACE

Two trends stand out in studies on representations of race. The first is linked to what Crain Soudien refers to as the persistence of “‘race’s” continued viability and salience as a marker of worth and identity’ (Soudien 2013, p. 15). The second is related to how changing theoretical and political responses to this continued ‘salience of race’ have shaped studies of representations in textbooks.

In trying to understand why race has continued to be ‘the defining question of the twentieth century’, Soudien recently reviewed the state of the debate on race (Soudien 2013). Both scientists and social scientists, he shows, agree that race is a ‘non-sense’. In tracing the scientific argument on ‘the myth of race’ from the 1940s and 1950s to the human genome project of the 1990s, he demonstrates that the consensus within the scientific community is that ‘race’, like the concept of ghosts, is an empty concept. It cannot be empirically demonstrated.

Several studies on textbook representations on race are informed by similar concerns. Two examples will suffice here: one relating to biology textbooks in the United States and the other regarding sports science textbooks in Australia. Morning (2008) finds that ‘race appears to be returning, not disappearing, as a topic of biological instruction’ (Morning 2008, p. 108). Her study of 80 biology textbooks published in the United States between 1952 and 2002 shows how the emphasis has shifted over time from an approach to race as phenotype to one of genotype without any empirical data to support it. She shows how genetically based definitions of race ‘have grown more popular’ (p. 119). Direct references to race include the positing of a hypothesis outlining the multiregional origins of humanity in direct opposition to the ‘controversial suggestion that all human beings share African ancestry’ (p. 124). Indirect reference to race is usually ‘in connection with lessons on human heredity, the stuff of genetics’ (p. 122). The race-as-biology concept has, she argues, endured because it is constantly reinvented and reformulated, and ‘this restructuring depends on neither scientific data nor public transparency’ (p. 109). For further discussion on race in biology textbooks, see also Péter Bagoly-Simó’s contribution to this volume.

The angle from which Morning views the role of textbooks, as an interface between a scientific and lay public, is insightful. She argues that textbooks ‘shore up’ the credibility of biological racial science, and thus of the concept of race, through the ‘successful reconciliation of science and folk knowledge’, ‘an essential ingredient for [the] maintenance [of racial ideology] and thus for the preservation of our society’s racial organisation’ (p. 108). Textbooks offer a ‘hybrid knowledge informed by both expert and lay imagery’, ‘reflecting scientific and popular views of race’, and ‘commercial and political pressures’. As such, ‘they offer insight into how certain racial beliefs are fashioned, made credible, and perpetuated’ (p. 111).

That this return to biology and genotype is not geographically confined to the United States is evident from various studies, perhaps best represented here by a study of the reproduction of biological race in physical education textbooks in Australia. McDonald traces this to the sports science curriculum and to textbooks which embed the notion, already taken for granted by students, that ‘skin colour is a determinant for athletic prowess’ (McDonald 2013, p. 186). His study, which used both content analysis of textbooks and interviews with students, shows that when textbooks use biological race to explain variability in sport, they focus almost exclusively on ‘black’ bodies, while the white body remains ‘invisible’.

Theoretical Approaches

Rezai-Rashti and McCarthy highlight three approaches to race: multiculturalism, anti-racism, and critical/reflective anti-racism (Rezai-Rashti and McCarthy 2008, pp. 529–531). In the multicultural approach, racism is presented in terms of prejudice, discrimination, stereotyping, and hate crimes. Society is seen as a group of homogenous cultures and racism as the irrational expression of racial bias by one group against another (p. 531). This is an approach that endeavours to understand the ‘uniqueness’ of each culture and ignores the centrality in anti-racist and critical anti-racist approaches of the view that racism is systemic, structural, and deeply imbricated in power relations.

Grawan theoretically illustrates the critical anti-racist approach with his work on the treatment of migrants in German textbooks from Bavaria (Grawan 2014; see also Marmer and Sow 2015). He draws on Bourdieu and the work of the British cultural studies theorist Stuart Hall, strongly based in Gramscian understandings of hegemony, to argue that race is a social construct linked to power, domination, and resource distribution and that racism operates principally as an implicit mechanism for the legitimation of power relations at all levels (structural, individual, and cultural). The social attribution of biological and cultural differences legitimates these power differentials. Textbooks mediate the valuation of these differences indirectly and in so doing participate in a wider social project of the maintenance of cultural hegemony. Not dissimilar from critical anti-racism, Critical Race Theory tries to understand ‘the complexities of race and its everyday practice’, and how narratives normalise both racialising beliefs and practices and core processes constitutive of racism such as colonialism and slavery (Araujo and Maeso 2012). In so doing, it attends to the micro-politics of power in the discursive constitution of subjectivities in texts.

Several powerful new themes have emerged from such work. The first shows how textbooks present racism as the prejudiced perceptions of exceptional groups outside the nation. Thus, Montgomery (2005a) analyses history textbook race discourses in Canada by drawing on Foucault. He argues that in the 1960s racism was presented as the views of exceptional groups, states, or flawed individuals, such as the Klu Klux Klan, the German Nazis, or white supremacists in apartheid South Africa. More recent textbooks present racism as an ‘error’ or deviation from a norm or an ‘us’ that remains unquestioned, a theme also picked up by Araujo and Maeso in their study of Portuguese history textbooks (Araujo and Maeso 2012, p. 1269; see also Montgomery 2005a, b; Rezai-Rashti and McCarthy 2008).

In this way, textbook discourses are shown to locate racism outside the nation. And yet deeper investigation also reveals how history textbooks naturalise the notion of race as based on ‘ties of blood’, through the taken-for-granted, racialising assumptions and language that treat race as skin colour and that valorise racial purity and the presumed superiority of ‘white civilisation’ (Montgomery 2005b). Here, as in sports science textbooks in Australia, authors draw attention to the fact that biological notions of race are not refuted.

This is akin to Loewen's discussion of the 'invisibility of anti-racism in American history textbooks' (Loewen 1995, pp. 131–195).

A second, related theme is that 'othering' processes are produced through the presentation and positioning of specific groups in another time and space. Thus US textbooks fix Native Americans as 'nomadic and as obstacles to the whites' westward expansion and their putting the land to good use' (Simpson 2011, p. 4; Simpson 2010; Wills 1994, pp. 283, 286, 291). So too Australian textbooks which place Aboriginal Australians 'in an ahistorical, frozen-in-time exotica image' 'far removed from mainstream society, instead positioned as part of the natural world' (Sharp 2013). Time and space are deployed in a way that constructs difference through distance. Unlike representations of explorers as individuals charting progress and a future for Australia, Indigenous Australians are placed firmly within a de-contextualised, asocial, and violent past. They are treated as part of 'the flora, fauna and wildlife of Australia' (Crawford 2013, p. 95), as people who, 'like an endangered species of animal [...] were to be protected and their culture studied before it disappeared altogether' (Crawford 2013, p. 96; Sharp 2013, p. 182).

Such Eurocentric representations of time and space that fix and distance 'other peoples as located in a remote age' are central, as Araujo and Maeso argue, to the representation of European history and the history of slavery and colonialism as a 'moral success story' (Araujo and Maeso 2012, p. 1273). What such narrative strategies and discourses do through their categorisation, naturalisation, and essentialisation of race is to 'deny the severity and specificity of racism' (Montgomery 2005a, b) on the one hand and on the other to 'evade' the key questions of power that such taken-for-granted knowledge 'make(s) plausible' (Araujo and Maeso 2012, p. 1267).

As a paradigm, Araujo and Maeso continue, Eurocentrism produces interpretations that deny and misrepresent history, 'shrinking' the understanding of racism, confining it geographically and locating it within the time frame of New Imperialism. Racist governmentality of the Portuguese and Spanish 'expansion' and systems of slavery are systematically avoided and diminished while Portuguese colonialism is de-politicised. In this view, a moral discourse of 'good' victim versus 'bad' oppressor is as incapable as multiperspectival strategies of addressing the systemically pervasive racism embedded in the Eurocentric paradigm. That such images of Africa and black-white constructions are not confined to the Portuguese example cited is evident in Marmer and Sow's investigations of textbooks in Germany (2015).

Methodological Approaches

Regarding methodological approaches, we observe a shift in focus from content-analytical to discourse-analytical strategies. Many studies use a combination of quantitative and qualitative methods (Shadowwalker 2012) or a combination of different qualitative methods such as content and hermeneutical analysis (see, e.g., Morgan 2010a, b; Grawan 2014) or content and discursive

analysis. Discourse and critical discourse analysis have been extremely productive in generating understanding of how the less explicit, more subtle forms of racism, including constructions of orientalism and ‘counter-orientalism’, work in texts (Mirfakhraie 2008). It is not only what is said but what is not said that produces meaning. Careful examination of the relationship between general and specific statements can generate insights into positive and negative portrayals, as can the analysis of images for what they do and do not say, how they present and portray protagonists as active or passive, closely involved or further removed, and ‘civilised’ or ‘uncivilised’. An analysis of images in Wigginton’s (2005) study of representations of blackness in Dominican social science textbooks shows how Dominicans see blackness as negative and whiteness as positive.

REPRESENTATIONS OF GENDER

Organising history and politics into time periods that revolve around exploration, conquest, consolidation of power, and the politics of ruling expanding empires necessarily means that women are accommodated through ‘adding sub-sections on famous women, paragraphs on their status and rights in these time periods, and sentences about their enabling contributions as wives and mothers of famous men’ (Commeyras and Alvermann 1996, p. 45). Olivo’s study of a dozen American government and politics textbooks also shows that ‘women are left out of the main narratives’ and ‘when they do appear, they appear as white, middle class women’ (Olivo 2012, pp. 136/137).

In her study of 36 history textbooks for national curricula in the UK, Osler (1994) categorises her data into five broad orientations: (1) conforming approaches that add women onto existing content within conventional paradigms, (2) reforming approaches, that see problems with existing approaches but still work within a dominant paradigm, and seek to represent great women, for example, (3) affirming orientations, that are outside existing paradigms and start developing a perspective of the powerless, thus presenting women as disadvantaged but also studying them on their own terms, (4) challenging approaches, that see gender as a dynamic of history and category of analysis, and (5) transforming approaches, which are balanced curricula. Her study shows not only that women are massively under-represented as authors but also that the conforming, reforming, and affirming approaches predominate (Osler 1994, p. 231). A study of South African textbooks modelled on Osler’s research found two out of three textbooks offered conforming and reforming approaches, while only one included an affirming orientation (Schoeman 2009, p. 552). Mutekwe and Modiba’s study in Zimbabwe concluded that such patriarchal approaches have a negative effect on female students’ self-concepts and self-confidence (Mutekwe and Modiba 2012, p. 369)

Theoretical Approaches

Responses to gender inequality and sexism can be cast in terms of the approaches of liberal feminism, radical feminism, and the turn to post-structuralism (Arnot 2007; see also Stromquist and Monkman 1998). During the 1960s and 1970s, liberal education feminists focused mainly on equality of access and treatment, paying attention to discrimination and sexism, which it was believed could be overcome through raising awareness and changing attitudes. They promoted ‘girl-friendly’ schools and ‘challenged stereotypical assumptions in textbooks, curriculum and pedagogies’ (Arnot 2007, p. 211). Radical feminists drew attention to sexual harassment and gendered violence, the use of language and the structural aspects of schooling in reproducing race, class, and gender inequalities. The turn to post-structuralism in the 1980s saw a movement towards understanding identity and subjectivity.

By contrast with studies on race representations, there has, with a few exceptions (see, e.g., Ott 2013), been some distance between post-structural feminist theory and textbook analysis. Theoretical approaches are typically situated within gender socialisation and language studies. Some authors use concepts of hegemony and ideology (Mutekwe and Modiba 2012) and feminist standpoint theory, raising questions about representations of female subordination as normalised (Commeyras and Alvermann 1996). On the whole, authors are concerned with gender stereotyping and the (in)visibility of women in contemporary textbooks. History, politics, art, mathematics, and language textbooks are on the agenda for analysis.

Analyses of the role of textbooks in gender socialisation and strategies for reworking textbooks to make them more gender-inclusive are well developed. Brugeilles and Cromer’s studies (2009a, b) show that a concern with teaching tools and textbooks dates from the work of the League of Nations in 1925 and UNESCO in 1946. The rise of feminism in the 1970s and the distinction between sex (as biology) and gender (as social construction) have enabled refinement of approaches and methodologies (Brugeilles and Cromer 2009b, p. 11). The importance of textbooks and interventions in the construction of gender-inclusive textbooks for developing countries is underlined in Blumberg’s (2008) overview of the literature on gender bias in textbooks for UNESCO’s EFA Global Monitoring Report (2008). The focus on gender bias illustrates the classic concerns in the liberal and socialist feminist-reviewed literature with equality of representation, visibility of women, and the gender division of labour. Of lesser concern were the representations of gender-based violence.

Methodological Approaches

Methodologically, the majority of studies are quantitative. They rarely draw on critical discourse analysis or post-structural feminist theory. Manuals exist on how to conduct such quantitative studies and identify key dimensions of gendered

representation (Brugeilles and Cromer 2009a, b). The method advanced by Brugeilles and Cromer first of all recognises that gendered representations are embodied in characters who have ‘skills, roles, statuses, ways of acting and attributes’ and who are ‘caught in a network of interactions with other characters’ (Brugeilles and Cromer 2009a, pp. 29–30). The essential qualities of each character are expressed in text and illustrations and so attention should be paid to both, as well as to the relationship between them. They provide examples of templates that enable researchers to count characters in textbooks according to sex and age. The analysis will show how many of each category features in which parts of the text. In addition, counting features of gender description such as social status, occupation and family functions, physical attributes, activities and actions, as well as character and personality traits all contribute to an overview of how gender is represented in textbooks.

Quantitative methodologies were employed in all examined studies whose purpose was to assess the manifest content of textbooks. Such methodologies measure lines of text, count the proportion of named characters, mentions in titles and citations in indexes, and consider the roles characters play in texts (Blumberg 2008, p. 347). As such, the studies recorded and tabulated the number of appearances of males and females and then examined how visible they are and how men and women are positioned vis-à-vis one another. Latent content is commonly analysed using content and discourse analysis. Here, authors conduct more in-depth, interpretive readings of specific sequences of text in order to understand the underlying meanings and symbolic patterns related to gender. One paper analysed and compared the gendered use of language in textbooks for Swedish as a foreign language in Sweden using both quantitative and qualitative methods. The qualitative method employed a discourse-analytical strategy to analyse the speech used by characters in certain contexts. These were categorised according to six linguistic features considered to be stereotypical forms of male and female speech. A small sample of selected stories were used and analysed in these terms (Gertzell n.d.).

The diminishing representation of girls/women in the upper echelons of education (in public life as in society) was also found to be important. In the studies on language, a significant finding from both Iranian and French West African textbooks was that while females were adequately represented in the first years of primary school, male representations progressively increased and female representations progressively decreased in secondary high school textbooks (Brugeilles and Cromer 2009a; Foroutan 2012). In the study of Ugandan textbooks, moreover, women are represented as ‘helpless, emotional and without a voice’ (Barton and Sakwa 2012, p. 180).

Another theme that cuts across the texts was whether language use has changed significantly or not in, for example, the use of the generic ‘he’ and in the positioning of men first whenever women and men are mentioned. Lee and Collins’ study of Australian and Hong Kong language textbooks found that while ‘the two sets of textbooks did not differ significantly in the heavily-biased ratio of male over female characters [and] in their representations of female and

male social and domestic roles[...]in which [women] serve weaker, more passive roles than men' (Lee and Collins 2010, p. 133), they did differ in pronoun use. The generic 'he' has virtually disappeared in Australia, and in Hong Kong, 'he/she' is more popular. Several studies noted a change in this level of language use but not in the male-first principle.

CONCLUSION

Conclusion: Class

Despite the continuation of class inequality globally, studies of class as portrayed in textbooks seem to have reduced in number in recent years, and there are certainly far fewer than on race and gender. This may in part be because of the loss of traction of Marxist analysis since the fall of the Berlin Wall and due to the rise of post-modernism and the critique of the colour- and gender-blindness of class analysis. More promising for future work is the recognition of the relational nature of class as a category and the intersectionality of race, class, and gender (Sleeter and Grant 1991, 2011; see also Markom and Weinhäupl 2007; Mirfakhraie 2008).

Conclusion: Race

Recent studies on representations of race are unequivocal about the persistence of racialised discourses and imagery in textbooks despite the fact that both science and social science have established race as a myth. They explore how biologically based notions of race are reconstructed, reinvented, and presented as 'common sense', thus reinforcing binary Us/Them oppositions. Critical discourse analysis and Critical Race Theory together enable us to read between the lines of the official text. Areas that might be explored in new work could include differences between countries and school subjects and analyses of the relationship between context and textbook discourse.

Conclusion: Gender

All the studies examined come to the same conclusions: that textbooks overwhelmingly, and in every respect analysed, demonstrate that women are under-represented, negatively represented, and misrepresented relative to men. These studies include a range of countries and subjects. Thus, for example, in US history textbooks, little has changed in the 40 years since Trecker found that 'the treatment of women [in textbooks] simply reflects the attitudes and prejudices of society' (Trecker 1973, p. 138). Studies of textbooks for world history, art history, and politics from the United States, all reinforce her arguments (Olivo 2012; Cornish et al. 2012; Commeyras and Alvermann 1996). This is also true for the UK history textbooks introduced for the 1991 national curriculum and those in post-apartheid South Africa (Osler 1994; Schoeman

2009); mathematics textbooks in Germany, Cameroon, and French-speaking West Africa (Ott 2013; Brugeilles and Cromer 2009a, b); and language textbooks in Australia and Hong Kong (Lee and Collins 2010), Iran (Foroutan 2012), Zimbabwe (Mutekwe and Modiba 2012), and Uganda (Barton and Sakwa 2012). Case studies from Syria, India, Romania, China, and the United States show, according to Blumberg (2008), that women remain under-represented and obscured by a system of gender stratification and role ascription.

There are exceptions to this pattern, however. Representations of women in Swedish textbooks, for example, are more favourable than the social patterns of gender divisions and inequalities in evidence in the wider society (Blumberg 2008). It also appears from Ott's study of German maths textbooks (2013) that textbooks have become more gender-neutral over the past century and that while representations on the one hand privilege men as professionals, breadwinners, and initiators and profile women as mothers more often than they profile men as fathers, they also present all social roles and activities as equally open to both men and women and present both genders as problem-solvers. Both studies raise important questions about the complexity of textbook construction itself and the relationship between text and context—analysis of such contradictions seems to promise an exciting new direction in this research field.

Studies on gender representation concur that representations of women may have improved in selected contexts, but that in the vast majority, the constructions of femininity and masculinity that appear remain mired in traditional and conservative positions which deny, devalue, and marginalise women. Questions arise about how textbooks mediate gender uncertainty and how post-structuralist feminist approaches can be put to use in textbook studies in a manner that illuminates constructions of femininity/masculinity and how these have changed over time and in different school subjects. More work can also be done on the relationship of such constructions to the actual, quantitative representations of men and women in different social spheres.

This chapter has examined a selection of recent literature covering representations of class, race, and gender in textbooks produced during a period when new global trends within schooling, emphasising outcomes and performance, have brought about a shift in the concerns of social movements and international organisations. That girls' and boys' performance may be heavily affected by how gender is represented in textbooks, whether in the sciences, social sciences, or humanities, is left out of the equation in the new approaches discussed.

Much of the research on gender in textbooks is quantitative, as has been shown, with apparently limited influence from post-structuralism. A combination of quantitative and qualitative research strategies has been extremely fruitful in the context of critical anti-racism studies and could be explored in gender studies of textbooks. By the same token, textbook studies on gender reveal concerted efforts to combat sexism and gender inequality in textbooks

to be a central part of the work of international agencies. Could similar interventions be developed in relation to classism and racism?

Despite the global rhetoric around race, gender rights, and equality, little seems to have been achieved when gauged against the everyday discourses that permeate textbooks across subjects. Many of the studies provide insightful snapshots of particular contexts at a particular point in time. More historical and comparative studies that pay attention to the changes in textbooks over time in particular fields and also compare them with textbooks in an international context might yield additional insights into why and how textbook representations could or should change. Significant geographical regions are not represented in this review: studies of countries in the former Soviet socialist bloc, for example, are a marked absence. Continued attention also needs to be paid to the co-constructedness of race, class, and gender identity as well as the specificities of their respective constructions.

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On Normativity and Absence: Representation of LGBTI* in Textbook Research

Marek Sancho Höhne and Dmitri Heerdegen

LGBTI* (lesbian, gay, bi, trans, inter*)¹ is often used as an umbrella term for supposedly divergent and non-normatively gendered beings and sexual orientations or identities, without explicitly naming the supposed ‘normal’: the cisgendered and heteronormative. Its use is frequently accompanied by a host of problems: on the one hand, ‘LGBTI*’ masquerades as an encompassing label whose focus is actually limited to homosexuality and, occasionally, bisexuality; on the other, trans* and inter* people are often referred to (if at all) in the non-normative compartment of ‘LGBTI*’ instead of being included in studies on ‘gender’. These phenomena are apparent in most of the studies we analysed.

We found very few studies focusing on LGBTI*-related content in textbooks. However, those that do exist cover a wide range of subjects, mostly in textbooks for secondary school subjects such as: biology (Bittner 2011; Røthing and Svendsen 2010; Temple 2005; Bazzul and Sykes 2011), social science or education (Røthing and Svendsen 2010; Temple 2005), moral or religious education or life orientation (Temple 2005; Wilmot and Naidoo 2014), history (Hawkins 2012; Bittner 2011; Wylie 2012), and English literature or English as a second language (Hickman 2012; Bittner 2011). We found two studies that focus on primary school textbooks: Pointer (2006; primers) and Jochim (2014; mathematics, English as a second language, German language and literature, and ethics). Most of the studies focus mainly on textbooks from the global north such as the United States (Hawkins 2012; Hickman 2012), Norway (Røthing and Svendsen 2010), Canada (Temple 2005; Bazzul and Sykes 2011), Germany (Bittner 2011; Jochim 2014), and Austria (Pointner 2006), the only exception being one analysis of South African textbooks (Wilmot and Naidoo 2014).

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E. Fuchs, A. Bock (eds.), *The Palgrave Handbook of Textbook Studies*,
https://doi.org/10.1057/978-1-137-53142-1_17

We consider four global conditions to be important, and although these may differ at local levels, they frame the (political) context of this chapter.

The first condition is that lesbian, gay, bisexual, trans*, and inter* subjects continue to be discriminated against and marginalised all over the world, both institutionally and in everyday life (Spade 2011, pp. 19–48; Lister 2003, pp. 191–207; Franzen and Beger 2002, pp. 53–68; TGEU 2015). It is reasonable to presume that schooling and textbooks reflect, represent, and reproduce societal knowledge, and therefore we may also assume that textbooks play a decisive role in upholding this structure of inequality and discrimination (see, e.g., Apple 2000).

The second condition is a global shift concerning gay and lesbian rights that partly contradicts the first. This is the supposed association of ‘gay-friendliness’ with ‘Western modernity’, as opposed to homophobia being a characteristic of allegedly traditional and non-Western societies. Jasbir Puar (2007, 2013) has coined the term ‘homonationalism’ to explain how demands for gay equality are taken as an indicator of ‘progress’ in modern, Westernised societies, which at the same time racialises homophobia and risks perpetuating white-Western supremacy.

The third condition, which is related to the second, concerns the (global) struggles for and protests against (essentially) gay visibility and policies that counter the discrimination and marginalisation of LGBTI* subjects. These movements may be state-backed, for example, the Russian federal law banning ‘the propagation of homosexuality [*sic*] among minors’. They can also take the form of ‘grass-root’ and anti-government protests such as the *Manif pour tous* (March for All) movement against same-sex marriage and the right to adoption for same-sex couples in France, the demonstrations of *besorgte Eltern* (concerned parents) against more inclusive curricula in Germany, evangelicals within (and outside) the United States, and so on. These protests develop transnational ties and manage to mobilise a surprisingly large amount of people and groups with different agendas to form a movement that includes anti-feminists, anti-abortionists, Christian fundamentalists, right-wing populist and neo-Nazi parties, national conservative anti-liberals, and anti-Westerners. These protests also operate within the global condition of homonationalism, as outlined by Puar. Yet, they attack that condition for the (partial) inclusion of homosexual populations rather than criticise its racialised exclusions.

The fourth and final condition relates to the dominant and central symbol or signifier in these constellations and struggles, which remains the image of the white, able-bodied, cisgendered male marked as homosexual (‘the modern gay’; Keinz 2010) despite attempts to reframe emancipatory struggles as struggles for lesbian, gay, bisexual, trans*, and inter* rights using the inclusive umbrella term ‘LGBTI*’. More often than not, while ‘LGBT’ or ‘LGBTI*’ are employed as labels, the agenda still focuses mainly on white, middle-class, able-bodied, cisgendered male gays.

These four conditions guide this review of textbook analyses that have focused on the representation of lesbian, gay, bisexual, trans*, and inter*

people and of homosexuality or heteronormativity. The analysis and critique of how gender binarism (see Chisholm in this volume), homophobia, and heteronormativity are portrayed in textbooks is important and necessary, as is a reflection on the categories employed in those analyses and their inherent fallacies and problematic implications.

MOTIVATIONS FOR TEXTBOOK ANALYSIS

The main findings of most studies analysed for this chapter is that LGBTI* subjects are either barely represented in the textbooks examined and/or that the textbooks are fundamentally heterosexist, which also applies when LGBTI* is reduced solely to homosexuality. These findings will not surprise those acutely aware of the world's heteronormative condition; others might be surprised at the degree of ignorance surrounding LGBTI* representation in textbooks, even in countries regarding themselves as progressive and inclusive. Subsequently, most studies show that lesbian, gay, trans*, or inter* people are barely covered, if at all, in textbooks. When mentioned, the context tends towards the negative (Temple 2005; Wylie 2012). Allusions to LGBTI* topics in textbooks are generally limited to references to 'gay', and most of the countries covered are active in constructing the idea of the 'modern gay', keen to prove their own 'modernity' and 'progressiveness' in this area through comparison to other countries. This shows that a progressive inclusion of LGBTI* does not imply the existence of an actively intersectional, anti-discriminatory attitude.

The question is therefore: Why conduct textbook research in general and why focus on the subject of LGBTI* in textbooks in particular? Obviously there are reasons inherent to the logic of the scholarly field, such as: topic 1 is researched in context a, but not in context b, therefore it should be researched. It is in this vein that Jeffrey Hawkins (2012, p. 241) states: 'Though a number of studies on sexual identity content in textbooks exist ... currently there is an absence of research that specifically examines LGBTQ content in U.S. history textbooks' (Hawkins uses Q for 'questioning'). A similar reason for conducting textbook research would be the advancement of the theory and/or methodology of the field. This particular scholarly interest was not at the centre of the studies we analysed, which predominantly applied established methods to the analysis of 'content', 'discourse', and textbooks as 'semiotic products'. Yet, textbooks also differ from other possible sources of analysis, as they are compulsory reading for those able to, entitled to, and compelled to be part of national schooling. The interest in analysing textbooks derives from the assumed conditions of their reception. 'Textbooks, on the one hand, have influence on the self-perception and interpersonal perception of students and, on the other hand, they are representations of actual societal norms'² (Jochim 2014, p. 1). As canonised, state-backed knowledge, textbooks can also be analysed and critiqued as reproducing forms of inequality in the way they represent 'facts', 'events', 'persons', and 'developments'. In reproducing inequalities,

textbooks become representations of inequality themselves. Therefore, critique and analysis of textbooks is viable and necessary (see also Behnke and Kolbeck and Röhl in this volume on textbook effects and practices, respectively).

Stating that heterosexism is pervasive in Canadian society and that it takes different forms, Julia Temple (2005, p. 272) asks: ‘But to what extent does heterosexism exist in Canadian textbooks?’ Mark Wilmot and Devika Naidoo (2014, p. 323) frame their question similarly: ‘Heterosexism and heteronormativity are pervasive in the [*sic*] South African society, but to what degree are they present in Life Orientation (LO) textbooks?’ Due to the marginalisation of ‘LGBTQ persons’ and the lack of visibility afforded them, Hawkins (2012, p. 236) strives ‘to showcase an analysis of LGBTQ content for comprehension, accuracy, and realism in current U.S. history textbooks’. Scott Wylie (2012, p. 130) seeks to answer the question: ‘In what ways are commonly adopted [US] secondary world history textbooks complicit in furthering a heteronormative worldview?’ Bittner (2011) refers to normative documents such as the German constitution, national laws, and international conventions in order to substantiate claims for non-discrimination and inclusion, thus arguing from a normative stance for changes to curricula and textbooks. Jochim (2014) essentially conducts a study on male-female stereotyping in textbooks, but also points out that the absence of trans* and inter* examples maintains gender binarism and that the absence of sexualities other than heterosexuality reinforces heteronormativity. Pointner (2006) criticises how the textbooks in question do not reference pluralised ways of life in general; the study does not analyse whether LGBTI* topics are present but rather how textbooks propagate normative perspectives on gender binarism and heteronormativity.

The studies draw an analogy between textbooks and society by plausibly assuming that textbooks reproduce societal structures of inequality; hence the importance of examining them. This assumption is supported by several arguments: the view that the textbook is the curriculum’s de facto representation, as the textbook has a “‘highly held” and “unquestioned” status’ (Hawkins 2012, pp. 238–9; cf. Jochim 2014, p. 1; Hickman 2012, p. 74; Wilmot and Naidoo 2014, p. 324) and the fact that ‘many educators rely upon the content of their adopted textbooks to structure their classes’ (Hawkins 2012, p. 238; see also Hansen in this volume). Textbooks, therefore, can be considered the ‘official arbiter of official knowledge’ (Bazzul and Sykes 2011, p. 273; cf. Jochim 2014, p. 3) and are thus ‘often perceived as natural rather than subjective interpretations of reality’ (Bazzul and Sykes 2011, p. 273). Wilmot and Naidoo (2014, p. 324) state that in ‘modern societies, the curriculum of schools [and the textbook in particular] provides the most powerful way to establish the norm, to police observance of it and coerce conformance with that norm’, as—citing education theorist Michael Apple—textbooks ‘participate in creating what “a society has recognised as legitimate and truthful” and “help set the canons of truthfulness”’.

When conceiving of the textbook as a kind of ‘machine to produce hegemony’,³ it is not surprising that most of the authors in our sample commit

themselves to evaluating the presence or absence of LGBTI*-related content. Criticism of the textbooks becomes a critique of society and a potential lever to induce change. This is one possible reason why most studies' authors find their subjects, the textbooks themselves, to be at fault rather than other scholars' interpretations of them. While we appreciate the necessity of this type of textbook analysis and critique, we do not believe this approach is likely to produce any unexpected results, as the critical aspect of the study becomes more important than the search for new findings. A seemingly more complex approach is taken by Åse Røthing and Stine H. Bang Svendsen (2010, p. 149) when they ask 'why young [Norwegian] people often remain homophobic concerning themselves, even when they are positive toward homosexuals in general'. This question differs from those asked by other studies, as it addresses Norwegian discourses on homosexuality by including textbook analysis instead of conducting only an evaluation of textbooks regarding the presence of LGBTI* realities. Pointner (2006) uses a more postmodern, Western approach based on middle- and upper-class values: the author promotes a pedagogy of diversity and assumes the existence of a diverse society when criticising that the textbooks are not based in the realities of children's lives (on diversity in a broader scope see Niehaus in this volume). Pointner characterises the representations in textbooks as stereotypically binary-gendered and reflecting a heterosexual norm, and calls for a less stereotypical approach.

WHAT SHOULD BE ANALYSED WHEN CONDUCTING RESEARCH INTO LGBTI* REPRESENTATION?

As the term LGBTI* has several implications, some of which overlap and others that reflect different concepts (sexual orientation/identity, gender identity, heteronormativity, heterosexism, gender binarism), we have examined studies that employ different analytical categories. Common to almost every study is a social constructionist approach to questions of gender identity and sexual orientation/identity with heteronormativity frequently the central conceptual link between gender and sexuality (heteronormativity presupposes gender binarism). The only exception is Jeffrey Hawkins, who employs the term 'LGBTQ' and uses a rather positivist conception in order to counter the idea that being LGBTI* is a matter of personal (therefore alterable or 'correctable') choice (see Hawkins 2012, p. 243).

Julia Temple's (2005) study focuses on 'same-sex sexuality' and heteronormativity, which is understood as 'the assumption that heterosexuality is superior to all other types of sexuality' (p. 272). Temple acknowledges that considering non-binary sex/gender conceptions as well would have further complicated the analysis (see Temple 2005, p. 278); in other words, the author does not attempt to draw conclusions regarding the encompassing term 'LGBTI*'. The study does not employ the term 'queer' in order to 'not slip into a queer/heterosexual dichotomy' (p. 278). Such careful reflection of the categories employed is frequently missing from other studies. In summing up

their study, Røthing and Svendsen (2010, p. 147) equate being 'LGBT' to 'living a non-heterosexual life', thereby ignoring the fact that the 'T[rans*]' in 'LGBT' often has little to do with being non-heterosexual. They are not the only authors to demonstrate misconceptions in their employment of certain terms. While Jeffrey Hawkins (2012, p. 244) insists on using 'inclusive and diverse terms' and criticises US history textbooks for using 'the limited term Homosexual', there is a huge gap between Hawkins' actual findings (that gays and, to a lesser extent, lesbians are represented in textbooks) and Hawkins' conclusion: 'Fortunately, for this study, comprehensive, accurate and realistic information was presented overwhelmingly throughout the nine U.S. history textbooks analysed for LGBTQ portrayals.' Hawkins does not, however, expand on how the representation of gays and lesbians can be viewed as 'comprehensive'. A similar conflation of categories can be found in Heather Hickman's (2012) study, which uses the term 'LGBT'. In Hickman's criticism of textbooks' perpetuation of heteronormativity, there is no allusion to the evidence of cisgender binarism in those same textbooks. Although Scott Wylie (2012) and Wilmot and Naidoo (2014) note that 'transgender' is not mentioned in the textbooks analysed, they continue to employ the category 'LGBT'. In doing so, they leave out questions of gender identity and refer only to questions of heteronormativity and sexuality/sexual orientation, thus contributing to a misconception of the term 'LGBT' (Wylie 2012). Even though Jochim (2014) seems to perceive trans* and inter* as undermining gender binarism, trans* and inter* topics are framed inconsistently: sometimes as gender identity, sometimes as sexuality (p. 62).

There are, however, also authors who manage to focus on trans* and inter* people in their studies, in the frame of gender identity, Melanie Bittner (2011, p. 10) outlines the nexus between gender binarism and heteronormativity, in which heterosexuality is presented as the norm whilst homosexuality and bisexuality are framed as deviations from this norm. Yet, all three presuppose established binary gender constructions (Bittner 2011, p. 11). This is also illustrated by Jesse Bazzul and Heather Sykes (2011, p. 268), who state: 'Since conceptions of gender and sexuality often intertwine it is impossible to fully separate mutually dependent heteronormative and gender/sex binary discourses that operate together in a text; one supporting the other.' Their study examines a biology textbook for elements reproducing both heteronormativity and sex/gender binarism. Jochim (2014, p. 98) and Bittner (2011, p. 12) both address gender norms and stereotypes that presuppose and reproduce gender binarism. They thereby reject, to a greater or lesser degree, the common academic practice of either focusing on representations of 'gender' (the binary male and female) or focusing on representations of LGBTI* as encompassing the 'deviant rest' (non-heterosexual and non-normative, non-binary-gendered). Bittner (2011), Bazzul and Sykes (2011), Jochim (2014), and Hickman (2012) also analyse the ways in which heterosexuality is represented as 'normal' and the normative sexuality and how homo- or bisexuality are framed as exceptions.

Angela Pointner's (2006) approach differs from most others, in that it does not explicitly look at whether trans*, inter*, or any kind of sexuality are represented in textbooks but rather how young children are already subject to normative binary gendering and how heteronormative behaviour dominates as 'normal' in primary school textbooks.

The distinction between 'gender' and LGBTI* is also reproduced in other research. While this chapter discusses analyses of LGBTI*-related content in textbooks, there are other papers on gender, which analyse the representation of cisgendered females and males in textbooks. Thus, trans* and inter* people are once again covered not in the category of gender but under the umbrella of the 'deviant rest', the non-normative sexualities and genders. This distinction may also be a result of the categories used in the textbook analyses. While nearly all authors of the studies we examined seem to highlight the continuing discrimination against and mis- and non-representation of LGBTI* (the first global condition we outlined earlier in this chapter), there are only two studies in our sample that adequately address the fourth condition outlined earlier in this chapter: the incorrect and problematic equation of LGBTI* to (mostly male) homosexuality.

LGBTI* INTERDEPENDENT/INTERSECTIONAL

All of the studies analysed use the terms 'LGBTI*', 'gender', and 'sexuality' interchangeably, and none of the studies discusses the categorisations as being normative themselves. Some of the studies mention intersectionality, although none of them applies a consistent, interdependent approach to analysing the role of gender and sexuality within power relations or discrimination based on race, ability, class, or age, for example. In other words, none of the studies offers a conceptual approach accounting for the ways in which gender is always interwoven with race, ability, class and age, or how each combination produces its own positionality. This may be a result of data collection methods that tend to count how often each individual category is mentioned in the textbooks, making it difficult to assess the power-based relationships between them.

Hawkins (2012, p. 249) mentions two quotations from one history textbook illustrating that homosexuality is not only a white, middle-class phenomenon, but the author does not consequently translate this inference to an approach consciously looking for intersectionality. Bittner (2011, p. 50) addresses other forms of 'diversity' and inequality and their representation, or lack of it, in the textbooks analysed: 'In the [textbook] *Duden Biologie 7/8* one of the [gay] boys is black, which could be viewed as a positive example of diversity and which also avoids a racist instrumentalisation of homophobia as being a problem of Muslim people, for example, instead of being a general social problem'⁴ (p. 80). Bittner also mentions as a positive the fact that the textbooks depict people of different ages and some textbooks do not exclusively depict able-bodied people (Bittner 2011, p. 52). Røthing and Svendsen (2010) focus more analytically than Bittner on the intersection of attitudes towards homosexuality, sexual self-identification, and ethnicity: 'Positive attitudes

toward homosexuality are depicted in teaching as something that characterises Norwegian society and Norwegian citizens and as a virtue ethnic minority students and immigrants in Norway preferably should acquire to become part of the national collective' (p. 150). Wilmot and Naidoo (2014) mention dimensions of power structures other than sexual orientation in order to point out that sexual orientation is not included in the list of discriminations named in the analysed textbook. However, this does not lead them to take an interdependent approach. In Hickman's (2012) analysis, other power structures appear only in citations that characterise queer theory or in demands for inclusive schooling and textbooks; in the analysis itself they are absent. The analyses by Wylie (2012), Bazzul and Sykes (2011), and Temple (2005) do not mention other power relations at all. Pointner (2006) explicitly uses the term 'pedagogy of diversity' but only focuses on the two categories of gender and sexuality. Pointner presents a critique on gender and sexuality/family as a 'neutral' analysis without referring to the fact that gender and heteronormativity are themselves interdependent, whilst also being intertwined with other power structures.

CONCLUDING REMARKS

Methodologically, the majority of the studies examined follow a rather standardised research approach, ultimately discussing the presence or absence of LGBTI* topics in textbooks, despite applying nominally qualitative and 'non-standardised' methods such as content analysis, discourse analysis, and queer theoretical readings. Jeffrey Hawkins (2012), for example, finds that as few as 0.006% of the textbook pages analysed and only 0.003% of the total sentences in the sample 'were devoted to LGBTQ portrayals' (p. 245). Scott Wylie (2012, p. 133) searches the indices of seven history textbooks 'for the terms *homosexuality*, *heterosexuality*, *sexuality*, *sexual orientation*, *gay*, *lesbian*, *bisexual*, and *transgender*' (italics in the original) and finds no mention of them. Wylie then goes on to investigate more thoroughly the topics that prior research on LGBTI* representation in US history textbooks has identified as relevant (Alexander the Great, Jane Addams, classical Greece, Civil Rights, the Holocaust, HIV/AIDS) in order to highlight the textbooks' omissions and distortions regarding (mostly male) homosexuality (see Wylie 2012, p. 134).

Bazzul and Sykes (2011, p. 270) reference Michel Foucault's *History of Sexuality* to support their focus on absence(s): 'As Foucault [...] asserts, what functions alongside what is said is *what is not said*, and both are integral to whatever strategies underlie a particular discourse' (italics in the original). Revealing and criticising this absence is significant as it demonstrates the continuing stigmatisation and silencing of LGBTI* populations and suggests that this process is tacitly perpetuated by textbooks. In examining ways to combat this discrimination and omission, it would be beneficial to conduct a closer evaluation of textbooks rather than simply a critique, by posing questions other than: 'Are LGBTI* people represented or not?'⁵ This type of question can only

be answered by applying pre-established and fixed categories of LGBTI*, sexual orientation, 'gender', and gender identity, that is to say by dismissing the possibilities present in qualitative methods.

Simply dismissing those categories would not necessarily be helpful since they are essential to emancipatory struggles, they are powerful analytical tools, and they are important for encouraging general and academic reflection on the subject. Yet, as long as there is so little LGBTI*-related content in textbooks, evaluating textbooks on the basis of these categories will continue to yield similar results. We argue, therefore, that future analyses focusing on LGBTI*-related content in textbooks should pose far more open-ended questions. Take, for instance, heteronormativity as the normative idea that human beings should be gendered for their whole lives as either male *or* female and should desire only other individuals who accept this lifelong gender binarism and identify as *opposite* to those that they desire. We could ask whether textbooks support this normative idea. We could, as well, pose many open-ended questions: How is the gender binary established, and how is the boundary between these two genders maintained? How does male/female gender stereotyping support and/or oppose this boundary? What is the relationship between the norms governing this boundary and those norms that are essential to upholding boundaries of race, class, ability, or age? How are attraction, sympathy, sexuality, friendship, love, intimacy, sexual and non-sexual reproduction, relationships and family related to each other? What are ambivalent or contradictory statements? What are the presuppositions of those statements? How are those ambivalences/contradictions to be mitigated, and by whom? If the textbook is silent on contradictions, for example, should it be presumed that teachers will answer questions arising from ambivalences/contradictions? In this case, relevant information could be obtained through complementary interviews with teachers and students and/or through participant observation in classrooms.

Precisely because there is hardly any LGBTI*-related content in textbooks, it would be more interesting and revealing to investigate what exactly is present instead of what is absent and how categories, norms, and power relations (and thus discursive and social boundaries) are produced, maintained, altered, and changed. This implies a reading of textbooks as not representing fixed, static, and stable meanings (even when textbook authors are at pains to stabilise meaning) but as a medium containing multiple, inherently unstable narratives that rely on external texts and discourses. In other words, textbooks should be seen and analysed as 'dialogic' (Bakhtin 1981) even if they are intended to be 'monologic'. Therefore, reconstructing both the dominant and the other non-dominant and marginalised narratives of sexuality and gender identity within textbooks could reveal more than simply counting and evaluating the rare occurrences when LGBTI* is not absent.

We believe that only this kind of interpretative, non-standardised close reading, an almost ethnographic approach, will yield more illuminating academic results, and that current approaches will continue to reproduce existing findings until textbooks significantly change with regard to their treatment of

sexuality and gender identity. The prevailing and rather standardised approach is still helpful in raising awareness of the ongoing silencing of and discrimination against gay populations despite their emergence in mainstream society. However, it will fail to render visible those who cannot pass into dominant society. As we have outlined earlier in this chapter, there are many power structures that must be considered in any discussion of gender identity and sexuality. Only a truly interdependent approach would include a critique of homonationalism and the instrumentalisation of LGBTI* topics in discourses about ‘Western modernity’. Addressing the interdependence of these structures requires more open and fewer standardised approaches.

NOTES

1. The appended asterisk * is used to make visible the endless possibilities of gender identifications and sexualities. Through this we point out that the acronym ‘LGBTI’ represents just a narrow range of possibilities and is already subject to processes of normalisation/normalised naming by way of categorisation.
2. ‘Schulbücher haben einerseits also einen Einfluss auf Fremd- und Selbstbilder der SchülerInnen und sind andererseits eine Abbildung derzeitiger gesellschaftlicher Normen.’
3. As Wylie (2012, p. 143) puts it: ‘Students tend to take knowledge at face value and seldom question the assumptions and interpretations of the text.’
4. ‘In Duden Biologie 7/8 ist einer der Jungen Schwarz, was als positives Beispiel für Diversity angeführt werden kann, während es außerdem vermeidet einer rassistischen Funktionalisierung von Homophobie als Problem von z.B. muslimischen Menschen statt als gesamtgesellschaftliches Problem in die Hände zu spielen.’
5. Posing semantically open-ended questions does not change the matter, for example, in Hickman’s formulation: ‘How do schools and their curricula—as demonstrated in textbook content—marginalize students who are, or are perceived to be, LGBT?’ (2012, p. 71). ‘How?’ in this context is equivalent to ‘Whether?’, as the evidence found in the textbooks answers both questions equivalently.

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Religion as a Subject of Textbook Analysis: An Exemplary Overview

Zrinka Štimac

RELIGION AND TEXTBOOK RESEARCH

Political, media, and academic circles are currently engaged in debate over the supposed renaissance of religion, with globalisation, pluralisation, and desecularisation variously cited as drivers. This said, the phenomenon appears not to be entirely new; as early as the 1970s, the Western world experienced, along with a reduction in numbers of the faithful regularly attending churches, a rise in interest in new religious movements and private expressions of faith (Luckmann 1971; Barker 1990). At the same time, immigration to Western societies has occasioned pluralisation in religious lifestyles (see, e.g., Pollack 2003–2012; Tomka and Zulehner 2000). Recent research, in its engagement with these developments, no longer defines ‘the religious’ simply as the opposite of the secular but instead is now identifying the emergence of forms of the religious in secular spaces (Wohlrab-Sahr and Burchard 2012, 881). In light of these societal developments, research on textbooks and educational media does not stand apart from this widespread interest in religion.

The term ‘religion’ has been subject to varying definitions at different times. The Europe of antiquity knew several competing definitions. The Enlightenment saw an idea of ‘religion’ influenced by Christianity give way to the concept of what was referred to as natural religion, considered to be a superstructure, shaped in the image of reason, which towered over all individual faiths. The academic discipline of the study of religion has a long track record of close engagement with the history of ‘religion’ as a concept and of the ideas it has brought forth. A critique of the application of Eurocentric limitations to the

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notion of religion has sharpened our awareness of the global diversity of expressions of the religious, with Hinduism speaking of dharma, Buddhism of dhamma, and Judaism of the covenant (Figl 2003, 163).

Educational media research encompasses a number of differing ideas of religion influenced by the conventions of the various academic disciplines which undertake this work. One might group these definitions into various categories; we restrict ourselves here to outlining those attempting to pinpoint the substance of 'religion', those revolving around its function and those relating primarily to cultural issues, drawing on symbol theory and notions of discourse. The first group emphasises the specifically 'religious' properties of particular forms of religion and approaches them phenomenologically, by seeking, for example, to illuminate the 'essence' of religion. Psychological definitions point to particular experiences carrying the nimbus of the religious, while sociological approaches to the term attribute emphatic significance to religious rituals and forms of community (Pollack 1995). On another analytical level, functional definitions seek to identify the purposes religions serve for individuals and society. These approaches point out that, while religion in the individual context helps people overcome fears and a sense of contingency, it contributes on a societal level to the shoring up, establishment, and legitimation of the hegemonic social order. Approaches drawing on symbolic anthropology regard religion as a system of symbols that create long-lasting moods, endow individuals with particular motivations, and surround both of these with a sense of facticity, meaning these 'moods' and motivations appear to correspond entirely with reality (Geertz 1987, 48). Accesses to the topic based in discourse theory, meanwhile, no longer conceive of 'religion' as a closed system but rather as a system of communication or an open arena of the interaction of various protagonists with one another in various different combinations (von Stuckrad 2003, 257).

RELIGION IN EDUCATIONAL MEDIA RESEARCH: AN OVERVIEW

Research on religion in textbooks and educational media takes place in a range of academic disciplines and covers a broad spectrum of geographical regions and investigative questions. The principal focus in terms of school subjects lies on religious education, history, geography, social studies, languages, and ethics education, the latter being a relatively new subject which as a rule emphasises intercultural and interreligious education (Jackson 2014).

The questions with which researchers engage in relation to educational media and religion vary in accordance with the relevant geographical setting and depending on the particular education policy context. We might illustrate this point by way of a number of examples: in Southeastern Europe, religious education is a significant societal issue in the light of the experience of communism and of the recent war. Textbook analyses focusing on this region examine all forms of religious education, frequently exploring the extent to which content critical of ideology appears in textbook depictions relating to religion or seeking to illuminate the explicit or implicit attitudes of these depic-

tions towards the democratic system (Husremović et al. 2007). Work issuing from Central and Eastern Europe frequently regards religion as a positive resource in education (Pusztai 2008); this research revolves, for instance, around whether religious education textbooks in the region meet the standards of intercultural education (Shakhnovich 2015). Textbook research on religion also relates to countries, such as the USA, in which religious education is not taught as a regular curricular subject in schools (on depictions of Islam here, see Douglass 1998, 2005). A project launched by the Egyptian Ministry of Higher Education explored representations of Islam and Arab culture in European, American, Asian, and African history textbooks (El-Halougi 2016).

This section will retrace the changes that have taken place since the 1980s in the focal issues examined by comparative studies with a synchronic design. The first broad-based analysis of this type, published in 1986, investigates the degree to which the image of Islam in German religious education, history, and geography textbooks is subject to the influence of prejudices and defensive attitudes (Tworuschka and Falaturi 1986). The authors proceed by giving primary attention to pre-determined dimensions of religion and its depiction such as writings, practices, and iconic figures, diverging from these categories and from their specificity to religion only in the analysis of the geography books. The study's findings point critically to a highly simplistic and on occasion inaccurate image of Islam in the textbooks and make recommendations for improvement (Falaturi and Tworuschka 1992).

A more recent study, from 2007, reaches differing conclusions, perceiving a positive depiction of personal Islamic religious practice in German religious education, ethics, and history textbooks (Biener 2007, 27ff). Caveats on its generally positive assessment of these books relate to their omission of Islamically influenced ethical argumentation and the general great brevity of the historical information they contain (Biener 2007, 446, 438ff).

An international comparative analysis of history and political studies textbooks from Germany, Austria, France, Spain, and the UK, published in 2011, sought to identify the extent of generalising and polarising tendencies in the attributions of characteristics to Islam and Muslims (Kröhnert-Othman et al. 2011). The authors of the study, which examined 27 textbooks for lower and upper secondary education published between 2005 and 2010, demonstrated that these textbooks tended to depict Islam in an ahistorical fashion, with a considerable inclination to homogenise and essentialise. The research found that, in the context of the twentieth century, the books regularly linked 'Islam' in general to Islamism and violence. It also established that the depiction of shared Christian and Islamic history and of instances of cultural transfer was limited to very isolated occurrences.

Some new research has focused on textbooks for Islamic religious education, which has been recently introduced in schools in a number of European countries. In Germany, such work tends to prioritise didactic and theological aspects of the subject (see, e.g., Behr 2005; Mohr 2009; Kiefer 2012; Spenlen 2012; Müller 2013). Work from Sweden has analysed the subject in the classroom setting (Berglund 2010). Critical observers (Spenlen 2012) have pointed

out that many analyses of Islamic religious education textbooks are geared towards political exigencies; as in the case of a study conducted in Austria (Reiss 2014), they seek to identify whether these textbooks assist in the integration of Muslims into the majority society and whether their content is in line with democratic values. This said, this particular study has also explored the influences exerted by these textbooks on processes of identity formation in young people and their depiction of those of other religions and of Muslims' interaction with the majority society (Reiss 2014, 91). The study established that the textbooks in use in Austria, while they do transmit general values held by the state, often fail to relate to Austrian society, to Muslim pupils' everyday lives, and to the other religions.

A large-scale comparative study published in 2006 investigated depictions of Christianity in textbooks, across all subjects and year groups, from Turkey, Iran, Egypt, and Palestine (Hock and Lähnemann 2005). The authors employ ideas from 'interreligious textbook research' as methodological springboards (Hock and Lähnemann pt. 3, 2012, 24). They thus consider issues such as the authenticity or otherwise of the books' presentation of the Christian religion and their depiction of historical, theological, and cultural aspects of the faith. Further, they explore the treatment of the phenomenon of missionary work and the account taken of educational considerations, specifically those related to media education.

Textbook research examined at a very early stage in its existence the depiction of Judaism in textbooks for Catholic and Protestant religious education (see, for instance, Omland 1979; Kastning-Olmesdahl 1981; Schatzker 1994), looking at the accuracy of these depictions and seeking to identify whether they contained prejudices or stereotypes. A more recent study on textbooks in Quebec turns instead to their perceptions of local Judaism and the knowledge they convey about the religion. It finds that textbooks, while they do present Judaism as a religion with a part in Quebec's historical heritage, tend to focus on the orthodox expression and obscure on occasion the diversity of lived Judaism (Hirsch and McAndrew 2014, 95).

Recent research has encompassed secular values education and the category of those unaffiliated with any religion (Wöstemeyer 2018) which includes, without being limited to, atheists, agnostics, sceptics, humanists, and 'free thinkers'. The research questions have included the thematic contexts in which those people appear in textbooks and the terms, images, and narratives used to discuss them. It is interesting that primarily faith-based textbooks—admittedly rather as an afterthought—touch upon these phenomena. Research on textbooks for "citizenship education" from former East Germany (Staatsbürgerkunde), analyses the country's official worldview. This analysis is innovative by virtue of its identification of the narrative effect of these textbooks and the discourse they contain as 'religion', or as 'religious' in nature, even where there is no explicit reference to religion, which enables the employment of this narrative approach as an analytical category.

Since the turn of the millennium, influenced by the rise of intra-societal religious plurality, research has been turning its focus increasingly to the issue of textbooks' handling of questions emerging from diversities of religions. In so doing, it has demonstrated, *inter alia*, that textbooks tend to set up hierarchies of religions with reference to evolutionist notions, which results, for instance, in the concept of magic appearing only in relation to African religions and not in the context of Hinduism (Lewis 2014, 200ff.). In a similar vein, textbooks almost always present the religions of prehistoric and traditional societies on their opening pages and Christianity in their final section, thus implicitly declaring it to be the completion or perfection of a process of evolution. Research has further identified a tendency for the religions of peoples separated by extremes of geographical and cultural distance, such as the Maori, the Inuit, and the Native Americans, to find themselves lumped together under the heading of 'religions of indigenous peoples', linked by their placement in opposition to the 'world religions' and by their status as religions without missionary activities and without a holy book or books. Many textbook depictions of these groups are at pains to assert that they struggle to adapt to changing conditions and draw from this an inference regarding the evolutionary advantage of Christianity (Cusack 2014, 121). Textbooks frequently emphasise practices such as female genital mutilation and draw them together into a stereotypical image of 'African religion' *per se* (Lewis 2014, 198).

Research on textbooks for the secular 'ethics' courses, integrated courses, and analogous subjects relatively recently introduced in schools frequently explores which religions these subjects discuss, what idea or ideas of religion predominate in them, and whether they assess religion positively or negatively. A study focusing on Japan finds that these books, too, construct hierarchical relationships among religions, with Christianity and Mahayana Buddhism, as 'world religions', ranking higher than 'ethnic' religions such as Judaism and Hinduism. Further, they depict Christianity as a religion of love and Buddhism as an 'eco-friendly' religion. In this way, an indirect suggestion to the reader emerges which promotes adherence to the teachings of Buddha and Jesus (Fujiwara 2014, 59). An analysis of German ethics books, in seeking to pinpoint the role they attribute to religion in the construction of identity, finds that some of them appear to regard belonging to a religion as a sign of weakness. A further conclusion of this study is that these books generally describe as problematic the relationship between religion and society, a matter primarily examined in reference to Islam. Another study set out to establish whether, and if so, how, textbooks discuss interactions among different religions. In the rare cases in which they do, the study found that they either focus one sidedly on the so-called Abrahamic religions or cast their considerations within a perspective on the history of religion that assumes a shared historical background to different religions (Štimac 2014).

One of the few studies to proceed from a diachronic comparative perspective reconstructs changes over time in the image of India and Hinduism presented in German textbooks (Linkenbach 2015). The findings point to a

frequent reduction in the 1990s of Hinduism to Brahmanism and a paternalistic and orientalist presentation of the religion as one devoid of tendencies towards individualisation. The author identifies greater differentiation in more recent textbooks, with discussions of Indian philosophy, intra-religious plurality, religious tolerance, and yoga, encompassed, however, within an ongoing overarching emphasis on Hinduism's 'foreignness' and alterity.

Longitudinal historical studies have also been conducted on the image of Islam in textbooks. A study on Swedish textbooks for history and religious education concludes that factual errors are in some instances pervasive and persistent, and women in Islam find themselves primarily labelled as subservient to their husbands (Härenstam 2009, 173). The older books describe jihad as a spiritual and physical discipline but not as a movement intent on world domination (Härenstam 1993, 202f.). History textbooks describe Islam as a religion which not only conflicts with the West but also creates unrest in Islamic countries. A study on Swiss textbooks spanning over a century (Jödicke 1997) underlines the changes observable over time, with older books primarily revolving around catechistic knowledge and historical facts and a symbolic concept of religion tending to predominate from the 1970s onwards. The most striking positive development registered by the study is a reassessment of the Eurocentric perceptions of Islam which determined the scene in earlier decades. This said, the author considers more recent textbooks to construct a new problem in their assertion of a conflict situation between traditional Islamic religiosity and modern European societies (Jödicke 1997, 111f.). An investigation of the depiction of Islam in German history textbooks which encompasses a longer period still, namely 1700–2005 (Jonker 2011), principally identifies and uncovers continuities, with reference to and in line with the concept of *longue durée*. The study points to four characteristic components of the depiction of Islam which recur across the centuries: the prophet Mohammed and 'his religion', supposed Muslim aggression, the Crusades, and 'proof' of the danger putatively posed by Islam. This narrative continued unabated until the children of Turkish 'guest workers' began to arrive in German classrooms in the 1960s. From the 1990s onwards, textbooks began to differentiate between the perspectives of 'us' and 'them', with the classroom effectively turned into an 'ethnographic field'. The author concludes that despite this changed situation, the drawing of boundaries between 'Europe' and 'Islam' remains a key motif of textbook depictions.

Although all authors use specific theoretical and methodological approaches, some of them highlight these considerations in their discussions. An analysis of Swiss textbooks (Frank 2014) has pointed to the predominance of a narrow concept of religion and the persistence of stereotypes and prejudices in their content and an overlap between theological information and such drawn from the distinct discipline of the study of religion. Further, this study finds that textbooks generally neglect to supply a theoretical basis for the content they deliver, providing a number of definitions of 'religion' without engaging critically with their sources. There is likewise no rationale for the categorisation of

specific religions as ‘world religions’. The result, as the study suggests, is that the books tend to depict religion as a part of ‘cultural memory’ and fail to examine lived religiosity empirically.

Arriving at similar conclusions, an edited volume ‘Textbook Gods’ published in 2014 points to the view of religion evident in textbooks as on the one hand an important resource for human development, on the other hand consisting in a nebulous sense of the ‘sacred’ or of ‘something evading rational explanation’ (Andreassen and Lewis 2014). While the study criticises textbooks’ apparent tendency to effectively turn religions into reservoirs of the symbolic, it praises their aesthetic approach and the fact that they create a positively connotated and empathic idea of religion which forges links between what is taught in the classroom and pupils’ lived realities. The same volume is highly instructive in methodological terms (Andreassen and Lewis 2014). One of its chapters (Thobro 2014), focusing on textbooks published in England, explores maps showing religions, identifying the emergence of a distinct discourse in and through them despite their proximity to their context or co-text (associated books). It finds that, for instance, the maps can show religions that are not discussed in the textbook’s units, and the books’ text fails to mention the theoretical perspectives underlying the maps. A study conducted by the author of this chapter (Štimac 2017) on Islamic religious textbooks in Bosnia and Herzegovina employs a praxeological approach modelled on Bourdieu, seeking to reconstruct the habitus implicitly transmitted by the textbooks examined. The study finds that the content of these textbooks is closely correlated with the societal position taken up by those involved in their production and that the books essentially create an as yet non-existent habitus whose emergence is a matter for the future. Similarly, another praxeological study of German history textbooks (Schmitz 2018) investigating the influence of expert opinions issued by churches on the information these textbooks give about religion finds that actors from the religious field have a significant role in the selection of textbook content, although, surprisingly, that role appears to go hand in hand with a substantial degree of critical self-reflection.

THEORETICAL APPROACHES

The pluralisation of religion is the dominant theoretical model in both older and more recent textbook analyses in the context of the use of constructivist approaches in the field of intercultural¹ and interreligious education. Key terms such as ‘world religions’, ‘re-Islamisation’, and ‘assistance with integration’ (Tworuschka 1986), as well as concepts including identity, self-perceptions, perception by others (Jödicke 1997), and changes in religious landscapes (Frank), find themselves read as indicators for degrees of pluralisation. Societal pluralisation itself is explicitly or implicitly explored variously centring on particular religions (by Jödicke, Reiss, Hock and Lähnemann, Linkenbach, Biener, Hirsch, Schatzker, and others), via a comparative view of several religions (Lewis, Frank, Sotoko, Biener), or through an examination

of content working from a markedly broad definition of religion (Wöstemeyer, Kirsch). Some work links pluralisation to the advancing globalisation of the so-called world religions. By contrast, attention is seldom paid to new religious movements or to the intra-religious diversity of specific religious communities.

Some work, arguing from a position drawing on theories of modernisation and secularisation, seeks to retrace societal developments in democratic (Frank 2009, 21) and post-conflict states (Kuburić; Moe and Pusztei). Other textbook analyses emphasise the point that it is the textbooks themselves which create an opposition between modernisation and Islam (see Kröhnert-Othman, Jödicke, Reiss, and, to an extent, Biener).

Post-colonial approaches emerge in analyses of the influence of European researchers' largely unconsidered preconceptions on images in textbooks of non-European peoples and the way in which these preconceptions thus serve to help legitimate imperialism (Linkenbach, Lewis, Cusack, Kröhnert-Othman). Some of this work has demonstrated the predominance of essentialisation, marginalisation, and constructions of 'strangeness' in, for example, textbooks' engagement with Hinduism (Linkenbach) and the persistence in textbooks of posited relationships of dualism—between the East and West, North and South, and local and international actors—which we might consider as an extension of the colonial practice of 'othering' beyond the colonial era. Similar approaches are at the heart of the critique of Eurocentrism apparent in other studies (Raheb 2018).

Only a handful of authors raise the question of the ways in which textbooks define and determine the relationship between religion and non-religion, an issue of growing significance in a context marked by emergent new forms of religiosity and secularity alike. Some studies proceed from the assumption of an opposition between religion and non-religion (Wöstemeyer 2018; Kirsch 2018), while others see this as being less the case (Wohlrab-Sahr and Burchard 2012). We perceive here a need to explore the ascriptions and attributions textbooks make to each of these categories.

METHODS

Most work in this field models its approach on discourse analysis and combines qualitative and quantitative methods (Hock and Lähneemann, Biener, Linkenbach, Jödicke, Hirsch, Cusack, Lewis, Schleicher, Wöstemeyer, Kröhnert-Othmann). The range of methods employed includes approaches from literary (Kirsch) and communication studies (Frank, Thobro) and the social sciences (Schmitz, Štimac). Research locating itself in the historical field tends to proceed hermeneutically (Jonker).

Qualitative content analyses generally conduct their enquiry via clusters of questions directed towards exploring the organisational and structural characteristics, content of specific religions, and the intentions of the lessons. One analysis of textbooks for Protestant Christian religious education from the

1980s (Tworuschka et al.) later underwent criticism for the narrowness of its criteria for recording content related to Islam (Hock, Lähnemann, Biener). Research on depictions of Islam in German geography textbooks drew up a system of analysis which sought to identify a discussion of the broad geographical dissemination of Muslims, Islam in its originary settings such as Oriental cities, cultural attainments in the Islamic world (including science, technology, and architecture), colonisation, the conditions in which Muslim populations live, and where and how Muslims live in (West) Germany (Fischer 1987). An examination of depictions of Christianity in Arabic-medium textbooks, working along similar methodological lines, differentiates between ‘explicit’, ‘implicit’, and ‘inclusive’ discussions of this religion (Bartsch 2005, 36ff.). The study classifies all text which expressly mentions or discusses Christianity as explicit, while ‘implicit’ refers to text which, although it does not make direct reference to Christianity, is relevant to the book’s depiction of Christianity or to whose context Christianity is relevant. The category of ‘inclusive’ is applied to content of significance to both Christianity and Islam yet depicted from an Islamic perspective (Bartsch 2005, 37). Critique of this methodological approach has called for greater engagement with intra-Islamic plurality and logics of education at work within Islam and with the diverse socio-political actors and sets of conditions which either bring political influence to bear on textbook content or seek to influence the political situation via textbooks (Raheb 2018).

A study on Islam, based on an analysis of the ‘dimensions’ of Islam, draws distinctions between ‘Islam’ as a religious system, as a way of life, as a historical, ethnic, or cultural phenomenon, as a cultural reality, and as an ideology (Jödicke 1997, 21ff). A more broadly based exploration of textbooks’ depictions of Islam in various European countries (Kröhnert-Othman et al. 2011) conducts a structural analysis in order to identify the contexts in which Islam enters into the discussion. Analysing further criteria like the publisher, extent of the depiction, and targeting of material to secondary school students, the detailed analysis seeks to establish whether the books construct ‘Muslims’ as a homogeneous entity and the degree to which they depict the spectrum of expressions of the Muslim faith as diverse (Kröhnert-Othman et al. 2011, 22f).

Various methods drawn from the discipline of communication studies have emphasised the study of maps as a path to uncovering the ways in which they arrange and generate information in their dependency on the horizons of knowledge available to them and the power relations that held sway at the time of their production (Thobro, 158). Other research has conducted frame analysis with reference to Goffman (Frank 2014) or combined a narrative-analytical approach drawn from literary studies with elements of content analysis and the examination of the relevant historical context, thus seeking to do justice to the hybrid structure of the text appearing in textbooks and their fusion of ‘factual’ and fictional components.

Praxeological textbook analysis seeks to uncover the dependence of textbook content on the conditions of its production. Two differing approaches

are in evidence (Schmitz, Štimac). One analyses the practices and stakeholders which influence and canonise corpora of knowledge. The other retraces the correlation of textbook content with the position of those producing textbooks in the religious field and conducts concomitant analysis of habitus.

CONCLUSION

In summarising this discussion, we can pinpoint two distinct phases in research on religion in textbooks. From its beginnings in the late 1980s, this sub-field has found itself confronting new issues in the shape of the societal changes brought about by migration and the increasing numbers of those living consciously without a faith, as well as the educational challenges inherent in the introduction of new curricular subjects which approach religion either from an integrative perspective, as in the new subjects, or from a religious perspective, different from that previously predominant, such as Islamic religious instruction. Textbook analyses no longer focus primarily on the factual accuracy or otherwise of educational media content; in line with general trends in the field, research in this area is now emphasising exploration of whether, and if so, how, textbooks present and discuss religious diversity, alongside examination of the theoretical assumptions underlying their depictions of religious matters. We find an exception to this general tendency in analyses of Islamic religious education books in German-speaking regions, which tend to allow the current political discourse to influence their key research objectives.

When surveying the theoretical approaches, it is obvious that the idea and reality of societal pluralisation raise a large number of questions for research, such as which religions textbooks depict or omit. Textbooks in this context are considered as discursively constructive media subject to a purpose and requirement to present subject-specific knowledge. Analyses of textbooks likewise reflect the assumptions from which particular academic disciplines proceed; studies have found that it was the Eurocentric notion of 'religion' predominating in religious studies that led to the exclusion of indigenous peoples and their religious ideas from research over a substantial period of time (Lewis 2014). Debates around the boundary between religion and 'non-religion' have only entered into textbook research in recent years.

From the methodological point of view, qualitative analyses are most common in this field. Some authors have criticised a neglect of basic research and an excessive focus on issues imposed on the field by political considerations, alongside the normative pre-determinations arising from them (Frank 2014); recent years, however, have seen a degree of expansion in the repertoire of methods employed.

Among the key results of the research discussed here has been the construction of various divergent notions of religion and society. Textbooks frequently proceed from the assumption that either everyone is religious or no-one is; they regularly perceive religions from the perspective of another religion and

depict them as separated along national boundaries; and they may carry out value judgements on religions, depicting them as positive or negative, or alternatively as non-valued. It is a rare thing indeed for a textbook to discuss the diversity of meanings of 'religion', or the variety of views it inspires. Decisions on which of the so-called world religions to depict and discuss in a textbook often follow a pragmatic logic, legitimised by reference to a religion's geographical spread or number of adherents or, on occasion, with an implicit view to the putative stage of evolution or capacity for modernisation considered to inhabit a religion. The result is the creation of a hierarchy. We become aware at this point that specialist knowledge generated by the discipline of the study of religion, which has long offered other ways of engaging with these issues, has only had a limited degree of influence on textbook content.

We conclude this discussion by pointing to some gaps in the research. One significant absence appears in the almost total dearth of work on empirical religion in textbooks or on the link between perceptions of religion and social stratification. The issue of the various conditions under which religious textbook production takes place and of the discursive practices and decision-making these conditions encompass has been neglected by research thus far. Similarly, the question of the ways in which young people attain knowledge about religion (ways of knowing) has yet to attract research. The case is the same for the aesthetic aspects of textbooks and their influence on how they depict religion. It is of note, and noteworthy, that all extant research on the connection between religion and conflict relates to Islam. We are as yet also without comparative analyses of the depiction of different religions in textbooks for different subjects. Supplementary, and especially digital, educational materials have drawn very little notice from researchers, although they are often the only ones available in societies affected by and in the aftermath of conflict. Lastly, the digital humanities have yet to turn their attention and methodologies to this arena of research and to the broad spectrum of potential foci, related issues, and school subjects associated with it.

NOTES

1. The term and concept of 'interculturality' has come in for criticism, as did its forerunner 'multiculturalism', and new terms and concepts, such as 'transcultural' and 'hypercultural' or 'diversity', are under discussion or already in use. However, as most curricula, alongside the Council of Europe (see Jackson 2014), continue to speak of the 'intercultural', we likewise retain this term here.

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Research into Textbook Portrayals of National Socialism and the Holocaust

Stuart Foster and Eleni Karayianni

INTRODUCTION

In recent decades, many education systems throughout the world have increasingly advocated the study of National Socialism and the Holocaust as important subjects for students of all ages. In particular, the study of these historical phenomena is now broadly recognised to be of central significance in almost every curriculum in Europe and the Western world. Typically, educators view these subjects as fundamental in educating young people to be critically engaged and responsible citizens of democratic states. Teachers often use the study of National Socialism and the Holocaust to alert students to the ‘lessons’ of the past and the potential dangers of allowing extremism, prejudice, and intolerance to take root (see, for example, Kinloch 1998; Pettigrew et al. 2009; Russell 2006). Arguably, attention to these issues encourages young people to become politically, socially, and morally active in both defending individual rights and embracing diversity.

Because the study of National Socialism and the Holocaust is frequently included in curricula and textbooks across the globe, a growing body of scholarship has emerged that focuses on how these subjects are represented in classrooms and in educational resources. The studies reviewed in this chapter, though not comprehensive of all textbook research in this area, point to the most important textbook studies currently published in, or translated into, the English language. A thorough literature search in libraries and electronic resources revealed a list of 37 relevant textbook studies concentrating on National Socialism and/or the Holocaust. These textbook analyses focus on a range of countries and/or regions where World War II and/or the Holocaust

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are portrayed in history textbooks, including Western Europe, Eastern Europe, the Americas, Africa, and Asia.

OVERVIEW OF TEXTBOOK STUDIES

As far as the focus of this research is concerned, out of 37 textbook studies analysed, 26 examine portrayals of the Holocaust directly. A further three studies examine the treatment of the Holocaust as an example within the investigation of broader issues, such as racism, war and peace, and empathy. In addition, two studies look at the treatment of the Holocaust in assessing the effect of educational reforms, while another examines the relationship between historical scholarship and textbook content. Although the topics are not mutually exclusive, these textbook studies tend to focus more on portrayals of the Holocaust than on broader studies of National Socialism. Indeed, only three studies look at Germany and National Socialism as independent topics (one investigates portrayals of Hitler's rise to power, another focuses on the Third Reich, and the third looks at representations of Germany more generally). Finally, three studies consider both the Holocaust and National Socialism.

The majority of the studies analysed (28) are small-scale studies with fewer than 30 textbooks in their samples. The analysis includes six studies with samples of approximately 30 to 60 textbooks, as well as three large-scale studies. Of these three large-scale studies, the first looks at 89 textbooks from 26 countries (Carrier et al. 2015), the second focuses on 465 textbooks from 69 countries (Bromley and Russell 2010), and the third examines 152 textbooks from just one country (Pate 1987). In addition, 33 of the studies included in this analysis focus on one country or region while only four studies are comparative, aiming to explore similarities and differences in the portrayal of the Holocaust between two or more countries. Thirteen of the studies aim to compare portrayals over time (between two or more periods of time), while the majority (24) focus on a single time period.¹ Overall, then, the textbook studies discussed in this chapter are mostly small-scale and focus on one country during a single period of time.

As far as geographic coverage is concerned, 7 studies are situated in Eastern European countries, 12 studies focus on Western Europe (mainly Germany and England), 9 studies are from the United States, 4 from Canada, 2 from South Africa, and 1 from Israel. In addition, two large-scale studies include perspectives from other countries in South America, Asia, and Africa.

The comprehensive literature search revealed that the majority of currently available textbook studies were written after the year 2000 (28 out of 37). This is potentially indicative of strengthened interest in the Holocaust (and National Socialism) over the past two decades, and/or it may simply indicate greater interest in textbook research in general. It is of note that all the analyses centred on Eastern European countries were published after 2010. This may reflect that textbook research has only recently expanded to include Eastern Europe or else that Holocaust education is a recent feature of textbooks and

curricula in these countries, and researchers are only now beginning to assess its inclusion and portrayal.

In relation to the particular focus of these 37 studies, our analysis revealed a wide range of themes and questions. Some studies are interested in the changes implemented in the teaching of National Socialism and the Holocaust across political administrations—such as Bărbulescu et al.’s (2013) study in Romania, Dietsch’s (2012) study in Ukraine, Michael’s (2013) in Slovakia, and Witschonke’s (2013) study in the United States—or before and after unification in Germany (Frohnert 2006; Pingel 2006; von Borries 2003). Other studies are more interested in changes that occurred after certain educational reforms were implemented, such as those in South Africa (Morgan 2012), Poland (Ambrosewicz-Jacobs and Szuchta 2014), and Romania (Waldman 2009).

Reflecting the diversity of the sample further, studies are often concerned with the accuracy of portrayals of National Socialism and the Holocaust (Crawford and Foster 2007; Detwiler 1982; Foster and Burgess 2013; Hirsch and McAndrew 2014; Pate 1987; Renn 1987), how textbooks present culpability for the Holocaust (Wenzeler 2003), or how they detail Hitler’s rise to power (Bunn 1962). Significantly, a number of studies touch on the issues of focus, description, and explanation. These studies typically discuss alternative historical representations, what and whose perspectives dominate, and how the diverse experiences of different groups are presented (Kanter 1998; Lässig and Pohl 2009; Lindquist 2009). Other studies are more focused on one specific aspect of content, such as Short’s (2001) study on the extent to which textbooks explain the role of religion, Korman’s (1970) investigation of textbook inclusions of Gentile-Jew relations before the war, and Perlmutter’s (2009) examination of visual images and the messages they convey.

In addition, some studies are interested in broader approaches to teaching National Socialism and the Holocaust: for example, whether these topics are depicted in historical or human rights terms (Bromley and Russell 2010) or how they contribute to human rights education (Hirsch and McAndrew 2014; see also Bromley and Lerch in this volume). Studies also focus on how national history, the history of the Holocaust, conflicting war memories, and notions of national identity influence textbook content (Beresniova 2014; Carrier et al. 2015; Frankl 2003; Schär and Sperisen 2010). Adopting yet an entirely different perspective, other studies do not exclusively focus on National Socialism and the Holocaust. Rather, these subjects are used to investigate how textbooks legitimise and maintain certain forms of institutionalised oppression, as in Montgomery’s (2005, 2006) investigations of racism and white supremacy and Short’s (2000) exploration of whether Holocaust education contributes to anti-racist goals. Finally, Morgan’s (2015) study, which focuses on the mediation of empathy and the assessment of South Africa’s pedagogical turn towards conceptual representations in history education, offers another distinctive contribution to the literature.

In general, an analysis of these studies reveals a diverse array of perspectives and approaches. Indeed, the studies show differences in content choice, purpose, scope, chronological span, and geographic coverage. While all studies are concerned with the representation of the Holocaust in textbooks, they vary in terms of the research questions, theoretical perspectives, and research methods they employ.

RESEARCH QUESTIONS

Based on a study's focus, research questions, findings, and recommendations, typically, it is possible to distinguish its guiding purpose (even if this is not explicitly stated). The primary purpose of most studies analysed here is to evaluate the accuracy and breadth of portrayals of the Holocaust. Lindquist (2009, p. 298) states: 'as with any major event, it is important for textbooks to provide a rigorously accurate and valid historical account', and 'the existence of Holocaust denial makes it crucial that textbook narratives should be completely accurate'. For some, therefore, the ultimate purpose of textbook analysis is to determine the historical accuracy of textbook narratives and thus improve the teaching and learning of the subject. In this respect, Witschonke (2013, p. 146) reasons, 'the results of this study indicate a methodological process in which textbooks could be used to create critical and historical thinking in today's classroom'.

Other studies, however, emphasise the importance of analysing representations of the Holocaust for different purposes. For example, Hirsch and McAndrew (2014, p. 24) claim that their study 'analyses the treatment of the Holocaust in Quebec's history textbooks, in view of the subject's potential and actual contribution to human rights education'. There are also studies whose declared purpose is to explore how learning about the Holocaust contributes to pedagogical or social goals, such as developing a sense of agency or understanding racism (Montgomery 2005, 2006; Morgan 2012, 2015; Short 2000). In these cases, the rationale for a focus on the Holocaust is much broader and more explicitly related to the teaching of values. As a result, the historical accuracy of how the Holocaust is portrayed is not of central concern.

Furthermore, many researchers embark on their textbook analyses in order to understand pedagogical trends in teaching about the Holocaust over time and in different geographical regions (Bărbulescu et al. 2013; Bromley and Russell 2010; Dietsch 2012; Pingel 2014; von Borries 2003). Bromley and Russell (2010), for example, analyse the state of Holocaust education in various countries and ask whether emphasis is placed on knowing the specifics of the historical event or on the promotion of human rights. Von Borries (2003) analyses how representations of the Holocaust have changed in Germany over time. These explorations are usually complemented by investigations into the historical, political, social, and cultural forces that determine textbook content. Many researchers also look at the ways in which specific political contexts and established notions of identity influence the treatment of the Holocaust

(examples are Ambrosewicz-Jacobs and Szuchta 2014; Michaels 2013; Schär and Sperisen 2010; Witschonke 2013). Michaels (2013, p. 19), to take one example, claims that her study contributes to understanding how ‘competing discourses interact to alternately advocate for, obstruct, and complicate the narration of the Holocaust across time and regime change in Slovak schools’.

It should be noted that the different purposes described earlier in this chapter are not always neatly distinguishable; in many cases, two or more of these guiding rationales coexist in a single study. For example, Witschonke (2013) aims to explore how changing political affiliations have influenced textbook portrayals of the Holocaust and also aims to provide recommendations for improved practice. Dietsch (2012) is not only concerned with the accuracy of the portrayed events but also interested in identifying the historical and cultural factors that have shaped the content of textbooks.

Considering the rich variety of motivations evident among researchers in this field, it is instructive to identify similarities and differences in purpose across geographic regions. For example, it is evident that a number of researchers in Eastern Europe have conducted textbook research in order to understand the ways in which political discourses influence education about the Holocaust. This focus on the politics of education also includes analysis of conceptions of national identity and how they influence, and are influenced by, narratives of National Socialism and the Holocaust. By contrast, in countries such as Germany, England, and the United States, the purpose of conducting textbook research usually centres on assessing the accuracy of historical events. In these countries, researchers are often more interested in how detailed the accounts are, whose perspectives are included, and which narratives appear pre-eminent. Often their ultimate objective is to make recommendations for improved teaching practice and textbook authorship. In other regions, however, the purpose of studying textbook representations of National Socialism and the Holocaust is to reveal and explore the treatment of other broader issues of local concern, such as racism, human rights, and values education, as in the cases of South Africa and Canada.

Johnsen (1993) reasons that textbook literature and research can be divided into three main categories according to whether it is concerned primarily with the ideology, use, or development of textbooks. The textbook studies included in this analysis belong mostly to the first category, although some also touch on the issue of how textbooks are used in the classroom (on textbook use in the classroom as well as textbook practices and effects, see Part IV in this volume). These ‘ideological investigations’ have been usefully categorised by Peter Meyers and Wolfgang Marienfeld (quoted in Johnsen 1993, p. 139) according to their purpose. Using these classifications, it is evident that current textbook analyses generally aim to understand how a nation or culture sees itself at a given point in time, to evaluate textbooks as teaching instruments (particularly in relation to historical accuracy and the promotion of certain values), and to make recommendations for improving teaching, learning, and textbook authorship.

THEORETICAL PERSPECTIVES

Theoretical frameworks are important because they ‘have implications for every decision made in the research project’ (Mertens 1998, p. 3) and can justify methods and conclusions (Nicholls 2005; Weinbrenner 1992). However, confirming Nicholls’s (2006) observation that textbook researchers generally refrain from theoretical discussions, most of the textbook studies analysed here provide only limited reference to how theory has shaped their research processes. Thus the influence of theoretical frameworks on research questions, methods, and interpretations remains largely unexplored. Notwithstanding this general observation, a number of researchers are more explicit in presenting the theoretical underpinnings of their work. For example, Morgan (2015) provides an excellent example of how theoretical formulations can be used to frame research projects. In her research on the ways in which and the extent to which history textbooks promote the development of empathetic skills, Morgan bases her analysis on Vygotskian cultural-historical theory with its central tenet of semiotic mediation. According to this theory, thought development is determined by language. Words do not *correspond* to the past; rather language *creates* reality through semiotic mediation. Morgan argues, therefore, that her method of data analysis is committed to ‘uncovering how authors discursively construct the past through particular choices—conscious or not—concerning literary devices, narrative strategies or “cultural tools”’ (p. 9). As a result, in her study, Morgan (2015) focuses on determining the main literary devices employed for developing empathy. For example, one principal literary device she identifies is portraying the perspectives of different actors, such as victims, perpetrators, bystanders, resisters, and rescuers. Morgan additionally substantiates her research by assessing textbooks and the extent to which they use these literary devices and tools in their narratives.

Furthermore, many researchers (Beresniova 2014; Crawford and Foster 2007; Dietsch 2012; Frohnert 2006; Lässig and Pohl 2009, Michaels 2013; Montgomery 2005, 2006; Wenzeler 2003) provide explicit theoretical discussions that recognise textbooks simultaneously as political products, selections by particular powerful groups, and images of a nation’s self-perception (on the notion of nationbuilding and the formation of national identity through textbooks see also Carrier in this volume). For example, Wenzeler (2003, p. 107) states that ‘next to delivering facts, textbooks transmit the ideologies and values of a society or its politicians in order to strengthen and promote national identity’. Michaels (2013, p. 23) explains that textbooks ‘provide valuable insights into the national identity narratives that state agents wish to impose on young citizens through the constitution of state schooling’. Beresniová (2014, p. 270) provides another example of a theoretical formulation by stating that her work ‘was informed by a Foucauldian approach, which acknowledges that historical and cultural influences shape national reforms, and that power relationships play an important role in the kinds of knowledge that are generated and reinforced within society, discourse, and schools’. Montgomery (2006, p. 21) also

begins his analysis by using Foucault's theory to assert that 'textbooks are "knowledge apparatuses" formed and circulated with the effect of promoting nationalism in the present'. In sum, although many authors do not adequately explain how theoretical perspectives guide and influence their studies on textbook portrayals of the Holocaust and National Socialism, a number of researchers understand the importance of articulating the theoretical framework that underpins their work.

RESEARCH METHODS

In general, many of the textbook studies analysed are not explicit about the textbook sample used or the selection criteria employed to identify key texts. Moreover, many cases do not describe methodological procedures in detail. Nevertheless, a number of studies do offer precise descriptions of their methodology and data collection procedures (for example Bromley and Russell 2010; Carrier et al. 2015; Foster and Burgess 2013; Lindquist 2009; Morgan 2012, 2015; Wenzeler 2003; Witschonke 2013). Morgan (2012), in particular, describes in considerable detail how she identified and coded themes and content in her study. Wenzeler (2003) also offers a clear explanation of how she combined quantitative and qualitative methods to support a methodologically robust investigation. For example, she first assessed in quantitative terms the number of images and amount of narrative space devoted to the Holocaust in relation to the overall pages. Then, she undertook a more detailed qualitative analysis with a smaller sample of textbooks. Moreover, the analysis not only evaluated textbook content but also considered the use of language and the opportunities given to pupils to interact with sources.

In a similar vein, Witschonke (2013) used a combination of quantitative and qualitative analyses, in which he first looked at content coverage and then devised a list of 20 analytical questions, based on previous research, to interrogate the text. He created an answer rubric for each of these questions and evaluated each textbook accordingly. Taking a somewhat different approach, Foster and Burgess (2013) employed a combination of methods: 'quantitative methods were used to explore relative emphasis on selected areas of content such as the number of sources authored by Nazi leaders or the priority given to the study of the Holocaust relative to other events of the twentieth century' (p. 23). The authors then applied the educational guidelines of the International Holocaust Remembrance Alliance on 'why, what and how to teach about the Holocaust' as 'external and explicit benchmarks' against which textbook content was evaluated using Glaser's 'constant comparative' method (p. 24). Lindquist (2009) employed a similar methodology by using the teaching guidelines of the United States Holocaust Memorial Museum to create eight core questions with which to evaluate textbook content. As a final example, Morgan (2015) used a definition of empathy from a synthesis of various scholars' work to create questions or criteria with which to assess textbook content for its efficiency in promoting empathetic understanding.

In general, as stated at the beginning of this section, not enough researchers pay explicit attention to detailing their methodological procedures. However, an encouraging number of textbook studies do provide important and compelling methodological detail. Of interest is that it appears that many researchers who do reveal their methodological approaches often evaluate textbooks using similar methods. Many, for example, combine qualitative and quantitative dimensions. Furthermore, where qualitative analysis is employed, it is often based on a list of questions or criteria against which content is evaluated. These exemplary studies all demonstrate the importance of underpinning textbook research with robust and explicit methods. Typically, such studies offer the reader a clear and detailed explanation of how the textbook sample is chosen and how textbook content is selected, coded, and analysed.

CONCLUSION AND FUTURE RESEARCH

This brief analysis of 37 textbook studies offers insight into core issues associated with textbook portrayals of National Socialism and the Holocaust. A close reading of the textbook studies indicates great variation in focus, purpose, and approach, which in turn reveals great diversity in the treatment of the Holocaust in various parts of the world. It is difficult within this complex picture to distinguish precise conclusions, but we can point to some important general trends.

In broad terms, researchers seem to agree that in many nations the historical accuracy of textbook portrayals of National Socialism and the Holocaust, though far from perfect, has improved over time. For example, textbook studies situated in Germany point out that textbooks make significant efforts to portray the country's difficult and uncomfortable past. As many studies illustrate, German textbooks typically present detailed accounts of events and offer complex explanations about how National Socialism prevailed and how the Holocaust became possible (Crawford and Foster 2007; Frohnert 2006; Lässig and Pohl 2009; Pingel 2006; Wenzeler 2003). Such findings stand in contrast to critical analyses of textbook portrayals in Eastern European countries, where textbook authors often appear unable or unprepared to confront the past and accept the negative actions of their forefathers (Ambrosewicz-Jacobs and Szuchta 2014; Bărbulescu et al. 2013; Beresniová 2014; Dietsch 2012; Michaels 2013). Similarly, numerous studies conducted in the United States and Canada have raised concerns about superficial, simplified, and inadequate accounts of the Holocaust (Detwiler 1982; Hirsch and McAndrew 2014; Kanter 1998; Lindquist 2009; Montgomery 2005, 2006; Pate 1987; Perlmutter 2009; Witschonke 2013).²

The studies analysed here use a variety of criteria when making judgements about textbook content, focus, and approach. Some studies use intrinsic criteria in the sense that they compare textbook content between time periods or between countries to reach conclusions based on similarities and differences.

For example, Wenzeler (2003) compares the content of German textbooks with English textbooks to conclude that German textbooks provide richer explanations of the events that led to the Holocaust. Frohnert (2006) compares the content of German textbooks before and after unification in order to assess how representations have improved over time. Other researchers use external criteria to evaluate the adequacy of textbook content. Lässig and Pohl (2009), for example, use current historical scholarship and pedagogy as criteria to judge the extent to which textbooks include historical and didactic concepts such as ‘multi-perspectivity’. Other researchers are very explicit about their criteria. Lindquist (2009) and Foster and Burgess (2013), for example, use external guidelines on how to teach the Holocaust to assess the accuracy and comprehensiveness of textbooks’ historical accounts.

On the basis of these insights and observations, we propose the following five directions for future research. First, researchers should be acutely aware of the context in which a study is being conducted. It is essential to be conscious of, and explicitly discuss, the cultural, historical, geopolitical, and pedagogical forces that potentially influence the content of textbooks. In this way, research studies can foster a deeper understanding of content selection issues and offer rich descriptions and interpretations of each country’s treatment of National Socialism and the Holocaust.

Second, there is a need for more thoughtfully designed studies on the treatment of National Socialism and the Holocaust, especially in regions where knowledge is still lacking, such as Southern Europe, South America, the Middle East, and Asia. More studies of this nature would allow researchers in the field to compare and contrast the practices of various countries or regions and thereby create a network of analytical studies. Ideally, more cross-referencing of studies will lead to a more effective and critical network of associated scholarship and also provide a more comprehensive portrait of what is known and agreed upon, what is contradictory, and what is unexplored. The work of Ambrosewicz-Jacobs and Szuchta (2014) provides an excellent example of good practice in this respect. After analysing textbook representations of the Holocaust in Poland, they incorporate other researchers’ conclusions about the portrayal of the Holocaust in other Eastern European countries, such as Romania, Czech Republic, Croatia, Serbia, and Belarus. This approach offers a deeper comparative understanding of how the Holocaust has been treated in this region and what primary issues and challenges exist.

Third, a need exists for studies that examine the historical development and treatment of National Socialism and the Holocaust in individual countries. In this respect, Witschonke (2013), who analyses Holocaust portrayals in US textbooks from 1943 to 1959, makes a valid point about the importance of examining the depiction of events over a period of time instead of looking only at a snapshot of a particular period. He cites Washburn, who has argued that a more historical view of textbook content is necessary ‘because studies that do

not take a longer view on the subject's representation fall prey to biases and pressures similar to those which they hope to expose' (quoted in Witschonke 2013, p. 147). By looking at how representations of the Holocaust have changed during the period under investigation, Witschonke (2013) offers rich insights into how politics influence educational priorities and how shifting political affiliations affect textbook content. More studies of this nature are needed in individual countries.

Fourth, current historiography can assist researchers in evaluating how accurately and comprehensively the events are described and explained. Evaluations of this kind need not be limited to the textual narrative but can expand to include visual messages. Furthermore, such studies can also address the pedagogy of the texts. For example, analysis might focus on what activities students are asked to undertake, what questions they are required to answer, and what judgements, if any, they are required to make. Potentially, on the basis of their findings, researchers could then make concrete recommendations for how to improve textbooks in terms of historical accuracy, focus, and pedagogy.

Fifth, scholarship on portrayals of National Socialism and the Holocaust should be more connected to other relevant studies, not only concerning content but also in relation to methodology. Other textbook studies, even with a different focus, could provide useful illustrations of appropriate procedures and techniques (examples are Crawford 2001; Foster 2005; Foster and Morris 1994; Mirkovic and Crawford 2003; Nicholls 2006; Sleeter and Grant 1991; Vickers 2006). Clear descriptions of sample selection, methods, and data analysis procedures can assist in comparisons and create a rich body of methodological procedures from which future researchers can draw.³

Overall, this literature review shows the need for more high-quality, diverse, and detailed textbook studies underpinned by research conducted with clear rationales, theoretical frameworks, and methodological procedures. Ultimately, such studies should connect to a network of other national and international research in order to advance teaching, learning, and scholarship related to National Socialism and the Holocaust.

NOTES

1. The reference to time periods does not imply any preconceived or agreed-upon notion of what a time period is. Rather, it indicates whether or not researchers were interested in exploring change and continuity over time.
2. For a detailed discussion of international trends in textbooks' treatment of the Holocaust, see Pingel (2014).
3. Towards this end, the work of Bourdillon (1992), Crawford (2000), Mikk (2000), Nicholls (2003), Pingel (1999), and Weinbrenner (1992) provide a good starting point.

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Colonialism

Lars Müller

There has been increased public and academic focus on colonial history since the 1990s. A combination of scholarly debates within the field of postcolonial studies and the effects of migration to Europe has resulted not only in an intensified academic examination of the processes of colonisation but also elevated public attention. Three leading journals have recently published special issues on the representation of colonialism in textbooks,¹ reflecting the significant upturn in this area of research.

OVERVIEW: COUNTRIES, TIME PERIODS, SUBJECTS

Modern colonialism was a global phenomenon that dominated the period between the early sixteenth century and the twentieth century. It did not involve homogeneous or linear processes and there were many facets to colonial practices (Eckert 2006; Osterhammel and Jansen 2009). Existing textbook analysis tends, however, to focus rather narrowly on specific countries, regions, periods, or subjects.

The majority of studies into national textbooks have examined textbooks from European countries. This research reflects societal discussions about colonialism and its consequences as well as the role of colonialism in Europe's cultural memory. Individual studies examining representations of colonialism have focussed predominantly on colonial powers who controlled large parts of the world for extended periods of time (see, e.g., Yeandle 2003; Oetting 2006; Petter 2008; Lantheaume 2013; Grindel 2013), but research has also been conducted into less-dominant powers such as Italy (see, e.g., de Michele 2011; Deplano 2013; Pes 2013; Cajani 2013), Germany (see, e.g., Kerber 2005; Poenicke 2008), and Belgium (see Nieuwenhuys 2014). There are, in contrast, significantly fewer analyses of the representations of colonialism in Spanish

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and Portuguese textbooks (see, e.g., [Dores Cruz 2007](#); [Araújo and Maeso 2012](#)). Studies have been conducted even in those European countries that were not directly involved in modern colonialism (see, e.g., Norway: [Aamotsbakken 2008](#); Iceland: [Loftsdóttir 2010](#); Switzerland: [Moser-Lécho 2012](#); Poland: [Techmańska 2014](#)). Most analyses of colonial powers focus particularly on the subject of violence as a constituent part of colonialism (see, e.g., [Lieven 2000](#); [Renken 2004](#); [Leone and Mastrovito 2010](#); [Müller 2013](#); see, in comparison, studies of textbooks from former colonised countries: [Gorbahn 2014](#)) where the focus is predominantly on conflict between colonial powers and their colonised subjects. [Foster \(2006\)](#) points out that the role of colonised people in other conflicts, such as World War II, is frequently omitted from textbooks and textbook research; this does, however, reflect wider trends in academia.

Comparatively few analyses of textbooks from non-European countries address representations of colonialism. This does not mean that colonialism is less important in social and academic policy debates in these regions, simply that they have a different focus. In former colonies, the interest lies mainly on the role assigned to population groups living in these areas before external settlers arrived. [Carleton \(2011\)](#), for example, analyses the colonial discourse in textbooks from British Columbia from 1920 to 1970 and ascertains that the texts were ‘vibrant tools of colonial power, prestige, and privilege’. Textbooks played ‘the important role of representing the past in general, and indigenous peoples in particular, in ways that justified colonialism and rationalized the development and continued existence of a capitalist settler society as natural, inevitable, and commonsensical’. Studies by [Crawford \(2013\)](#) and [Kaomea \(2000\)](#) have a similar focus in their examination of representations of ‘Aboriginal Australians’ and ‘Native Hawaiian peoples’, respectively. [Nishino \(2008\)](#) focusses particularly on the longevity of a colonial way of thinking in his exploration of ‘settler historiography’ in South African textbooks by comparing a textbook published in 1890 with textbooks published between 1945 and 1996.

The question of how history can or should be written (in textbooks) following decolonisation is of particular importance for African and Asian nations. Following their independence they have each had to integrate colonialism into a ‘new’ national history. Levels of research vary greatly between individual countries, due, in part, to the divergent importance of textbooks as a medium of instruction. The nationalisation of teaching content has been a subject of study, by [Bouras](#), for example, whose [2013](#) study examined Algeria, where the first Arab-language textbooks produced after 1963 depicted historic events in the form of a national narrative. Another perspective is offered by [Holmén \(2011\)](#) in his analysis of Kenyan textbooks, which emphasises that Kenya is a multi-ethnic country that does not have a common precolonial history upon which to base its national narrative and therefore focusses on pan-African, national, and tribal identities. The study shows that colonisation by Europeans is portrayed as a unifying, pan-African experience in which Europeans are differentiated as ‘the Others’. In addition it demonstrates that ‘tribal identity’ is

encouraged above ‘national identity’ by the state. In her analysis of Zimbabwean textbooks, Lindgren (2002) also highlights tribal identities, such as that of the Ndebele. Her study focusses on history books written by the ‘indigenous historian’ Pathisa Nyathi, whose books are distinctive because they are based predominantly on oral history and on interviews with elders conducted locally by the author (in Matabeleland). Lindgren examines how Nyathi portrays selected events from the narratives of the Zimbabwean Ndebele people and compares these with textbooks written by ‘colonial authors’ and other Zimbabwean authors. This approach enables depictions of colonial events to be analysed not only in relation to the nation state but also in relation to the colonial tradition and to the respective indigenous history tradition. There are further studies that analyse the representation of colonialism in the textbooks of selected countries from a postcolonial point of view (see, e.g., Seri-Hersch 2010; Koross 2012). There are comparatively few English-language works exploring representations of colonialism in textbooks of other regions. Hau (2010) has written one of the few English-language studies of Latin America, in which he compares the role of Spanish colonialism in the construction of nationhood in Mexico, Argentina, and Peru.² Studies involving textbooks from Asia also explore how they have changed over longer periods of time. Naoki (2001) concentrates on how knowledge about colonialism was produced in an examination of the changes in Malaysian textbooks, written first by British authors and later by Malaysian authors. Other studies look at India (Basu 2010), Hong Kong (Kan and Vickers 2002), or Burma (Oo 2012a). Although the primary focus of each of these studies is not necessarily the portrayal of colonialism, it is certainly a significant factor of analysis. The study by Kim et al. (2013) explores the representation of two historical themes in current South Korean textbooks based on examples of four analytical criteria (constructions of ‘subject/other’, discourses of inclusion-exclusion, silencing of voices, and narratives of re/colonisation). The study focusses primarily on the industrial revolution and the ‘discovery of new trade routes’, a topic closely related to colonialism. It elaborates on how a Eurocentric postcolonial hegemony was reproduced and how ‘textbooks silence and marginalise certain historical events and people’. By exploring, as her central theme, how ‘the colonial myth of oppressed indigenous women’ is depicted in textbooks, Kaomea (2006) demonstrates how gender themes can be linked to colonialism. Similarly, race is a concept that is addressed in several studies related to colonialism (see, e.g., Stanley 2000; Barnes 2007; Marmer et al. 2010; Basu 2010; Chisholm in this volume).

The vast majority of these studies analyse history textbooks, although other subjects can provide equally revealing source material in terms of representations of colonialism. In his 2010 study, Joshi analysed geography textbooks from India and Pakistan to see how the two countries have crafted ‘two different histories out of a shared past’. A pivotal factor here was that each state had constructed a different ‘imagined geography’. Indian textbooks depicted the ‘naturalness of India’ that developed during the colonial era while Pakistani textbooks highlighted the “‘natural” affinities of Pakistan with the Islamic

world'. These differently taught geographies lead to historic events that emphasise commonality being obscured. While many studies concentrate on processes and landmark events in their analysis of colonial representations, this study shows that 'geographical spaces' are equally relevant. Kennedy's 2002 study is one of the few that examine reading books. She demonstrates that life in the colonies was portrayed in Imperial Germany and during the Weimar Republic as a 'transplanted extension of the coziness, intimacy, and familiarity of the German Heimat' thereby masking the violent aspects of colonialism.

RESEARCH PERSPECTIVES

In the following section, I will introduce studies that reflect three theoretical perspectives: the Self and Other, memory, and knowledge.

Self and Other

The majority of studies address, indirectly at least, concepts from postcolonial studies. They frequently focus on general questions regarding the dissolution of Eurocentric constraints, the voice of the colonised peoples, processes of *Othering*, or the decolonisation of thought. These studies reveal how colonial hierarchies were stabilised within images of the Self and Others (see, e.g., Grindel 2008; Kim et al. 2013; Haue 2014; Kokkinos et al. 2014; Löfström 2015). Perspectives differ depending on how the individual national narrative relates to colonialism. In many European states studies revealed that the history of colonialism had either been suppressed initially in textbooks or that no critical debate had taken place. Only in recent years have there been developments in this area (see, e.g., de Michele 2011; Lantheaume 2013; Müller 2013; Grindel 2013). Although the construction of 'Self' is closely interwoven with the 'Other', some studies favour an examination of one aspect over the other. In his various studies of France, Otto (see, e.g., 2011) demonstrates that the *mission civilisatrice* was constitutive of the self-characterisation of the nation and that decolonisation challenged this. Colonialism had similar significance for Italy as demonstrated by Pes (2013) and Deplano (2013). Other studies have focussed on the issue of how the respective 'Others' are used to define 'Self' (see, e.g., Aamotsbakken 2008; Loftsdóttir 2010), a question that has been explored insightfully for former colonies such as Australia, Canada, and Hawaii. These case studies examined how the respective indigenous peoples are described as the 'Other' within the colonisation process and to what extent this way of thinking continues to have an impact far beyond the more direct effects of colonisation (see, e.g., Kaomea 2000; Carleton 2011; Crawford 2013). Textbooks in African countries have been studied to ascertain the extent to which periods of colonialism created differences between national identity, tribal identity, and pan-African identity (see Holmén 2011). One of the few works questioning how colonisers are portrayed in the textbooks of the former colonies is a study by Maca and Morris (2014) whose case study of the

Philippines examined how the Japanese were portrayed in textbooks in comparison to other colonial powers.

Memory

Studies exploring colonialism in cultural memory have been conducted mainly for textbooks from European countries. They have asked how the colonial past is represented and also what is considered worthy of remembrance and therefore assigned significance in the present. In this context, textbooks are seen as reflections of hegemonic discourse. Theoretical concepts from memory studies are implemented to varying degrees in such studies; some examine textbooks against the general background of a culture of memory while others are based more firmly on specific concepts. Schilling (2014) focusses on various ‘mnemonic “artefacts”’ and ‘particular forms of media’ and through them examines how colonialism is represented, not only in textbooks but also in colonial literature (*Afrikabücher*), in ‘state gifts’, ‘family heirlooms’, and other objects of memory. The logical progression is then to investigate how the form of media itself can influence how memory is constructed. Building on the assertion that colonialism is increasingly discussed as a European project, Grindel (2008) ascertains that despite general European references, colonial history continues to be addressed predominantly from the standpoint of national memory cultures. The perspective of memory also incorporates themes that are *not* remembered. Nieuwenhuys (2014), for example, refers to a collective amnesia in Belgian textbooks written between the 1960s and the end of the 1990s with regard to the (post)colonial history of the Congo. Similarly, Oetting (2006) states that French textbooks give the impression that ‘decolonial’ events have not entered the ‘collective memory’. In recent years the field of memory studies has been drawing attention to social controversies surrounding that which should be remembered. Textbooks are placed within a wider context in this sense. In a special issue of the *Journal of Educational Media, Memory and Society* edited by Fuchs and Otto (2013), textbooks are seen not only as a medium of memory culture but also as an object of the postcolonial politics of memory. This issue specifically addresses how the past can be made applicable to the present.

Knowledge

Academic approaches within historical studies focus on mutual knowledge production and therefore always analyse textbooks in context. By concentrating on knowledge, the separation between, for example, colonised and coloniser can be broken down, as can the linear and simplified perception that colonial powers directly influenced teaching content in order to retain colonial authority and to propagate colonial thinking. Taking Hong Kong as an example, Kan and Vickers (2002) demonstrate that the influence of colonialism on education systems was considerably more complex. They examine textbooks, examination

papers, and marking schemes in the context of collaboration between British administrators and local education elites. In addition to the traditional history course, ‘nervous British administrators’ introduced a further course in Chinese history. The study illustrates that there may be a range of perceptions regarding what counts as history and how history should be taught. By incorporating local debates and stakeholders in the discussion surrounding colonial education, the authors offer an illuminating perspective that applies beyond the case of Hong Kong.

A number of works explore the production of colonial knowledge. In his 2010 study, Basu examined Bengali-language geography textbooks and focussed on the establishment of a ‘geography knowledge system’. The introduction of ‘race’ as a central category in this knowledge system was the result of dialectical processes rather than being a departure from the precolonial period (see Oo 2012b). In addition to questions regarding precolonial knowledge, colonial knowledge, and the relationship between them, other studies focus on questions of how educational policy can produce ‘transformative knowledge for decolonization’ in textbooks. In this sense, Subreenduth (2013) asks how history textbooks in South Africa address the master narrative of equality and social justice, in order to overcome the indoctrination of apartheid. Approaches examining concepts of knowledge are frequently found in analyses of textbooks from formerly colonised countries, but these perspectives can also be applied successfully to European countries. Müller (2013) explores the circulation of knowledge in German textbooks between the fields of politics, academia, and education. Textbooks can be analysed in this context as a component of social negotiation processes and debate. (For further reading on the production of textbooks in their context, see part I of this volume.)

METHODS

Analyses of textbook content on the subject of colonialism are generally qualitatively structured and tend to be oriented towards postcolonial approaches. Comparative studies dominate the field, commonly elaborating differences or parallels between depictions of colonisation. One of the few comparisons of former colonial powers and colonised subjects was conducted by Grindel in 2012, where she demonstrated the interconnections between selected textbooks from European and African countries. Grindel’s work shows that the representation of a (shared) colonial history in the textbooks is firmly embedded in the respective national perspective. However, an important difference is the attribution of agency: African textbooks portray Africans as considerably more significant players in history than European books. Gorbahn (2014) also compared textbooks from former colonial powers and colonised subjects (Tanzania and Germany) and examined the differences in the preparation of material (visual material, instructions for readers, etc.). There are also country-comparison studies that select the representation of specific events rather than

colonialism as a whole. Carretero et al. (2002) showed that the way in which the ‘discovery’ of America in 1492 was depicted in Mexican and Spanish textbooks was heavily dependent on the respective national perspective.

Grindel (2012) and Trepsdorf (2006) have each conducted comparative studies of how various colonial powers depict colonialism in their textbooks. Trepsdorf, however, did not simply compare two countries with differing colonial histories; rather, he analysed how the portrayal of the African ‘Other’ is manifested in a range of contexts and media. Some existing studies consistently set textbooks in the context of education policy debates while others compare textbooks with other media. A contrasting approach can prove illuminating. Kaomea (2000), for example, compares textbooks with travel guides and argues that in both media, Hawaiians are strongly represented in a colonial tradition. She develops the argument further by adding that colonial depictions in travel guides serve the economic interests of the travel industry and that even the colonial depictions in textbooks benefit the industry by attracting low-paid tourist industry labour. A further option for comparatively analysing textbooks in context is to examine the relationship between colonialism in textbooks and the diverse stakeholders involved in the education system; such studies generally apply social science methodologies. In his 2002 study, Cave investigated what constituted the ‘correct’ approach to a colonial past in his comparison of English and Japanese textbooks. His study design incorporated an analysis of textbooks and curricula combined with observations of history lessons and semi-structured interviews with teachers. Analyses of colonialism in textbooks have also been combined with interviews and questionnaires in studies involving South Africa (Subreenduth 2013) and Greenland (Haue 2014) while others have included investigations into production practices (Cave 2013; Macgilchrist and Müller 2012; Barnes 2007).

DESIDERATA

In the mid-1980s, MacKenzie (1985: 174) pointed out the lack of studies investigating the role of the empire in English textbooks, a fact that also applied to many other countries at that time. This deficit has been corrected in recent years, but there are still gaps in research. This field of research would benefit from a shift away from its temporal and geographical fixation on nineteenth-century European colonialism. It would be enlightening to examine how textbooks address colonial powers, the role of colonised subjects, or the consequences of conflict with former or non-European colonists.

Broader or comparative research into history as a school subject would also be valuable in order to establish the degree to which the different subjects perpetuate the depiction of colonialism or whether the expression of ideas changes from subject to subject. Precisely because textbooks are often analysed as reflections of society, it would be useful to investigate whether textbooks vary across disciplines. Future studies could also discuss whether the increasing

focus on the perspectives of colonised people in modern textbooks is indeed, as frequently suggested, a result of social change and postcolonial approaches or whether it is also due to didactic considerations.

Despite some initial comparative studies, there is still a lack of systematic comparative case studies pertaining to specific countries. The arguments that colonialism in textbooks is predominantly part of processes of national memory culture or that textbooks increasingly address the negative aspects of colonialism could be explored through case studies. It remains to be seen whether these changes have occurred in parallel across a range of countries or whether there are country-specific differences. This applies equally to textbooks used in former colonies and by former colonial powers.

Finally, it would also be productive to move away from the focus on the text written specifically for textbooks and to investigate visual elements more closely. (For further reading on visual educational media and the visual turn, see the chapter by Bock in this volume.) An exploration of whether a visual canon emerges in portrayals of colonialism in textbooks would be illuminating as would studies of how similar or even identical images are contextualised in different countries. A more detailed examination of visual material may reveal conflicts between texts and images within textbooks and may also highlight the particularity of textbooks as media. Comparative analysis of other educational material, such as film, could establish how depictions of colonialism are shaped not only by national debate but also by the respective media. It is clear that significant gaps in research still exist despite elevated interest in the subject and increasing numbers of studies into representations of colonialism in textbooks.

NOTES

1. International Textbook Research 2008; Journal of Education Media and Memory Studies 2013; International Society of History Didactics Yearbook 2014.
2. This overview focuses on English-language analyses; there are more textbook analyses in other languages that cannot be covered here. Heylen (2004), for example, gives an overview of questions concerning textbooks and colonialism in Taiwan. Ribeiro (2007) offers an English abstract of his analysis of the colonial past in Brazilian textbooks.

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Concepts of the Past: Socialism

Barbara Christophe and Lucia Halder

Socialism is hard to pin down. It was and is a lot of things at once: a form of rule, an important part of the history of political thought, and a social movement that takes different forms in different parts of the world. Above all, however, it is the subject of an ongoing political controversy.

Twenty-five years after the fall of ‘real socialism’, and more than two decades after the prematurely heralded end to a story in which capitalism seemed to have finally triumphed over socialism, and, not least, in the long shadow of the 2008 financial crisis, socialist alternatives continue to enter the discussion. At conferences, intellectuals talk about the ‘idea of communism’.¹ Books explain why socialism does not have to remain a utopian dream (Cohen 2009), why Marx was right (Eagleton 2011), what a socialist America could look like (Goldin 2014), and which currently relevant visions of the future socialism can still yield (Honneth 2015). Political parties such as Syriza in Greece and Podemos in Spain, which avow themselves to a socialist agenda, have achieved electoral success. In many post-socialist societies, it is impossible to ignore the nostalgic longing for a social order that seemed to stand for terror and oppression immediately after the upheaval of 1989 but is now associated with social security and predictability (Todorova and Gille 2010).

At the same time, there were and still are tendencies in the other direction. Well-known authors direct their focus to the crimes of socialism in power and believe it should be placed on the same moral level as National Socialism (Courtois et al. 2004 [1998]). They describe the October Revolution as the

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E. Fuchs, A. Bock (eds.), *The Palgrave Handbook of Textbook Studies*,
https://doi.org/10.1057/978-1-137-53142-1_21

tragedy of a people (Figes 1997), paint a detailed portrait of the Soviet Gulag (Applebaum 2003), or characterise Eastern Central Europe, first under National Socialist then socialist occupation, as the ‘bloodlands’ (Snyder 2010) where millions of people were murdered. Influenced by the global imperative to also—or especially—commemorate the dark sides of a country’s own history, nearly all post-socialist societies have institutionalised the examination of their socialist pasts. Days of remembrance, museums, and memorial sites keep the memory of injustice under socialist dictatorships alive.

For textbooks as a teaching tool and a medium of memory culture, this situation of open dissonance regarding the meaning of socialism—whose rise is among the central events of the twentieth century (Hobsbawm 1994)—is both a challenge and an opportunity. The challenge is that in democratic societies, textbooks aim to portray not only hegemonic patterns of interpretation but also the societal controversies surrounding those interpretations (Klerides 2010). This desire is not easily satisfied here, considering the political explosiveness of the polarised debate and the fundamental need to select and simplify the content of textbooks, which are addressed to a very general readership. The opportunity arises from the fact that dealing with a topic as controversial as socialism provides the incentive and occasion to reflect upon the role of textbooks in pluralistic, individualised, medially fragmented memory cultures.

For textbook research rooted in cultural studies, this presents the exciting question of how textbooks have addressed the task of describing and discussing socialism at different times and in different places. As a globally occurring mass medium and a serial product, subject to not only national regulations but also global standards, textbooks serve as an ideal source for a comparative reconstruction of international processes to negotiate interpretations of socialism.

We will present our current research findings in five steps. We will (1) sketch basic lines of research development, (2) reconstruct the theoretical background and findings of specific studies, (3) identify methodological strategies pursued by various authors, (4) present studies that we consider theoretically or methodologically innovative, and (5) highlight research gaps and areas from whose exploration research in this field could benefit.

OVERVIEW

Looking at focal geographical areas, a clear imbalance emerges. Most analyses consider German textbooks or case studies from post-Soviet countries. Far fewer studies concentrate on Eastern Europe, and a very small number turn to countries like Spain or the United States, which have no historical experience with socialism as a societal system.

The strong focus on Germany has to do with Germany’s special constellation. Debates here on an appropriate way to address the German Democratic Republic (GDR) in schools are often entangled with discussions on the role of schools in dealing with National Socialism (on textbook representations of National Socialism, see Foster and Karayianni in this volume). Citing the double

experience of dictatorship (on dictatorship, see Oteíza and Achugar in this volume), many call, for example, for a better handling of the situation than with the delayed discussion of the Nazi regime (Handro 2011). But considering the popular stance that the Holocaust was unique, it is also crucial to avoid the impression that remembering the experience of victims of Socialist Unity Party (SED) rule intends to relativise National Socialist perpetrators (Behrens 2011).

The relatively strong representation of post-Soviet countries in research may have to do with the enormous opportunities for comparative studies offered by their common state history in the USSR and the rapid differentiation in their development of individual memory cultures today.

In terms of sources for textbook research, we can observe a marked dominance of teaching material for the history classroom. Two interesting exceptions are studies that analyse the depiction of socialism in books for native-language literature courses (Hranova 2010; Steding 2014). It is striking that there has been hardly any research on social studies material. Only a few authors conduct a systematic comparison between representations in textbooks and in other memory texts, such as biographical memory narratives by history teachers (Christophe 2012, 2013; Umetbaeva 2015) or films and fictional literature (Nicht 2011).

Thematically, as well, a certain narrowness becomes apparent. Almost all studies implicitly equate socialism with a societal and government system or a phase of development in the history of a specific country. It would be fascinating to systematically analyse how one and the same textbook portrays 'real socialism' in the countries of the Eastern Bloc and deals with socialism as an ideology of the nineteenth century or as a global mass movement. By maintaining a focus on socialism in power, research reiterates the same tendency that authors (Dimou 2004, 2010) have identified in the textbooks themselves: a subtle Russification and de-Westernisation of socialism. Slovenian and Croatian textbooks seem to represent an exception to this rule; although they hardly address Leftist movements in Western Europe after 1945, they discuss the revolutions in Germany and Hungary after World War I, the People's Front Movements of the 1930s, and the Spanish Civil War in connection with the concept of socialism (Vodopivec 2010).

THEORETICAL APPROACHES

In attempting to summarise the available research, one encounters an astounding number of inconsistent, even contradictory findings. This becomes especially clear in analyses of German textbooks. While some authors explicitly disparage students' lack of learning about the SED's permeation of state and society (Arnswald 2006) or critically comment that the term *Stasi* hardly appeared in West German textbooks before the collapse of the GDR (Jacobmeyer 1999), others argue that textbooks are much too one-sided in their discussion of force and oppression (Dimou 2004, 2010). Upon closer examination of this phenomenon, one quickly finds that such discrepancies are

rooted in opposing theoretical assumptions that exist on different levels. Theories can shape one's view of socialism as the object of investigation, influence positions on the societal function of memory, or even feed ideas about the nature of history as such.

Those who explicitly (Mätzing 2009; Chromova 1999; Sapoval 1999; Naval and Pavon 2011) or implicitly (Jacobmeyer 1999) argue along the lines of totalitarianism theory will, for example, go beyond a structural historical comparison between the socialist state and National Socialism. They will also applaud textbooks that give ample room to political aspects in general and the socialist power apparatus in particular. Scholars whose assumptions are based in modernisation theory will advocate a stronger emphasis on the cultural and social change (Dimou 2004, 2010; Helmedach 2004; Vodopivec 2010) that socialist state societies and other modern, industrial societies have undergone. Those who feel affiliated to the cultural turn in cultural studies will see a deficit in textbook narratives that focus exclusively on force and oppression. They will argue that these texts do not explain why and based on which—at times entirely contradictory—motives people were prepared to give their lives for socialism (Vodopivec 2010). Scholars who take an entangled history approach will view the East-West dichotomy as a contingent construct of the Cold War era, one that blinds us to both Westernised lifestyles in the East and the roots of the Western welfare state in the competition between ideological systems (Vodopivec 2010). In the traces of poststructuralist paradigms, one can recognise the contrasting, reciprocally referencing images of Western capitalism and Eastern socialism as the result of a discursive dynamic that defines the Other through a one-sided dramatisation of opposites (Christophe et al. 2014; Dimou 2010).

METHODOLOGICAL APPROACHES

The different theoretical positions sketched above transfer to the findings in a relatively unfiltered way because most studies conduct deficit analyses. They are usually based on external, pre-established categories derived from theoretical models.

Some authors view textbook narratives on socialism critically when these narratives are assessed against the latest research. Scholars dealing with the representation of the Soviet Union, for example, pay attention to whether the contradictory nationality politics of the CPSU, which aimed not only for Russification and oppression but also to foster national cultures and national cadres, is depicted in a nuanced way (Sapoval 1999; Razmadze 2010; Umetbaeva 2015). Or they check to see if the narrative mentions contributions to modernisation alongside the terror of Bolshevik rule (Chromova 1999; Fischer-Dardai 1999). Other scholars might ask whether the willingness of large swaths of the population to cooperate with the regime—and not only by force—comes to light (Vodopivec 2010) or whether nearly everyone is portrayed as a victim (Chromova 1999).

Sometimes positions on the historical process also become a scale by which to measure textbook narratives. Critique might address an exaggerated focus on political history while excluding everyday history, or the construction of teleological narrative structures (Dimou 2004, 2010; Benthin 2004; Helmedach 2004) that tell the history of socialism starting from its end as a trajectory of pre-programmed failure.

It is important to note that deductive analyses at least implicitly presume the possibility of creating a balanced textbook narrative. However, this presumption is diametrically opposed to the observation that we currently have no consensus on how to remember socialism, and considering the plurality of stakeholders purveying patterns of historical interpretation, perhaps there will never be one (Handro and Schaarschmidt 2011).

Studies that inductively cull their analytical criteria from the material itself manage to escape this dilemma. Some authors conduct a synchronic comparison among textbooks issued by different publishers in order to expose decisions on what is included and what is left out and to draw conclusions about the frameworks that stabilise the textbook narratives (Handro 2011; Kaplan 2009; Steding 2014). Others compare the interpretive patterns within a single textbook developed to deal with different historical events. Through coherence analysis, these researchers reconstruct ambivalences and discrepancies that appear when different societal positions are represented in the textbook or when, like a palimpsest, layers of memory from different times overlap and interfere with each other (Christophe 2010, 2013; Christophe et al. 2014; Razmadze 2010; Umetbaeva 2015).

The methodological decisions discussed here have a decisive influence on the research findings. Scholars who conduct deficit analyses often conclude that national textbook narratives are homogenous. Those who favour framework analysis find typological differences among the textbooks, while those who prefer coherence analysis reconstruct incoherent or fractured narratives.

INNOVATIVE STUDIES

In the following section, we will describe specific studies in more detail. We concentrate on the work of three authors who take the same approach on basic methodological questions but diverge significantly in what they choose to emphasise. By pursuing different research interests and looking at differently structured constellations of memory culture in Germany, Lithuania, and Russia, these studies not only exemplify the broad spectrum of research strategies in textbook analysis but also show the diversity of societal approaches to discussing socialism.

All three researchers developed their analytical categories during the research process itself, demonstrating ways to conduct textbook analysis without trying to measure the content against supposedly objective standards. All three also used comparison as a heuristic device that aided them significantly in constructing robust analytical categories.

Beyond these commonalities, it is the differences that are especially striking. Saskia Handro subjects German history textbooks to a diachronic and synchronic comparative analysis. Taking a typologising perspective, she investigates the various frameworks that structure narratives in different textbooks. Barbara Christophe, meanwhile, concentrates on a single Lithuanian history textbook. Through a coherence analysis, she compares narratives about the socialist era with narratives about the post-socialist period. She is particularly interested in how the textbook authors integrate the two historical periods into a coherent narrative and respond to the needs of different societal groups in terms of memory culture. Vera Kaplan focuses on Russian textbooks. Like Saskia Handro, she uses a comparison of textbooks written at different times and issued by different publishers to identify typological differences. Like Barbara Christophe, she asks how and through which strategies frameworks can build coherence in a narrative.

Introducing these studies, we will look at the following aspects: (1) explicitly stated epistemological interests in relation to specific theories, (2) the fundamental idea of the textbook as a special category of text, (3) the concrete methodological procedure used, and (4) the research findings.

In her study of German history textbooks, Saskia Handro (2011) investigates how the portrayal of the pivotal year 1989 is integrated into the narrative on German history since 1945. She begins by arguing that there is currently no consensus in the Federal Republic of Germany on how to interpret the GDR past. Drawing on Wolfgang Jacobmeyer, she describes history textbooks as national autobiographies (see also Carrier in this volume). She therefore sees them as ‘exclusive sources through which to explore the principles of constructing a nation’s own history and the opportunities for identification they offer’ (Handro 2011, p. 92).

With a focus on variation and difference, Handro examines a total of 62 history textbooks published between 1990 and 2009. Her methodology is initially qualitative. She asks what each textbook narrative conveys and leaves out, and, using two convincing and easily operationalised criteria, she reconstructs the narrative frameworks that structure the textbook narratives. Specifically, she focuses on chronological markers of change and typical constellations of actors.

Throughout this process, she succeeds in exposing significant differences among the textbook narratives and highlighting four dominant patterns of interpretation. Textbooks that construct a binary opposition between the SED and the people, she argues, usually ignore both reform processes within the state party and forms of action or agendas of the various people’s movements. The population appears as the passive object of repression and propaganda. Within a narrative structure that revolves around the goal of unification, the meaning of the year 1989 is seen above all as fulfilling the dream of German unity. By contrast, textbooks that focus their depiction on leaders of political protest in East and West Germany choose entirely different emphases and focus on different turning points. The nation as an interpretive category hardly plays a role here; the narratives rather follow a structure that concentrates on the

value of democracy. A third category of textbooks embeds the history of socialism in Germany in the international history of the Cold War. The fourth group largely eschews the construction of a narrative framework at all, instead taking a deconstructive approach in order to draw attention to the narrative patterns currently circulating in society.

Following this investigative step, Handro uses a statistical analysis to ask how often the narrative patterns she has identified appear in the textbooks of her sample. She shows that textbooks of the first and second type represent the vast majority, with 37 and 47 per cent, respectively. She also demonstrates that the distribution of dominant narratives depends strongly on the type of school and federal state for which the textbook is approved.

Like Saskia Handro, Vera Kaplan conducts a diachronic and synchronic comparison between the depictions of socialism in different history textbooks in her work on 'The Vicissitudes of Socialism in Russian History Textbooks'. Focusing on Russian textbooks, however, she articulates a different core interest. She is less concerned with the structure of textbook narratives than with their explicit or implicit conceptual understanding of socialism. She draws her influence from conceptual history, as developed by Reinhard Koselleck, which investigates the change in meaning and function of specific concepts.

In Kaplan's view there are at least three reasons why history textbooks make for an especially productive source through which to reconstruct a concept's transformation. Because their authors often remain anonymous and because the books are produced in a collaborative process, one can assume that they reflect broad societal tendencies. In addition, state elites use textbooks in a targeted way to communicate social and political messages to the broader society. Moreover, according to Kaplan, publishers must always adapt textbooks to the dominant political ideology. In consequence, the version of the past that they transport is marked by an effort to simplify content and achieve consensus.

In compiling her corpus of investigation, Kaplan follows the principle of maximum contrast. She analyses textbooks from three phases: the early 1990s, the late 1990s, and the first decade of the new millennium. Her methodology relies on Jerzy Topolsky's model for the analysis of historical narratives. Kaplan is specifically interested in how concepts of socialism assume the role of a master narrative, whose purpose it is to create coherence and contribute to integrating smaller narrative segments into the larger structure with as little contradiction as possible.

Kaplan's analysis uncovers interesting developments. In the early 1990s, socialism was still portrayed as a totalitarian ideology of modernisation that exacted countless sacrifices from the population. In the late 1990s, textbooks depicted socialism as a civilisational model shaped decisively by Russia's intermediate position between Europe and Asia. Since the turn of the millennium, textbook authors have described it above all as a useful vehicle for the consolidation of the Russian Empire.

Barbara Christophe, in her analysis of a Lithuanian textbook, looks at tensions and breaks within a single work. She guides her inquiry with assumptions from memory theory on the one hand and empirical observations from public debates and discussions in Lithuania on the other. Fundamentally, she cites individual memory to argue that it is never possible to ‘integrate the vivid and contradictory human experience into a single, harmonious picture’ (Christophe 2010, p. 72). On a collective level, every memory culture consists of different overlapping, competing threads. Christophe thus makes it her goal to investigate the traces these threads leave behind in the texts.

Taking textbooks as a source through which to reconstruct the negotiation processes of memory culture, the author follows two theoretical approaches. Drawing on Klerides (2010), she views textbooks as a hybrid medium in which we find not only hints of hegemonic discourses but also traces of societal controversies. Citing Jacobmeyer (1998), she, too, sees textbooks as national autobiographies. She uses this formulation to draw on biographical research in developing concrete methodological processes. From Fritz Schütze, she borrows the concept of the pragmatic break, which identifies contradictions by comparing things said in the mode of argument and in the mode of narration. She also cites Schütze in looking for (repair) strategies that narrators develop to neutralise contradictions.²

Christophe’s findings show that the textbook manages to overcome tensions and contradictions by fostering a narrative of split society, which appears in two forms. The first is a division between a courageous minority of dissidents, whom the text credits with playing a decisive role in the victory over socialism, and an opportunistic majority, whom the text accuses of adapting to an unjust system. Second, the text depicts a division between poor and rich in the post-socialist present, also attributed to the political marginalisation of dissidents and the way in which newly minted capitalists (previously Communists) managed to secure themselves a political and social hegemony. However, the repair strategy produces new contradictions because of the tension that exists between the two narratives of societal division.

RESEARCH GAPS AND NEW APPROACHES

Although an array of case studies already exists, based on many different theoretical and methodological approaches, there are still several gaps in the research. It is striking, for example, that with few exceptions (Anyon 1979), hardly any studies analyse how socialism is represented in textbooks from Western countries. Generally speaking, there are so far astonishingly few studies that systematically compare. If we take seriously the premise of memory theory that the present exerts strong influence on the image we have of the past (Halbwachs 1991; Erl 2005), a comparison between representations of socialism in textbooks from different memory cultures would be highly rewarding.

To begin with, one could probe differences among Western European countries, looking at cases that differ in terms of whether the Communist Party is or has been present in politics. For instance, we might compare West Germany, a country in which communist parties were marginalised and periodically criminalised, with Italy and France, where communist parties have been involved in local and regional governments. Systematic comparisons between various post-socialist societies may also uncover crucial insights in relation to theories of memory. Scholars interested in such an undertaking could choose countries based on the principle of maximum contrast, focusing on societies that consistently differ from each other in two respects: (1) they have had different experiences in the socialist past due to a differing extent of repression exerted by the regimes in charge and divergences in the degree to which opposition movements were able to articulate their protest. From this point of view, it would almost certainly prove highly instructive to compare, for example, Polish with Albanian textbooks and (2) they pursue fundamentally different history politics today. We are thinking here of comparisons between, for instance, Lithuania, in whose public sphere a number of opposing interpretations of history contend with one another; Estonia, where anti-Communist interpretations hold a clearly hegemonic position; and Belarus, where the publicly expressed memories linked with socialism are predominantly positive. It goes almost without saying that, in the context of retracing the emergence of shared European narratives of memory, comparison between societies in Eastern and Western Europe would be of considerable interest and may enable insights into such matters as whether the contrast *between* East and West is more significant than differences *among* countries in Eastern Europe with socialist pasts and *among* Western European nations without.

Comparative work in this field might proceed beyond these issues to examine textbooks themselves, foregrounding questions as to differences in the values presented and advocated by textbooks according to whether they discuss socialism as an idea, a political movement, or a social system. A further matter for research in this context might be whether such differences are explicitly reflected upon in textbooks, and if so, which argumentative strategies find use in the process. With reference to the observation made by Thomas Höhne (2003) that textbooks are an interdiscursive medium, we might consider it particularly fascinating and fruitful, especially in relation to a topic as unabatingly surrounded as is socialism by significant societal controversy, to examine its representations in a range of media. Further, there would doubtless be interesting insights to be gained from an exploration of whether and, if so, how interpretations of socialism contained in other media which transmit cultures of memory, such as films, novels, museums, and memorials, manifest themselves in textbooks which have committed themselves on a fundamental level to the principles of multiperspectivity and the juxtaposition of contrasting views.

Finally, it would be desirable for textbook research, in its engagement with socialism, to draw inspiration from those areas of the discipline of history which have benefited from an extension to encompass cultural studies, as it has done

in relation to other topics of research. The sub-field of visual history in particular has much to offer in the way of approaches with potential (Paul 2016; Halder 2014). Photographs, in their apparent or alleged objectivity, frequently serve as points of reference for individual and societal self-location and self-affirmation and as such are eminently suitable for the transmission of political positions and attitudes. Paintings, cartoons, and maps are likewise dependent in their creation, distribution, and public reception on the historical, political, and social context in which they came into being. The history of images is always also a history of media and therefore closely connected to the history of textbooks as media. Textbooks are seen increasingly as multimodal structures composed of text *and* images (van Leeuwen 1992; Heinze and Matthes 2010). So far, textbook analyses on the representation of socialism have not yet tapped in to this trend. This is especially regrettable since those who advocated socialism as a societal model engaged early on with visual media such as pictures and posters. Out of this, a specific visual language with its own icons developed. The same goes for opponents of the system, who mobilised their own accessible visual language in order to discredit socialism. It would be fascinating to look at what elements of this visual memory found their way into textbooks and perhaps still appear there today.

NOTES

1. Events with this title took place in 2009, 2010, and 2011 in London, Berlin, and New York.
2. See the excellent summary of Schütze's approach by Riemann (2003).

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History Textbooks and the Construction of Dictatorship

Teresa Oteiza and Mariana Achugar

Dictatorships are breaking points in the social fabric (Franco and Levín 2007), and as such they constitute contested events in social and historical discourses. In history textbooks, authors reformulate these traumatic past events according to disciplinary practices. However, these representations and explanations of the dictatorial past are not only academic discourses; they are also important cultural artefacts through which narratives about a contested past become legitimised. In this chapter, key studies on the representation of dictatorship in textbooks from Latin America and Spain are reviewed. In doing so, we distinguish between three types of study: (1) those that address the issue from a discourse analytical perspective, (2) those that embed the representations within the context of educational reform(s), and (3) those that relate the representations to social memory studies.

We discuss the methods used by each of these approaches to investigate this topic, identifying the strengths and weaknesses in each line of work. Finally, we propose areas to target in future studies on the representation of dictatorships in textbooks.

RESEARCHING DICTATORSHIP FROM A DISCOURSE ANALYTICAL PERSPECTIVE

Discourse analysis studies on the representation of dictatorships in history textbooks focus on how configurations of linguistic resources (such as the use of nominalisation, active and passive structures, or impersonality) that operate at

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the discourse-semantic level of language—constructing meaning beyond the written text—contribute to representations and evaluations of contested pasts. Most studies conduct a close analysis of pragmatic effects (e.g. through the use of presuppositions or persuasion) and linguistic choices in connection to hegemonic narratives that serve to reproduce ‘official history’. These analyses focus mainly on how key historical actors are represented and evaluated and how the emergence of the dictatorship is explained. There are both synchronic and diachronic investigations of how textbooks represent dictatorships. Investigating representations of the dictatorship in Spain, for instance, Pinto (2004) explores how a Fascist civics textbook for primary education published during Franco’s dictatorship, *Así quiero ser: El niño del Nuevo Estado* (This Is How I Want to Be: The Child of the New State; AQS), imposes an indoctrination of fascist ideology. Pinto incorporates the Bakhtinian notion of authoritative discourse in his analysis of the rhetorical devices employed, which include the simulation of multiple voices and the use of control and manipulation strategies through emotionally charged language. In a more recent study of 33 textbooks published during the *franquismo* in Spain (1939–1975), Pinto (2011) explores the teaching of etiquette norms as a significant component in the socio-political education of ‘*the children of the New State*’¹ (2011, emphasis in the original).

Along the same lines, Oteíza and Pinto (2008) analyse more contemporary history textbooks used in Chile and Spain and their representations of recent dictatorships. Oteíza and Pinto’s main research question deals with the representation of social actors (e.g. Franco) and the historical, multi-factor explanations for the respective dictatorships. The authors show that in one textbook, Franco’s representation is based on nine descriptors that contribute to a positive image, such as ‘general’ and ‘head of state’, while he is only referred to as ‘dictator’ three times, a term that could contribute to his negative image. In the same manner, the word ‘regime’ is clearly favoured over ‘dictatorship’. Oteíza and Pinto state that ‘one of the most significant characteristics of both [history textbooks] is that when the government is involved in blatantly negative or violent actions, the authors employ syntactic structures to avoid attributing responsibility to any explicit agent’ (Oteíza and Pinto 2008).

A great number of studies give special attention to the ways in which secondary-level history textbooks and other educational materials represent the past on a discursive semantic level, the language stratum of the text, and on a lexico-grammatical level, the language stratum of the clause (e.g. Achugar 2016; Achugar et al. 2011; Borges Sellan 2011; D’Alessandro 2014; Giudice and Moyano 2011; Oteíza 2006, 2014; Zullo 2014).

Sandra D’Alessandro (2014) investigates representations of the most recent dictatorship in Paraguay (1954–1989) in history textbooks published between 1989 and 2008, focusing on discourse-semantic structures. She looks at four aspects in particular: (1) macro-propositions, that is, she identifies the main discursive topics of a discourse; (2) semantic micro-propositions, that is, she analyses local meanings in the discourse by paying attention to the lexical and

syntactic structures selected in the text (van Dijk 2003); (3) the discursive strategies of reference, that is, she asks how people are referred to in the discourse; and (4) predication, that is, she explores which information is hidden or not included in the discourse (Wodak and Meyer 2003). As a result, D'Alessandro states that the textbooks propagate a negative representation of the regime while also implementing silencing and erasure strategies that reproduce dictatorial discourses by associating this period with the idea of 'peace and progress'. D'Alessandro finds a critical shift in these representations in 2008, when the new textbook attributes agency and responsibility to some of those responsible for human rights violations.

Giudice and Moyano (2011) also look at transformations in the dominant textbook narratives of the early 2000s concerning the Argentinian dictatorship (1976–1983). They show how rhetorical and argumentative strategies are used in these textbooks to construct a negative evaluation of the period by introducing alternative versions of the past. However, some of the textbooks present the events as if they have only one possible meaning: that of the hegemonic memory supported by Kirchner's government and human rights organisations. This type of textbook discourse does not offer space for debate; the historical content and the tasks proposed limit the ways in which to engage with the topic (Zullo 2014).

Achugar et al. (2011) focus their analysis of Uruguayan textbooks published between 1990 and 2009 on the explanatory arguments constructed in the texts. They find multi-causal explanations for the origin of the dictatorship (1973–1985). The process is described as a gradual corrosion of democratic institutions in the context of an economic and social crisis. The 1973 coup d'état is often mentioned without explicitly identifying the agents that produced it (e.g. using phrases such as 'the institutional break', 'the dissolution of Parliament', 'the institutional rupture', etc.). Some of the textbooks give equal responsibility for the coup d'état to politicians, the president, and the military, while others ascribe responsibility to the military only. None of the textbooks assigns responsibility to the guerrilla or other social movements (labour unions, student protests, etc.). The authors show that the textbooks use reported speech to avoid making choices about how to attribute responsibility while at the same time presenting different narratives that have competed in the public sphere. The texts include explicit debates over how to interpret the dictatorship, presenting historiographical discourse in action. However, the sources of these competing versions are not identified, so the readers cannot evaluate them considering the authors' interests and ideological positioning. In their conclusion, Achugar et al. (2011) point out that despite some change over time, the textbooks do not provide enough information for readers to construct a contextualised historical and political understanding of the events.

In her studies of Chilean history textbooks published between 2005 and 2013, Oteíza focuses on the discursive codification of the recent Chilean past. Looking at the linguistic mechanisms employed, she investigates how memory is constructed and negotiated by comparing official documents on human

rights violations, historical and sociological discourses, and primary- and secondary-level textbooks (Oteíza 2011, 2014). These studies have demonstrated that different memory positions and historical explanations are increasingly integrated into textbook accounts. The value of local historical sources and testimonies, which are incorporated into more recently published history textbooks in Chile, marks a significant change compared to history textbooks published between 1990 and 2001.

Taking a diachronic perspective, Oteíza's (2011, 2014) work shows that the publication of the two main official documents on human rights violations committed during the Pinochet dictatorship (1973–1990), the Rettig Report (1991) and the Valech Report (2004), have had a significant impact on the way in which Chilean history textbooks construct the dictatorship and human rights violations committed by the organs of state repression. Secondary-level history textbooks published in 2012 and 2013, for example, explicitly state that the 'terror campaign' against leftist parties in the country was supported economically by the United States through the CIA. Additionally, after a strong dispute between left-wing and right-wing political actors, the term 'dictatorship' was accepted as a valid label for what was previously called the 'military government'.

Another interesting approach to the study of dictatorships in textbooks combines a critical discourse analysis with ethnography. Díez Gutiérrez (2013) explores not only how repression during the Francoist dictatorship is constructed in Spanish secondary-level history textbooks but also how history teachers use these books in the classroom. The study reveals that the systematic Francoist repression is minimised or not even mentioned in the history textbooks analysed and that some topics, such as the role of the Catholic Church during Franco's dictatorship, are completely silenced both in history textbooks and by teachers in the classroom. Victims of Francoism are hardly mentioned in either context (p. 401). At the same time, when discussing recent national history, Spanish textbooks—like textbooks in Argentina, Uruguay, and Chile—draw on what the author calls 'excesses from both sides' in order to justify the coup d'état, thus constructing a scene of two forces, equal in power, fighting under 'equal conditions' (Díez Gutiérrez 2013).

Achugar (2016) focuses on how Uruguayan textbooks are used in the classroom as instruments of intergenerational transmission. Based on an analysis of classroom discourse around textbooks, a survey of 102 history teachers, and ethnographic interviews with teachers and students, she shows how teachers provide a framework for students' understanding of historical events by integrating their own social memory into the lessons. Regarding textbook representations, she also states that the textbooks, like the teachers, reproduce historical arguments that the coup d'état (1973) responded to a gradual deterioration of democratic institutions and an economic and social crisis. However, textbooks differ in their distribution of responsibility for this event. Most textbooks ascribe responsibility to the executive and the military. Social actors—particularly the military, the government, and the parliament—are evaluated in

negative ways. Meanwhile, the people themselves are represented only as being affected by the actions of others and evaluated through their reactions to the actions of others. They are not considered agents in these events but rather victims. In addition, the textbooks explicitly highlight primary source documents and the voices of academic experts, which are used to legitimise the narrative they construct.

Looking at the pedagogical discourse resulting from interactions with history textbooks, Achugar (2016) argues that historical narratives constructed in the classroom are (re)constructed and (re)interpreted as argumentative resources in other contexts. For instance, in discussions with their peers, some youth used facts they had learned in discussions of textbooks in the classroom, such as the number of civilians imprisoned or the importance of international political actors, to understand local events (e.g. the role of US support for dictatorships in Latin America in the context of the Cold War).

EDUCATIONAL REFORMS AND THE REPRESENTATION OF DICTATORSHIP IN TEXTBOOKS

Within the fields of education science and sociology, some scholars have focused on how pedagogical theories and educational reforms have framed textbook content (e.g. Amézola 2008; Boyd 1997; Braslavsky 1992; Cole 2007; Kaufmann 2006, 2012). Others have explored the relationship between political processes and social memories on the one hand and textbooks on the other (e.g. Born 2010, 2013; Born et al. 2010; Harriet 2006). There has also been research on the teaching and learning of the recent past (e.g. Arrieta and Palumbo 2009; Bertinant and Rubio 2013; Carretero et al. 2013; Demasi 2002; Lorenz 2002; Levín 2007).

Amézola and Cerri (2008) provide a comparative analysis of how the transitional periods that Brazil and Argentina underwent in the 1980s are reflected in current curricula, syllabi, and textbooks. Munakata (2012) has extensively studied the impact of conflicts and debates in Brazilian society on the teaching of history and the production of textbooks there. Among other things, both studies show that Brazilian textbooks were long produced with the assistance of specialised teams from the United States. These textbooks were initially used as a source for the transmission of the military regime's ideology; however, with time, they also became a space of resistance and a place to express the ideology of the opposition (Amézola and Cerri 2008; Munakata 2012). As one example, Amézola and Cerri (2008) point to a 1991 textbook titled *História do Brasil da Colônia à República*, which describes the military's crimes.

The same authors also look at the question of how different educational reforms supported by governments with different ideological perspectives have had an impact on the content of history textbooks. For Brazil, Munakata (2012) describes how the educational reform of 1971, which merged history and geography into the new subject of social studies, led textbooks to place much more emphasis on the ideology of national unity and the concept of religious dignity.

In history textbooks, reference to the danger facing Brazil from communist regimes additionally served to legitimise the military regime. Along the same lines, Assunção (according to Munakata 2012) points out that history textbooks legitimised the 1964 coup d'état against President João Goulart due to his leftist ideological tendencies. In all Brazilian history textbooks published since 1971, the term 'revolution' has been used to signify the military movement of 1964. In the last four decades, Brazil has been presented as a successful and magnificent country in which all students participate as citizens.

In two other studies, Munakata (2004, 2012) analyses textbooks in Brazilian society. In the 1970s and 1980s, he argues, there was a systematic effort to denounce the 'wrong historical narratives' or the 'beautiful lies' offered by Brazilian history textbooks (Munakata 2012). According to this study, ideological critique could be extreme in its judgments. Alternative history textbooks started to be published under the dictatorship (1964–1985), which was possible in part because textbooks did not need official approval before being published. In these alternative textbooks, social movements in opposition to the military regime could be mentioned without being represented as 'terrorist', that is, textbooks included protests, manifestations, and strikes, among other things, with many images of the social actors involved (Leonardo, according to Munakata 2012, p. 147). As Munakata concludes, 'the rise of these textbooks on the market indicated that there was a new generation of authors who were in tune with the discussions happening by that time at the universities, which remained one of spaces of the opposition, despite the persecutions and the expulsion of professors and students' (Munakata 2012, p. 149).

Amézola and Cerri (2008), on the other hand, highlight that the traditional and academic study of specialised history and education history in Brazil have long justified a 'necessary' distance in textbooks from the nation's recent past. Nevertheless, the authors find that topics such as disappearances or armed opposition to the dictatorial regime were very quickly incorporated into secondary-level history classes during the 1980s.

Looking into the educational reforms enacted during Franco's dictatorship in Spain, Revuelta Guerrero (2012) shows that after the reform of 1953, during the second period of the Franco dictatorship, strong emphasis was placed on the creation of a national spirit as a fundamental and obligatory task of history education. The mission of Spain throughout history and the idea of 'Spain as a spiritual empire' and 'the men as carriers of eternal values' (Revuelta Guerrero 2012, p. 169) received ample space in the history curriculum.

In Chile, Osandón (2013), Reyes (2004), and Rubio (2013) analyse the impact of the educational reform enacted during the period of democratic transition on the representation of dictatorship. The reform of 1999/2000 signalled a fundamental transformation in the history curriculum and led to significant changes on a theoretical and methodological level. Osandón (2013) and Oteíza (2006) report that since the reform, textbooks have treated topics in a more complex way, with a methodology that promotes autonomous exploration by the students; moreover, even beyond direct exposure to sensitive

topics, students are asked to work with a variety of sources and testimonies in independent activities.

SOCIAL MEMORY STUDIES

Another important line of research is the social memory studies perspective, which incorporates a sociological lens to examine the role of textbooks in the representation of dictatorships. Some of the most innovative studies on the relation between social memory and textbooks from the field of historical sociology have been written by Diego Born (2010, 2013; Born et al. 2010). Born explores representations of the Argentinian dictatorship in secondary-level history textbooks from 1976 to 2009. Taking a synchronic and diachronic perspective, the studies analyse how the struggles of various social actors (e.g. armed forces, the president, or political parties) and memory-based groups (e.g. Mothers of Plaza de Mayo) in the Argentinian public sphere have affected textbook representations and educational policies towards teaching the memory of the dictatorship in schools. Born argues that changes in the history textbooks were not always connected to or in sync with changes in the public sphere, where hegemonic discourses about the dictatorial past were contested and transformed at a different pace.

Moreover, he shows that textbooks differ with regard to how they link the dictatorial experience to the larger narrative of the nation-state. According to Born (2010), two positions can be observed in Argentinian textbooks during the period of study: the 'integral critique' and the 'institutional critique' of the dictatorship. The integral critique focuses on denouncing the political repression and economic policies of the military government. In addition, this position links the dictatorship to the current democratic state and the position of those still in power, showing continuity between past and present. By contrast, the institutional critique of the dictatorship focuses on the institutional break, repression, and authoritarianism of the regime, as well as its consequences for the subsequent democratic governments but without drawing a causal connection between past and present. From the institutional critique perspective, responsibility for the dictatorship falls on the military only; in the integral critique position, responsibility is attributed to an alliance among militarily and economically powerful sectors of society (Born 2010).

Born demonstrates that transformations in textbook representations of the dictatorship result from a complex interplay among factors such as struggles in the public sphere between competing memory-based groups, historiographical approaches, and editorial marketing processes and practices.

FINAL REMARKS

This chapter has reviewed key studies analysing the representations of dictatorships in history textbooks published in Latin American countries and Spain. These investigations, which fall into the areas of discourse studies and

educational and sociological studies, explore the role of contested memories of recent dictatorships, which, in turn, inform pedagogical practices in history and social studies classrooms.

From the discourse analytical perspective, textbooks are considered to be part of a social practice expressed as a discursive practice with different verbal and visual semiotic modes (Oteíza and Pinuer 2016). This approach focuses on studying the linguistic resources that construct ideational and evaluative points of view. Emphasis is given to the representation and evaluation of historical events, social actors, and processes in the discourse. Analysing how these aspects are semiotically constructed in history textbooks reveals the ways in which hegemonic narratives are reproduced and contested through particular choices.

Studies with a pedagogical or sociological perspective have focused on how history textbooks represent dictatorships and how these conceptualisations have evolved along with educational reforms and social changes in the societies involved. Without paying special attention to the role of language in the construction of meaning (as the discourse studies approach does), this line of research also takes a fundamentally diachronic perspective to look at the concept of dictatorships in textbooks. In addition, these researchers have made valuable contributions to our understanding of how shifting relations of power between competing political factions and memory-based groups influence what it is written in textbooks and what is conveyed by teachers. Their diachronic analyses of educational reforms, for instance, have allowed for a better examination of the content and ideological perspectives endorsed by dictatorships and later by democratic governments in the countries studied. Similarly, studying the relation between public discourses and battles over the meaning ascribed to a traumatic past on the one hand, and textbook representations of that past on the other, offers a unique explanation of how textbook representations form part of larger historical and political processes (see also Höhne in this volume on cultural political economy).

This research on the representation of dictatorships in history textbooks is tied in with notions of social ‘memories’. Because the dictatorships in Latin American countries and Spain were characterised by severe human rights violations, as documented by national ‘Truth and Reconciliation’ reports in Brazil, Chile, Paraguay, Argentina, and Uruguay, the representations of these dictatorships in textbooks need to address these traumatic issues. Such reports have provided inescapable proof of systematic human rights violations committed by the state, and this content has been added to history textbooks over more or less the last decade. This is a trend in history textbooks in other contexts as well. As Meyer et al.’s (2010) quantitative analysis of 455 textbooks from 69 countries shows, there has been an increase over time in the emphasis given to human rights in history and social studies textbooks around the world. The battles over how to come to terms with the dictatorship period in these countries, particularly in relation to violations of human rights, challenge the construction of a hegemonic explanatory narrative in textbooks. Within the current, dominant textbook discourses on dictatorships, economic progress, and human rights violations are presented in ways that have moved closer to

the discourse of human rights organisations. Nevertheless, although there is a growing consensus on the necessity of teaching about human rights violations committed during these dictatorships, the process of state repression is generally constructed in history textbooks with scarce mention of human responsibility. The secret organs of state are depicted as being responsible for the violent repression, and at times opposition groups from the leftist parties and extreme left are also assigned responsibility, but the culpability of main figures from these regimes—Pinochet, Stroessner, Franco, or Bordaberry, the Argentinian Juntas, other political parties involved—is hardly ever spelt out. For further examination of human rights education, see also Patricia Bromley's and Julia Lerch's chapter in this volume.

As research from a discursive point of view has shown, the pedagogical discourse of history represents the past in an ambiguous, abstract, and fragmented manner that facilitates the construction of representations presented as natural and not suitable to being questioned. More historical explanation is needed. Causality is often presented in a simple manner that makes it difficult for students to understand their past and comprehend the historical significance of the events.

The current challenge for research in this area is to better understand how memory practices are being enacted in relation to textbooks and how youth derive meaning from these contested pasts. It is key to look at classroom interaction in order to analyse how primary- and secondary-level students are learning about the history of recent dictatorships and human rights violations (Achugar 2013, 2016; Oteíza et al. 2015). More studies are needed on discursive memory practices vis-à-vis recent dictatorships and not only textual analysis. This entails paying more attention to the role of history textbooks in the classroom: how they are used or not used and how they interact with other pedagogical material and with the personal and social memories that students and teachers bring to the interaction. It also requires more historical and sociological analyses that draw connections between political and social macro-processes on the one hand and the social meanings and functions of textbook representations of dictatorships on the other. Finally, the field would benefit from more comparative studies across different countries, in order to increase our comprehension of dictatorship in various national contexts.

NOTES

1. All translations are by the authors.

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War in Textbooks

Sylvie Guichard

INTRODUCTION

In 1935, E.C. Walker observed that ‘textbooks are usually at their best [...] on warlike matters’. According to this British historian, tales of war ‘have undoubtedly usurped an unwarrantable position in our books and teaching’ (Walker in Marsden 2000, p. 31). There has for a long time been an interest in how history in general and war in particular are depicted in textbooks. In the first half of the twentieth century, critics pointed towards the dangers of nationalist education and ‘poisonous history’ that were propagating lies and hate (Marsden 2000). After the First World War, international organisations such as the League of Nations and later UNESCO began scrutinising textbook content, particularly that of history textbooks, and the ways in which they depicted conflicts, wars, the ‘nation’ (see Carrier in this volume), and its ‘enemy’ or ‘enemies’. The assumption was and remains that textbooks containing prejudices contribute to fuelling conflict while well-balanced books support the attainment or maintenance of peace.

Although these processes depend on the textbook content as a whole, wars have a particular role to play, as demonstrated by recent literature on the representation of war in textbooks. However, this chapter is not a comprehensive review; it modestly seeks to map the broad trends in research on this topic over the last 20 years¹ and is restricted to history textbooks as these are the focus of most studies.² It shows how scholars of the last two decades have addressed the representation of wars in history textbooks by examining the types of studies conducted, their methods, and theoretical backgrounds and will propose possible routes for further research.

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OVERVIEW OF STUDY TYPES

We can distinguish between four types of studies with which authors have approached wars in history textbooks: vertical or diachronic analyses, horizontal or synchronic analyses, broader studies on national narratives, and studies addressing the non-representation of certain wars. Analyses from the first two categories have textbooks and their representations of war as their main subject, while studies from the last two categories address these aspects as part of research with a larger scope.

First, vertical or diachronic (also called longitudinal) analyses examine the portrayal of an event in a war, a conflict, or a civil war *over time*. These studies underline the changes or similarities in relevant depictions in successive textbooks within one country. There are numerous examples to choose from here. To mention some of the recent studies, we might cite on American textbooks, Percy (2014) on the depiction of the American Civil War and Loewen (2000) on the treatment of the Vietnam War. Studies on Israeli textbooks include Yogev (2012) on the 1967 War and Podeh (2000, 2010) on the portrayal of the Arab-Israeli conflict. On Japanese textbooks, Yoshida (2007) has written on the involvement of Japan in the Asia Pacific War. Valls (2007) has published on the Spanish Civil War in Spanish textbooks, Montgomery (2006) on representations of wars in Canadian high school textbooks from 1945 to 2005, and Loitfellner (2008) on the portrayal of the Wehrmacht in Austrian textbooks.

Since 1991, special attention has been paid to the curricula and textbooks of the ‘new’ countries of the former Soviet bloc. Studies have investigated the rewriting of history textbooks that distance themselves from the Soviet version of history to present a more national reading of the past. In this context, authors have shown how representations of the Second World War (henceforth WWII) in textbooks have changed in these countries, and how controversial these modifications have been, as they often directly address issues of national identity (examples are Gilge 2006; Klymenko 2014; Radonic 2011).

Some diachronic analyses also compare the treatment of several wars over time in one country (see Lachmann and Mitchell 2014) or the evolution of the depiction of one war in several countries (examples here are Crawford and Foster 2007; Dierkes 2010). Lachmann and Mitchell (2014), for instance, examine the representation of WWII and the Vietnam War in American high school textbooks from 1970 to 2009; Crawford and Foster (2007) study the evolution of the treatment of WWII in English, German, French, Japanese, Chinese, and American textbooks; and Dierkes (2010) compares, among other historical episodes, the representation of WWII in high school textbooks from (East and West) Germany and Japan.

Second, horizontal or synchronic analyses examine how (usually) contemporary textbooks—often from different countries—depict one war or one event in a war. Several recent studies have compared the treatment of WWII (see Nicholls 2006; Shin 2012) as well as representations of the Korean War

(see Bleiker and Young-Ju 2007; Suh et al. 2008; Lin et al. 2009) in textbooks from different countries. Similarly, Firer and Adwan (2004) scrutinise the representation of the Palestinian-Israeli conflict in Israeli and Palestinian textbooks (see also Barnard 2003, for another study in this category).

Third, broader studies on nationalism and national narratives, the politics of history, or the political use of the past often touch upon the question of textbooks and their accounts of war. Wang (2008), for example, explores the national ‘patriotic education campaign’ launched in China after 1991. The Chinese government sought to reinforce national identity through an emphasis on ‘chosen traumas’, notably the anti-Japanese war, the Opium War, and the Korean War. Wang shows how the resulting narrative of ‘100 years of humiliation’ is transmitted through museums and public monuments, films, and textbooks. In this category, we could also mention Pilvi Torsti’s study (2007) on how history textbooks support images of ‘the enemy’ in post-war Bosnia and Herzegovina. In her discussion of the textbooks’ content, she mentions the depiction of WWII and of the civil war of the 1990s, as both events play an important role in the construction of the ‘Other’ (see also Segesten 2008 on history textbooks in the Balkans).

Fourth, some studies observe the absence of certain wars in textbooks and examine why these wars are not represented, often explaining why they should be; examples are Meertens (2013) on Sri Lanka and Buckley-Zistel (2009) on Rwanda.

METHODS: REPRESENTATIONS OF WAR AS DISCOURSE

Most of the studies mentioned earlier in this chapter address historical discourses in context and perform a loosely defined form of discourse analysis. To interpret discourse, the studies reviewed use several methods, often mixed in one study; these are mainly techniques of discourse analysis and what could be called a historical narrative approach (see later in this chapter). The analysis of discourse is performed in different ways that are more or less formalised depending on the author. Many pay attention to the use of words and debates or controversies surrounding the act of naming (a conflict, a specific event, or the ‘Other’). To mention just two examples, Pirický (2013) analyses the perception of the Ottoman Turks and their expansion into Central Europe in textbooks published between 1990 and 2010 in Hungary, Poland, Slovakia, and the Czech Republic. He observes that the Ottoman expansion is generally described as the ‘Turkish Wars’ and several textbooks use the term ‘Turkish’ for all things Ottoman. On Israeli textbooks, Podeh (2010, pp. 53–54) observes the reticence of textbook authors in mentioning that what is referred to in Israel as the ‘War of Independence’ is called *al-nakba* (‘the disaster’) by the Palestinians; in this context, we can also refer to Peled-Elhanan (2012, p. 16), who had also discussed the use of the term ‘Palestinian’ in Israeli textbooks.

Other studies taking a discourse-analytical approach refer directly to techniques of discourse analysis such as those used by Loitfellner (2008,

pp. 157–158), who points out that ‘identification of various *argumentation strategies* (justification discourses, distortions, “playing down”), as well as particular forms of *linguistic realization* (personalization, anonymization and so on)’ is useful in analysing textbooks. And some studies propose elaborate and detailed linguistic or semiotic analyses of the representation of war (for a semiotic approach, see Montgomery 2006, and Peled-Elhanan 2012). An article by Barnard (2003) analyses the language found in 88 Japanese textbooks for secondary schools in use in 1995. He compares the language chosen to refer to the German attack on Poland and the Japanese attack on the United States at Pearl Harbor. He shows how language choices (such as use of the passive voice) work towards lessening the responsibility of the Japanese state for the attack at Pearl Harbor compared to that of the Germans (on the use of the passive, see also Yogev 2012).

Several authors couple discourse analysis with a method that can broadly be called a ‘historical narrative approach’. It ‘compares textbook narrative [*sic*] with other historical narratives, while pointing out alternative interpretations, omissions, distortions, and the presence of historical “myth”’ (Percy 2014, p. 46). In this vein, some studies discuss the extent to which textbook contents reflect the current state of historiographical knowledge and scholarly debate. For example, Dierkes (2010) shows how textbooks in former West and the reunified Germany have changed over time as historians’ analyses of the Nazi regime evolved (on other historiographical questions, see Le Marec 2006; Loitfellner 2008; Yogev 2012).

Discourse is not limited to the written word, and it is therefore astonishing how little attention the studies reviewed dedicate to images and to other elements of the ‘paratext’ such as graphics, learning targets, or the use of colours and boxes. Most studies do not mention iconography at all; those which do tend to treat images as text (see Lachmann and Mitchell 2014; Suh et al. 2008). A few propose a reflection on the iconography *per se*, inquiring as to what types of images have been chosen and why and what messages they convey in conjunction with the text (an example is Yogev 2012). Loewen, in his analysis of the Vietnam War in American secondary school textbooks, strongly criticises the seemingly neutral, intendedly uncontroversial images used in the textbooks (images of ‘servicemen on patrol, walking through swamps, or jumping from helicopters’), particularly given that photographs played a role in the war; they not only reported the war, they also ‘*made* history, for they affected the way Americans—and Vietnamese—thought about the war’. Indeed, Loewen points out that nowadays adults old enough to do so still clearly remember some of the images of the war, such as the photograph of a little girl running naked down Highway One fleeing a napalm attack. Ironically, as Loewen reports, this image is absent from textbooks not because it was too shocking but because publishers follow a rule of no nudity (Loewen 2000, pp. 156 and 155).

In terms of method, the study by Nurit Peled-Elhanan (2012) is of particular interest. It does not focus on the representation of war *per se* but on the representation of Palestine and Palestinians in Israeli history, geography, and civics textbooks. It combines critical discourse analysis, social semiotics, and

multimodal analysis. Peled-Elhanan looks at the meaning transmitted by textbooks through the combination of text, photographs, maps, colours, and general layout, not in terms of an additive compilation of meaning but rather with a view to the general significance evoked by all aspects together.

As textbooks are educational and subject-oriented texts, their analysis can focus either on the content as text ('What does the text tell us? Is it in accordance with academic research? Does it sufficiently cover the topic in question?') or on its didactics, exploring 'the pedagogy behind the text' (Pingel 2010, p. 31). Of course, content and didactics are closely interrelated. Over the last few decades the teaching of history in many countries has aimed less at conveying content and more at transmitting skills. Correspondingly, textbook content has shifted from single narratives to source-based (less coherent) text presenting multiple perspectives. These changes in the teaching of history have influenced the way in which wars are portrayed in textbooks (see, e.g., Terra 2014 on Northern Ireland). We should note at this point that the aim here is not to discuss multiple-perspective methodologies and skill-orientated approaches and their flux and reflux. Pingel (2010, p. 40) observes, for example, that 'some of the European countries who went relatively far in putting a multi-perspectival approach into practice are now shaken by a move backward to national core curricula or a consensual canon'.

When telling the (hi)story of a war, perspective is a particularly pressing question, as the experience of war depends strongly on one's personal and also the national stance during the events. Textbook contents are also affected by this situational 'bias'. Most probably, textbooks will not speak in the same way of other nations' wars—an example might be an account of the American Civil War in a Swiss textbook—as it would of its 'own' war(s). The portrayal will also differ depending on whether the country was a winner, a loser, or remained neutral (see Nicholls 2006; Dierkes 2010) and whether the (civil) war in question ended recently (Buckley-Zistel (2009) on Rwanda or Meertens (2013) on Sri Lanka) or constitutes an ongoing conflict.

In order to bypass this limitation in the representation of war, many scholars have advocated that textbooks move from univocality to multivocality, their content including different, sometimes competing, narratives. This can be exemplified by the 'dual narrative approach' that presents in parallel the Israeli and the Palestinian versions of the Arab-Israeli conflict (Korostelina and Lässig 2013; for another version of multivocality, see Podeh 2010). The assumptions on which this approach is based is that '[w]hen students of each side see their narrative alongside the Other's, they are more willing to learn about the narrative of the Other, and more open to accepting it. This is seen as a necessary step to create a real dialogue and a better relationship between the two peoples' (Eid 2010, p. 56). However, the impact of this approach on students remains unclear and mostly untested. A study of a sample group of Palestinian-Israeli students' reactions to the dual narrative approach on the 1948 events shows that neither acceptance of the Other's narrative nor positive feelings towards the Israeli narrative resulted from the experiment (Eid 2010).

THEORY: NARRATING THE NATION IN CONTEXT
AND AS A PROCESS

Most studies reviewed here are embedded in the theoretical framework of social constructivism that considers school textbooks objects of social construction and artefacts that can only be understood with regard to their historical, cultural, political, and socio-economic contexts. Within this broad framework, scholars refer to theories such as Apple's 'hidden curriculum' or Foucault's 'regime of truth' (see, e.g., Foucault in Foster and Crawford 2006, p. 89).³ More precisely, most analyses reviewed conceive of history textbooks as bearers of national narratives and examine the role of war in this narrative, that is, how the representation of war has changed over time (as compared with changes in the national narrative); how the image of a certain war varies from one country to another; and how these 'war stories' are contested nationally and internationally (for a development of this frame of analysis and for bibliographical references, see, for instance, Crawford and Foster 2007). These studies point to elements of nationalist bias in the representation of wars in textbooks. These can take the form of attempts to conceal or diminish the responsibility of one's own country for war atrocities; strategies in this regard include the rejection of responsibility, its diffusion using the passive voice, or its condensation and projection onto one leader, such as Hitler in Austrian textbooks (Loitfellner 2008) and Mussolini in Italian books (Nicholls 2006). Other approaches might consist in an over-emphasis of one's own victims and suffering and/or a lack of attention to casualties and violence inflicted on the 'enemy' (e.g. the number of victims is often only given for one's own country; see Loitfellner 2008, pp. 160–161; Lachmann and Mitchell 2014, p. 202).

In a recent study, however, Lachmann and Mitchell (2014, p. 188) contest this conception of textbooks as vehicles of national narratives. They distinguish between three approaches to history textbooks in the literature: textbooks 'as purveyors of a "hidden curriculum" that seeks to foster patriotism and unquestioning service to the nation', 'as sites for political and ideological conflicts', or 'as expressions of a growing world culture of individualism that is replacing group conformity'. They 'test' these three approaches by analysing the evolution of the portrayal of WWII and the Vietnam War in 102 American textbooks. Their results show that between 1970 and 2009, the number of impersonal accounts of battles decreased, leaving more space for the personal experiences of soldiers. The textbook contents thus shift from a glorification of combat to an emphasis on the suffering of soldiers. The authors conclude that the 'hidden curriculum' theory 'is not well supported by data' (Lachmann and Mitchell 2014, p. 200) as textbooks do not seek to turn young citizens into potential soldiers. Further, they determine that the findings concerning the second approach (textbooks as 'sites for political and ideological conflicts') remain inconclusive because, despite the fact that textbooks more often mention anti-war movements, the criticism expressed by these movements is ignored. Finally, they find that the analysis best supports the third approach

(linked to the world-culture theory). Lachmann and Mitchell therefore consider American textbooks to have moved away from a celebration of patriotic sacrifice or even blatant militaristic nationalism to ‘reflect the worldwide legitimation of “the identities and needs and choices of individual persons, not of corporate societies”’ (Lachmann and Mitchell 2014, p. 201, quoting Frank and Meyer). This conclusion seems fundamentally weakened, however, when the authors add that ‘the limited perspective on suffering in war presented by U.S. textbooks suggests that the changes we trace have less to do with a generalized opposition to war and more to do with concern for the individual rights and well-being of one’s fellow citizens’ (Lachmann and Mitchell 2014, p. 202).

On the basis of this last observation I would draw different conclusions to Lachmann and Mitchell. Textbooks that no longer advocate nationalistic militarism may well still promote nationalism, which indeed might not require militarism. Nowadays nationalism is defined in many ways and not only in terms of a willingness to die for one’s nation. Montgomery (2006) shows, for example, that Canadian history textbooks construct a national narrative built around Canada’s role in peace building and underlines that this narrative—even if it does not encourage citizens to die for their nation—still corresponds to a nationalist discourse based on ‘racialised hegemony’ and ‘nationalist mythologies’.

Moreover, the dichotomy perceived by Lachmann and Mitchell in the literature whereupon textbooks are *either* ‘purveyors of a hidden curriculum’ *or* ‘sites for political and ideological conflicts’ does not exist. As the reviewed studies document, textbooks are political instruments that result from processes of negotiation and adjustment. Studies witness how textbooks contain a certain discourse on national identity—in general the dominant discourse—and how this discourse is contested at different stages of the textbook’s lifetime (see, e.g., Jilge 2006; Podeh 2010; Terra 2014; Yogeve 2010).

Many authors thus recognise the importance of what could be called ‘the textbook as a process’ in their analyses and take into account that textbooks are preceded by curriculum choices; that authors are commissioned to write the text and that images are chosen in line with economic and other publishing constraints; that textbooks must often be approved by government bodies; and that teachers might not teach the content of the book and students might be selective in what they learn. Each step is subject to controversies, negotiations, and re-routing or diversion. Context plays a central role in the process, and internal political changes (see, e.g., Yoshida 2007; Wang 2008), geopolitical elements (see Suh et al. 2008), and changes in society and historiography (an example is Podeh 2010, p. 59) will further influence the content of the textbooks.

Concerning the representation of wars in particular, while the different stages of the textbook development process have received some attention, analyses of reception or use (what is taught and what is learnt) remain rare (McCormack 2004 is an exception) and consist mainly of brief remarks, such

as those in Loewen (2000) and Valls (2007). Such comments state, for instance, that teachers are reluctant to teach a specific topic (examples might be the Vietnam War or the Spanish Civil War) and often choose not to do so. For further investigation on textbook use, see Thomas Illum Hansen in this volume.

NEW DIRECTIONS FOR RESEARCH: MORE COUNTRIES AND MORE WARS

There is a spatial and temporal limitation in current research: the majority of studies focus on textbooks from European countries, the United States, Japan, and Israel, and they nearly exclusively examine twentieth-century wars, mainly WWII, and to a lesser extent the Vietnam War, the Korean War, or the Israeli-Palestinian conflict.⁴ There are few studies analysing the depiction of wars in Asian textbooks (with the exception of Japanese textbooks) and even fewer addressing African textbooks.⁵ Central and South America are equally under-researched, at least in the English language.

Moreover, several researchers underline the general focus on war in history textbooks: when peace comes, for example, the telling of the story is discontinued (Firer and Adwan 2004, p. 153). While we know how textbooks present certain wars, we have few insights as to their discourse (or discourses) about war in general. Studies rarely examine war in an ontological sense whose exploration might inspire an understanding of the general image of war that textbooks portray (exceptions include Scott 2009; Lachmann and Mitchell 2014; Montgomery 2006). This could be clarified by basic quantitative data, such as how many times the terms ‘war’ or ‘conflict’ appear in a textbook or how many pages are dedicated to depictions of war. It would also be interesting to ascertain how pre-twentieth-century wars are portrayed; whether older wars are depicted in the same way as more recent events, which wars are discussed, how the choices are made, and how these aspects affect the ‘war narrative’ in textbooks.

From a historiographical point of view, the studies reviewed show that, while the weight of social and cultural history has increased (see Scott 2009), military and political history still dominate in many textbooks (Loitfellner 2008, p. 164; Pirický 2013, p. 113). The history told often remains one of (great) men, albeit occasionally with acknowledgements of women’s participation (see Crawford and Foster 2007, pp. 145–175). Moreover, as Percy (2014, p. 58) suggests, the presentation of wars in textbooks leaves little space for individual agency. These depictions build a teleological narrative in which conflicts seem inevitable and suffering unavoidable. In general, one’s own side is in the position of suffering while cruelty is associated with the other side (Segesten 2008, p. 147; Lin et al. 2009, p. 228). Textbooks do generally stop at this general ascription of guilt, however, and astonishingly little is said about suffering and violence (see Loitfellner 2008, p. 166 and, on the representation of violence in textbooks, Guichard 2013).

To conclude, many questions remain unanswered and there is much space for further research. The existing literature on wars in textbooks explores issues that are all the more fascinating, however, as ‘past wars have also shaped, and in their ongoing representations continue to shape, the identities of nations, communities and individuals. Indeed, “fighting” continues post-bellum [...] over competing and contradictory interpretations of wars’ (Baraban et al. 2012, p. 6).

NOTES

1. I do not, however, include studies on the Holocaust and decolonisation, as these are the subjects of separate chapters in this volume. Nevertheless, I do mention studies on particular wars that took place during decolonisation (the Algerian War).
2. For studies on the representation of war in textbooks for other subjects, see Carballés (2010) on the treatment of the Spanish Civil War in Spanish language textbooks used in France; Firer and Adwan (2004) on the representation of the Israeli-Palestinian conflict in Palestinian and Israeli civics textbooks; Kamusella (2010) on school history atlases; Peled-Elhanan (2012) on geography and civic textbooks used in Israel; and Stimac (2017) on the depiction of war and peace in religious education textbooks of the Islamic community in Bosnia and Herzegovina.
3. Foster and Crawford quote Foucault’s explanation in their introduction: ‘Each society has its regime of truth, its “general politics” of truth: that is, the types of discourse which it accepts and makes function as true; the mechanisms and instances which enable one to distinguish true and false statements, the means by which each is sanctified; the techniques and procedures accorded value in the acquisition of truth; the status of those who are charged with saying what counts as true’ (Foucault in Foster and Crawford 2006, pp. 8–9).
4. On the less-studied conflicts of the late eighteenth and early nineteenth centuries, see Lehmann (2015) on how French history textbooks used between 1875 and 1895 depicted the Franco-Prussian War; see also Müller (2013) on the depiction of the German-Herero War (1904–1907) in German history textbooks since the 1990s.
5. One of these few is Mussie Habte’s study on the depiction of the Eritrean War for Independence in Eritrean textbooks (see Habte 2012, pp. 500–505 and 546–559).

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How Diverse Are Our Textbooks? Research Findings in International Perspective

Inga Niehaus

INTRODUCTION

Studying diversity in the context of educational media, it is important to look at ‘diversity education’, which has taken a prominent place in the educational sciences over the last decade. ‘Diversity’ and the closely related term ‘heterogeneity’ are socio-political concepts that highlight power relations and inequality and thus play an important role in the educational field. Often these concepts are linked to an anti-discrimination perspective or oriented towards a policy of inclusion. Initially born out of diversity management approaches in business administration, diversity concepts serve as instruments with which to achieve equal treatment and opportunity (see Walgenbach 2014, p. 92). The goal is to create a society largely free of barriers and discrimination. As so-called travelling concepts, these approaches have spread not only across disciplines into the educational sciences but also across the globe: diversity education originated in the United States and Canada, classic immigration countries, before entering the discourse in other (primarily European) countries with diverse societies also shaped by immigration (see Walgenbach 2014, p. 92).¹ ‘Diversity education’ is often used synonymously with ‘multicultural education’ (Faas and Ross 2012; Banks 2006; Appelbaum 2002); in both cases the term implies recognising social diversity and preventing the exclusion of certain groups or individuals in schools or in the broader society.

The literature distinguishes between two different approaches to diversity: the first is an affirmative approach that fosters an appreciation of difference in educational contexts and is thus normative by nature. Early on, however, scholars of critical multicultural theory challenged this approach for failing to

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critically reflect on inequalities and the political and economic privilege of certain social groups (Appelbaum 2002, p. 2f). The second approach to diversity is analytical, concentrating in part on power asymmetries and the relevance of specific categories of difference for the educational field and other areas of society (see Walgenbach 2014, pp. 92–93; Baader 2013). Both approaches posit that differences are not simply a given but are always socially constructed (through the process of Othering). Accordingly, the education scholar Allemann-Ghionda (2011, p. 25) defines the construction of difference as follows: ‘Diversity is made up of individual and group-based attributes, some from birth, some acquired individually, some originated through laws and institutional practice.’ Categories of difference constructed in this way—and relevant to textbook research—are, above all, gender/sexual diversity (see Höhne and Heerdegen in this volume), socio-economic status, age, nationality, place of origin, ability/disability, and religion/worldview (see Štimac in this volume). Diversity education is closely related to intersectionality research (see Baader 2013, p. 39), which developed from gender and black feminism discourse in the United States. Intersectionality research studies overlap categories of difference, for instance, socio-economic status and place of origin or gender and religion. At its core is the assumption that the position of individuals in society is often shaped by membership in multiple categories. For example, it is not a child’s immigration background alone but rather the convergence of this attribute with low socio-economic status that leads to disadvantage in the education system. Closely tied to the concepts of diversity and heterogeneity is also the notion of integration. Especially for societies shaped by immigration, integration is defined as an open, multi-directional, cultural, and political negotiation process in which all members of a society should participate (Auernheimer 2003; Beger 2000). In the 1980s and 1990s, such societies tended to focus their school integration policies on assimilating children of immigrants into the receiving majority, but since the 2000s there has been a significant shift. A ‘pedagogy of diversity’ now focuses on various categories of difference, for example, gender, (social) background, and different abilities (Prengel 2007, p. 56).

STUDIES ON DIVERSITY AND THE REPRESENTATION OF DIFFERENCE IN TEXTBOOKS

This section will begin by outlining the significance of educational media for society and education policy, as well as the relevance of textbook research in this field. Next, referring to the diversity education approaches elaborated earlier in this chapter, it will introduce the findings of international textbook studies on the representation of certain categories of difference. In portrayals of social diversity, these studies show that classic immigration countries diverge sharply from states that see themselves as culturally and religiously homogenous. Finally, the section will highlight the applied nature of textbook studies on diversity, many of which culminate in recommendations for education policy and practice.

Since textbooks are widely disseminated and used daily by teachers and students in the classroom, scholars and educational practitioners ascribe them a special role in fostering social coherence. Often, however, the imbalanced, stereotyped depictions in textbooks have a negative effect on students: 'Textbooks ... have helped promote highly idealised views of one nation or group of people. At the same time, they have helped promote incorrect and inappropriate images about others, both of which may be detrimental in establishing social cohesion, respect for diversity, tolerance, and, ultimately peace' (Greaney 2006, p. 47f.).

According to Dervin et al. (2015, p. 7), international studies on diversity in textbooks today tend to follow four trends: analyses of diversity in general, of diversity and citizenship education, of language and culture in English textbooks, and of textbook use in the development of intercultural competence and/or empathy. Thematically, textbook studies related to diversity focus on the representation of gender and sexual diversity (see the chapter by Höhne and Heerdegen in this volume on LGBTI* in textbooks), migration and immigrants (Hintermann et al. 2014; Grabbert 2010; Höhne et al. 2005; Mannitz 2005; Wiater 2004), Islam and Muslims (Kröhnert-Othman et al. 2011; Gürsoy 2016; see also Štimac in this volume), Africa and Africans (Marmer 2013, 2015; Marmer and Sow 2015; Guggeis 2004), specific ethnic or religious minorities (Noboa 2006; Krupnikova 2004), or national minorities (Seewann and Maier 2015; Çayır 2015; Senegačnik 2012; Janjetović 2001; Karge and Helmedach 2001). Especially studies on immigrants, Muslims, and other religious and cultural minorities show that textbooks cultivate a stereotyped opposition between 'us' and 'them', 'modern' and 'traditional', and 'belonging' and 'not belonging'. Marginalised groups are often portrayed as the Other and not ascribed any measure of agency.

Some work investigates whiteness, racism/race, or the depiction of Africa and Africans in textbooks (Marmer 2015; Grawan 2014; Sleeter and Grant 2011; Loftsdóttir 2010; Osterloh 2008; Rezai-Rashti and McCarthy 2008; Guggeis 2004). These studies show that textbooks reproduce colonial representations replete with stigmatising depictions. Racism is visibly manifested through language, causing *whiteness* to be held up as the normative standard.

Only a handful of studies look exclusively at the representation of disability or people with disabilities in textbooks, or address this topic in relation to other categories of difference (Táboas-Pais and Rey-Cao 2012; Sleeter and Grant 2011; HALDE 2008; Hodkinson 2007). Common to all of these analyses is the conclusion that people with disabilities hardly ever appear in textbooks at all, and when they do, it occurs in negative or inadequate images. One impressive work is the quantitative study by Maria Táboas-Pais and Ana Rey-Cao (2012) on photographs in contemporary Spanish textbooks. Of the 3316 photos examined, just 45 showed people with disabilities or activities adapted to people's handicaps. Aside from one photo of an inclusive physical education class, the images of people with disabilities depicted mostly segregated activities (Táboas-Pais and Rey-Cao 2012, p. 320f). Similar findings are reached by

Alan Hodkinson (2007), who examines illustrations and photographs in British educational material, concluding that people with disabilities only rarely appear. In most studies related to disability, the emphasis lies not on the representation of disabled individuals but on the critical evaluation of textbooks in terms of their usability for students with various disabilities (Nader and Samac 2007; McKinney 2005).

Few textbook studies examine the representation of diversity in general (Hahl et al. 2015; Treadwell 2014; Faas and Ross 2012; Paparoussi 2010). Most confine themselves to a specific national framework rather than draw comparisons across countries. Some exceptions are the quantitative, comparative textbook studies by Lerch (2016), Bromley (2014), Meyer et al. (2010), and Ramirez et al. (2009). Qualitative comparative studies have been conducted on the representation of Islam and Muslims in European textbooks (Kröhnert-Othman et al. 2011) and national minorities in European textbooks (Senegačnik 2012), as well as binational comparative studies on the portrayal of migration in German and US textbooks (Radkau 2004) or diversity in French and English civics curricula and textbooks (Soysal and Szakács 2010).

While the representation of immigration/immigrants or race/racism builds the focal point of textbook studies in classic immigration societies like the United States or Western European countries (Beauftragte der Bundesregierung für Migration, Flüchtlinge und Integration 2015; Hintermann et al. 2014; Sleeter and Grant 2011; Rezai-Rashti and McCarthy 2008), elsewhere—especially in multiethnic, multireligious societies—specific (national) minorities and religious groups stand at the centre of researchers' investigations (Seewann and Maier 2015; Karge and Helmedach 2001; Senegačnik 2012).

The literature makes it clear that perspectives from members of minorities and an elaboration on historical aspects of their immigration and cultural or economic contributions are entirely absent from textbooks in certain societies (Yamada 2011, p. 307; Noboa 2006; Greaney 2006; Krupnikova 2004). In European textbooks, a Eurocentric perspective is prominent in discussions of history and the present. Nils Andersson (2010, p. 54), for example, finds that in portraying the colonisation of Latin America, Africa, and Asia, European textbooks tend to emphasise a narrative of European superiority and the 'discovery' of new territories, especially in the subject of history.

Many analyses show that while textbooks might portray diversity and multiculturalism in a positive light, they still represent a particular 'mainstream' and do not allow for a controversial discussion of divergent (cultural and political) positions (see Hanauer 2013; Paparoussi 2010; Rezai-Rashti and McCarthy 2008). Analysing a Canadian social studies textbook, Rezai-Rashti and McCarthy (2008, p. 537) write: 'The textbook avoided the discussion of complex and controversial issues and represented race, multiculturalism and anti-racism within a language of universality and objectivity.'

A bias also emerges in the depiction of foreign cultures in textbooks for English learners in non-English-speaking countries (Yuen 2011; Nguyen 2011; Yamada 2011). Looking at English textbooks in Hong Kong, for example,

Ka-Ming Yuen shows that they mostly present examples from native English-speaking countries, assuming a ‘tourist perspective’. Similarly, Nguyen (2011, p. 27) observes that didactically, the insistence on upholding native-speaker norms in Vietnamese textbooks stands in opposition to regional communication; instead, she argues, Asian English speech varieties should be incorporated as well. Contrary to the recommendations of contemporary language teaching methodology, English is usually not presented as an international language used around the world, and examples of regional linguistic innovations in English from Asia and Africa are only rarely introduced (Yuen 2011). One exception comes through in a study by Mieko Yamada on English-teaching material in Japan. The author shows that ethnic and racial diversity in these textbooks has increased dramatically in recent decades, and the textbooks generally attribute diversity to the process of globalisation. Moreover, the English material frequently incorporates examples from other Asian countries and underlines Japan’s status in the Asian region (Yamada 2011, p. 307). Investigating German teaching material for US schools, Darren Ilett (2009, p. 56f) finds that—compared to earlier studies—the quantitative representation of ethnic diversity in photos and illustrations has increased heavily over the past decades, but texts still include statements describing the presence of ‘foreigners’ in Germany as problematic and filled with conflict potential.

In addition, several studies reveal a discrepancy between textbook content and educational policy guidelines. Comparing Irish curricula with the corresponding textbooks, Faas and Ross (2012, p. 586) observe that the curricula propagate ethnic and religious diversity as a constitutive aspect of Irish society, while textbooks portray diversity as a new phenomenon, emphasising a national identity mostly shaped by Catholicism. A handful of chronological studies also demonstrate significant (positive) changes in curricula and textbooks in recent decades. Concentrating on British history curricula since the 1970s, Paul Bracey (2006) determines that Irish history has become increasingly integrated into the curriculum, reflecting an acknowledgement of the Irish as the largest immigrant community in England. In a comparative study on civic education in France and England, Yasemin Soysal and Simona Szakács find that the curricula and textbooks ‘acknowledge global inter-connectedness and assume outwardly open nations and citizens who contribute and engage constructively at a local, national, European and global level’ (Soysal and Szakács 2010, p. 90).

Particularly interesting findings emerge in a diachronic, international comparative study on the representation of diversity in textbooks, with a focus on post-conflict countries. The author finds that since the 1990s, countries have generally increased their discussions of immigrants/refugees, indigenous people, and minorities, and their rights in textbooks. However, textbooks from post-conflict countries have done so with much less frequency (Lerch 2016, p. 38). According to the author, ‘post-conflict countries do not seem to have incorporated multicultural narratives of diverse population groups and their rights to the same extent as textbooks in non-conflict countries’ (Lerch 2016,

p. 38). Moreover, the textbooks in her study indicate that their purpose is ‘to inculcate the sense of a unified and unique nation in the aftermath of internal conflict’ (Lerch 2016, p. 41).

Especially notable is the strong practical orientation of studies on various categories of difference in textbooks. Textbook studies often conclude with recommendations for education policy and practice, hoping to exercise direct influence on changes to educational media and their use. These recommendations are directed towards publishers of educational media, textbook authors, and teachers (Marmer and Project LEO 2015; Beauftragte der Bundesregierung für Migration, Flüchtlinge und Integration 2015; Kröhnert-Othman et al. 2011; Krupnikova 2004; Noboa 2006; for further examination of the role played by the diverse actors involved in textbook development and production see also Bläsi and Otto in this volume, for textbook use by teachers see Hansen in this volume). The practical application of textbook analyses and recommendations is even more explicit in the context of international development cooperation. In 2002, the World Bank launched a programme titled ‘Respect for Diversity through Education’, which comprises three aspects: curriculum, textbooks, and teaching methods (Smith 2006, p. 33). On the basis of country analyses, the World Bank publication formulates comprehensive recommendations for textbook production and the use of textbooks in the classroom (Socknat 2006). In formulating these kinds of practical considerations, many textbook analyses focus on the central role of the teacher. Some authors point out that even biased textbooks can be used critically in the classroom as long as the teacher possesses the necessary level of intercultural competence (see Andersson 2010, p. 57).

METHODOLOGICAL APPROACHES

Textbook studies on diversity are primarily based on text analyses, most of which take a discourse-analytical approach. Such analyses focus their attention on the hybrid nature of textbook texts, perched at the intersection of various socio-political discourses. This applies as much to studies that focus on current textbooks (Yamada 2011; Markom and Weinhäupl 2007; Grabbert 2010; Beauftragte der Bundesregierung für Migration, Flüchtlinge und Integration 2015) as to those that analyse historical works (Loftsdóttir 2010, p. 84). Quantitative textbook studies also exist, for example, a comparative study looking at the prevalence of certain international standards on recognising diversity and human rights in the textbooks of various countries (Bromley 2014). Other textbook studies take a mixed-method approach, combining quantitative and qualitative strategies (Táboas-Pais and Rey-Cao 2015; Ahlrichs 2015; Paparoussi 2010; Ilett 2009). This lends itself particularly well to studies that first lay out an overview of how certain diversity-related categories are represented before going into more depth through a text-based content analysis. Maria Paparoussi, for example, uses this approach to investigate diversity in Greek language and literature textbooks. She first gathers quantitative information on which authors

and literary texts are being used, then analyses qualitatively the extent to which textbooks convey the notion of a diverse society and whether they contain stereotyping and one-sided representations.

A majority of textbook analyses focus on the social science subjects (history, geography, social studies/civic education) and material for teaching languages. One exception is a study by Maria Táboas-Pais and Ana Rey-Cao (2015) that concentrates on racial representations in physical education textbooks. This study is also unusual because—unlike most others—it does not focus on texts but on images, which the authors evaluate quantitatively.

Most textbook studies are synchronic, dealing primarily with current textbooks. A few, however, take a diachronic approach, comparing historical and contemporary textbooks in order to show how representations change over time. This applies, for instance, to studies on representations of Islam (Gürsoy 2016) and representations of migration (Geuenich 2015). More seldom is purely historical research focusing on representations in historical textbooks only (Matthes 2004).

So far there have been very few studies on the effects of diversity-related representations in textbooks and the extent to which they are internalised by their users. One exception is a study by Hintermann et al. (2014) which uses a qualitative textbook analysis to ethnographically examine the effects of textbook representations on students in Austrian classrooms. In another pilot study on how teachers address diversity in the classroom, Johanna Ahlrichs investigates how teachers evaluate textbook depictions of immigration and which criteria they use to select textbooks (Ahlrichs 2015). The author finds that the teachers were mostly critical towards textbook approaches to immigration. In particular, they criticised what they saw as a one-sided perspective and problematisation of immigration, and they expressed the need for teaching material that incorporates more perspectives (Ahlrichs 2015). A further study examines the representation of Latinos in history textbooks in the United States. Using a mixed-method approach, the author conducted individual and focus group interviews with history teachers in Texas, as well as a qualitative analysis of history textbooks (Noboa 2006). In the interviews, the teachers cited a lack of time due to standardised curricula and testing as the primary reason why the perspectives of minorities and women were not addressed adequately in class (Noboa 2006, p. 127). The racism scholar Elina Marmer (2015) empirically investigates the ways in which portrayals of Africa affect students. Using both open and structured questionnaires, she asked students at one school to describe how they pictured Africa. In focus groups she confronted black students with representations of Africa in textbooks. Her study reveals that students overwhelmingly took an ‘afropessimistic’ or an ‘afromanticising’ position. In the focus groups, however, the black students dealt with the textbook depictions of Africa in a highly critical way and, at times, reflected upon their own (hurtful) experiences (Marmer 2015, p. 144f). The study on racial representations in physical education textbooks also used a method in which images extracted from the textbooks were presented to students, and their

responses were then analysed empirically (Táboas-Pais and Rey-Cao 2015). In this way the authors show that students' attitudes contained prejudices and stereotypes, and they tended to perceive people of colour as 'the Other' (Táboas-Pais and Rey-Cao 2015, p. 8).

THEORETICAL APPROACHES

On a theoretical level, many textbook studies draw on diversity education or multicultural education approaches from the educational sciences (Beauftragte der Bundesregierung für Migration, Flüchtlinge und Integration 2015; Paparoussi 2010; Noboa 2006), as well as discourse theory (Höhne et al. 2005; Rezai-Rashti and McCarthy 2008). Some authors explicitly cite the discourse theoretical approaches of Ernesto Laclau (Andersson 2010, p. 35; Mikander 2015, p. 111). Norman Fairclough's model of linguistic analysis is also used in the context of discourse theory to link text, discursive practice, and social practice (Andersson 2010, p. 35).

In addition, some researchers make use of newer didactic approaches from historical and political education in immigration-based societies. In a textbook study by Dirk Lange and Sven Rößler, for example, the authors develop new substantive guidelines for a didactics of migration (2012, p. 191).

Intertextual and intersectional theoretical approaches are also used in textbook analyses, especially in order to highlight the positions of and relationships between majorities and minorities in textbooks. This approach not only theorises that educational media represent societal groups differently but also argues that certain groups are perceived as 'problematic', which constructs asymmetrical power relationships and inequality (Aamotsbakken 2010, p. 62f; Markom and Weinhäupl 2007). Some authors refer to sociological theories such as the theory of communicative action developed by Jürgen Habermas (Treadwell 2014, p. 33).

Textbook studies on race generally follow critical race theory (Marmer 2015; Rezai-Rashti and McCarthy 2008; Osterloh 2008), often oriented towards practical application in educational contexts (Marmer and Project LEO 2015; Marmer and Sow 2015). While drawing on critical race theory, some authors also look to postcolonial theory, in one case concretely referring to postcolonial ethnology (Guggeis 2004). Many authors also take approaches from cultural studies, especially in analysing the representation of certain cultures or intercultural understanding and intersectional aspects of diversity (Yuen 2011; Huber 2015). Others refer to theoretical approaches related to intercultural communication (Yamada 2011).

Studies involving quantitative textbook analyses comparing multiple countries sometimes rely on approaches from neo-institutional theory (Lerch 2016; Bromley 2014; Meyer et al. 2010; Ramirez et al. 2009) in order to draw conclusions about the progress of textbooks globally in meeting international standards (in terms of human rights or diversity).

CONCLUDING OBSERVATIONS

In general, the findings of the studies presented here demonstrate that societal diversity is still represented in textbooks as a ‘special case’ and not as a normal reality. Diversity is mostly perceived as a challenge to societal cohesion and portrayed as something problematic, carrying with it a certain conflict potential. This seems to be the reason why many scholars see an urgent need for textbook revision and formulate concrete recommendations to textbook publishers and education practitioners.

In all categories of difference addressed here—representation of disability, immigrants, people of colour, and other religious or ethnic minorities—the studies found that explicitly discriminatory or racist representations rarely appear in contemporary textbooks.² But even in textbooks whose countries follow multicultural policies or see themselves as shaped by immigration or societal diversity, implicitly stereotyped and exclusionary content still exists (Höhne et al. 2005; Schissler 2009; Noboa 2006). Moreover, many authors observe that certain groups affected by discrimination (minorities, people of colour, people with disabilities) are underrepresented in curricula and textbooks or do not appear at all (Táboas-Pais and Rey-Cao 2012, 2015, p. 8; Hanauer 2013, p. 59; Greaney 2006, p. 53). Studying primary school textbooks in Myanmar, for example, Brooke Treadwell found that even though 135 different ethnic groups live in the country, ‘people depicted throughout the textbooks are almost universally Buddhist, Burman and Burmese-speaking’ (Treadwell 2014, p. 35).

It is important to note that very few textbook studies look at the intersectionality of multiple categories of difference. The notion of membership in multiple categories and the intertwined nature of differences, so central to processes of exclusion and inclusion, could enrich research on educational media and help break away from one-dimensional approaches. This would also align scholars more closely with new approaches in educational research that increasingly seize on the idea of intersectionality.

In addition, it is crucial to expand research on the use and adaptation of materials in order to examine how the discriminatory depictions highlighted in the studies earlier in this chapter are actually perceived and judged by students and teachers. Only by taking this step is it possible to make recommendations to educational policymakers and practitioners based on solid, empirical findings.

In light of the broad upheaval currently shaping policies and pedagogies of inclusion within the education systems of many countries, it is also necessary to conduct further research on representations of ability/disability in textbooks and to investigate whether textbooks conceived especially for the inclusive classroom really do hold up to the expectations of special needs education.

Finally, most of these studies concentrate on textbooks at the secondary level. It would be beneficial to devote more attention to primary-level textbooks, since in many countries primary school is the least segregated and most

inclusive phase of education. It would be helpful to explore whether there are primary-level textbooks that contain innovative concepts for how to represent societal diversity and can be used as best-practice examples. An expansion of research on educational media to include subjects beyond the social science spectrum would also provide a valuable perspective.

NOTES

1. On the development and theoretical approaches of diversity education and multicultural education, see Appelbaum (2002).
2. The studies presented in this chapter primarily look at countries that identify themselves as multicultural or as being shaped by immigration.

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Human Rights as Cultural Globalisation: The Rise of Human Rights in Textbooks, 1890–2013

Patricia Bromley and Julia Lerch

Today, the topic of human rights and its attendant values and skills are routinely celebrated in schools. Although it was not always the case, human rights education (HRE) is now relatively common in curricula and classrooms around the world. In this chapter, we first briefly review the evolution of HRE into a core concern for the international community and a mainstream facet of mass schooling. We then offer an overview of common theoretical and methodological approaches and central themes in the academic scholarship on HRE, with a particular emphasis on work addressing the incorporation of human rights and related topics into school textbooks. In the final sections of the chapter, we turn to an under-studied aspect of the HRE phenomenon and a promising area for future research: namely, explaining why HRE has become so prevalent worldwide. To this end, we present new empirical evidence documenting the striking expansion of human rights discussions in textbooks around the world over the whole twentieth century. Overall, HRE is best understood as a cultural phenomenon that has emerged in two phases: first, there was a period of institutionalisation in the years leading up to and in the wake of the two World Wars. A second period of rapid diffusion began in the 1990s with the end of the Cold War and entrenchment of neoliberal ideologies.

The collection of the data used in this chapter was funded from a Spencer Foundation Grant (200600003).

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BACKGROUND: THE RISE OF HUMAN RIGHTS EDUCATION

The horrors of World War II had a major impact on the global human rights regime, which intensified dramatically in the post-war years, spearheaded by the Universal Declaration of Human Rights (UDHR) set forth in 1948 (for further reading on war in textbooks see Sylvie Guichard's chapter in this volume). The development of HRE is intimately tied to expansions in the scope of this regime over the second half of the twentieth century. During this period, global human rights visions came to articulate human rights protections for a growing range of persons (e.g. children, women, minorities). In addition, their narrow legal emphasis transformed into a broader social one, with an expanding array of social problems understood as human rights concerns and human rights foci incorporated into social institutions writ large (Elliott 2007). As part of these developments, and reflecting the growing importance of education as a social institution, human rights became an educational issue. A global curricular movement dedicated to HRE emerged, and HRE organisations, publications, and programmes proliferated tremendously (Suárez 2007; Ramirez et al. 2007).

A critical early step in the evolution of HRE into a core concern for the international community came through its inclusion in the 1948 UDHR. Soon after, driven by a firm belief that 'since wars begin in the minds of men, it is in the minds of men that defences of peace must be constructed', the founders of the United Nations Educational, Scientific and Cultural Organization (UNESCO) took formal steps to spread teaching about human rights in schools internationally (ASPnet 2003, p. 5). In 1953 the Scheme of Co-ordinated Experimental Activities in Schools of Member States, as it was called at the time, was established to encourage the development of national education in accordance with UDHR principles (1952 UNESCO General Conference Resolution 1.341, quoted in ASPnet 2003, p. 5). The initial gathering in Paris included 21 experts representing 33 secondary schools in 15 countries (ASPnet 2003, p. 7). Today the UNESCO Associated Schools Project, as it is now called, has multiplied into a global network of 10,000 educational institutions in 181 countries (UNESCO 2015; see also Suárez et al. 2009).

Until the 1990s, the expanding Associated Schools Project remained the centrepiece of UNESCO's human rights education activities. But in the 1990s, with the end of the Cold War and collapse of the Soviet Union, new opportunities for more global cooperation emerged, and other HRE efforts multiplied rapidly. The United Nations (UN) declared a decade for HRE starting in 1995 and continued with this work through the World Programme for Human Rights Education, run by the UN Office of the High Commissioner for Human Rights (OHCHR). This programme promotes HRE across all levels of education (primary through tertiary) and for a range of participants (from educators and state officials to law enforcement and military) (OHCHR 2015).

Beyond UN efforts, HRE activities became a growing focus for non-governmental organisations (NGOs). New NGOs dedicated to the issue were established, and existing human rights NGOs, such as Amnesty International, integrated HRE into their programmes and strategies (Suárez and Ramirez 2007). Today, the topic of HRE has received renewed emphasis as part of the Sustainable Development Goals, which aim to ensure that all learners acquire the knowledge and skills to promote sustainable development, including through HRE. The following section surveys the field of academic studies pertaining to HRE and offers insight on the incorporation of HRE into national education curricula.

SURVEYING THE FIELD: STUDIES OF HUMAN RIGHTS EDUCATION

The proliferation of HRE efforts has been reflected in a substantial academic literature on the topic. Here, we first present an overview of HRE scholarship and then delve more extensively into a particular strand: academic studies on the treatment of human rights in national textbooks and curricula. The dominant theme in the literature on HRE pertains to the development of pedagogical approaches and definitions (e.g. Tibbitts 2002; Bajaj 2011). Early on, Tarrow (1987) distinguished between education *as* a human right and education *about* human rights. Others have emphasised education *for* human rights, defining HRE as teaching young people to promote human rights and related elements of peace, justice, and tolerance (Flowers 2000; Osler and Starkey 2010). Synthesising several approaches, Tibbitts (2002) identifies three models of HRE, each associated with particular target groups, content, and strategies: the Values and Awareness Model, the Accountability Model, and the Transformational Model. The three models underscore the multiplicity of goals underpinning HRE as a whole, including the transmission of knowledge and values, training in the protection of human rights, and individual human empowerment. In a contemporary examination of the field, Bajaj (2011) identifies two areas of broad agreement among scholars and practitioners. First, HRE includes both content and process (see, e.g., Tibbitts 2005). Second, and related, HRE should also aim to foster particular values and produce action (see, for instance, Flowers 2000). In this spirit, the vast majority of HRE scholarship is dedicated to refining teaching theories and practices, often via case analyses of particular programmes or countries.

A notable research strand, however, zooms in on national textbooks and curricula to understand how the topic of human rights has been incorporated into school materials. Much of this literature consists of rich and primarily qualitative country case studies and small-n comparisons (e.g. Firer 1998; Karaman-Kepeneci 2005; Suárez 2008; Moon and Koo 2011). But in recent years, cross-national, quantitative studies of textbook data have emerged to complement case research (Ramirez et al. 2009; Meyer et al. 2010; Russell and Tiplić 2014). Collectively, this scholarship signals a dramatic rise in human

rights discussions in textbooks in recent decades. For instance, a quantitative study of 465 textbooks from 69 countries published between 1970 and 2008 found that while only one fifth of textbooks published prior to 1995 discussed human rights, almost half of the books in the sample did so in the years from 1995 to 2008 (Meyer et al. 2010). Additionally, there is evidence that historical events are today depicted in terms of human rights: for example, Bromley and Russell (2010) find that textbooks around the world increasingly frame discussions of the Holocaust in terms of human rights violations. Many qualitative studies that incorporate a longitudinal angle point to similar findings. In an analysis of South Korean civics textbooks between 1981 and 2004, Moon and Koo (2011) find that material on human rights began to appear in their sampled books in the 1990s. Similarly, Suárez (2008) identifies increased discussions of human rights in a sample of civics textbooks from Argentina and Costa Rica in the past two decades. Rich qualitative case studies highlight tensions and complexities around this growing incorporation of human rights into textbooks. For instance, human rights are often (and perhaps increasingly) presented as abstract concepts, decoupled from local social problems, with human rights violations highlighted elsewhere but not at home. In a study of Israeli textbooks, Firer (1998) finds that human rights issues are presented in ‘objective language’ that makes no reference to ‘the problems of minorities and their significance for Israel’ (p. 198).

While selected textbook studies have focused exclusively on human rights, the topic is often studied in relation to the question of how textbooks more broadly incorporate multicultural and cosmopolitan, rather than exclusively nation-based, notions of citizenship. Indeed, there is a sizeable related literature on textbook narrations of diversity rights, centring, for example, on gender and women (Blumberg 2008; Nakagawa and Wotipka 2016), minorities (Yamada 2011; Çayır 2015), and refugees and immigrants (Hintermann et al. 2014). Despite growing incorporation of diversity rights into textbooks in all world regions (Terra and Bromley 2012), a persistent theme in the literature is that this incorporation has been uneven. For instance, a quantitative study found that minority rights were emphasised more in liberal democracies (Bromley 2014). And in-depth qualitative studies across world regions continue to find patterns of omission and stereotyping of marginalised population groups, notwithstanding increasing coverage of diversity rights (see the studies cited earlier in this chapter for various groups). Beyond scholarship focusing directly on (human) rights, textbook studies of global and region-based citizenship offer additional insights, as these citizenship notions tend to embrace human rights principles (see, e.g., Keating 2009; Buckner and Russell 2013). (For further reading on diversity and textbooks, see Inga Niehaus’ chapter).

Despite this growing literature on HRE pedagogies and its incorporation into school materials, relatively little work has been dedicated to understanding *why* HRE developed into such a prominent worldwide emphasis in curricula and classrooms, a point to which we now turn.

A REMAINING PUZZLE: EXPLAINING HUMAN RIGHTS EDUCATION

In contrast to the extensive focus on applications of human rights in curricula and teaching, the question of why we see the rise of HRE has received little attention. This gap exists because it is typically taken for granted that HRE will change student attitudes and actions in ways that promote the creation of a more just and peaceful world; with this baseline assumption, the answer to why HRE is expanding is obvious. However, two features of HRE suggest that there is more to the story. First, there is little systematic evidence that HRE contributes to its ultimate goal of fostering a more just and peaceful world, and it is implausible to design research to definitively show an overall causal connection using current social science methodologies. Naturally, many factors that play into transgressing human rights principles rest far outside the scope of classroom control. Due to the complex causes of human rights violations, developing causal evidence that links any one HRE programme to subsequent events seems unrealistic. Instead, HRE rests on a deep faith that a causal link plausibly exists (or, at a minimum, that it is morally correct to provide HRE regardless of its ultimate impact). Second, the diffusion of HRE is decoupled from any particular context where it might seem most needed. HRE has expanded worldwide following World War II rather than emerging in specific local situations. In view of these considerations, it bears asking why. This question is particularly salient because many countries still struggle with basics like literacy and numeracy, and others face intense pressure to improve subjects like math and science. In the face of competing demands on schools, including intense pressure to prepare students for specific jobs, why has HRE become a core feature of education around the world?

To tackle the puzzle of HRE expansion, a handful of sociological studies have turned to a cultural explanation. This research posits that the worldwide spread of human rights stems from the rise and globalisation of a culture that privileges individual rights, empowerment, capabilities, and responsibilities over alternative, more collective, bases of social order (Meyer et al. 1997; Meyer and Jepperson 2000; Elliott 2007; Meyer et al. 2010). These scholars argue that global diffusion indicates that broad cultural forces are at work; individual citizens and countries are reconceptualised as deeply interconnected in fundamental ways that go beyond economic or political necessities (Meyer et al. 1997). Focusing specifically on the expansion of HRE, Ramirez et al. (2007, p. 35) describe how the current emphasis on human rights education reflects a growing understanding of the individual person as a member of a global society rather than as mainly a national citizen. Cultural and political globalisation all work as important motors in this process, generating standardised educational models of human competencies (Rychen and Tiana 2004), and of national progress (Ramirez and Meyer 2002).

Although these studies provide some explanatory purchase on understanding the global expansion of HRE, one drawback has been that the explanations

point to the end of World War II as a major driver of cultural globalisation, but data exists only for later decades, making it impossible to examine the War's effect.

With new data collected from a content analysis of 1008 social science textbooks from 100 countries, we present a first look here at the expansion of human rights going back to 1890. In our sample, social science textbooks include history, civics, social studies, and geography textbooks. The majority of analysed books come from the excellent collection at the library of the *Georg Eckert Institute for International Textbook Research* in Germany. We supplemented them with books from university libraries, as well as from personal collections and local bookstores around the world. As it is not feasible to randomly sample textbooks, our selection was largely dictated by availability, but we tried to achieve as even a distribution over time and across countries as possible. Finding books for the first half of the twentieth century proved to be the most difficult due to availability and because we only sampled independent countries. Eighty-three per cent of our sampled books are thus published after the end of World War II. History books make up the largest proportion (52 per cent) and social studies the smallest (8 per cent). Each book in our sample was analysed by a native or near-native speaker using a standardised survey that measured, among other aspects, whether the book explicitly discussed human rights.

Figure 25.1 charts the rise of human rights narratives in textbooks from 1890 to 2013, graphing 20-year moving averages of the proportion of books in our sample that mention human rights. There is early expansion in the decades prior to World War II; growth then remains tamed until a steep increase starting in the 1990s. Overall, the figure offers striking evidence for the incorporation of human rights in textbooks over the course of more than 100 years.

Table 25.1 gives insight into this expansion by region. For each region, the table reports the proportion of books mentioning human rights, divided into three historically meaningful time periods: the years up to the end of the two World Wars (1890 to 1945), the post-World War II and Cold War period (1945 to 1989), and the post-Cold War era (1989 to 2013). It shows worldwide increases: growth in human rights coverage is evident in each region, particularly in the post-Cold War period, when the changes in most regions are highly significant.

Regional variation remains even in the latest era, however, with only about one third of textbooks in the Middle East and North Africa and in Eastern Europe and Central Asia mentioning human rights, and around 65 per cent of those in Sub-Saharan Africa doing so. The notable rise of human rights discourse in textbooks from Sub-Saharan Africa suggests that these countries are highly susceptible to global models, perhaps not surprising given the extensive involvement of global actors in the region. As can be expected considering the cultural underpinnings of human rights, Western textbooks feature human rights discussions prominently. Textbooks from Latin America also incorporate human rights at high rates (46 per cent of books in the latest period) and show

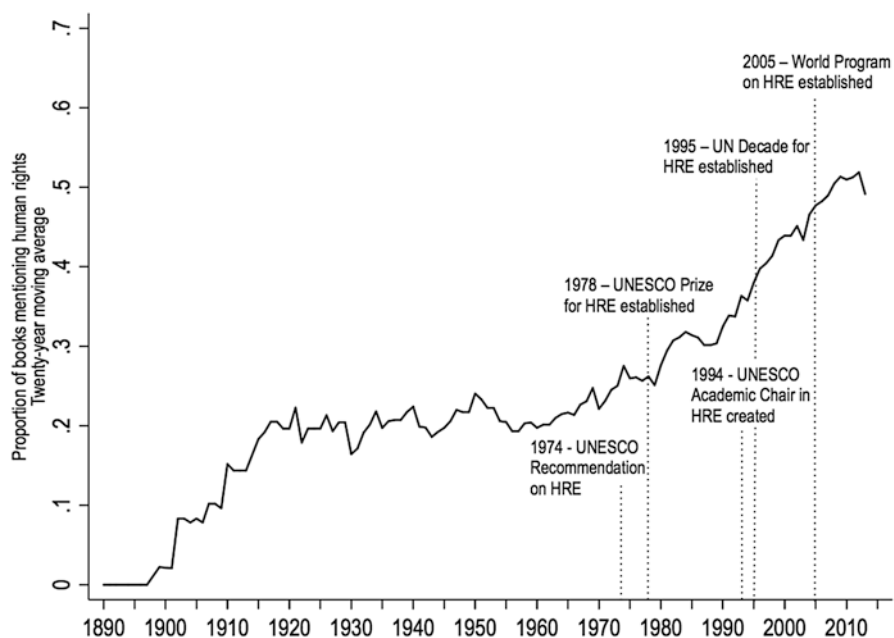


Fig. 25.1 Global expansion of human rights in textbooks, 1890–2013. Source: textbook data (line graph); timeline adapted from Suárez and Ramirez (2007)

Table 25.1 Proportion of textbooks mentioning human rights, 1890–2013, by region^a

	1890–1945	1946–1989 ^b	1990–2013 ^c
West (North America, Western Europe, Australia, New Zealand)	0.20	0.29	0.55***
East, South-East, and South Asia	0.30	0.35	0.41
Eastern Europe and Central Asia	0.17	0.16	0.30†
Latin America and Caribbean	0.07	0.26*	0.46*
Middle East and North Africa	0.08	0.20	0.31
Sub-Saharan Africa	0.00	0.18**	0.65***
All Regions	0.19	0.25	0.45***

Source: textbook data

*** $p < 0.001$, ** $p < 0.01$, * $p < 0.05$, † $p < 0.1$, two-tailed tests

^aThe number of books for each region by time period is: West (96, 140, 139); East, South-East and South Asia (27, 55, 69); Eastern Europe and Central Asia (24, 49, 82); Latin America and Caribbean (14, 53, 41); Middle East and North Africa (12, 54, 54); Sub-Saharan Africa (2, 56, 30). The total number of books by time period is: 175, 408, 425

^bSignificance indicates t -test comparing difference between means or percentages of periods 1 and 2

^cSignificance indicates t -test comparing difference between means or percentages of periods 2 and 3

Table 25.2 Proportion of textbooks mentioning human rights, 1890–2013, by subject^a

	1890–1945	1946–1989 ^b	1990–2013 ^c
Social studies textbooks	0.00	0.29**	0.52*
Civics textbooks	0.57	0.53	0.70†
History textbooks	0.16	0.25†	0.46***
Geography textbooks	0.00	0.03	0.13*
Mixed textbooks	0.19	0.24	0.50*
All subjects	0.19	0.25	0.45***

Source: textbook data

*** $p < 0.001$, ** $p < 0.01$, * $p < 0.05$, † $p < 0.1$, two-tailed tests

^aThe number of books for each subject category by time period is: social studies (2, 28, 50); civics (14, 60, 54); history (123, 214, 186); geography (9, 77, 71); mixed (27, 29, 64). The total number of books by time period is: 175, 408, 425

^bSignificance indicates t -test comparing difference between means or percentages of periods 1 and 2

^cSignificance indicates t -test comparing difference between means or percentages of periods 2 and 3

early expansion. Prior research has similarly noted the prominence of human rights discourse in Latin American textbooks (Suárez 2008). In the first time period, textbooks from East, Southeast, and South Asia show the highest coverage of human rights. We believe this may be due to the specifics of our sample. The books that mention human rights in this time period are all civics textbooks (from China). As illustrated later in this chapter, civics books contain consistently more discussions of human rights than books in other subjects, which suggests that the prominence of human rights in early Asian books is likely due to their subject orientation.

Overall, the key insight from Table 25.1 is that despite enormous differences in the historical legacies and contemporary geo-political conditions worldwide, we see a strikingly similar pattern of expansion of human rights discussions. Specifically, there is a period of gradual increase and institutionalisation, followed by a statistically significant increase marking a period of rapid diffusion in most regions of the world since the 1990s.

Table 25.2 offers a look at our data by subject category. For each subject, it shows the proportion of books mentioning human rights, divided into the three time periods. All subject categories show substantial increases in human rights discussions over time. Again, the post-Cold War era features the most expansive growth, with all changes statistically significant, many of them highly so. As among regions, variation persists among the school subjects as well, even into the most recent period. Only about 13 per cent of geography textbooks mention human rights, in contrast to as much as 70 per cent of civics books and around half of history books and books mixed across the categories. In general, civics textbooks stand out with a consistently high tendency to incorporate human rights themes, which is not surprising given the subject's concern with citizen rights: even in the first period, 57 per cent of civics books mention human rights. As a whole, Table 25.2 confirms the findings of Table 25.1: human rights discussions in textbooks increase across time in all subject categories, with the most dramatic expansion witnessed in the post-1989 time period.

Taken together, our data points to a remarkable worldwide, non-subject-specific rise in human rights narratives in textbooks between 1890 and 2013, with the most dramatic expansion taking place in the 1990s and 2000s. Of course, our analysis is limited in that we are measuring simply whether books mention human rights, without examining in detail *how* they are discussed. Furthermore, our coverage is evidently limited in some regions and time periods, and we do not have textbooks from every single country. It is also difficult to ascertain how much the books in our sample were utilised. Nevertheless, the expansion of human rights we find over the course of the twentieth century is impressive and robust, whether we look at regional or subject-specific variation. Complementing insights on context-specific patterns and histories of HRE from the studies above, these findings highlight the value of conceptualising the rise of HRE as broadly driven by the globalisation of cultural individualism in the last half of the twentieth century, particularly the most recent neoliberal period.

NEW DIRECTIONS

The success of human rights as a discursive project is astonishing. Today HRE has spread worldwide, and it takes many different forms and meanings. On the one hand, the term's ambiguity leads some to worry that the phrase has little meaning. As Osler and Starkey (2010, abstract) describe: 'Campaigners, politicians and the media cite human rights to justify or challenge anything from peaceful protest to military action. The phrase "human rights" appears to be a slogan in need of a definition.' And certainly, in the course of expansion, human rights language is sometimes appropriated in rather bizarre ways (e.g. pirates can claim human rights violations when arrested at sea, dictators can purport to protect certain types of human rights such as economic welfare while violating other principles). On the other hand, the potential for multiple interpretations likely helps explain the phenomenal expansion of human rights discourse. Bajaj (2011, p. 507–8) argues:

[T]he mutability of HRE is its strength. That different organizations with distinct social bases and worldviews ground themselves in this discourse suggests the richness and possibility of HRE ... The diversity of contexts in which HRE can and has been implemented is indeed a testament to its relevance, adaptability, and promise as a lasting educational reform.

Many studies seek to categorise, describe, and evaluate various HRE approaches, but little research has examined the extent to which it expands globally or attempted to explain why this growth occurs. Here we have drawn on new analyses to show that the most rapid discursive increase has occurred since the 1990s in most of the world. These findings show that the construction of an international human rights regime in the wake of World War II provided a foundation for HRE, but its spread was more limited until the end of the Cold War. A likely interpretation of this pattern is that following the collapse of communism, individual human rights (rather than more state-centric

citizenship rights or collective cultural rights) emerged as the social counterpart to increasingly dominant neoliberal economic and political ideologies. As a whole, it is difficult to assess whether the expansion of HRE contributes to peace and justice in the world. But our research suggests that independent of its actual contribution (which is unknown) the HRE project is tied to particular (neoliberal) cultural underpinnings that, if changed, would alter its attractiveness as an educational model.

The implications and dynamics involved in this phenomenal spread of HRE to diverse contexts worldwide present a fruitful and much needed area for future research. Given the malleability of HRE as a concept, we need to know more about the factors shaping its form and meaning in different contexts. How do policymakers, curriculum designers, and educators translate HRE models into particular local and national settings? How do unique national needs and priorities shape what form HRE takes? Vast demographic, cultural, and political differences between the countries adopting HRE in curricula and classrooms offer unique opportunities for understanding what elements of HRE are compatible with different social and educational landscapes. Moreover, future research could usefully focus on how HRE is reconciled with more traditional notions of rights tied to national citizenship. Education systems have long been tasked with nation-building, and the likely complex interactions between HRE and such nation-centric educational foci deserve scholarly attention.

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The Environment

Tobias Ide

INTRODUCTION

The natural environment of the Earth is degrading at drastic speed. Loss of fertile soil and water depletion are endangering the food security and livelihoods of more and more people (Bai et al. 2008; Wada et al. 2010). Biodiversity loss and the pollution of air, soil, and water pose threats to human health and the stability of ecosystems (Cardinale et al. 2012; Jamieson et al. 2017). Climate change is accelerating these processes as well as posing additional challenges in the form of more frequent and intense natural hazards and rising sea levels (IPCC 2014). Various prominent initiatives have been launched to counter these worrisome trends, including Agenda 21 (developed in 1992), the UN Decade of Education for Sustainable Development (2005–2014), and the Sustainable Development Goals (to be achieved by 2030).

Education is often a key element of such initiatives. Accordingly, increasing research efforts are being dedicated to the issues of environmental education, ecological awareness, and education for sustainable development (Bajaj and Chiu 2009; Wenden 2014). In this context, many studies have focused on extracurricular materials made available through websites, toolkits, NGOs, or researchers (Bajaj and Chiu 2009; Haynes and Tanner 2015; Stratford 2016). Other researchers have focused on official curricula and school textbooks, which will be the primary emphasis of this chapter.

An engagement with school textbooks is particularly promising in social science research on the environment for two reasons. First, formal teaching in schools is still frequently organised around school textbooks (Fuchs et al. 2014), which makes them a crucial instrument for the transmission of knowledge from one generation to the next. The topic of the environment is no

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exception in this regard. Although teachers, peers and parents are often more significant influences on what is known as the informal curriculum (Bird 2007), school textbooks provide some important understanding of environmental issues to young people (Sharma and Buxton 2015). Analysis of how school textbooks deal with environment-related issues, and identifying potential for improvement, is hence an important task for researchers. Second, school textbooks can be considered as ‘material representations of the official knowledge’ in a given society (Mahamud 2014, 31). The study of textbooks can thus assist researchers in understanding how environmental issues are conceived by dominant discourses (Lässig 2009). Such dominant discourses have been shown to be important for the dynamics of environmental governance at various levels (Hajer 1995).

THEORETICAL APPROACHES

Analysis of school textbooks can be—and has been—employed in a number of environment-related fields of study. As a discussion of all of them would be beyond the scope of this chapter, I will focus here on three research areas: environmental education, disaster education, and critical geopolitics.

Environmental education can be defined as ‘a process aiming at promoting people aware of and concerned about the global environment and its associated problems, and developing attitudes, motivations, knowledge, commitment, and skills to work individually and collectively towards solutions’ (Carvalho et al. 2011, 2588). Like the related field of education for sustainable development (Sauvé 2002), it is based on the assumption that adequate education is crucial to mitigating future and addressing existing environmental problems (Sahin 2016). Theoretically, the foundations of environmental education rest on two different traditions, though most studies are reluctant to explicitly locate themselves in one of these. The first of these asserts, in line with constructivist reasoning (Berger and Luckmann 1967), that human actions towards the world are structured by intersubjectively established discourses, which need to be shaped by education in order to enable pro-environmental behaviour. The second perceives human decisions as characterised by bounded rationality (Gigerenzer and Selten 2002); in other words, the assumption here is that most people have a rational interest in environmental protection, but that adequate actions are limited by insufficient environmental knowledge, a gap environmental education can (and should) address.

Though children and young people are often regarded as important agents of change in the face of environmental stress (Buttigieg and Pace 2013), school textbooks have received comparatively little attention from environmental education researchers.¹ This said, a considerable number of extant studies focus on the depiction of environmental issues in geography and science textbooks in contexts as diverse as Germany (Boehn and Hamann 2011), Mexico (Barazza 2001), and the USA (Sharma and Buxton 2015). A particularly noteworthy piece of research in this context is the comparative study of 14 Western

European, Eastern European, and non-European countries by Carvalho et al. (2011). All these studies also issue practical advice on how to improve the environmental education components of school textbooks. Examples of such advice include exhortations to frame humans as embedded into nature rather than using nature-society dichotomies (Korfiatis et al. 2004), to employ interdisciplinary approaches (Salmani et al. 2015; Sharma and Buxton 2015), and to highlight the dual local and global nature of environmental problems (Carvalho et al. 2011).

Disaster education is commonly understood as the delivery of information via media so that ‘citizens prepare for various disasters, consider what they would do in a disaster and think about how they would respond’ (Preston 2012, 3). Broadly speaking, disaster education is more in line with concepts of bounded rationality, as it assumes that humans are motivated and able to cope with natural disasters more effectively if they are better informed about them (Shaw et al. 2011). Disaster education provides information on all four stages of the disaster cycle, which are mitigation, preparation, (more or less emergency) response, and recovery. Disaster education further assumes that a certain number of natural disasters are unavoidable. As in broader debates about interactions between humans and nature (Schilling et al. 2017), the focus hence shifts from mitigation—the main objective of environmental education—to adaptation and to building resilience (Haynes and Tanner 2015).

For a long time now, there has been an understanding that young people have importance and agency in responses to natural disaster, particularly where they are able to act as transmitters of knowledge (Sharpe and Kelman 2011). During the 2004 Indian Ocean tsunami, for instance, a ten-year-old girl recognised the tsunami early warning signs she had learned about in school and triggered the evacuation of a beach in Thailand (Owen 2005). Despite such widely recognised success stories, there is comparatively little research on school textbooks in disaster education. Studies conducted in England (Sharpe and Kelman 2011) and Nepal (Shiwaku and Fernandez 2011), for instance, found insufficient coverage of active prevention and response measures and underdeveloped links between disasters and broader socio-environmental issues in textbooks. In general, more comprehensive analyses are dedicated to formal curricula and extracurricular activities (Selby and Kagawa 2012; Wisner 2006). This work generally overlooks the significant role of school textbooks in these contexts.²

Critical geopolitics takes a different perspective. It ‘directs our attention towards the constructed imaginaries of nation states, ideologies and cultures, framed within discourses of power, space and territory’ (Mawdsley 2008, 510). In other words, the critical geopolitics literature studies the construction of politics, identities, and spaces in and through various discourses and seeks to identify which actions and interests such constructions legitimise or, by contrast, render illegitimate, futile, or even unthinkable (Dalby 2008). In so doing, it clearly takes a constructivist stand and aligns itself with critical theories. Environmental education and disaster education, by contrast, are largely

problem-solving theories as defined by Cox (1981). The environment is an important issue in critical geopolitics because environmental discourses are often profoundly political. They can, for instance, legitimise, or indeed delegitimise, the exclusion of local people from natural resources in the name of conservation, or the blaming of countries from the global south, rather than northern states and corporations, for environmental problems (Cavanagh and Benjaminsen 2014; Dalby 2014).

School textbooks are important objects of study for critical geopolitics research. They are commonly assumed to stabilise the hegemony (in a Gramscian sense) of a social group by transmitting sanctioned knowledge to a wider population (Ingrao 2009). Further, they reflect discourses circulating in the various domains in which critical geopolitics is interested, which include popular culture, intellectual elites, and policymaking (Ide 2016). While textbook analysis is still an emerging approach in critical geopolitics, various authors have produced interesting environment-related insights. Sidorov (2009) discusses how US textbooks stigmatise Eastern European countries by depicting them as rural, backward, and environmentally polluted. Similarly, focusing on portrayals of links between the environment and conflict in German textbooks, Ide (2016) found that the global south is imagined as irresponsible and dangerous, while the global north is implicitly conceived as a threatened, but positive actor.

METHODS

As diverse as the above-mentioned research fields are, they often employ rather similar methods when studying school textbooks and their depiction of the environment. Quantitative content analysis frequently features in endeavours to gain an overview of the terms, actors, regions, issues, and so on which occur in these depictions. This method is useful due to the fact that school textbooks usually form a large and quite heterogeneous corpus. But the description of the exact method used is rather brief in almost all studies and there is virtually no debate on the most appropriate procedure. In addition to quantitative content analysis, scholars often use some qualitative methods, such as critical discourse analysis (Sharma and Buxton 2015) or qualitative comparative interpretation (Sidorov 2009). Few studies rely solely on quantitative (an example is Salmani et al. 2015) or qualitative (for instance, Sharpe and Kelman 2011) methods.

The dominant focus of most studies is the textual level. However, awareness of the importance of visual culture in education and politics is well established (Heck and Schlag 2012; Janko and Knecht 2014). Consequently, several analyses have included (Ide 2016) or indeed focused primarily on (Carvalho et al. 2011) visual elements of textbooks, such as photographs, maps, or charts. But although these studies conceive of textbooks as multi-modal objects, they do not (explicitly) draw on tools from multimodal analysis (van Leeuwen 2005).

DIRECTIONS FOR FUTURE RESEARCH

In recent decades, the environment has received steadily increasing attention from social science scholars—a development to be welcomed given the enormous environmental problems of our time. The analysis of school textbooks can contribute to this research agenda in manifold ways. In the first section of this chapter, I have discussed three areas of study where textbook analysis has already been used and holds great potential for future research: environmental education, disaster education, and critical geopolitics. All three of these areas can gain further insights from analysing textbooks by developing this research in the following three ways.

First, research on textbooks needs to be broadened. In other words, despite their relevance as indicators and transmitters of societally dominant knowledge, school textbooks and their conceptualisations of environmental issues remain under-researched, particularly by scholars working in disaster education and critical geopolitics.

Second, all three areas would benefit from studying textbooks in greater depth. There are various ways to achieve this task. Where multiple textbooks exist, scholars should beware of restricting their analysis to only one or a few textbooks (Sahin 2016; Sharma and Buxton 2015), as they would risk focusing on outlier cases. International comparison enables insights into best educational practice and different perspectives on environmental and geopolitical issues (Carvalho et al. 2011; Ide 2017). In an ‘age of visual culture’ (Walker 2004 23), scholars would also be well advised to draw more frequently on tools from visual (Rose 2005) and multimodal analysis (van Leeuwen 2005).

Third, more attention should be paid to the contexts of school textbooks. Manik (2008) and Stanišić and Maksić (2014) have shown that even if textbook content on environmental issues changes, the effect on practices in schools might be minimal, for instance, because teachers are unwilling or unable to implement such changes. Similarly, engagement with textbook content and even with the taught curriculum on the part of students is likely to be selective, depending on their sociopolitical background (Porat 2004; Ronan and Johnston 2003). Further, the content of textbooks is determined by complex interactions between politicians, ministerial staff, textbook authors, and publishing houses (Sammler et al. 2016). Such production processes remain barely investigated, yet awareness of them is crucial to the success of practical interventions. A focus on the production, use, and reception of textbooks would also fit with the emerging emphasis of critical geopolitics on the societal contexts of discursive articulations and on audience dispositions (Dittmer 2011; Dittmer and Gray 2010).

Beyond these three concrete suggestions (broaden, deepen, contextualise), I would like to discuss a more far-reaching point. The fields of environmental education, disaster education, and critical geopolitics have all, to some degree, conducted research into school textbooks and the information/discourses they provide/reproduce. However, there are other environment-related social science fields which could greatly benefit from analysing school textbooks, but have not yet done so.

One of these fields is (global) environmental governance. Among other factors such as the actor networks involved and the material or legal power they are able to mobilise, discourses are key in enabling or restraining environmental politics. Authors such as Hajer (1995) or Selbmann (2015) highlight how different constructions of the nature, causes, and consequences of environmental problems facilitate certain policy options. The most obvious example is the controversy around the existence and human causation of climate change in the USA (Fisher et al. 2013). Many studies on these issues focus either on speeches and documents produced by policymakers or on news media content. The analysis of school textbooks could provide a useful complementary perspective, as it enables researchers to focus on broader and more continuous elements of the discourse, as opposed to the emphasis on elite discourses in relation to policymaking and the rapidly changing nature of news media reporting.

Another relevant field in this context is environmental conflict and cooperation. A large amount of research has been dedicated in recent years to the question of whether environmental stress, and particularly climate change, can trigger violent conflict over such matters as scarce water resources, or whether it might instead induce joint attempts at problem-solving in the face of shared challenges (Ali 2007). Various studies indicate that knowledge and education can shape such dynamics of conflict and cooperation, for instance, by establishing a sense of shared environmental vulnerability and responsibility (Ide and Fröhlich 2015; Naoufal 2014). But these studies are still small in number, and they predominantly focus on NGO activities, rather than on formal education and school textbooks, which have a far greater reach.

A final example for the potential of textbook analysis is provided by critical research on environmental discourses. Scholars in this field highlight how scenarios involving climate refugees serve to legitimise the closure of borders and reproduce Orientalist stereotypes (Bettini 2013), or how calls for the strengthening of resilience³ shift responsibility from corporate and state actors to the shoulders of local communities (Evans and Reid 2013). Such narratives take on particularly critical significance when articulated by seemingly neutral actors, such as security experts or development workers. In this context, the investigation of the depiction of environmental migration, resilience, ecological modernisation, and other contested concepts in school textbooks, which function as supposedly neutral 'epistemic authorities' (Fuchs and Otto 2013, 5), would be a promising avenue. This is especially the case due to the eminent suitability of school textbooks for analysing changes in discourses over extended periods of time and hence for uncovering historical contingency.

CONCLUSION

Environmental issues are continuously increasing in significance in social and political processes as well as in social science research. In this chapter, I have outlined theoretical, methodological, and practical issues related to studying

the depiction of environmental topics in school textbooks. I discussed three fields of study which already use textbook analysis—environmental education, disaster education, and critical geopolitics—and formulated suggestions for future research in these as well as in other fields which have not yet drawn on textbooks. Research on school textbooks is certainly able to make a difference by enabling researchers to provide advice to environmental NGOs, ministries, and policymakers in charge of environmental issues, textbook authors, and teachers. Similarly, research on school textbooks has the potential to contribute to several major debates in the environmental social sciences, including those on environmental governance, environmental conflict and cooperation, environmental security, and the mitigation of and adaptation/resilience to environmental changes. All of this indicates that cooperation between textbook researchers and scholars in socio-environmental studies represents a promising alliance for the future.

NOTES

1. For instance, in the principal peer-reviewed outlet of the research field, the *Journal of Environmental Education*, only a small number of papers explicitly engage with school textbooks.
2. Extra-curricular activities are often not regulated by national policies and have much smaller coverage than school textbooks, while formal curricula are often vague and need to be substantiated by textbooks.
3. Resilience is understood here as the ability of a (often local) group to anticipate, cope with, recover from, and learn from external shocks, usually related to environmental stress and natural disasters.

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PART IV

Textbook Use, Effects, and Practices



Textbook Use

Thomas Illum Hansen

A SHORT INTRODUCTION TO THE TOPIC

Textbooks are used for many purposes and in different contexts. They are used to target and frame teaching, disseminate content, set assignments, supply scaffolding for student activities, provide homework, support and guide teachers, and more generally regulate behaviour in different ways. Thus, they appear multifunctional and polysemic. This is probably why textbooks can be hard to grasp and conceptualise.

The concept of a ‘textbook’ is difficult to delimit and define by means of a few distinguishing characteristics. Instead, it is characterised by a set of prototypical features socially shaped over time to fulfil the general function of a textbook in different learning environments and educational settings. Therefore, the concept ‘textbook’ is a dynamic category, evolving historically and varying with the sociocultural practices which surround it.

This conceptualisation of a ‘textbook’ emphasises the importance of research in textbook use; this research is needed if we are to explore and challenge the understanding of what Hartmut Hacker has described as the six didactic functions of a textbook: (a) structure, (b) representation, (c) steering, (d) motivation, (e) differentiation, and (f) practice and evaluation (stabilisation of the learning outcome and feedback to the learner about the learning level) (Hacker 1980; Hansen 2006). These didactic functions have to be examined from both a teaching and a learning perspective in pedagogical practice, in which both perspectives are deeply connected when teachers use textbooks to scaffold students’ learning within their zones of proximal development.

It is possible, on the basis of research into textbook use, to elaborate the understanding of the six didactic functions while pointing to several other

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E. Fuchs, A. Bock (eds.), *The Palgrave Handbook of Textbook Studies*,
https://doi.org/10.1057/978-1-137-53142-1_27

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functions such as the integrative function of textbooks, which ‘means that textbooks underpin the comprehension and integration of knowledge the students receive from other resources’ (Horsley and Sikorová 2014).¹

AN OVERVIEW OF KEY STUDIES

Two reviews, an international review of research into learning materials (Knudsen et al. 2011) and a review of research on textbook use in the United States (Watt 2015), give us a basis with which to form an overview of key studies (Knudsen et al. 2011). Some of the primary areas of interest in this regard are the dissemination and dominant role of the textbook in the classroom, the modification of textbooks by teachers and students, and comparative studies of printed and digital textbooks.

First of all, these two reviews are key studies in themselves, showing that there is a general lack of research in the use of textbooks. Watt’s study covered a number of pieces of quantitative research which confirm the textbook’s dominant role in accordance with Knudsen et al. (2011), but also included case studies which point to great variation between teachers in the ways in which textbooks are used, including fidelity of use (Watt 2015). On this basis, Watt concludes that the qualitative studies moderate the quantitatively based generalisations on the dominance of textbooks. This methodological conclusion can be explained and put into perspective by conceptualising textbooks as context-sensitive artefacts, a view which calls for mixed methods studies, a methodological point that will be addressed later.

Watts’ findings in the United States can be put into perspective by another key study from the Czech Republic. Based on interviews with teachers of mathematics and Czech language in primary and lower secondary schools, the study by Sikorová (2003) identified a number of ways in which teachers modified textbook subject matter, including making it more comprehensible, better organised, more transparent, and more interesting and simplifying it, leaving out complicated matters and tasks, and so on. Of particular interest here are the subject-specific differences that were noted. Mathematics teachers often modified maths learning material in order to align it with the curriculum, while language teachers modified Czech language learning materials in an attempt to make them more interesting.

Two key studies from Finland elaborate perceptions of how teachers use and modify textbooks. Heinonen (2005) identified four types of teachers: (1) individual innovators, (2) teachers reliant on educational materials, (3) curriculum-minded innovators, and (4) target-oriented innovators. The first type develops his or her teaching independently of both textbooks and the curriculum. The second type follows the textbooks. The third type bases his or her teaching on the national curriculum and seeks to create a more student-centred learning experience. The fourth type focuses on a reformulation of the curriculum and uses textbooks selectively.

The second Finnish key study focuses on mathematics textbooks and distinguishes between three ways of talking about textbooks: justification, criticism, and guilt (Pehkonen 2004). The first approach, justification, is positive, in that the teacher refers to textbooks as a guarantee of quality in teaching, as a support for reforms, and as an aid and inspiration for new ways of teaching. The second approach, criticism, is negative, in that the teacher presents textbooks as a burden, an obstacle, and a restriction of teachers' freedom to make their own choices. The teachers' experience is therefore that the textbooks make them passive, instrumentalise teaching, and make it mechanical. The final approach is more burdened by guilt over the extent to which they use textbooks. This approach also includes a critical component, but is more part of a general resignation and concern over the loss of teachers' professional expertise.

An important contextual factor that illuminates the role of the teacher is captured in a video-based observational study from Australia which analyses the relationship between the teachers' level of experience and their strategies for the use of textbooks in their teaching (Horsley and Walker 2006). There is a big difference between the novice teacher and the expert teacher. Novice teachers use textbooks for individualised teaching, leaving students to work alone with too little focus on teaching and learning strategies. Thus, the novice teacher does not scaffold an appropriate use of the textbooks, an introduction into the culture surrounding the academic discipline, or a collaborative process of the construction of opinion. In comparison, expert teachers spend far more time on the collaborative use of textbooks in their teaching and on scaffolding, which promotes a more metacognitive and productive approach to textbooks. One can add that it is not only experience but also the degree of specialisation which is significant here. In Finland, a large quantitative study has documented that the use of teacher's guide varies with the level of education and the degree of teachers' specialisation in the content taught. In support of this finding, the use of a teacher's guide is much more common in school systems in which teachers need to teach many different subjects and thus do not have the opportunity for specialisation or to develop expert knowledge (Atjonen et al. 2008).

However, textbooks remain by far the most commonly used learning material. This claim can be supported by some evidence, thanks to TIMMS (Trends in Mathematics and Science Study), an international evaluation programme which produces historically large data sets on students (in 52 countries around the world in 2011), including data on textbook use distinguishing between textbooks as a primary basis for lessons and as a supplementary resource in mathematics and science, in years 4 and 8 of schooling.

Horsley and Sikorová have conducted a large-scale study with TIMMS data from 2003, 2007 and 2011, and they conclude that textbook use is highly prevalent; in 2011 there was a remarkable finding: 'The percentage of students whose teachers used textbooks as a basis for instruction markedly rose, and at the same time the percentage of students whose teachers used textbooks as a supplement distinctly declined' (Horsley and Sikorová 2014, 54).

Finally, digitalisation has led to new key studies. A particular reason to carry out comparative studies has been the development of digital textbooks and open educational resources. A research anthology, *Digital Textbooks: What's New?* (Rodríguez et al. 2015), has reviewed the topic and confirms that there is a lack of data-driven research in textbook use; the vast majority of comparisons build upon theory-driven analyses of form and content and reflection on the potential of digitalisation. Although this finding might apply generally, it can be supplemented and nuanced. An extended search within computer and information sciences shows that some research in use has been emerging over the past few years, comparing the effects and perceptions of printed textbooks to those of digital textbooks and open educational resources.

A systematic review of 16 studies on open educational resources (Hilton 2016) and congenial studies on digital textbooks (Walton 2014; Daniel and Woody 2013; Kim and Jung 2010; Woody et al. 2010; Maynard and Cheyne 2005) reveals some effect studies (conducted using competence tests) and several perception studies. The essential findings are that there are few, if any, differences in learning outcome between the different types of learning materials. Students prefer printed textbooks (Walton 2014; Woody et al. 2010); both reading time and multitasking are significantly increased when students use electronic textbooks (Daniel and Woody 2013); and students perceive the quality of traditional learning materials as comparable to that of digital learning materials (Hilton 2016). Therefore, the main arguments for digital textbooks and open educational resources seem to be price and policy objectives to increase the use of ICT (information and communications technology) in education.

One exception to this is a large comparative study from South Korea (Kim and Jung 2010), where 80 classes with a total of 5255 students in years five and six of schooling were divided into two groups, one experimental and one comparative, who used digital and printed textbooks, respectively. Questionnaires were used to study the students' perceived educational outcome within five subjects: Korean, sociology, science, mathematics, and English. The result was that the digital textbooks had a positive effect on the students' attitude towards learning, which improved by 7.5 per cent compared to the control classes. According to the students' own reports, this positive effect could be measured in relation to several parameters: 'meta-cognition, self-regulated learning, self-efficacy, information exploration, problem-solving, intrinsic motivation, and self-reflection' (Kim and Jung 2010, 247). This effect included a certain amount of variation, however, as it depended upon academic subject, the student's level of performance, and the location of the school (rural/urban). Academic subjects seem to play an influential role as moderators and generative mechanisms, in that no significant differences could be measured in mathematics or English.

This suggests that there is a need for mixed methods studies to obtain a deeper insight into the influence of subject didactics and subject-specific cultures as important moderators for the effect of the digitalisation of learning

materials. This also constitutes a problem in itself, as it is difficult to compare digital and printed textbooks because the interface and interaction design of the digital textbooks has undergone considerable development in recent years. Likewise, it is problematic to make generalised statements about the extent to which digital textbooks promote deeper reading (Mardis et al. 2010).

A comparative study of perceived educational effects is like a snapshot which calls for a more precise analysis. Written representation and chapter progression often play a role in digital textbooks, in a manner similar to the printed textbook. There are, however, differences in not only the integration of aspects such as simulations, animations, interactive models, custom functions, and learning analytics with real-time feedback but also in the role of these features and their significance to the overall interaction design.

AN OVERVIEW OF METHODOLOGY

The two most widespread methods in research on textbook use are surveys and interviews, which use students, teachers, or supervisors as respondents. The findings of this type of research are insights into the choice of textbooks, attitudes towards textbooks, and an overview of the prevalence and frequency of textbook use. Roughly speaking, surveys and other quantitative studies offer a representative overview of use patterns, while semi-structured interviews and other qualitative studies provide an insight into the psychological and sociocultural dynamics that regulate this use.

Qualitatively speaking, interviews provide a deeper insight into the approach to textbooks and the criteria and procedures for selection and use that add further nuances to the role of the textbook. It is reasonable to assert that the textbook still plays a central role, which can be analysed using, for example, Hacker's six didactic functions, but this is not synonymous with textbook-driven teaching. One important moderator is what Lambert has named textbook pedagogy in order to highlight the importance of teacher attitudes and the ways that teachers use textbooks in the classroom (Lambert 2002; Horsley and Walker 2003; Walker and Horsley 2006).

Qualitative studies of this type point towards textbook pedagogy, including teachers' agency and interpretation of the curriculum and textbooks as important influencing factors. There is a tradition in Denmark to distinguish between three types of teachers based upon a parameter relating to agency: (1) the autonomous, who use textbooks as inspiration; (2) the partially autonomous/independent, who use textbooks for support; and (3) the dependent, who use textbooks to steer their teaching (Hansen and Skovmand 2011). This kind of typology calls for specific studies with observations of classroom use.

Qualitative studies of teacher user profiles, that is, profiles of teachers (teacher types) as users of textbooks, point to a need for more research, in part quantitatively, on the prevalence of the different user profiles. Students' user profiles may require both qualitative and quantitative methods to further our understanding. One contribution of the latter type is found in a comparative

study from the Netherlands, which compared 56 students aged 15–16 working in pairs on the topic of electricity with and without textbooks (Kanselaar et al. 2000). Although this was a small-sample study, it indicates a general problem that occurs; students in almost half of the cases did not have a strategy for their textbook use, but instead skimmed aimlessly through them in search of usable information. This problem was exacerbated by the fact that the students with textbooks discussed less than those without them, which in this study was explained by reasoning that the students perceive the textbooks as authoritative. In general, the study paints a picture which is problematic because the students have at this age not yet developed metacognitive strategies such as relating to the textbook as an artefact with several types of semiotic resources, evaluating and discussing the relevance and usefulness of the various resources, and posing critical questions to the textbooks and their authors, which is known from the QtA method, ‘Questioning the Author’ (Beck et al. 1997).

Along with the quantitative and qualitative methods of surveys, interviews, and observation, the use of diaries, the think-aloud method and eye-tracking are also important to consider in this respect. Diaries are used in various formats, from the classic, written diary to audio, image and video recordings. In a Finnish study, teacher diaries were used to document the ongoing evaluation of textbooks in relation to curricular objectives in upper secondary-level chemistry and to compare this with the students’ own evaluations (Ahtineva 2000). This method made it possible to chart a systematic difference in teachers’ and students’ perceptions of study tasks. The students evaluated the tasks from a motivational perspective, and the non-motivated students in particular wanted harder tasks. The teachers evaluated the tasks from a content perspective and wished for simpler tasks which could consolidate comprehension of the content.

The think-aloud method is similarly used in several formats including listening, audio recordings, combined audio and visual recordings, and in the margin notes technique, whereby the student regularly notes down meta-reflections connected with the use of textbooks. A good example of the think-aloud method is Maagerø and Skjelbred’s (2010) study of the reading of academic texts in mathematics and the natural sciences. Analyses of textbooks and classroom observations of the use of textbooks in class were combined with think-aloud sequences for selected students. Peculiar to the think-aloud method is that it provides insight into the students’ inferences, for example, when they have to interpret visual clusters with combinations of text, images, or diagrams. Maagerø and Skjelbred were then able to map out a number of problems that suggest that the students found it hard to use images and diagrams as semiotic resources in connection with their written representation when they were required to form inferences about the academic subject at hand. Diagrams in mathematics and the natural sciences especially challenged the students because they condensed information which the students found difficult to unpack again. It is this ‘unpacking’ that the think-aloud method makes accessible. An example would be the difficulty of understanding the three-dimensionality of a diagram which represents volume (Maagerø and Skjelbred 2010).

Moreover, eye-tracking has to be mentioned because it represents new technological and methodological ways of collecting and processing data on textbooks and other learning materials (Knight and Horsley 2014). Eye-tracking makes it possible to record eye movement and fixations and thereby produce data on learners' different patterns of attention while they are using learning materials, for example, what they are attending to, the order in which they do it, and the duration and distribution of time in relation to different types of tasks and texts in the material.

The different methods quite clearly contribute different aspects to the question, and in recent years there has been a tendency to integrate them in mixed methods studies in order to approach the use of textbooks as polysemantic artefacts in complex contexts. For example, new studies in Denmark combine text analysis of textbooks, document analysis of teachers' planning texts, semi-structured observations, interviews, and teachers' and students' scoring of the textbooks across several parameters. Such a combination of methods has made it possible to carry out quasi-experimental studies of textbook use in mathematics, which indicates that teachers are undertaking what we could call a 'retraditionalisation' of innovative textbooks in mathematics in that they use a station-based and collaborative textbook system with many tactile materials for a relatively traditional mode of teaching. This prioritises the transmission of content and the training of the individual student (Hansen et al. 2015). What is interesting in this context is that the teachers were not aware of the retraditionalisation prior to being presented with cases with detailed descriptions of interaction patterns for the lesson in question.

Another more recent example is Reichenberg's video-based observation studies (2015), in which the author looked at the use of textbooks and other learning materials in 74 lessons across four Swedish primary school classes. The observations formed the basis for a coding and regression analysis which confirmed but also challenged a number of hypotheses on the reasons for the teachers' decisions concerning the use of learning materials. Two factors are interesting in this context. First, it was particularly challenging to code the use because there is a lack of general terminology for physical actions that matches the basis for the coding of verbal discourse, for example, 'taking turns to talk' (Reichenberg 2015). Second, the study adds depth to the general causal model, which asserts that choosing textbooks over digital technology can be attributed to the traditional nature of the textbook and the preference for teacher-centred teaching practice (Belland 2009). Reichenberg thus tested for causal mechanisms which illustrated a need for control and suggests that professional recognition is vital for the use of learning materials. This is borne out by the fact that class size, academic subject, and collegial interaction are important for the teachers' decisions concerning use and that this varies from subject to subject; all this is interpreted as a proxy for the significance of 'the mechanism of the collegial focus due to interactions within the subject area' (Reichenberg 2015, 28).

AN OVERVIEW OF CENTRAL THEORETICAL APPROACHES

An overview of theoretical approaches contributes three central points to this discussion. It illuminates why there is a lack of research in textbook use, it points to the absences of theoretical reflection in quantitative studies, and it promotes reflection upon theoretical and methodological shortcomings.

The vast majority of research into textbooks consists of theory-driven text analyses and document studies whose primary focus is on content, only secondarily on form, and a lack of data-driven research on use. This can be explained by the fact that prevailing paradigms have been hermeneutical, with a focus on the textbook as a historical phenomenon and a textual construction. At the same time, it has been possible to observe a competing structuralist paradigm focusing on the textbook as a sign system and a linguistic manifestation.

The data basis has therefore been the form and content of the textbook *per se*, possibly supplemented with studies of use based on methods of text analysis. One example is Torvatn's (2004) study of text linguistics, which used rhetorical structure theory (RST) analysis of the textual structure of textbooks and supplemented this with interviews with students and observations of the students' understanding of the textbooks. This combination of methods made it possible for her to confirm the significance of the rhetorical construction; for example, the suggestion that information ought to be placed at the top of a text hierarchy, preferably supported by several different 'satellites' with added information if one wishes to promote understanding (Torvatn 2004). An experimental variant of this is Reichenberg's (2000) comparative study of students' reception of various text versions. In this study, two original texts were reworked into three versions to study the significance of clear causality and the author's voice in textbooks. The results showed that an explication of the two characteristics, causality and authorial voice, together has a positive effect on comprehension.

The tradition of anchoring empirical studies of textbook use in methods and approaches, which has developed in relation to analyses of form and content, has meant that the research has largely been affirmative and applied on the basis of premises drawn from textual methodology. It has thus often appeared as supplemental to an analysis of the potential of a textbook.

Parallel to this tradition, we can observe two complementary tendencies. Quantitative studies are not particularly explicit about their theoretical approach, except when it comes to conceptual clarity and methodical precision, which are important for the validity and reliability of the study. Qualitative studies are more explicit about their theoretical approach, and they find it difficult to break away from a text-analytic tradition.

The theoretical basis for an exploratory approach can be found in, for example, sociocultural theory and the conceptualisation of technologies and materials as artefacts that play a significant and constitutive role in human cognition and patterns of action (Vygotsky 1997; Wartofsky 1973; Cole 1996). Vygotsky

(1997) uses the concept of an artefact to describe how a person does not simply create and give a form to things but is also shaped by his or her interaction with them. This means that we must understand a person based upon his or her actions with mediational means. Wertsch describes people as ‘individual(s)-acting-with-mediational-means’ (Wertsch 1991, 12). With this theoretical framework, we avoid a splitting of the person from his or her social and material surroundings, including textbooks.

INNOVATIVE RESEARCH POTENTIAL AND OPEN QUESTIONS WITHIN THE FIELD OF TEXTBOOK USE

As has been noted several times earlier in this chapter, it is significant that research into textbook use has developed as a more independent research field so that it can be allocated more weight and become more than merely a supplement to analyses of form and content. The goal ought not solely to be one of a triangulation of form, content, and use, because triangulation emerges within a positivist paradigm and therefore strengthens a tendency to assume that we are studying one and the same object on the basis of various qualitative and quantitative methods.

If we take the sociocultural approach seriously, then textbooks ought to be studied in their use as multifaceted and polysemantic artefacts which are difficult to determine in advance by form or content analysis. For this purpose, we can find inspiration in studies that prioritise the observation of practices and the documentation of interaction patterns. Some examples are the video-based observation studies conducted in Australia by Horsley and Walker (2006) and, more recently, the video-based observation studies conducted in Sweden by Reichenberg (2015), as well as Ahlrichs et al. (2015) and their extended ethnographic observations in German history classrooms.

Typical of studies of this type is that data on processes and interaction patterns form the basis for more explorative studies of textbook use. This has made it possible to map new correlations between students’ comprehension of a subject, teaching methods, and learning materials.

These examples can serve as the basis for a more general methodological point with a view to future research into the use of textbooks. The assertion is that the mixed methods approach can enrich the research field, if we are dealing with a combination of methods where the centre of gravity is distributed across several methods. This assertion is strengthened with reference to Greene’s taxonomy for the combination of methods (Greene et al. 1989). The best-known combination is triangulation, which looks for convergence, confirmation, and agreement between results produced from different methods. The affirmative approach to textbooks which focuses on text analysis is an example of this. Moreover, Greene et al. (1989), on the basis of a larger-scale review, point towards four other mixed methods designs which have innovative research potential:

- *Complementarity* seeks elaboration, enhancement, illustration, and clarification of the results generated by one method with the results from the other method; an example might be qualitative studies of the generative mechanisms that moderate the perception of the dominant role of textbooks as identified in quantitative studies.
- *Development* seeks to use the results from one method to help develop or inform the other method, for example, design analyses of digital learning materials, which are the basis for the codification and classification of learning materials into different types.
- *Initiation* seeks the discovery of paradox and contradiction, new perspectives, and new frameworks, for example, extended ethnographic observations of heterogeneity in practice, where learning materials can act as sources of the reproduction, destabilisation, and interruption of layers of understanding in the classroom, which can be difficult to map with quantitative methods.
- *Expansion* seeks to extend the breadth and range of inquiry by using different methods for different components of an inquiry, for example, a combination of qualitative and quantitative methods for researching the ecosystem of the textbook and its importance for centripetal and centrifugal dynamics in the planning, implementation, and evaluation of teaching in different contexts, including professional learning communities, lectures, group work, homework, and collaborative problem-solving.

Common to these four designs is that they combine methods contrapuntally so that they can be used exploratively to develop, expand, and problematise the research field. They can thus be used to both complement and challenge triangulation, and they can also serve to establish a meta-perspective on the existing research in textbook use and to point towards ways in which we can expand the field to cover other types of learning materials. The text methods can still be justified, but they are assigned another function in connection with use studies in which they are employed to form hypotheses, for example, or more broadly to formulate a set of assumptions and hypotheses (also called a theory of change) as a basis for both predictive and exploratory studies.

One crucial element in such a development of the research field is the epistemology on which it is based. The hermeneutic anchoring in text analysis is methodologically biased and has a tendency to emphasise the subjectivity and the potential of the textbook from a first-person perspective. On the other hand, quantitative mapping of amounts, types, and frequencies is biased in another way and tends to emphasise the objectivity, prevalence, and dissemination of textbooks from a third-person perspective. A more substantial combination of methods thus requires a dual epistemology which can combine these perspectives because textbooks appear both as subjective experiences and objective materialities and structures in the world. It is this duality to which contrapuntal studies in the use of textbooks and, more generally, of learning materials can approximate as an alternative and more holistic approach, which

conceptualises textbooks and learning materials as mediating artefacts that cannot be adequately described from either a solely subjective or a purely objective perspective. A substantial combination of methods and a dual epistemology opens up vistas for new research questions in which the potential of textbooks is understood as a matter of interactional affordances or, in other words, as emergent phenomena which cannot be determined by text analysis alone.

NOTES

1. A special thanks to the late Mike Horsley, who generously helped me with inspiration and feedback on this chapter.

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Textbook Effects and Efficacy

Yvonne Behnke

Textbooks largely determine not only what topics and ideas are taught in the classroom but also the way they are presented to students (Stern and Roseman 2004, p. 539). Thus textbooks affect learning and teaching in many different ways. This chapter aims to provide a brief overview of current research approaches on the effects and efficacy of textbooks, aligned to the major areas of research in this field. In doing so, it summarises empirical evidence produced in different fields dedicated to textbooks and educational media. The emphasis here is on experimental and quasi-experimental studies.

CURRENT RESEARCH APPROACHES

Textbook Language

Language influences the ways in which people construct their world, values, social realities, and knowledge (cf. Ott 2014, p. 254). How language in textbooks may affect students' knowledge construction is therefore one major research area in textbook research that covers various scientific fields, such as linguistics (i.a. Ott 2014), language studies (i.a. Hadley 2013; López-Jiménez 2014), and education (i.a. Reichenberg 2013; Oleschko and Moraitis 2012; Berkeley et al. 2012; Linderholm et al. 2000). Research on reading comprehension is located in this area because reading comprehension is one central factor in the construction of knowledge through language and, in turn, crucial for learning with textbooks. Ways in which learners can be supported in reading comprehension was investigated, inter alia, in an experimental study by Reichenberg (2013). The findings of this work show that readers of average ability performed better when reading authentic texts, whereas for readers of

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E. Fuchs, A. Bock (eds.), *The Palgrave Handbook of Textbook Studies*,
https://doi.org/10.1057/978-1-137-53142-1_28

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below-average ability, text comprehension did not increase when reading ‘reader-friendly’ texts. This is in line with Linderholm et al. (2000), who reported that both readers of average ability and readers of below-average ability benefited from causal structure repairs only with difficult texts. In this context, Oleschko and Moraitis (2012) propose a *linguistic sensibility* approach to fostering learning with textbooks in heterogeneous learner groups. These studies comprise only an exemplary section of this broad research field.

Further research has been conducted, for instance, on foreign language learning (Hadley 2013; López-Jiménez 2014) and the appropriateness of text structures in history textbooks (Berkeley et al. 2012). The introduced studies suggest two things in general. First, that both readers of average ability and readers of below-average ability prefer interesting, stimulating, narrative, and descriptive texts (Reichenberg 2013). Second, to foster learning and promote motivation, textbook language should contain clear, accurate, coherent, and consistent structures (Berkeley et al. 2012) and avoid oversimplification.

SOCIO-CULTURAL AND SOCIO-ECONOMIC FACTORS AND TEXTBOOK EFFECTS

Gender Representations in Textbooks

Textbooks are fundamental to the learning of gender systems as they can contribute to the legitimation of gender roles (Brugeilles and Cromer 2009) and may serve as a source for the acquisition of gender role models (Nofal and Qawar 2015). UNESCO (Brugeilles and Cromer 2009) has produced a methodological guide for promoting gender equality through textbooks. Müller (2012) revealed that in recent years several German textbook publishers provided primary school textbooks with gender-specific colour coding, topics, and learning tasks to support the diverse interests and special learning needs of male and female students. Müller (2012) argues textbooks may contribute to reinforce gender stereotypes. This is in line with Blumberg (2015) who still identified the presence of gender bias in textbooks virtually worldwide.

Recent studies examining how gender representations in textbooks affect students’ achievement came to varying conclusions. Good et al.’s (2010) experimental study with US high school students demonstrated that female students had higher science comprehension after viewing counter-stereotypical images (female scientists), whereas male students had higher comprehension after viewing stereotypical images (male scientists). In contrast, Foulds’ (2013) interview study analysed Kenyan primary students’ gender perceptions of textbook images and revealed a continuum of gender stereotypes, particularly manifest when images of gender roles were incongruent with students’ realities. Therefore, it can be concluded that the effects of gender representations in textbooks are influenced, inter alia, by students’ cultural and social context. Hence, Foulds argues, on the basis of the Kenyan cultural context, that any effort to alter gender perceptions must come first from students’ lives and then be brought into the classroom.

Socio-economic Factors

Textbooks have been proven to be a rather cost-effective way of improving student attainment (Frölich and Michaelowa 2005). This fact notwithstanding, many countries, specifically in Africa (Dremmeh 2013), still face a shortage of textbooks. In this context, Frölich and Michaelowa (2005) investigated peer effects of textbooks owned by classmates in sub-Saharan Africa and reported that textbooks have a very wide reach through book sharing and knowledge sharing.

Fischer et al. (2015) investigated the effects of no-cost open digital textbooks on the achievement of students from lower socio-economic backgrounds in the USA. The study revealed that due to the cost savings associated with open educational resources (OER), students in courses using OER enrolled in courses worth a significantly higher number of credits in the next semester, while student achievement was equal to courses using commercial textbooks. Enrolment intensity is an indicator of student progress towards graduation (Fischer et al. 2015). These studies, then, emphasise the importance of cost-effective access to textbooks for student achievement.

Overall, the studies on gender representation suggest that the effects of gender representations in textbooks on students' achievement are influenced by cultural, social, and ideological structures featuring in students' daily lives (Foulds 2013; Good et al. 2010). Consequently, further research on 'gender fair' textbooks is required, as they may support the remedying of gender bias (Good et al. 2010).

In addition, the UNESCO Gender Review 2016 (GEM Report) emphasises the role of education (and textbooks) in fostering gender equality and women's empowerment. Moreover, the 2016 GEM Report remarks on the need for more comprehensive data on gendered aspects of curricula, textbooks, assessments, and teacher education (UNESCO 2016).

TEXTBOOK DESIGN

According to Morgan (2014), well-designed textbooks have the potential to make learning more fun, lasting, and meaningful and may actively engage learners' cognition in many ways, through such mechanisms as visual processing, analytical thinking, posing questions, testing hypotheses, and verbal reasoning.

Theoretical approaches for learning-effective textbook design principles can be found, *inter alia*, in visual communications and psychology.

Wertheimer's (1923) Gestalt theory summarises visual perception principles such as figure-ground, proximity, similarity, and closure which are today well-established media design principles.

Mayer (2009) developed the Cognitive Theory of Multimedia Learning, supplemented by 12 principles of instructional design which discuss how people learn effectively from combinations of static/dynamic images and written/spoken text. Mayer's principles of multimedia learning include findings from Wertheimer's Gestalt theory.

Information designers (i.a. Tufte 1990; Horn 1999) developed concepts to visualise and communicate complex information (data or ideas) in a clear, memorable, and understandable manner that attracts curiosity and attention (Knemeyer 2006; Smiciklas 2012; Uyan Dur 2014). Gestalt theory, multimedia theory, and information design can provide methodological tools for approaching textbook design, which includes layout, typography, and images.

Layout

Studies investigating students' image-text comprehension have been primarily based on Chandler and Sweller's (1991) cognitive load theory, Mayer's (2005) cognitive theory of multimedia learning (CTML), and Schnotz's (2005) integrated model of text and picture comprehension. Within this context, Richter et al. (2016) examined signals (pictorial, such as colour coding, and deictic, such as text references) highlighting correspondences between text and pictures to foster content comprehension. The findings support the signalling principle (CTML), in particular for learners with limited prior knowledge. Eitel and Scheiter (2014) investigated *sequencing* and report that it is not the sequence of text and pictures that affects learning but rather underlying conditions, such as prior knowledge or complexity. In addition, studies have revealed students' difficulties in interlinking complex image-text relations (Hochpöchler et al. 2012; Schnotz et al. 2011).

The efficacy of textbook layout may be influenced by resource style, learning objectives, and learner characteristics. However, clarity, coherence, consistency, and aesthetics can be principles that learning-friendly layouts should take into account. This is in accord with LaSpina (1998), who argued that good textbook design provides visual guidance through the textbook content by means of a well-articulated layout in which clarity and complexity are not mutually exclusive.

Typography

The potential influence of typography on learning with textbooks is currently under discussion. Within this context, Rummer et al. (2015) have examined the effects of hard-to-read (disfluent) fonts on students' achievement. Whereas previous studies revealed the presence of a more profound level of cognitive processing for text in disfluent fonts (disfluency effect) (Diemand-Yauman et al. 2010), Rummer et al. did not endorse the disfluency effect. Rummer et al.'s findings are consistent with those of Meyer et al. (2015), who conclude that 'disfluent fonts don't help to solve math problems' (Meyer et al. 2015, p. 16). Further, these two sets of findings are in line with Willberg and Forsmann's (1997) principles of 'reading typography'.

Images

Crucial competencies related to the construction of knowledge from images are the capacity to decode images, the ability to interlink images with related

content, and visual attention to images. Behnke (2015) investigated students' visual attention while observing textbook spreads. The study revealed little attention to photographs and a marked focus on text. This is in line with Schnotz et al. (2014), who investigated learners' focus of attention and choice of text modality in multimedia learning (modality effect) and found that learners frequently show tendencies to ignore pictures. Pintó and Ametller (2002) also report difficulties in interpreting textbook images, stating: 'Teachers should be aware that an image is worth a thousand words only if the student knows the codes to interpret images' (Pintó and Ametller 2002, p. 341). Equally, Testa et al. (2014), and Bétrancourt et al. (2012) revealed students' difficulties in decoding graphic visualisations.

Therefore, it can be assumed that, notwithstanding the omnipresence of visuals in everyday life, students face challenges when learning with images. Consequently, competencies in decoding visuals (visual literacy) should be taught more thoroughly and practised regularly (Behnke 2016; Schüler et al. 2015; Scheiter et al. 2015; Testa et al. 2014). Visuals and image-text combinations in textbooks should be designed and utilised in a manner more conducive to supporting learning. In this context, Schnotz et al. (2014) suggest guiding learners towards picture analysis by using paragraphs of text related to the illustrations featured.

Design, then, can be crucial for learning with textbooks; a design which harmonises with the textbook's content and has the learner and their needs in mind may facilitate learners' understanding of the meaning of information provided (Holmqvist Olander et al. 2014). Purposeful design includes, among other aspects, the instructional, educational, technical, and aesthetic quality of visuals (Pettersson 2015), the clarity and coherence with which the information in graphic visualisations is presented, a layout that guides the reader through the resources and enables them to identify relevant information, visual and textual linking between related materials, and reader-friendly typography.

COGNITIVE, AFFECTIVE, AND BEHAVIOURAL EFFECTS OF TEXTBOOKS

Recent studies have investigated cognitive and affective aspects of multimedia learning with the aim of integrating emotion, motivation, and attitude into cognitive processing models (Park et al. 2014). The theoretical background builds on Moreno's (2006) *cognitive affective theory of learning with media* (CATLM), which is an extension of Mayer's CTML with the addition of motivational and affective aspects, self-regulatory skills, and learner characteristics (Park et al. 2015).

Emotional Design

The *emotional design hypothesis* assumes that visually appealing learning materials support cognitive processing (Mayer and Estrella 2014). Within this con-

text, studies examining design principles supportive of learning revealed that well-designed learning materials may foster positive emotions and comprehension (Park et al. 2015; Plass et al. 2013) and reduce the perceived difficulty of learning tasks (Um et al. 2012). Conversely, the ‘cognitive load theory’ put forward by Chandler and Sweller (1991) assumes limitations in learners’ working memory and suggests the avoidance of decorative elements to reduce cognitive load. Magner et al. (2014) have investigated whether decorative illustrations trigger learners’ interest and engagement or distract the learner. This study found that decorative illustrations distracted students with lower levels of prior knowledge, whereas students with higher prior knowledge benefited. We might then conclude that well-designed learning materials containing meaningful and purposefully implemented decorative elements may support learning if learner characteristics and learning objectives are taken into consideration.

Achievement

Approaches to the improvement of student achievement with textbooks have been proposed, for example, by Akyüz (2004), who investigated how textbook style (conceptual) and the K–W–L reading strategy (K–W–L = what I know, what I want to learn, what I learnt) affect students’ achievement and their attitudes towards science. He reported that conceptual textbook text supported positive attitudes, K–W–L increased achievement, and their combination boosted both positive attitudes and achievement.

Approaches to improving students’ attitudes towards science have been proposed by Foley and Mcphee (2008) and Willard and Brasier (2014). Foley and Mcphee (2008) noted that students in ‘hands-on’ classes had a more favourable attitude to science than students in purely textbook-based classes. Willard and Brasier (2014) compared the effectiveness of primary literature to that of traditional textbooks in university science classes and reported that first-year students are capable of making great progress through the use of primary literature. They assume that introducing students to primary literature early on in their career can increase enthusiasm for science and improve their confidence with scientific methodologies.

Djokic (2015) investigated how an innovative mathematics textbook whose purpose was to support RME (Realistic Mathematics Education) affected students’ learning outcomes. The results suggest that RME positively affects students’ achievement in geometry by encouraging geometrical and systematic thinking. Slavin et al. (2008), by contrast, noted that schemes focusing on day-to-day teaching practices and well-structured co-operative learning had a greater impact on student achievement than those emphasising textbooks.

Beishuizen et al. (1994) investigated the influence of instructional support (focusing on metacognitive or cognitive levels of task accomplishment) and task constraints (exam preparation or searching for a particular text unit) on the way students with different learning styles (deep processing versus surface

processing) completed a task. The study revealed that students who combined self-regulation with deep processing and students who combined external regulation with surface processing outperformed students with complementary combinations of regulation style and processing style.

Skills Development

Modern textbooks are called upon to go beyond the imparting of subject matter to students and to help teach competencies, skills, and ‘powerful knowledge’ (Young 2011), such as key scientific concepts. The current state of affairs barely does justice to this lofty ambition; studies have revealed that US textbooks provide little support for the acquisition of key scientific concepts (Stern and Roseman 2004); Finnish textbooks fail to foster global learning (Pudas 2013); Turkish English-language textbooks do not develop all four key language skills (listening, reading, speaking, writing) (Dogan and Zekiye 2015); and Iranian textbooks do not provide socio-cultural constructs for the promotion of life skills (Khosravani et al. 2014). In other words, numerous textbooks do not yet satisfy the requirements of modern curricula in terms of attending equally to the acquisition of competencies, important skills and ‘powerful knowledge’.

This work has found that innovative textbooks could improve student achievement if they address day-to-day teaching practices and well-structured co-operative learning. Engaging students more closely in research activities and including primary literature could be useful approaches to textbook improvement. However, the studies also highlight the importance of teacher preparation and the need for further research. To conclude this section, we might observe that it is crucial when designing learning materials, and critical to understanding and investigating learning, to give due consideration to affective, behavioural, and cognitive variables (Park et al. 2014).

DIGITAL TEXTBOOKS

Technological innovations, such as digital textbooks, influence education in various ways (Stone and Baker-Eveleth 2013, p. 984). This section summarises findings and methodological approaches relating to the efficacy of digital textbooks.

Learning Outcomes

Investigations comparing students’ attainment through digital textbooks with that achieved using print textbooks reported differing results. Daniel and Douglas (2013) emphasise that although students using electronic media generally took more time to read a text than those reading from traditional textbooks, student achievement was similar. Likewise, Szapkiw et al. (2013) revealed no difference in learning outcomes between digital and print formats, but higher perceived levels of affective and psychomotor learning for digital

textbooks. Conversely, a meta-analysis from South Korea reported limitations of digital textbooks in terms of increasing student attainment, despite their encouragement of motivation (Jang et al. 2015). Within this context, Jang et al. (2015) highlighted classroom practices as crucial to students' achievement through digital textbooks.

Students' and Teachers' Attitudes to Digital Textbooks

Technological innovations cannot be successfully implemented without considering users' attitudes (Joo et al. 2014, p. 95). De Oliveira et al. (2014) investigated Spanish primary school students' and teachers' attitudes to digital textbooks. The classroom observation they conducted revealed that whereas the students valued the ease of access to information with which a digital textbook provided them, the teacher rated the textbook negatively because of the limited accessible information it provided. Nevertheless, the students continued to make use of printed textbooks as scaffolds supplementary to digital resources.

Studies with university students reported a largely negative attitude towards digital textbooks. Yalman (2015) established Turkish students' preference for print textbooks. Douglas et al. (2010) and Daniel and Douglas (2013) noted that digital textbooks were unpopular with US college students. Students' reticence towards replacing print textbooks with digital textbooks was observed in Ghana (Asunka 2013).

This leads us to the question of the factors that affect the acceptance or otherwise of digital textbooks. In this context, Cassidy et al. (2012) note that while college students do not favour e-books over printed books, they nevertheless value their convenience. The authors assume that many students might be still unaware of e-books, whereas de Oliveira et al. (2014) find that acceptance of digital textbooks is affected by the institutional culture in which they are embedded. According to Joo et al. (2014), student subjective norms relating to environmental variables, student self-efficacy, perceived ease of use, and perceived usefulness affect students' attitude to digital textbooks.

Technology-Enhanced Learning

Today's school students are 'digital natives'; they have grown up with gadgets and constant connection to the Internet (Boeckle and Ebner 2015, p. 1510). Researchers are investigating the ways in which these gadgets might be integrated into teaching and learning. Thomas (2014) examined how textbook format (game-based versus traditional) affected students' mental effort and time spent on a task. He reported that students spent significantly more time on tasks carried out through game-based textbooks, whereas differences in mental effort were not evident. Equally, Farha (2009) reported a tripling in scores on learning outcomes for game-based learning compared with learning via traditional textbooks. Likewise, an investigation of students' achievement

through mobile learning (tablets) reported that mobile learning outperformed traditional textbooks in learning outcome and cognitive load (Shadiev et al. 2015). Fotaris et al. (2016) found within a quasi-experimental study that the application of a multidimensional gamified problem-based learning approach positively affected students' learning experience, motivation, recall ability, and performance.

These findings suggest that technology-enhanced learning can be beneficial if it is meaningfully integrated in learning environments using strategies such as the embedding of a problem-based learning approach linked to effective pedagogy (Fotaris et al. 2016; Boeckle and Ebner 2015).

Digital textbooks have the potential to become effective tools in learning and teaching because of their motivational, communicative, and technological capabilities. However, their effectiveness is influenced by users' acceptance of these media, their perceptions of their usefulness and perceived usability (Joo et al. 2014). (Further aspects of digital media are explored in the chapters on theory and methods as well as in the new directions chapter).

One possible reason for the low acceptance of current digital textbooks is that they are effectively, and primarily, enhanced digitalised copies of print textbooks. Acceptance of digital textbooks may thus increase if they differ from printed textbooks in terms of their design, usability, the didactic concepts behind them, and features they have that support learning.

Ryan and Deci's (2000) *self-determination theory* supports these findings by revealing three intrinsic motivational factors effective in learning: competence, autonomy, and relatedness. Competence relates to the construction of self-efficacy. Autonomy (in learning contexts) is described as the ability to strive towards one's own goals, interests, and aptitudes. Relatedness is described as the experience of interacting with and being connected to others (Hense and Mandl 2012; Fotaris et al. 2016).

Therefore, useful features of digital textbooks should include interactivity, connectivity, customisation, differentiation, immediate feedback, or playful elements meaningfully embedded in the learning context and as part of a thought-through and consistently implemented didactic concept. Possible approaches could be found in technology-enhanced learning and game-based learning.

SUMMARY OF CURRENT RESEARCH APPROACHES

Current empirical research dedicated to textbooks and educational media can be summarised in five research directions.

The first of these relates to linguistic aspects, such as how language in textbooks may affect students' knowledge construction, reading comprehension, and foreign language learning. The second revolves around effects of socio-cultural and socio-economic factors, such as gender representations and effects of access to or shortages of teaching materials.

Third, there are the effects of visual textbook parameters, such as design, layout, typography, images, and information design, on learning processes.

Fourth are cognitive, affective, and behavioural effects such as student achievement, learning style, knowledge and skills acquisition, cognitive development, and assignment. Fifth are new technological and/or methodological approaches, such as digital learning environments, technology-enhanced learning, or game-based learning.

However, numerous scientific areas are currently investigating the effects and efficacy of textbooks via manifold approaches.

Only a limited set of studies covering a range of research topics on textbook effects and efficacy, such as the influence of textbooks on pedagogical practices in classrooms, were identified. This suggests a need for further exploration and indicates potential new directions in research.

POTENTIAL NEW DIRECTIONS IN RESEARCH

Several of the studies discussed earlier in this chapter had particular limitations, which may highlight possible further directions for research in this field. First, the research population consisted to a substantial extent of university students. However, textbooks may affect school students' learning differently due, for instance, to lower levels of prior knowledge or their use of less elaborate learning strategies. Second, numerous studies in this field were conducted under experimental conditions. Research on learning-effective textbook design, where it takes place in the area of educational psychology, is largely based on theories of cognitive information processing such as cognitive load theory (Chandler and Sweller 1991) and the cognitive theory of multimedia learning (Mayer 2005). However, more recent empirical studies do not always endorse all aspects of these theories (Jarodzka 2016). Several observed phenomena, such as the modality effect in multimedia learning, were found only in specific conditions (Schnotz et al. 2014). As a consequence, these theories should be tested in relation to new findings on perceptual processes underlying learning and confirmed by research in real learning settings such as the classroom (Jarodzka 2016).

Third, in many cases, the material examined consisted of experimental educational media rather than 'regular' textbooks. Modern textbooks exhibit complex image-text relations and a broad variety of visuals. Therefore, the sole use of experimental test material, which to a considerable extent is optimised to meet specific test conditions, may fail to detect additional factors influencing students' learning with textbooks. The implication of this is the advisability of conducting more classroom studies as well as research on 'regular' textbooks. This is in line with Cheng et al. (2015), who noted a research gap in classroom-based research, particularly in primary and secondary schools (see also Hansen's chapter in this volume).

Fourth, various studies among those analysed here have mentioned limitations regarding learner characteristics. Consequently, there is a need for further investigation of the influence of learner characteristics such as learning style, previous knowledge, and individual preferences on the efficacy of textbooks.

This is of particular importance because knowledge acquisition from textbooks is a complex process that may be affected by various factors, such as students' interests and learning strategies, media-specific skills, design preferences, and the effects of textbook design on learning (Schnotz et al. 2011; Ainsworth 2006; Behnke 2016).

Finally, interdisciplinary approaches remain underrepresented in research on textbook effects, and further investigation is required in relation to the visual analysis of textbooks (cf. Morgan 2014); there is also a need for empirical studies of textbook effects (cf. Fuchs et al. 2014).

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Textbook Practices: Reading Texts, Touching Books

Georg Kolbeck and Tobias Röhl

Textbooks are not mere collections of content but textual artefacts that are in practical use in the classroom. In this chapter, we highlight the consequences of this apparent commonplace for (qualitative) textbook research and delineate a programme of research that focuses on practices. The notion of practices refers to developments in social theory termed the ‘practice turn’ (Reckwitz 2002). For research on the use of textbooks, this entails two consequences: (1) reading a textbook is a situated interpretative process involving different actors and (2) like other practices, textbook use is a bodily activity that depends on material qualities of artefacts. Textbooks and their textual content are thus not static entities that simply convey a message but are materially shaped textual artefacts that are adapted, transformed, contested, subverted, or may even be banned from the classroom.

This chapter will map research on textbook practices that points in these directions. In doing so, we will focus on research based on qualitative interviews and observations. We identify two shifts denoting an increasing recognition of practices in textbook research: (1) a shift from static content to dynamic texts in use and (2) a shift from *textbooks* to *textbooks*—that is, from written language to the material artefact. Then, we conclude the chapter by outlining possibilities for further research on textbook practices.

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READING TEXTS: FROM STATIC CONTENT TO DYNAMIC TEXTS IN USE

Textbooks are still often researched solely in terms of their content. Such studies give important insights into political (see, for instance, Torsti 2007; Khamsi and Han 2014) or pedagogical issues (an example is Fan and Zhu 2007) implicit in these texts. By isolating textbooks from their classroom use, however, this strand of research often fails to account for the dynamic nature of texts and treats the textbook as a ‘static collection of ideas’ (Weinberg and Wiesner 2011, p. 50). Consequently, the relationship between text and reader and text reception is not in the focus of this approach. In contrast, authors in literary theory (such as Barthes 1975), cultural studies (like Hall 1996), and social semiotics (an example is Hodge and Kress 1988) argue that the reading of texts is in fact a complex interpretative process in which meaning is decoded and made anew. There is thus, this research argues, an insurmountable gap between the textbook and how it is used (Cronbach 1955), and the intended reader of the textbook can never be identical with its empirical reader (Weinberg and Wiesner 2011). Accordingly, the text and its performance in the classroom have to be distinguished and each researched in their own right.

The Teacher as a Reader

In this vein, a number of authors argue for extending research on textbooks beyond content analysis and for an investigation of their actual use (Fuchs et al. 2014, p. 23; Matthes 2014, p. 21; Horsley and Walker 2005, p. 48; Repoussi and Tutiaux-Guillon 2010, p. 155). Many studies that share this performative sentiment see the teacher as a mediator between the text (‘intended curriculum’) and its use in the classroom (‘enacted curriculum’) (Remillard 2005). How teachers mediate the textbook depends on the teachers’ personal beliefs about appropriate instruction, the time available, and the students’ capabilities (Freeman and Porter 1989). In their multinational observational study on mathematics classes, Pepin and Haggarty (2001), for example, found that in German schools, the textbook is used intensively by teachers who believe their students to be not very academically capable. When students are perceived to be more competent, mathematical ideas are developed by the whole class and there is less reliance on the book. English mathematics teachers, on the other hand, generally use the textbook more frequently due to a perceived lack of time and a more constrictive educational environment in which schools are expected to deliver measurable results.

Brown (2009) investigates how teachers use curriculum materials in middle-school science classes in the USA. In his observations, he identifies three typical styles of use. In ‘offloading’, teachers rely on the instructions provided by the curriculum materials (such as textbooks). Other teachers practised ‘adapting’ of materials to the specific context and to both their own preferences and those of the students. ‘Improvising’ refers to a minimal reliance of teachers on the

materials of instruction. Sikorová and Cervenková (2014) similarly identified different styles of textbook use, based on observations of and interviews with teachers. Unlike earlier studies (Sosniak and Stodolsky 1993), they found that textbook use varied according to the subject taught. English teachers tended to systematically follow the textbook through the course of the lesson and the school year. Mathematics teachers, on the other hand, used it as only one out of several sources they drew upon in conducting their lessons. Teaching experience, however, did not correlate with a specific style in this study. This finding notwithstanding, a study on mathematics teachers' use of textbooks (Taylor 2013) did reveal a change in behaviour over time when teachers participated in professional development courses on curriculum use; they shifted from a teaching style in which they closely followed the textbook to a more open style in which the textbook was heavily adapted to meet their and their students' specific needs. On a global level, most teachers use textbooks mainly to prepare their lessons and only loosely follow its structure (Pingel 2009, p. 46). Close adherence to the textbook in classroom instruction is, however, more prevalent in countries with a rigid curriculum.

When teachers make use of the textbook in the classroom, they pursue different goals. In his research on British geography classes, Lambert (1999) identified three roles that teachers ascribe to their textbooks: (1) some teachers employ the textbook to discipline their students, such as by making extensive use of it when their class behaved badly ('classroom management role'); (2) others see the textbook as providing curricular topics and use it to structure their lessons, by, for instance, closely following curricular sequences in the book ('curriculum mediator' role); and (3) many teachers, however, see themselves as the main source of curricular knowledge and relegate the textbook to a mere supporting role, for example, by making only selective use of texts provided by the book as an optional source of information ('curriculum support' role). Lubben et al. (2003) criticise the association of the textbook with an authoritative voice and report that Namibian science teachers use textbooks to consolidate knowledge, thus (unintentionally) limiting students' opportunities to develop critical thinking (p. 122). In their observation of Canadian student teachers, Nicol and Crespo (2006) found that the role assigned to the textbook changes during teacher education. Before their practical placements, student teachers expected to be able to rely heavily on their mathematics textbooks in the classroom. Once in placement, however, they were confronted with a set of unexpected practical questions and had to adapt their use of the textbook accordingly.

Besides teachers' pedagogical style, their beliefs about their students' intellectual abilities, and the goals they pursue in the classroom, there are also political and cultural issues which influence their use of the textbook. Using interviews and classroom observations, Hintz (2014), for example, showed that social studies teachers only make intensive use of innovative curricular materials when their political beliefs align with those depicted in their textbook. In his historical account of the portrayal of nationhood in Argentinian,

Mexican, and Peruvian textbooks, Vom Hau (2009) similarly traces how teachers position themselves politically towards textbooks. Because they politically opposed Peronist notions of nationhood, which entailed an emphasis on mass culture, Argentinian teachers of the 1940s and 1950s had a strained relationship with textbooks containing the Peronist curriculum. Consequently, they only used them for limited time periods and selected tasks (such as spelling exercises) in their classrooms, thus minimising students' contact with them. In contrast to this, Mexican teachers in rural areas in the 1930s embraced the concept of an agrarian nation which was present in the textbooks of Cardenas' Mexico. Teachers thus used the textbooks deliberately and frequently in their classes. Textbook use by teachers, then, is framed by a socio-political context. Opposition towards a textbook often results in selective use of it or even refraining from using it at all.

Teachers thus not only adapt textbooks according to pedagogical notions but also in accordance with political and cultural concerns—for example, the question of how gender issues should be represented. In doing so, teachers not only choose textbooks and select, modify, or supplement texts (Abraham 1989) but also frame them verbally. In their observations of foreign language classes, Sunderland et al. (2001), for example, identify different ways of 'talking around the text'. Like parents reading stories to their children, teachers shape how students respond to a text. By verbally subverting, endorsing, or simply ignoring the portrayal of gender roles, teachers transform texts in line with their own beliefs about gender. Teachers using textbooks are thus not only mediators of an educational curriculum but also of cultural norms and beliefs and therefore ultimately of gender, class, and racial identities. Teaching with the textbook, then, is not a simple transmission of curricular content, but in fact educational and cultural meaning-making that builds on pre-established narratives (Gudmundsdottir 1991). Teachers adapt and modify textbooks according to their (and their students') anticipated needs, their disciplinary culture, their political and cultural beliefs, and the wider societal contexts in which they are located.

The Student as a Reader

By analysing the relationship between the textbook and the *teacher*, the aforementioned studies address the problem of how curricula make their way into the classroom through the authoritative figure of the teacher enacting the textbook. The relationship between textbooks and *students*, however, often suffers from neglect and there are only a few studies that deal with the use of textbooks by students. Analysing interviews, classroom observations, and markings in students' books, Rezat (2013) identifies a set of typical schemes of ways in which students use their mathematics textbooks. Students who rely on 'position-dependent practicing' suppose that tasks in the book that lie adjacent to each other might be similar. In 'block-dependent practicing', students assume that the mathematics textbook is thematically organised in blocks (such

as chapters). Accordingly, they pick tasks from a certain block only, assuming that they are connected to other tasks from the same block. In ‘salience-dependent practicing’, tasks are chosen by the students on the basis of visual features that appear to be similar to those of the tasks introduced by the teacher. Lithner (2003) made similar observations among university students of mathematics. In his video recordings, the students often try to tackle exercises in the textbook by identifying superficial visual similarities between them and the preceding exercises.

In a mixed-method study on college students’ use of textbooks in an introductory accounting course, reading practices varied according to academic performance (Phillips and Phillips 2007). Academically strong students read their textbooks to prepare for class and continue reading even when they encounter difficult passages. By contrast, weaker students postpone reading and stop reading when they fail to understand a passage. Both groups of students, however, equally resorted to two different reading strategies: superficial reading of a text in the textbook (skimming) and engaging with the text in more detail (sinking). By analysing the marginalia in library textbooks, Attenborough (2011) uncovered insights into how students negotiate what being a student means. While they annotate and mark passages for learning purposes (‘doing education’), some use the margins to distance themselves from the academic knowledge and from the comments made by other students (‘doing being a student’). Marginalia are thus a means of students appropriating their textbooks and literally making their mark on them—both as learners and as peers.

Like teachers using the textbooks, students interpret what they read. It is thus not entirely clear what meanings they make from the textual offerings of the books read in school (Vom Hau 2009, p. 149). Furthermore, students usually do not read textbooks on their own but instead collectively, thus multiplying the voices shaping the text in the classroom. Reading textbooks is a ‘cultural practice’ (Rockwell 2006) that is done in different ways with different aims. Extending textbook practices to include the students’ perspective therefore multiplies the possible meanings offered by curricular materials in textbooks.

TOUCHING BOOKS: FROM TEXTUAL CONTENT TO MATERIAL ARTEFACT

The studies discussed earlier in this chapter show how meaning is situatively and culturally made and in doing so highlights the ambiguity and dynamic nature of texts. Teachers and students using textbooks transform and adapt them by selecting texts and interpreting their content. This hermeneutical stance is prevalent in many studies on textbook use. Nevertheless, an exclusive focus on this aspect of textbooks risks neglecting the fact that textbooks are also artefacts with material qualities that affect their users.

There are, however, some studies that understand reading as a practice in which textbooks and users enter into close interaction. Some of the studies already discussed draw on Vygotskian activity theory to trace the interrelationship

between textbooks and users (Brown 2002; Horsley and Walker 2005; Remillard 2005; Rezat 2013). These researchers see textbooks as cultural tools that are both shaped by their use and shape how they are used. Texts exhibit an ‘objectively given structure’ (Remillard 2005, pp. 231ff.) that offers different things to different users. When students, for example, think that similar tasks are placed in proximity to one another, they will engage differently with the textual order of the book than will other students (Rezat 2013).

Ethnomethodological research on textbooks understands reading as a practical activity in which the relationship between reader and text has to be established anew in each situated occasion of engagement with the text and its organisational features (Sharrock and Ikeya 2000). Drawing on actor-network theory, other researchers highlight the role of the material qualities of textbooks as opposed to their textual content (Law 2007). Textbooks are not neutral tools conveying a curricular message but rather ‘mediators’ (Latour 2005) that transform educational practice—often in unexpected ways (Waltz 2006, pp. 56f.). Fenwick and Edwards (2010), for example, state that ‘to focus only on the information and discourses [textbooks] embed is to ignore the fact that activity changes if the materiality of the textual thing is paper, digital, or plastic, heavy or delicate, mechanical or organic’ (p. 8). Textbooks are seen as part of a heterogeneous network in which human and non-human actors (artefacts, texts, architecture, etc.) interact and transform one another. Instead of asking what sort of knowledge is inscribed into the text, this approach asks how the textbook contributes to a network in which students, teachers, and a number of material artefacts perform practices of knowing.

Textbooks can thus be seen as artefacts that are more than just a collection of textual content. The material qualities of the textbook make a difference in classroom practice. There are two central aspects to this: (1) the spatial organisation of the text and (2) the material qualities of the book itself.

Spatial Organisation of the Text

Textbooks are not a mere collection of texts attached one after another in a linear order, each one building on the next. Instead, they open up an intertextual field in which texts refer to one another—both within and without the book (Heer 2011, pp. 474–480). Texts generally create a complex spatial order of textual elements (Krämer 2003): title pages, chapters, headings, footnotes, paragraphs, text boxes, and other elements are distinguished from one another typographically (by font size, typeface, lines, etc.) and placed in spatial relations to one another (below, above, left, right, before, after). Increasingly, textbooks are designed according to visual principles highlighting the non-linear spatial organisation of the text (Bezemer and Kress 2009): they use, for instance, a variety of graphic elements such as text boxes and different fonts and place multiple images on a single page. Typography is thus not a neutral carrier of meaningful signs; rather, it contributes to the meaning of a text (see Assmann 1994; Van Leeuwen 2006, and also the chapter on effects in this volume).

Consequently, a textbook can justifiably be described as ‘*a hierarchical system of juxtapositions*. It makes some things big and some small, while others drop out of the picture altogether’ (Law 2007, p. 131; emphasis in original). This hierarchical order of the text usually resembles the organisation of the body of knowledge itself which it contains (Sharrock and Ikeya 2000, p. 280). Introductory texts in mathematics textbooks, for example, begin with ‘basic definitions’ and ‘elementary operations’ before they introduce more complex algebraic principles.

This spatial hierarchy of the textbook is also a prerequisite for selective reading of the text in a non-linear fashion. Readers use visual cues to orient themselves and find their own way through the text—the text can thus be merely skimmed, some parts can be skipped, and so forth. Reading is about ‘finding places in the text’ or, in other words, locating oneself relative to the text and its ‘phases, argumentative steps, narrative parts and functions’ (Sharrock and Ikeya 2000, p. 276). The spatial organisation of the textbook therefore enables the variety of different styles of use observed earlier in this chapter.

Material Qualities of the Book Itself

The material qualities of the book itself, that is, its size, its weight, its binding, the thickness of its pages, and so forth, also play a key role in shaping its use. For studies interested in practices, these material qualities go beyond the status of signifiers denoting cultural ideas and conventions. These approaches focus on how material qualities are (made) relevant in and for practical use. In this vein, reading can be seen as bodily practice with a textual artefact (Engert and Krey 2013). In order to use a book, one has to know how to manipulate it, how to hold it correctly, how to turn pages (Rezat 2013, p. 663). As *educational* books, textbooks are designed in a way that meets certain anticipated demands of working with them that distinguishes them from other books: their size reflects the size of students’ desks and bags; their weight is limited due to ergonomic concerns. And since students switch between different activities in the classroom (reading the textbook, answering questions, writing in their exercise books, typing on a calculator, etc.), textbooks need to be able to remain open while lying on a desk. Sometimes, material properties of textbooks vary according to national and regional differences in education systems. In Germany, for instance, textbooks are often the property of the schools and are lent to students each year. They therefore need to be rather sturdy in order to withstand frequent use in the classroom over the course of several years. However, in countries where textbooks are purchased individually, books tend to be more flimsy.

These different material qualities enable a mode of reading which goes beyond interpretation and can more accurately be described as operating with and manipulating the text: marking and highlighting passages (Rezat 2013), writing in the margins (Attenborough 2011), flicking through the book to find a certain page, leaving the book open for later use, and so on. Of course, a

textbook is open to a number of practices which subvert the text's educational purpose: the book can become a shield hiding the student from the teacher's gaze, or it can be used as a ping-pong bat, and so forth (Mohn and Amann 2006). In these latter cases the book becomes a mere thing—only its material qualities are relevant, not its educational content. This illustrates the fact that textbooks are usually regarded as carriers of meaning and points to the reason why it is so difficult to view them as artefacts with specific material traits: 'most of us find it surprisingly difficult to focus on the *organization* of a book. After all, the structure of books is pretty conventional. Like wallpaper, [a book] is almost invisible and not very interesting, a simple means to a narrative end. Instead we tend to think that we should be attending to its *contents*, the story' (Law 2007, p. 131). A focus on practices aims to shift our attention from the content alone to the organisation of a textbook and make the relevance of its material qualities to practice visible.

OPEN QUESTIONS FOR FUTURE RESEARCH

By observing practices surrounding textbooks, researchers can trace the emergence and achievement of cultural and curricular meaning in action. This insight points to a number of promising areas for future research, of which we will now identify some examples:

1. *Identity practices*: textbooks serve their readers as cultural subjects with certain traits. They employ a particular 'voice' (Herbel-Eisenmann 2007) assigning roles to readers. Mathematics textbooks in particular often make authoritative claims about what students are supposed to do and know—for example, by combining second-person singular pronouns and a verb telling them about themselves ('you know', 'you think'; Herbel-Eisenmann 2007, p. 356). Practices with textbooks are thus simultaneously practices of self-positioning in relation to constructions of identity offered by the text. This raises important questions about cultural identity in modern societies (Fuchs 2011, p. 13). For instance, how are concepts of national identity taken up by an increasingly heterogeneous student body? In this vein, Ahlrichs et al. (2015) investigate how historical memory is constructed in contemporary German history classrooms.
2. *Interrelationships*: another question which still awaits a convincing answer concerns the interrelationships among different levels of textbook research. On the one hand, we know very little about the interaction between teachers' and students' uses of the textbook. Rezat (2012), for example, reports that students use textbooks more often to practise mathematics at home, when their teachers frequently employ them in the classroom. On the other hand, further research is required to investigate the relationships between the production of textbooks, textbooks themselves, and their use. In production, editors and authors devise the textbook with its (imagined) later use in mind, anticipating problems and

instances of resistance (Macgilchrist 2012b). Nevertheless, some researchers argue that textbook developers fail to acknowledge that the textbook has to be enacted in the classroom by the teacher (Ball and Cohen 1996; Weinberg and Wiesner 2011). Therefore, a ‘textbook pedagogy’ (Horsley and Walker 2005) has been proposed to the end of identifying how textbooks can effectively be used and how they should be designed to permit such use.

3. *Digital media and textbooks*: finally, further research is required for the investigation of how traditional textbooks are and will be used in the digital age. These days, the textbook is increasingly confronted with digital media that also claim to represent knowledge, such as online videos (Bernhardt and Friedburg 2014), online encyclopaedias, learning software, and the textbook’s digital counterpart, the e-textbook (Macgilchrist 2012a). The future status of the traditional textbook in light of the digitalisation of curricular content and the presence of digital media in the classroom is unclear and creates a new ‘battleground for the determination of this artifact’ (Waltz 2006, p. 63). Preliminary research disagrees on the extent to which the textbook’s authority as a reliable source of information is experiencing challenge. Horsley (2002) argues that teachers are increasingly using other resources to prepare their lessons and to teach, resulting in school lessons in which the textbook and its structured content are less relevant. In contrast, and more recently, Knight (2015) reports that the Australian teachers he interviewed still view textbooks as a reliable educational tool. In their view, textbooks, unlike digital curriculum materials from the web, contain an easily identifiable order of topics and clear markings indicating the boundaries of knowledge; further, the interviewees see textbooks as providing reliable information. O’Hare and Smith (2012) similarly found that students still prefer traditional textbooks to their digital counterparts. And despite their claims of interactivity, many e-textbooks still conceive of their users as passive recipients (Macgilchrist 2012a). However, if it were to make use of features that enable users to create their own content, the digital textbook could become a true alternative to the traditional textbook.

Pursuing these and other questions with a focus on textbook practices will help us to better understand how curricular and cultural meaning comes into practical being through the actions of teachers, students, and the textbook itself.

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PART V

Conclusion



New Directions

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The chapters in this handbook clearly illustrate the diversity of research into textbooks and textbook-related media. This concluding chapter aims to frame the field of textbook studies by synthesising the central theories, methods, and issues, consolidating the conceptual approaches and outlining directions for future research.

TRENDS: CONCEPTS AND THEORETICAL APPROACHES

The handbook maps significant trends in recent theoretical approaches in textbook studies. Three points are particularly noteworthy. First, the understanding of what a textbook is and what this means for analyses has become an object of explicit reflection and moreover seen significant trends on a couple of different levels. The handbook demonstrates that textbooks are increasingly perceived as socially constructed objects, instruments of national and transnational policy, arenas of social controversy, and as media which must be understood in their historical, cultural, political, or socio-economic context. Authors stress that textbooks play a crucial role in unstable, ambivalent processes of subjectivation: readers of textbooks are addressed as particular subjects by assigning them varying reading positions, roles, and identities. Textbooks are no longer seen as simple transmitters of policy intentions; rather, they are analysed as complex media residing at the intersection of competing discourses, while also

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reflecting and shaping hegemonic discourse. They are not exclusively viewed as vehicles of a hidden curriculum aimed at stimulating patriotism, they are also a site in which political and ideological conflicts are waged. They are no longer the privileged domain of nation states but media which express world culture. History textbooks, for example, are no longer examined merely as national autobiographies; they have become arenas that reflect social controversies surrounding the meaning of the past. Analyses which viewed textbook knowledge as always the knowledge of the dominant groups are being complemented by studies considering how ‘common sense’ is reproduced and altered through conflict, compromise, and negotiation. Overall, the textbook is now viewed as a medium that contains diverse and fragile narratives resulting from a wide network of texts and discourses.

The second trend concerns the opening of textbook studies for a broad range of theoretical approaches. Classical approaches of hermeneutics, ideology critique, and research on stereotypes dominated research on textbooks. The occurrence of several turns in the social sciences and humanities, for instance, linguistic, spatial, and practice turns, as well as the institutionalisation of cultural studies, opened new opportunities for textbook studies. The chapters in the handbook point to the increasing prominence of, for instance, discourse theory, semiotics, multi-modal approaches, neo-intuitionism, practice theory, and new materialism.

Third, textbook studies is now well-enough grounded to make significant contributions to theoretical debate in several areas. For instance, in the field of memory studies, analysis of textbooks has shown that media formats can influence how memory is constructed. Textbook researchers have investigated how textbooks, teachers, and pupils remember specific events in the past and, in doing so, have made a significant contribution to shaping the research field of memory practices. In the field of discourse studies, textbook analyses have highlighted the necessity of exploring ambivalence and non-coherences in the mediated (de)stabilising of meaning. Practice theoretical studies on educational media have contributed to sociological understandings of knowledge production. Biographical research has profited from research on how teachers adapt their biographical narratives to the dominant discourse in order to use them as teaching resources. Research on teacher education has also benefited from theories of educational media use.

These three developments illustrate that contemporary textbook studies has become a conceptually rich field of inquiry, which has gained a sound understanding of its own foundations, has entered into dialogue with relevant disciplines, and has enriched theoretical debates at the intersection of social sciences and cultural studies.

TRENDS: METHODS

The theoretical consolidation outlined earlier in this chapter has gone hand in hand with the *refining*, *diversification*, and *expansion* of methods and analytical tools.

One of the most important instruments of textbook studies is comparison. The chapters in this handbook show how this well-established method in the social sciences and cultural studies has been substantially refined by its use in analyses of textbooks. Since textbooks have the distinct advantage of having a relatively homogenous institutionalised function across diverse social, political, and cultural spaces and time, they enable research to tease out the specific purchase of both diachronic and synchronic comparison. This unique structure of textbooks, which assume the same functions across formal educational systems worldwide since the global spread and institutionalisation of the nation state, enables researchers to explore which specific kinds of diachronic and synchronic question can be *systematically* and fruitfully raised.

Diachronic comparisons, for instance, which examine textbooks from different periods, have been used to investigate three primary questions: they explore how changes of power and government affect textbooks. They study whether educational reforms lead to change, and in what way. They may also involve studies of *longue-durée* phenomena such as those structures and meanings which remain stable over time. Synchronic comparisons generally comprise three principal forms: studies compare how one particular event or phenomenon is presented in textbooks produced in different countries; such studies tend to focus on the influence of political factors and cultural context upon textbook narratives. Analyses also focus on similarities and disparities in how one topic is treated by different school subjects in one country, asking how these subjects each shape the narrative. Alternatively, they study how two or more different, yet comparable, events, such as the Second World War and the Vietnam War, are depicted in a single textbook.

A second example of how textbook studies have refined empirical methods lies in the approaches to content analysis. Other media, such as the press or social media, allow outspoken and engaged voices in public debates to be heard. The textbook, however, is considered to be a ‘slow’ and ‘boring’ medium, which smooths the edges of public controversies, and reflects standard, codified, established knowledge. Thus, textbook studies have had to develop sophisticated methods of content analysis which not only attend to manifest content but also to latent content.

That the methods of textbook studies have substantially diversified is particularly visible in the emergence of discourse studies as a prominent set of methods alongside content analysis. Whereas content analysis provides an established set of analytical tools, discourse studies is a dynamic and highly diverse interdisciplinary field. The methods and epistemologies of discourse analysis in textbook studies range from linguistic or multi-modal to post-structuralist or neo-materialist. Sharing the assumption that discourse not only reflects but also constitutes reality, these studies reflect on power, hegemony, and identity and aim to contextualise textbook content in political, social, and cultural relations. But they differ in the attention they pay to each of these aspects and how they translate these priorities into specific research designs.

Where some studies, for instance, in critical discourse analysis or multimodal discourse analysis, explore how language/visual forms such as nominalisation, passive voice, or close-up shots, *construct* subjects, objects, relations, places, and so on, other studies, particularly in a post-structuralist or post-Marxist tradition, aim to *deconstruct* hegemonic relations, exploring gaps and fissures, non-coherences and ambivalences. As the chapters in this handbook show, the former kind of study has illustrated how meaning is stabilised and thus dominant exclusions further entrenched; the latter has illustrated how resistance is already visible on the margins of dominant discourse and where change is potentially underway. The former aims to demonstrate how dominant discourse is reconstructed and strengthened; the latter aims to demonstrate how the dominant discourse is precarious and fragile. In this sense, analyses oriented to construction tend to adopt an understanding of the textbook as an instance of dominant social/political/cultural relations, whereas analyses oriented to deconstruction tend to adopt an understanding of the textbook as a site of contestation, negotiation, and compromise. The potential for innovation in future research may lie in embracing the double nature of textbooks as simultaneously an instrument of hegemonic power and an arena for discursive struggle.

In addition to refining and diversifying a range of existing methods for text analysis, textbook studies has also expanded its repertoire to include methodological tools from social science and cultural studies which move beyond the textbook as text and orient to what people do with textbooks. From various theoretical perspectives, studies draw on and contribute to, for instance, psychological research on learning, design-based research, learning analytics, research on media effects, media use, and media practices.

The turn to practice theory, in particular, has foregrounded an understanding of the textbook as practice. These studies see ‘media’ as the technological form plus the related practices, assuming, for instance, that what television as a medium ‘is’ changes depending on whether people watch it together at public places or alone in their living room; and changes over time, from its emergence as a new physical entity in the living room, to practices in which ‘television’ is watched on personal handheld devices. To this end, textbook studies has investigated the practices of using textbooks in divergent settings with different research foci. In studies interested in textbooks as institutionalised objects of cultural memory, textbook use has been analysed as part of memory practices. Studies interested in textbooks as material entities have explored how textbooks—as non-human actors—actively participate in processes previously thought to be enacted entirely by human actors, for example, world-making, constructing reality, making the past present, assigning subject positions, creating boundaries by excluding and including or depoliticising knowledge.

A further expansion of methods has emerged with recent possibilities offered by digital technologies. This has led to the digitisation of large corpora of (historic and contemporary) textbooks which can now be analysed with tools from digital humanities. These tools, including topic modelling, text mining, and opinion mining, open up new potential for large-scale textual analysis, which go

beyond the possibilities of manual analysis. Digital technologies have also led to the design of new digital educational media, from interactive, digital textbooks to other digital curricular materials, which accompany printed textbooks in many contemporary classrooms worldwide. New methods are necessary to investigate possible shifts in how media are produced (e.g. publishers deciding to employ software engineers rather than editors), how content is presented (e.g. from linear to hyperlinked), and how they are used (e.g. when the authority for finding and ratifying knowledge shifts from teacher to student).

The trends outlined here clearly show that the field of textbooks studies has continued to develop and hone its own array of methods through productive interaction with relevant partner disciplines and by keeping abreast of current developments in those disciplines. They also reveal that this productive exchange has not been a one-way street. By applying individual approaches to textbooks as research objects, it has been possible to refine and develop the heuristic potential of methods across the disciplines.

TRENDS: RESEARCH FOCUS

Across the handbook, we see several trends in the specification and expansion of the issues covered by the individual contributions.

First, the chapters highlight that a number of social, political, cultural, economic, and technological changes have led new issues to emerge. Social movements and the articulation of demands for equality have placed subjects such as gender, race, LGBTI, or human rights on the agenda. Historic turning points such as the implosion of state socialism, the deepening of economic and cultural globalisation after 1945, or the increasing perception of ethnic and religious heterogeneity push these issues to the fore. Normative shifts in public debate, such as the delegitimisation of purely ethnic national concepts, the emergence of postnational concepts of citizenship or the enforcement of human rights as a universal norm, provide textbook studies with new stimuli. Educational reforms, manifest in changes to teaching and learning processes, curricular or structural transformations, challenge textbook studies to investigate pressing issues such as teaching about multiple perspectives or designing materials for inclusive education. Economic change, such as the increasing privatisation of education, has led to studies on how the rising competition and concentration in the field of educational media production and the retreat of the state in decisions over textbook content have impacted the knowledge and student subjectivities being circulated. Technological innovations raise questions about media production and use. Studies on production have investigated whose knowledge is of most worth, when open educational resources or other digital resources enable a broad range of previously silent actors to create and distribute educational materials. Studies on the design and uptake of media explore whether ‘new’ media formats are domesticated into traditional educational objectives or open up new educational practices.

Second, in addition to these new issues, the theoretical and methodological shifts noted earlier in this chapter have led to novel ways of exploring traditional topics. Rather than investigating *whether* the nation and other forms of collective affiliation are constructed to be ‘sufficiently’ accurate, plural (giving voice to marginalised actors), or reflective (corresponding to norms of tamed nationalism which include reflections of the nation’s own transgressions), recent studies ask *how* the construction process is organised. Analyses investigate, for instance, which values and characteristics are assigned to citizens or explore which historical events are made relevant. Rather than investigating *whether* history textbooks dedicate enough space to the European dimension, studies on Europe also focus on *how* the theme of Europe is addressed, which historical periods, events, or people are alluded to and referenced in order to make ‘Europe’. Rather than asking *whether* representations of a religion corresponds to its ‘true’ nature or whether narratives of encounters between religions are historically accurate, studies looking at religion increasingly inquire into *how* religion is understood in textbooks, where the boundaries between the religious and the non-religious are drawn, or what kind of habitus is attributed to the true followers of a religion.

Third, surprisingly traditional methods are employed to analyse new topics. The analysis of LGBTI issues, for example, is dominated by approaches that examine whether any mention of such categories is at all made in textbooks. There has been scant attention to the question of how the boundaries between genders are constructed and the effect this could have on gender norms or binary concepts.

Fourth, textbooks have been increasingly contextualised, specifically within the processes of production and uptake. A guiding assumption for textbook studies has long been that textbooks are located at the intersection of culture, economics, policy, and society. However, until recently, very little was known about which actors have taken the initiative in order to shape what is included and excluded from textbooks. Also, very little was known about what happens to the textbook after it has been produced: How do teachers and students engage with textbooks? An emerging body of research has begun to address these issues. Studies have found, for instance, that it is easier for students to comprehend shorter texts on digital devices and longer texts in printed materials; that expert advice from religious institutions has influenced the content of religious education books; and that although previously marginalised knowledges, such as Africanist concepts of national identity in post-Apartheid South Africa, are included in textbooks, teachers barely touch the subject in their classrooms.

In summary, the central issues addressed by textbook studies continue to be the construction of knowledge and the representation of, in particular, socio-political phenomena, historical events, social groups, or ethnic, cultural, and religious identities as well as geographic regions and states or regimes. However, there is a clear shift from questions of ‘whether’ the representations are appropriate or not, to questions of ‘how’ these phenomena are constituted and what

that means for social life. This focus also invites studies on how textbooks are produced, designed, distributed, used, and creatively appropriated.

LACUNAE AND FUTURE RESEARCH

Each chapter in this handbook has identified lacunae and new directions for future research. On a theoretical level, it is clear that there is no single ‘theory of the textbook’ and there is no perceived need for such an all-encompassing theory. Rather, the primary lacuna identified by several chapters is the lack of reflexivity, with few studies rendering their theoretical frameworks and concepts explicit. In this sense, if more studies reflected more explicitly on their theoretical frameworks and concepts, and outlined their contribution to broader theoretical debates, this would increase the potential for cross-fertilisation between textbook studies and the related disciplines.

On a methodological level, gaps in research have been identified on several levels. For many school subjects, multi-modal analysis is the exception rather than the rule. Similarly, the field would benefit from more widespread mixed-method approaches. Depending on the topic, for instance, there is a clear tendency to favour either quantitative or qualitative approaches: the former dominates research into gender constructions in textbooks, questioning which gender is associated with which type of verbal activity, while the latter is predominant in studies on the representation of race/racism.

Ethnographic studies are also still quite rare. This in-depth observational approach is particularly suitable to investigate discursive conflicts and instabilities not only in text but also with regard to the production, writing, and design of textbooks, as well as their use, reception, and uptake. Looking in more detail at these media practices, in their contexts of production, usage, and ‘produsage’, promises to generate further insights into the complex and interwoven, material and medial, political and economic processes of shaping the knowledge and subjectivities with which young people are confronted today. The question of ‘whose knowledge’ circulates in formal education is thus grounded in historically specific accounts of how decisions are made on what to include, how the texts are (discursively/multi-modally) shaped, and how teachers and students engage with these texts in specific historical/situated contexts.

Further research addressing the contextualisation of textbooks would benefit from methods which enable textbooks to be analysed in relation to other media, in particular in the context of digital media and open educational resources. This clearly relates to a need for more studies into how different types of media are integrated in classroom practice, but also relates to potential comparative studies on how the same (controversial) topic is constructed in different media, for instance, in the press, on social media, in online educational videos, in interactive apps, and in textbooks.

Transnational methodologies that compare different cultural contexts of knowledge production and examine the significance and everyday practice of

knowledge transfer in terms of textbook knowledge remain a further notable lacuna in textbook studies. In this vein, relational approaches which systematically investigate and compare diverse social contexts or the broad range of stakeholders and networks involved in textbooks and knowledge production would be an important step forward.

There are still few studies committed to a historic perspective. Employing a long-term perspective would enable researchers to explore change and continuity in textbook knowledge. Systematic attention to the structures of knowledge production and the conditions that enable or hinder transfer from one context to the other would deepen our understanding of how textbook knowledge evolves over time.

In addition to the lacunae identified with regard to theories and methods, the chapters in this handbook identify several high-priority focal issues that still need to be addressed: depending on the topic, research has focused on specific geographic regions while neglecting others. There is a significant lack of research into representations of the Holocaust, for example, in textbooks from areas such as Southern Europe, South America, the Middle East, and Asia. The majority of studies investigating the depiction of war in textbooks focus on European countries and on the USA, Japan, and Israel, while central and Latin America or Africa are barely mentioned, certainly in English-language publications. Analyses of transnational identities are limited almost exclusively to Europe. Studies in other regions of the world, especially Asian countries, tend to focus more on transnational values. Research addressing the portrayal of LGBTI in textbooks is confined to the global North. The post-Soviet space is conspicuous by the absence of studies addressing race, gender, and class. Yet equally there are few studies exploring socialism in the textbooks of Western European countries. The exploration of colonialism reveals a curious geographic asymmetry. Studies focussing on textbooks produced by former colonial powers tend to concentrate on the use of violence, whereas conflicts between colonial powers and the colonised subjects are primarily the subject of textbook studies in former colonies.

There are many issues, in addition to the lacunae mentioned so far in this volume, that undoubtedly deserve further study and which have barely been touched upon in textbook studies. Some examples include cross-cutting issues such as freedom, empowerment, equality, justice, progress, childhood, or modernity, which are not flagged as topics in textbooks and which will not be found in the indexes or glossaries of textbooks, because they are effectively found only when reading between the lines. The contributors to this handbook could not examine such topics either because their remit was to address the specific, clearly defined issues which we expected to dominate the research field. Here, we would like to briefly address how these potential focal points excluded by our system could speak to central social, political, and cultural debates.

The potential of analysing overarching topics to provide meaningful results is indicated, for instance, by looking into modernity and modernisation. Taking

a diachronic, comparative perspective would enable continuities and changes to be extracted and not only in the sense of where modernity is demonstrated but also with regard to the normative evaluation of modernisation. It would, for example, be possible to analyse where and from which point in time the postmodern relativisation of modernity's claims to superiority first entered textbooks. It would also be illuminating to examine, from a historical perspective, the changing relationship between modernity and 'backwardness'. Similarly, international comparisons or comparisons among textbooks for different subjects could be fruitful. The images of modernity projected by religious education or mathematics textbooks could be compared with the images in history or geography textbooks. Finally, studies could examine in which societies constructions of modernity and modernisation are made at all relevant as expressions of a specific understanding of time and where such terminology is simply not applied to descriptions of change.

Another topic, somewhat at odds with textbooks' proscribed content, is that of childhood and youth. Relevant questions would explore how childhood and youth is constructed in books for a range of subjects and age ranges but would also take a comparative approach to textbooks produced at different times and in different locations, examining what competences are required of each age group and whether shortcomings are defined as deficiencies in knowledge or character flaws.

In conclusion, it is clear that in terms of theories, methodologies, and research focus, textbook studies has established itself as an independent research field with a distinctly defined outline. Equally, it is apparent that there is a lively exchange between this field and the numerous relevant disciplines in the social sciences and humanities. In recent years, many theories, methodologies, and research questions have been imported from those disciplines, and they in turn have been enriched through textbook studies; not only the exciting empirical findings but their theoretical and methodological approaches can be honed, differentiated, and refined when applied to textbooks. This is perhaps the most important impulse for the future. Textbook studies is no longer a research field that simply benefits education studies. Its unique fusion of broad sociopolitical relevance, theoretical scope, focussed object of analysis, and increasingly honed methods also enrich ongoing debates across the social and cultural sciences.

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