

THE REPRESENTATION OF BRICS COUNTRIES IN SOUTH AFRICAN SCHOOL HISTORY TEXTBOOKS

TARRYN CHANEL HALSALL
(u18300830)

**Submitted in fulfilment of the requirements for a PhD in Education
(History Education)**

University of Pretoria

DECEMBER 2023

Supervisor: Professor J.M. Wassermann

As the candidate's supervisor, I agree to the submission of this thesis.



Signed: Prof JM Wassermann (supervisor)

ETHICAL CLEARANCE CERTIFICATE

The author, whose name appears on the title page of this thesis, has obtained, for the research described in this work, the applicable research ethics approval. The author declares that he/she has observed the ethical standards required in terms of the University of Pretoria's Code of ethics for researchers and the Policy guidelines for responsible research.



UNIVERSITEIT VAN PRETORIA
UNIVERSITY OF PRETORIA
YUNIBESITHI YA PRETORIA
Faculty of Education

RESEARCH ETHICS COMMITTEE

CLEARANCE CERTIFICATE

CLEARANCE NUMBER: **UP 16/09/01 Wassermann 19-001**

DEGREE AND PROJECT

PhD
The representation of BRICS countries in South
African school history textbooks

INVESTIGATOR

Ms Tarryn Halsall

DEPARTMENT

Humanities

APPROVAL TO COMMENCE STUDY

31 July 2019

DATE OF CLEARANCE CERTIFICATE

03 November 2021

CHAIRPERSON OF ETHICS COMMITTEE: Prof Funke Omidire



CC

Ms Thandi Mngomezulu
Prof JM Wassermann

This Ethics Clearance Certificate should be read in conjunction with the Integrated Declaration Form (D08) which specifies details regarding:

- Compliance with approved research protocol,
- No significant changes,
- Informed consent/assent,
- Adverse experience or undue risk,
- Registered title, and
- Data storage requirements.

ABSTRACT

South Africa's inclusion in the geopolitical and economic power bloc BRICS has influenced its political and economic landscape both nationally and internationally. South Africa joined the BRICS bloc in 2010, just prior to the establishment of the then-new curriculum, Curriculum Assessment Policy Statement (CAPS). South African's insertion into the BRICS bloc has secured South Africa's international clout and as such, it has changed its global landscape as well as political allegiances. Given this important collaboration between the Global South and its fellow BRICS counterparts, it is important to discern then what South Africans learn of these countries within the programmatic curriculum. My research focused on the phenomenon of representation guided by two research questions: how are the BRICS countries represented within South Africa's school history textbooks and why they are represented the way they are? It is important to understand, given South Africa's important political and economic affiliations, how South Africa represents its key partners in its history textbooks. What is learned of these countries within the programmatic curriculum versus the political reality of South Africa. My study was guided by the conceptual framing of power and authority. Where does the power and authority lie within historical representation and who decides it?

I used qualitative content analysis to analyse my findings from each textbook. The methodological choice, underpinned by the interpretivist paradigm, worked for my study as it was necessary for the themes to emerge from the data as opposed to working with pre-established themes. A number of themes emerged from the extensive analysis and from that, several key findings emerged. The first key finding notes that Russian historical representation dwarfs the other BRICS partners. The focus on Russian is extremely heavy-handed and thus is in keeping with South Africa's long and deeply historical relationship with Russia, especially as an anti-apartheid ally. This signifies that Russia's history is the most important and therefore, considered powerful in that it reasserts the power and authority of the current government. Secondly, a golden thread that runs across the grades and textbooks is that of male leadership. The textbooks heavily foreground male historical leaders and women's history and contributions are largely silenced. The male leaders represented are considered as powerful 'big men' and thus are represented as heroes and great movers of history. Lastly, it is evident that textbook historiography has remained largely unchanged despite new scholarship.

(Keywords: history textbooks; BRICS; representation)

LANGUAGE EDITOR'S DISCLAIMER

Anne Kruger Language Practice

- ❖ 19 Nooitverwacht, 105 Main Street, Paarl 7646
 - ❖ tel 072 374 6272
 - ❖ annekruger25@gmail.com
-

To whom it may concern

DECLARATION OF LANGUAGE EDITING

I, Elsje Anne Kruger, hereby declare that I have personally read through the dissertation of Tarryn Chanel Halsall titled "The representation of BRICS countries in South African school history textbooks". I have highlighted language errors and checked references. The track changes function was used and the author was responsible for accepting the editor's changes. I did no structural rewriting of the content.

Yours sincerely



Date

4 December 2023

ACKNOWLEDGEMENTS

“This is so important for you to understand. I didn’t make it that far on my own. I mean, to accept that credit or that mantle would discount every single person that has helped me to get here today — that gave me advice, that made an effort, that gave me time, that lifted me when I fell. It gives the wrong impression that we can do it alone. None of us can. The whole concept of self-made man, or woman, is a myth.” – Arnold Schwarzenegger

First and foremost, I need to thank my supervisor, Johan Wassermann. Thank you for seeing me through to the end of the PhD. You have been my mentor and voice of reason since my undergraduate days. I cannot fully put into words how much I appreciate your guidance and words of wisdom over the near-twenty years. Thank you for your patience and kindness.

I would like to thank the University of Pretoria for the bursary provided for my PhD. The financial assistance was greatly appreciated.

I would like to thank my family and friends for the immense support over the many years. The support has been immeasurable and essential in maintaining my sanity and providing me with the necessary drive to complete the PhD.

Lastly, I would like to acknowledge my grandmother who passed away just a few months prior to completion. Thank you for all you did and your continued support over the years. This is for you.

Table of Contents

THE REPRESENTATION OF BRICS COUNTRIES IN SOUTH AFRICAN SCHOOL HISTORY TEXTBOOKS	I
ETHICAL CLEARANCE CERTIFICATE	II
ABSTRACT	III
LANGUAGE EDITOR’S DISCLAIMER	IV
ACKNOWLEDGEMENTS	V
LIST OF ACRONYMS AND ABBREVIATIONS	XIII
CHAPTER ONE	1
1.1 Introduction	1
1.2 Background and context	3
1.2.1 The rise and fall of western dominance	3
1.2.2 Decline of US hegemony and possible alternative	5
hegemonies	5
1.2.2 Emergence of a multilateral world	6
1.2.3 Inter-BRICS relations and contributions	10
1.2.4 Impact of COVID-19	14
1.2.5 Challenges to BRICS	16
1.2.6 Systemic challenges within South Africa	19
1.2.7 South Africa’s historical link with its BRICS partners	21
1.3 Rationale and Motivation	23
1.4 Focus and Purpose	24
1.5 Research Questions	24
1.6 Research design and methodology	25
1.7 Outline of thesis	25
1.8 Conclusion	27
CHAPTER 2	28
LITERATURE REVIEW	28
2.1 Introduction	28
2.2 Conducting a literature review	29
2.3 Using the literature review	31
2.4 Nature and purpose of textbooks	33
2.5 Nature and purpose of history textbooks	40
2.6 Ideological identity in history textbooks	45
2.7 Nationalism in history textbooks	49

2.8 Myths in history textbooks	50
2.9 Power blocs in history textbooks	52
2.10 Conclusion	54
CHAPTER THREE	56
THEORIES OF POWER	56
3.1 Introduction	56
3.2 Understanding power and authority	57
3.3 Theories of power and authority	59
3.4 Using theory	71
3.5 Blended conceptual framework	72
3.6 Power and authority of South African history textbooks	74
3.7 Conclusion	77
CHAPTER 4	78
RESEARCH DESIGN AND METHODOLOGY	78
4.1 Introduction	78
4.2 Research design	79
4.3 Qualitative approach	80
4.4 Interpretivist paradigm	84
4.5 Epistemological and ontological assumptions	87
4.6 Research methodology	89
4.7 Content analysis	90
4.8 Qualitative content analysis	91
4.9 Analysis	94
4.10 Sampling	96
4.11 Ethical issues	107
4.12 Trustworthiness	107
4.13 Conclusion	109
CHAPTER 5	110
DATA ANALYSIS	110
5.1 Introduction	110
PART ONE: BRAZIL AS REPRESENTED IN SOUTH AFRICAN SCHOOL HISTORY TEXTBOOKS	
5.2 Introduction	112
5.2.1 Analysis	112
5.2.3 Conclusion	113

PART TWO: RUSSIA AS PORTRAYED IN SOUTH AFRICAN SCHOOL HISTORY TEXTBOOKS	114
5.3 Introduction	114
5.3.1 Russia in the Grade 9 history textbooks	114
5.3.1.1 The representation of Russia in Grade 9 history textbooks	116
5.3.1.2 The representation of the US as the counterfoil to Russia in the Grade 9 history textbooks	118
5.3.1.3 Representation of competing ideologies communism and capitalism in Grade 9 history textbooks.	119
5.3.1.4 The representation of the Cold War in Grade 9 history textbooks	120
5.3.1.5 The representation of Russian leaders in the Grade 9 history textbooks	123
5.3.1.6 How assessment influences representation of Russia in Grade 9 history textbooks	124
5.3.2 Russia in Grade 11 history textbooks	125
5.3.2.1 The representation of Tsarist Russia in Grade 11 history textbooks	126
5.3.2.2 The representation of Communist Russia under Lenin in Grade 11 history textbooks	127
5.3.2.3 The representation of Communist Russia in Grade 11 history textbooks	130
5.3.2.4 The representation of Russian leaders in the Grade 11 history textbooks	133
5.3.2.4.1 Tsar Nicholas II	133
5.3.2.4.2 Lenin	135
5.3.2.4.3 Trotsky	138
5.3.2.4.4 Stalin	138
5.3.2.4.4 The representation of Tsar Nicholas II, Lenin, Trotsky and Stalin in the summary section of the Grade 11 history textbooks	140
5.3.2.5 Comparative representation of February and October Revolution in Grade 11 history textbooks	142
5.3.2.6 Second World War representation in the Grade 11 history textbooks	146
5.3.2.7 The representation of communism in Grade 11 history textbooks	147
5.3.2.8 The representation of women in Russia in the Grade 11 history textbooks	147
5.3.2.8 How assessments influence the representation of Russia in Grade 11 history textbooks	150
5.3.3 Russia in Grade 12 history textbooks	151
5.3.3.1 The representation of Russia in Grade 12 history textbooks	151

5.3.3.2 The representation of the Cold War in Grade 12 history textbooks.....	152
5.3.3.2.1 Foreign Policy and Containment in Grade 12 textbooks.....	154
5.3.3.2.2 Cuban Missile Crisis representation in Grade 12 history textbooks.....	155
5.3.3.3 Ideological representation in Grade 12 history textbooks.....	156
5.3.3.4 The representation of leaders and leadership in the Grade 12 history textbooks.....	158
5.3.3.5 The representation of Russia in Vietnam in Grade 12 history textbooks.....	160
5.3.3.6 The representation of Russia in China in grade 12 history textbooks.....	160
5.3.3.7 The representation of Russia in Africa in Grade 12 history textbooks.....	161
5.3.3.8 The representation of the post-Cold War Russia in Grade 12 history textbooks.....	162
5.3.3.9 The representation of the Russian impact on South Africa in Grade 12 history textbooks.....	163
5.3.3.10 How assessments influence the representation of Russia in Grade 12 history textbooks.....	163
5.3.3.11 Conclusion.....	164
PART THREE: INDIA AS REPRESENTED IN SOUTH AFRICAN HISTORY TEXTBOOKS	173
5.4 Introduction.....	173
5.4.1.1 The representation of India in Grade 4 history textbooks.....	173
5.4.1.2 The representation of Gandhi in Grade 4 history textbooks.....	174
5.4.1.3 The representation of Britain as a colonial power in Grade 4 history textbooks.....	177
5.4.1.4 The representation of South Africa in Grade 4 history textbooks.....	178
5.4.1.5 How assessments influence the representation of India in Grade 4 history textbooks.....	179
5.4.2 India in Grade 8 history textbooks.....	179
5.4.2.1 The representation of India in Grade 8 history textbooks.....	180
5.4.2.3 The representation of Passenger Indians in Grade 8 history textbooks.....	183
5.4.2.4 The representation of Britain as a colonial power in Grade 8 history textbooks.....	183
5.4.2.5 The representation of South Africa in Grade 8 history textbooks.....	184
5.4.2.6 The representation of Anti-Indian legislation in Grade 8 history textbooks.....	185
5.4.2.7 Gender representation in India in the Grade 8 history textbooks.....	186
5.4.2.8 How assessments influence the representation of India in Grade 8.....	187

history textbooks	187
5.4.3 India in Grade 10 history textbooks	188
5.4.3.1 Representation of India in Grade 10 history textbooks.....	188
5.4.3.1.2 Representation of Mughal India in Grade 10 history textbooks	189
5.4.3.1.3 The representation of British India in Grade 10 history textbooks	190
5.4.3.2 The representation of indentured labour and Passenger Indians in	192
Grade 10 history textbooks	192
5.4.2.3 Gender representation in India Grade 10 history textbooks	192
5.4.2.4 How assessments influence the representation of India in Grade 10	194
history textbooks	194
5.4.2.5 Conclusion	195
PART FOUR: CHINA AS REPRESENTED IN THE SOUTH AFRICA SCHOOL HISTORY TEXTBOOKS	198
5.5 Introduction.....	198
5.5.1 China in Grade 9 history textbooks.....	198
5.5.1.1 The representation of China in Grade 9 history textbooks.....	198
5.5.1.2 How assessment influences the representation of China in Grade 9.....	200
history textbooks	200
5.5.2 China in the Grade 10 textbooks	200
5.5.2.1 The representation of China in Grade 10 history textbooks.....	201
5.5.2.2 The representation of Ming China in Grade 10 history textbooks.....	202
5.5.2.3 Gender representation in China in the Grade 10 history textbooks	204
5.5.2.4 The Eurocentric reflection in the Grade 10 history textbooks.....	206
5.5.2.5 How assessment influences the representation of China in the Grade 10.....	206
history textbooks	206
5.5.3 China in Grade 12 history textbooks.....	207
5.5.3.1 The representation of China’s internal history in the Grade 12 history.....	208
textbooks	208
5.5.3.2 The representation of the interplay between China, SU and the US in the	212
Grade 12 history textbooks	212
5.5.3.3 The representation of China’s global position in the Grade 12 history	213
textbooks	213
5.5.3.3.2 The representation of China and India.....	215
5.5.3.3.3 The representation of China and Vietnam	215
5.5.3.3.4 The representation of China and Taiwan	216
5.5.3.3.5 The representation of China in Africa	216

5.5.3.4 The representation of Mao Zedong in Grade 12 history textbooks.....	217
5.5.3.5 The representation of China in Grade 12 history textbooks.....	218
5.5.3.6 Gender representation in China in the Grade 12 history textbooks	221
5.5.3.7 How assessment influences the representation of China in the Grade 12.....	221
history textbooks	221
5.5.3.8 Conclusion	222
PART FIVE: BRICS AS A CONCEPT IN THE SOUTH AFRICAN SCHOOL HISTORY	
TEXTBOOKS	227
5.6 Introduction.....	227
5.6.1 Analysis	227
5.7 Conclusion	227
CHAPTER SIX.....	229
DISCUSSION OF FINDINGS	229
6.1 Introduction.....	229
6.2. The scale of representation of BRICS countries in South African school	230
history textbooks	230
6.3 The scope of representation of BRICS countries in South African school	236
history textbooks	236
6.3.1 The scope of representation of Russia in South African school history	237
textbooks	237
6.3.2 The scope of representation of China in South African school history	247
textbooks	247
6.3.3 The scope of representation of India in South African school history	253
textbooks	253
6.3.4 The scope of Brazil’s history in South African school history textbooks.....	258
6.4 Cross-cutting themes on BRICS countries as represented in the South	258
African school history textbooks	258
6.5 Conclusion	269
CHAPTER SEVEN.....	272
CONCLUSION OF THE THESIS	272
7.1 Introduction.....	272
7.2 Overview of the study	272
7.3 The contribution of my study to the scholarship of textbook research.....	275
7.4 Personal-Professional Reflections.....	279
7.5 Recommendations	282
7.7 Conclusion	283

REFERENCES.....286

LIST OF ACRONYMS AND ABBREVIATIONS

ANC	African National Congress
BEIC	British East India Company
BRIC	Brazil, Russia, India and China
BRICS	Brazil, Russia, India, China and South Africa
CAPS	Curriculum Assessment Policy Statement
CCP	Chinese Communist Party
CERF	Central Emerging Response Fund
CMC	Cuban Missile Crisis
COMINTERN	Communist International
CPSA	Communist Party of South Africa
CPTD	Continuous Professional Teacher Development
DGC	Domestic Global Consumption
DBE	Department of Basic Education
ECHR	European Convention on Human Rights
EIC	English East India Company
EU	European Union
FDI	Foreign Direct Investment
FRG	Federal Republic of Germany
GDP	Gross Domestic Product
GET	General Education and Training
ICT	Information Communications Technology
IMF	International Monetary Fund
IWD	International Women's Day
KMT	Kuomintang
LIC	Low Income Countries
MPLA	People's Movement for the Liberation of Angola
MTT	Ministerial Task Team
NATO	North Atlantic Treaty Organization

NDB	New Development Bank
NIHSS	National Institute of Humanities and Social Sciences
SABTT	South African BRICS Think Tank
SACP	South African Communist Party
SSC	South-South Co-operations
UN	United Nations
US/USA	United States/ United States of America
UK	United Kingdom
WEF	World Economic Forum
WHO	World Health Organisation

CHAPTER ONE

THE WORKINGS OF THE WORLD

“The great question which in all ages has disturbed mankind ... has been, not whether there be power in the world, nor whence it came, but who should have it” - Locke (2013)

1.1 Introduction

Since 2010, South Africa has been partnered with the geopolitical economic group Brazil, Russia, India and China (BRICS). This came about because the global political and economic stage is undergoing a paradigm shift which sees the world moving away from the Western-centred unipolar world towards a multipolar one dominated by the emerging market economies, including China. It is on this global precedent that South Africa finds itself through its geopolitical positionality in partnership with BRICS. The South African immersion into the BRICS power bloc has been long-lasting and so it is vital to unpack how South Africa represents its geopolitical partners within its historical framework of the programmatic curriculum.

As the world enters into the Fourth Industrial Revolution,¹ South Africa is injected into this global phenomenon through its coalition with the geopolitical economic group BRICS (Schwab, 2018). The economic buzz-word ‘emerging economies’, formally replacing ‘third world’, seeks to represent those countries with emerging markets; markets or economies that show features of a developed market but are not quite developed (Amadeo, 2020). It is under this umbrella where BRICS falls. As it is comprised of supposed emerging economies, the economies found within BRICS are currently perceived as contenders to the ‘throne’ of global economic power currently held by the West, more specifically the United States of America (USA/US) (Miyoshi, 1993). A result of this ‘throne’ contention is a shift within global governance. Subsequently a transference of power is occurring away from unilateral control by the West towards one of multipolarity through multilateral trade agreements, of which South Africa is part by virtue of its BRICS position (Alden & Vieira, 2005; Armijo, 2007).

¹ A term used to describe the current global stage in technological advancements.

Consequently, this shift has had an undeniable impact on South Africa as well as on the BRICS counterparts' relationship with South Africa.

My study will focus on how the BRICS counterparts are represented within South African school history textbooks (the programmatic curriculum). The purpose of understanding this representation is because South Africa's alliance with its BRICS members is historically rooted and politically nuanced. South Africa's Curriculum Assessment Policy Statement (CAPS) was implemented in 2012 and it is this curriculum that underpins the programmatic curriculum involved in this study.

Identity construction forms the backdrop of the phenomenon *representation* within the analysis of the programmatic curriculum. Through the phenomenon of representation, a perceived construct is established through the image that is presented within the textbooks. Identity construction is vital in the creation and perpetuation of a national narrative (Carretero, Castorina & Levinas, 2013). The national narrative is crucial to the conceptual framing of the concept of *nation*. It is the conceptual framing of the *nation* and the subsequent construction of a specific national narrative that scaffolds a national history and identity (Carretero et al., 2013). South Africa's inclusion in a geopolitical and economic power bloc has influenced South Africa's political and economic landscape both nationally and internationally. How then, does South Africa portray its partnered countries or the histories of the countries within the programmatic curriculum? The focus of my research lies in the phenomenon of representation. As such, my study has been conducted through the lens of both South Africa and the South African History programmatic curriculum. The histories and identity construction of South Africa's BRICS partners are embedded through their inclusion or possible exclusion within the programmatic curriculum.

National identity is often formulated and perpetuated through school history which reinforces an illusion that national identity is a natural phenomenon (Lopez, Carretero & Rodriguez-Moneo, 2014). The question that arises is how, through one's perception and construction of national identity, does one interpret other people's histories (Lopez et al., 2014)? It is through the lens of a constructed South African identity that one learns about other people's histories. Herein lies the crux of the matter; how then does South Africa represent the histories of its power bloc partners within the South African historical framework? My study tracks the representation of the four different countries (other than South Africa) of the BRICS power

bloc within South African school history textbooks. It tracks how the power bloc partners are presented, or how their histories are presented within the history textbooks ranging from Grade 4 (the start of History as a subject as part of Social Science up to Grade 9) to Grade 12.

Within this chapter, I will need to pin the power bloc BRICS within the new hegemonic framework. It is first prudent to contextualise the rise and fall of Western dominance as it is essential to the understanding of global politics today and the current shift within the post-Cold War paradigm. Secondly, the notion of a multilateral world is a projection and therefore theoretical, and so, I offer alternative theories that could follow in the wake of a Western decline. Thirdly, a new hegemonic rift has occurred in today's changing socio-political structure which has allowed for the rise of contending power blocs, such as BRICS, and so an emergence of a multilateral world will need to be contextualised. Fourthly, COVID-19 has had an irrevocable impact on the global political and economic landscape, the extent of which will not be known for many years. The impact of COVID-19 has also affected theories and projections surrounding the emergence of a multilateral world; therefore, it is necessary to unpack the effect of COVID-19 and what is known at the time of writing. Following the impact of COVID-19, I will outline the various challenges to BRICS as a possible contender for the global hegemon. Additionally, it is important to look at the systemic challenges within South Africa in relation to its connection to BRICS and, furthermore, to provide a fuller contextual understanding of the power bloc's interconnectedness, I will also discuss briefly the historical relationship (if any) that South Africa shares with its counterparts.

1.2 Background and context

1.2.1 The rise and fall of western dominance

The shape of the modern world and current global economic power shifted at the end of World War II (1939-1945), with the USA emerging as the dominant hegemon of the Global North² or the West (Miyoshi, 1993). It is this world order that is in a state of decline which allows for the rise of BRICS and subsequently a rise of the Global South³ (Armijo, 2007; Öniş & Kutlay, 2013; Van der Pijl, 2017). Although the South-North divide is considered pivotal within internationalism, the South is challenging the economic stronghold of the US which now leans

² The Global North represents the geopolitical location of four of the five permanent members of the United Nations Security Council, namely, the US, United Kingdom, France and Russia.

³ The Global South relates to the emerging economies in the southern regions of the world specifically.

more towards multilateralism (Alden & Vieira, 2005). Öniş & Kutlay (2013) postulate that there are two schools of thought regarding the current global order. The first is a decline of the US-centred world towards one of multipolarity, while the second school of thought centres around the concept that the world is already experiencing a post-US world (Breslin, 2013). Despite the disagreement within the order of succession, the underpinning argument is clear; the global order is undergoing a change, arguably from unipolarity to multipolarity (Armijo, 2007; Ferguson, 2004; Khanna, 2019; Koba, 2011; Miyoshi, 1993; Öniş & Kutlay, 2013; Van der Pijl, 2017).

After almost two centuries of European control, a shift in global power occurred resulting in the overtaking of Britain by the United States as the global power (Khanna, 2019; Miyoshi, 1993). The Spanish-American War of 1898 can be considered the benchmark for US ascension for the reason that, as a result of this war, the country gained the former Spanish colonies Philippines, Guam and Cuba, essentially becoming an imperial power and global leader (Khanna, 2019). The US's dominance in the global theatre became unequivocal after the end of World War II (Khanna, 2019; Miyoshi, 1993; Van der Pijl, 2017). The US emerged as global leader epitomising Western control and ideology through the influence of its military and economic power as well as its influence within international institutions such as the North Atlantic Treaty Organisation (NATO), the World Bank, the United Nations (UN) and the International Monetary Fund (IMF) (Khanna, 2019).

In the early post-Cold War years, during the reign of US dominance, the country introduced two doctrines in the 1990s and 2000s respectively, that allowed for the continuance and the facilitation of Western dominance: the Wolfowitz Doctrine and the Abramowitz Doctrine (or Bush Doctrine). The Wolfowitz Doctrine was in itself a creation to ensure that the US remained the sole world power and therefore remained the leader in arms technology, to avoid a repetition of the Cold War (Van der Pijl, 2017). This doctrine allowed for the maintenance of global dominance and even restricted the power of the (then) newly formed European Union (EU), thus leaving the US solely capable of setting the global policies, thereby maintaining and securing their power (Van der Pijl, 2017). The Abramowitz Doctrine allowed for the intervention by the US in those countries not considered within the realm of Western civilisation, like China, Russia and the Islamic world, on the basis of defending globalisation by forcing inflexible countries to remain open (Van der Pijl, 2017). Economic power thus lay in the hands of Western dominance and China, Russia and the Islamic states, historically, were considered outside the realm of what is considered 'Western civilisation' (Van der Pijl, 2017).

The creation of a dominant economic hegemon fosters a constructed westernised identity, rejecting others that don't conform or are not tailored to the criteria.

The decline of the US as a global hegemon and the move to multipolarity, according to Breslin (2013), can be marked by the 2007-2008 Global Financial Crisis. The crisis necessitated and re-emphasised the importance of collaboration amongst regional powers (Breslin, 2013).

1.2.2 Decline of US hegemony and possible alternative hegemonies

Whilst some scholars (Alden & Vieira, 2005; Armijo, 2007; Breslin, 2013; Öniş & Kutlay, 2013) claim that with this decline of US power, the world is currently shifting towards a multipolar hegemonic paradigm, other scholars like Ferguson (2004) and Prashad (2020) offer alternative theories. Ferguson (2004 p.34) is hesitant to argue that following the decline of US hegemony there would be no awaiting hegemony to usurp the available power, plunging the world into a state of 'apolarity'. Moreover, Ferguson (2004) postulates that, historically, the world abhors monopoly and, subsequently, challengers emerge to return the world back to multipolarity. As opposed to a multipolarity replacement, Ferguson (2004) poses a theory, that, instead of one hegemony replacing another, there might be an absence of a replacement power. Ferguson (2004) articulates as the reasons for this possibility that the power of both the US and EU is waning and, alternatively, the replacement power of China might not be a realistic possibility. Because of China's communist tendencies within the political structure and the corruption it breeds, Ferguson (2004) is doubtful that China has the capabilities to ultimately replace the power of the US. Prashad (2020) offers a counterargument which is based on the premise that, instead of a multipolar paradigm, the current relationship between China and the US will instead lend itself more towards a bipolar world.

The EU as a possible consideration for replacing, or at the very least competing with, the US has its shortfalls. The EU cannot be considered a counterweight to the US despite its global status (Ferguson, 2004). The EU's global strength is waning due to a myriad of underlying socio-economic problems. Despite the EU's 12-country monetary unit and enlargement, there has been a significant decline in international influence and importance (Ferguson, 2004). Additionally, a significant drop in fertility rates, in comparison to the conversely rising life expectancy, results in the dependency ratio rising which could cripple the economy and 'old Europe' would essentially be too old (Čajka, 2012; Ferguson, 2004; Walker & Maltby, 2012). Furthermore, Čajka (2012) states that by 2050, the proportion of Europeans aged 80 and above

is expected to have tripled which would be further exacerbated by the one quarter of the European population aged between 60-79. This phenomenon has been termed ‘active ageing’ as the over 80 age group is the fastest growing age group. The active ageing, coupled with declining fertility rates, has a widespread impact on social and economic policies now and in the future (Čajka, 2012; Walker & Maltby, 2012).

Furthermore, traditionalist views could also condemn the EU if they refuse to Americanise their foreign policy, which would mean much more immigration to combat the ageing European population. The result of increased dependency ratios would be fatal to the EU’s economy and overall international influence (Ferguson, 2004). Furthermore, the EU’s conservative institutional reforms sees much more autonomy outside of the economic sphere thus not allowing for the dramatic institutional reform needed (Ferguson, 2004). Another factor to consider when weighing up the potential hegemonic power of the EU is the current crisis of the United Kingdom (UK) leaving the EU (known by the popularised acronym of BREXIT). The late 2020 exit of the UK from the EU was not a smooth exit and at the time of writing in 2022, the UK is still experiencing a myriad of problems as a result (Partington, 2021). The longevity and the long-term ramifications of leaving the EU will not be known for some time. It is sufficient to say that the exit has cast a shadow over the longevity of the EU and UK themselves. This potential financial knock further retracts the hegemonic potential of the EU as a global powerhouse.

1.2.2 Emergence of a multilateral world

In 2001, economic analyst Jim O’ Neill from the multinational investment company Goldman Sachs, noted four countries (Brazil, Russia, India and China) exhibiting potential economic growth which, allegedly, led him to coin the term BRIC to highlight the rising economic potential of these countries (Koba, 2011; Morazán, Knoke, Knoblauch & Schäfer, 2012; Mostafa & Mahmood, 2015; O’Neill, 2001). At first, BRIC was a conceptualisation rather than an investment opportunity, until 2006 when the BRIC countries met for the first time, with South Africa joining in the latter part of 2010 creating BRICS (Morazán et al., 2012). BRICS was created under the guise that it offers multilateralism and seeks to focus more on a multipolar world which is deemed a challenge to the US dominated unipolar one. Despite the USA following a unilateral economic approach, the global order is shifting towards a multilateral approach as a result of the impact of globalisation (McCann, 2008). BRICS in itself

is essentially a global distribution power and as such has fast-tracked South-South economic cooperation (Breslin, 2013).

Despite South-South co-operations and existing trade relationships between members, the partnership is considered an unusual pairing by Breslin (2013). Each member offers a different economic and political weighting to the bloc – an almost uneven partnership (Breslin, 2013). Despite this uneven contribution, BRICS members mutually benefit from each other's partnership (which will be discussed further on in Chapter 1) (Breslin, 2013). The pairing of the BRICS members can be considered to be spurred by a mutual dissatisfaction with the existing global economic power relations and through the economic and political partnership of BRICS, formal or more *legitimate* challenges to 'official' global governance can now be made (Breslin, 2013).

Within the new post-Cold War paradigm, the transformation of power between hegemonies differs from previous historical shifts in power (Öniş & Kutlay, 2013). The US is no longer the dominant hegemon within the world because it is no longer able to shape the political and economic spheres single-handedly which sees a shift in world dominance (Öniş & Kutlay, 2013). Öniş & Kutlay (2013) suggest that traditionally the transference of power exists between two singular hegemonic powers. However, in today's world, there seems to be a lack of a singular hegemonic power to which a transference of power could occur. This interlude strengthens the notion of a shift towards a multipolar system. Furthermore, Öniş & Kutlay (2013) state that, given the weak recovery of the US during its 2007-2008 financial crisis, this has allowed for high growth performances from within non-Western powers like BRICS and near-BRICS⁴ countries (such as: Mexico, South Korea, Turkey, Indonesia and Malaysia). This shift in economic performances has created a new platform which has further accelerated the contestation between Western dominance and the emerging economies as a significant power bloc (Öniş & Kutlay, 2013). The subsequent rise of BRICS as a power bloc contests the stronghold of Western dominance, and therefore can be seen as a contender to the current global order (Öniş & Kutlay, 2013; Van der Pijl, 2017).

⁴ Near-BRICS countries refer to emerging economies that are not quite as influential as BRICS but are showing signs of increased global governance and influence (Öniş, Z. & Yılmaz, Ş. 2014. The Political Economy of BRICS and near-BRICS in an Emerging Global Order.

Globalisation⁵ has been a game-changer to the world order which has necessitated a need for broader transformations within the emerging economies, leading to an increase in multilateral trade agreements (Alden & Vieira, 2005; McCann, 2008; Breslin, 2013). BRICS is made up of emerging economies and is therefore seen as a challenge to the economic powerhouses of today (McCann, 2008; Van der Pijl, 2017). China's economic strength might not seem to align with the concept of what an emerging economy is; however, historically, according to Breslin (2013), China's identity is that of the leader of the Third World countries. McCann (2008) suggests that this current era of globalisation is different from previous eras as the muscle of internationalism is far greater today, thus making the world more prone to interconnection than periods before. Globalisation has been a key factor in the rise of BRICS as it has influenced a rise in regional power which has allowed for more autonomy over domestic and foreign affairs for emerging countries (such as those belonging to BRICS or near-BRICS) rather than passively accepting the roles determined for them by the Global North (Öniş & Kutlay, 2013; Morazán et al., 2012). This autonomy empowers these emerging economies with the ability to invest in foreign policy on their own volition rather than moulding themselves to the needs of greater powerhouses such as NATO and the EU; this in itself is the defining indication of the shift towards multipolarity (Öniş & Kutlay, 2013). Breslin (2013) asserts that the BRICS coalition can be viewed negatively by the holding powers as BRICS is being built upon a shared insight that they have been side-lined in the current global economic order. It indicates a wish to change the global distribution of power which suggests a malevolent move.

The global economy, according to McCann (2008), has undergone three fundamental changes (institutional, technological and organisational), which have altered global economics. With this being said, the debate over the survival of BRICS is superfluous given BRICS' current political and economic influence⁶. The institutional changes that took place began in the 1980s when formerly centrally planned economic systems (like the then-Soviet Union, (now the Russian Federation) collapsed which led to approximately 260 million workers entering the global labour market and workforce. Adding to this was the opening up of China and India's economy to the global market which allowed for millions more to enter the global labour

⁵ Globalisation pertains to the ever-growing connection and integration of people, governments and companies globally.

⁶ In 2023, 6 more countries (Ethiopia, Saudia Arabia, Egypt, Argentina, Iran and the United Arab Emirate) have stated they will be joining BRICS from 2024 to form BRICS+ Ismail, S. 2023. 'A wall of BRICS': The significance of adding six new members to the bloc. *Al Jazeera*, Maihold, G. 2023. The Geopolitical Moment of the BRICS+. *The BRICS Summit 2023: Seeking an Alternate World Order?* : Council of Councils.

market (McCann, 2008). Secondly, improvements in Information Communication Technology (ICT) have transformed trade. Goods and services can now travel at a much faster pace across larger geographical spaces which would create the need for more lateral trade agreements (McCann, 2008). Thirdly, to accommodate the change within the technological sphere requires more organisation which leads to the creation of more multinational firms to allow for the changing landscape of the global economy (McCann, 2008; Breslin, 2013). Globalisation has also triggered the rapid growth of many developing countries through which the developing countries have sought relations and support through fellow developing states rather than established nations (Breslin, 2013). Breslin (2013) further argues that due to the globalised nature of the world, no country can unilaterally survive without some outside support or relationship. Moreover, Breslin (2013) argues that a shift towards more multilateral cooperation can be seen as not only being triggered by the 2007-2008 Global Financial Crisis but by two specific flu outbreaks: SARS in 2003 and the Bird Flu in 2006. These disease outbreaks, compounded by shared common problems especially amongst Asian countries, called for common solutions in order to cope with multilateral problems (Breslin, 2013).

The creation of multinational firms, asserted by McCann (2008), illustrates the growing trend towards multipolarity. The broader transformations within the middle-class sector have led to trade agreements with developing countries, in particular South-South relations. South Africa, Brazil and India (all part of the Global South and part of BRICS) have gone into trilateral trade agreements (Alden & Vieira, 2005). The relationship between members of the South-South coalition reinforced the strength and economic potential of BRICS as there are pre-existing economic ties within the BRICS coalition (Breslin, 2013). Furthermore, the South-South coalition strengthens the projection of a highlighted global focus on multilateralism and the influence of the emerging economies (Jaldi, 2023). Mostafa & Mahmood (2015) posit that, given the growing middle class and by extension the expanding consumer base, the Domestic Global Consumption (DGC) will have an impact on the GDP, thus the increase in the purchasing power of the middle-class emerging economies is said to have an impact on the global economy. Where BRICS has failed is that they have increased their financial support through co-operation with Low Income Countries (LIC) within the South-South cooperation (Morazán et al., 2012). This encouraged self-reliance amongst the emerging economies (which is inclusive of the LICs) which sees these economies turning away from the traditional economic stalwarts like NATO, the EU and America (Breslin, 2013).

1.2.3 Inter-BRICS relations and contributions

The BRICS countries boast leading emerging economies both regionally and internationally (Morazán et al., 2012). This signifies the global economic importance of the countries as well as BRICS as a power bloc and therefore symbolises the shift in economic power away from G7⁷ countries towards the developing world (Koba, 2011; Morazán et al., 2012; Van der Pijl, 2017). The BRICS power bloc qualifies as the largest entity on the global stage as well as containing some of the biggest and fastest growing emerging markets within its bloc (Koba, 2011). Additionally, another factor that provides the BRICS bloc with more influential support is the sheer size of the coalition. The BRICS group constitutes roughly 25% of the world's land mass and an estimated 40% of the world's population (Koba, 2011; 24, 2023). These dimensions are significant to the power that the BRICS bloc can wield, as the global economic stage is shifting towards emerging markets in which the BRICS countries dominate. O'Neill (2001) predicted that by 2050, the original BRIC grouping will overshadow the world's strongest economies. Indeed, Mostafa & Mahmood (2015) predict that by 2030, the original BRIC grouping will be one of the strongest economies of the world with China being at the forefront of economic power, underpinning the significance of the BRICS group on the global stage (Morazán et al., 2012). Despite South Africa not being mentioned in predictions, South Africa still forms part of the power bloc and, therefore, is a major player on the global economic stage.

Of the BRICS countries, China is the leading power contributor to the group as it is the world's second largest economy which is said likely to surpass the US between 2030 and 2040 (Armijo, 2007; Koba, 2011; Mostafa & Mahmood, 2015; O'Neill, 2001; Rapoza, 2017; Schwab, 2018). Currently, according to the World Economic Forum (WEF),⁸ China is the world's second largest economy however, if one includes trade, China is bumped up to the number one spot, surpassing the US (Schwab, 2018). Not only is China the world's second largest economy, it is also currently home to the greatest number of new billionaires in the world (Rapoza, 2017). China is the world's largest exporter as well as being the world's biggest supplier of manufactured goods (Koba, 2011; Schwab, 2018). The supply of manufactured goods

⁷ The G7 was created after the collapse of the international fixed rate in an attempt by the powerful western countries to secure global security and therefore create financial governance through intergovernmental co-operation (Mostafa, G. & Mahmood, M. 2015. The rise of the BRICS and their challenge to the G7. *International Journal of Emerging Markets*, 10, 156-170.

⁸ Founded in 1971, the WEF engages in political and businesses aspects of society to shape both regional and international and Industry agenda.

improves China's economy because it illustrates the focal point of the economy being driven more by the consumption and services (Schwab, 2018). It is also rich in coal, iron ore, petroleum, natural gas, mercury, rare earth elements, and uranium as well as having the world's largest potential for hydropower (Koba, 2011). China is considered a regional power as well as the leading country of the third world (Breslin, 2013). The rising power of China on the global stage is ascertained through China's position as a member of the G20 and its position on the UN Security Council (Breslin, 2013). This status allows for China to vote on or veto key global issues which is indicative of the power and subsequent responsibility of China (Breslin, 2013). Breslin (2013) asserts that this global position is indicative of China being unwilling to be classified or perceived as inferior in comparison to the Western counterparts.

China's economic prowess also extends to its BRICS counterparts. For Brazil, one of its major exports is agriculturally based. China has supported Brazil by funding agricultural projects in order to assist Brazil's economy (Rapoza, 2017). According to Rapoza (2017), Russia depends on China as an economic support base against the West. China (including Hong Kong) is India's second biggest trading partner after the US, and for South Africa, China is its biggest export market (Rapoza, 2017). Overall, because of the heavy reliance of the BRICS members on China, this further illustrates the dominance of China's economy and furthers the notion of China being the most powerful BRICS nation (Koba, 2011; Chaulia, 2021). Furthermore, China's influence as a global export market goes beyond just fiscal means; it has even impacted the contemporary music market. A rap song by Higher Brother entitled *Made in China* encompasses the influence of China as the song unpacks that all the jewellery and everyday items they own are made in China (Brothers, 2017). This may seem like a frivolous item to mention; however, it denotes China's influence as being ubiquitous and highlights how far globalisation has extended.

Despite the WEF's 2018 report of Russia being the top performer in Eurasia, Russia's influence as a superpower is waning (Morazán et al., 2012; Rapoza, 2017; Schwab, 2018). Although Russia may have lost some of its footing as a superpower, it still retains some of its former power as it is the leading nation in oil, coal, natural gas and nuclear power and, alongside Brazil, the leading supplier of raw materials (Koba, 2011; Morazán et al., 2012; Rapoza, 2017). Additionally, Russia has to her advantage a large territory and a large well-trained and educated workforce and therefore, some potential remains which doesn't side-line Russia's global contributions (Koba, 2011; Morazán et al., 2012; Mostafa & Mahmood, 2015; Rapoza, 2017;

Schwab, 2018). In 2018, the WEF noted an overall improvement in Russia's performance over the last five years (Schwab, 2018). This considerable improvement outlines a new wave of potential for economic growth for Russia (Schwab, 2018).

With regards to India, it displays great economic potential as its growing middle class sectors directly correlate to global economic potential (Koba, 2011; Mostafa & Mahmood, 2015). The shifting of financial globalisation and subsequent result of a growing middle class has put India at a distinct advantage as India has 10 of the 30 fastest growing urban areas globally thus creating a greater demand for goods and services (Koba, 2011; Mostafa & Mahmood, 2015). Moreover, India is rich in iron ore, bauxite, and copper ore and is a leading producer of iron globally as well as being the dominant supplier of services (Koba, 2011). The culmination of financial globalisation, improved innovation and being a dominant supplier of services has led to a considerable improvement in India's rankings on the global scale according to the findings of the 2018 World Economic Forum (Schwab, 2018). The improved ranking is the highest gain among the G20 countries which captures the significance of India's economic potential (Schwab, 2018). A 2020 article reported by the BBC, a left-leaning British news broadcaster, has suggested that by 2030, India could possibly have the third largest global economy (BBC, 2020).

Despite being South America's largest economy, Brazil has experienced slow economic growth in the recent past and shows a slow revival of foreign investment, hence Brazil's economy is heavily dependent on its agricultural output (Koba, 2011; Rapoza, 2017; Schwab, 2018). In addition to agricultural products, Brazil is abundant in oil and with Russia is a dominant supplier of raw materials (Koba, 2011). Brazil's ex-Far-Right President, Jair Bolsonaro, has been heavily criticised by local and global media for his authoritarian approach and his approach to COVID-19 and overall governance (BBC, 2021b; Phillips, 2021; Phillips, 2020). Bolsonaro and his government have been criticised because of the lackadaisical approach to COVID-19 and the vaccine and the media has likened it to an attempted genocide (BBC, 2021b; Phillips, 2021; Phillips, 2020). Under Bolsonaro, Brazil's government follows an authoritative and conservative approach to ruling – largely as a result of former President Bolsonaro's military experience. Brazil, along with China, Russia and increasingly, India, tend to follow authoritarian regimes.

South Africa's inclusion into the rising economic bloc is considered an unlikely and unequal partnership, considering it does not have the same political weight or economic influence as its counterparts (Koba, 2011; Morazán et al., 2012). However, South Africa adds new demographic and geopolitical dimensions to the group, thus complementing the policy of multilateralism (Mostafa & Mahmood, 2015). Geopolitically, South Africa is of importance as it is the only African representative within the group and, in addition, it is also part of the South-South cooperation alongside Brazil and India. As a result of these geopolitical attributes, South Africa can be considered an acceptable addition as it expands the influence of South-South cooperation within the African continent. South Africa is also the only African country to have a G20 seat and is largely accepted as the leading economy on the continent. Despite having a GDP one-third the size of Brazil, South Africa also has much to offer in terms of natural resources such as gold, silver, platinum and energy (Bond, 2000; Koba, 2011). South Africa's inclusion in BRICS expands the trilateral trade agreements amongst the Global South and would therefore encourage multilateralism amongst China and Russia respectively. In addition to the geopolitical advantage South Africa holds, it offers significant potential in its abundant natural resources of diamonds, gold, iron ore, platinum, manganese, chromium, copper, uranium, silver, beryllium and titanium. Moreover, South Africa is the largest energy producer and consumer in Africa (Bond, 2000; Koba, 2011). South Africa's economic growth potential is displayed in its large market size, good infrastructure, well-developed financial system and advanced innovation capability (Bond, 2000; Schwab, 2018).

BRICS is an important entity within the global economic hegemon as it focuses on the emerging economies therefore offering an alternative hegemon that previously had focused more on the wealthier nations of what is called the Global North (Morazán et al., 2012). In terms of the influence of BRICS, the size of its economy, the economic growth rates and the desire for a strong political voice all add to the significance of BRICS globally as well as South Africa itself (despite South Africa not meeting the same above criteria as its counterparts) (Morazán et al., 2012). An example of such relations is the R15 billion trade deal made between China and South Africa in 2018 (Mokone, 2018). This great financial tie not only secures China's role and growing influence within Southern Africa but highlights the deepening relationship that South Africa has with the BRICS members. South Africa is also an equal partner in the BRICS bank, the New Development Bank (NDB) (Jaldi, 2023; Maasdorp, 2020). The purpose of the bank is to provide financial assistance to member countries to improve infrastructure and to bolster the economies of member states when needed (Jaldi, 2023;

Maasdorp, 2020). This is a long-term goal of the NDB which shows the investment each country, including South Africa, has in the coalition.

Trade and economic relationships within the BRICS groups had been in existence since the 1990s prior to the inception of BRICS. The concept of BRICS was not a proposal by its member states but merely an adaptation of O' Neill's earlier assertion in 2001 (Mostafa & Mahmood, 2015). The coalition between the BRICS counterparts was not an obvious grouping according to Armijo (2007). Armijo (2007) asserts that the international politics and economics of the BRIC (at this point South Africa had not joined the bloc) were contradictory at their most fundamental level. Where India and Brazil follow supposed democratic principles, China is a Marxist People's Republic and Russia, although in theory a democracy, is turning towards authoritarian rule under Vladimir Putin (Armijo, 2007). The distinct diversity between each counterpart provides a conundrum regarding the longevity of the bloc. This conundrum is posited by Armijo (2007) in her article *Mirage or Insight* relating specifically to whether the BRICS group is a realistic coalition. This encapsulates the notion that perhaps BRICS is a fad or perhaps the internal and external challenges faced by each member might overpower them. Prashad (2020) underscores the potentially transitory nature of BRICS as a united power bloc as Brazil and India contain too many inherent problems which would impact the cohesion of the BRICS group. Furthermore, Prashad (2020) asserts that the transition, which before looked like a multipolar one, is turning into a bipolar one with China and the US at the helm. Furthermore, another hindrance to the growth potential of BRICS is the lack of a shared vision (Breslin, 2013). According to Breslin (2013), there does not seem to be a collective end goal in sight. This would prevent the coalition from moving forward towards any type of hegemonic control.

1.2.4 Impact of COVID-19

It would be remiss of me not to include the COVID-19 pandemic. In December 2019, China publicly declared that there was an unknown virus outbreak in the city of Wuhan. It wasn't until 7th January 2020 that the Novel Coronavirus was identified, but it wasn't until the 11 March that the World Health Organization (WHO) declared the Coronavirus a global pandemic (WHO, 2020). Earlier, on 1 March 2020, the UN had released \$15 Million from the Central Emergency Response Fund (CERF) to aide economically vulnerable countries (UNICEF, 2020). To emphasise the global threat of this virus, UN Secretary General António Guterres,

on 23 March requested a global ceasefire, to give countries space to deal with the outbreak (Guterres, 2020).

Compounded with several imposed lockdowns and restrictions, the economic impact on many countries, including leading economies, has been drastic. The lasting effects of this we will not know yet. The Coronavirus pandemic has had an indelible impact on most nations around the world, including powerful nations like the US and the UK. At the onset of the pandemic in 2020, China was impacted quite severely (the full extent may have been censored by the authoritarian regime); however, now it seems to be making an economic recovery and is set to become the leading global economy sooner than expected (BBC, 2020). The importance of this is quite simple: much of the economic data that has been provided thus far have been projections. These projections were established prior to the global pandemic of COVID-19 and, as such, the pandemic has affected the global economic predictions. However, COVID-19 has drastically altered the façade of the world which has caused a shift in the data. What is now projected, and what has been made clear as a result of the pandemic, is an influentially waning United States and an economically growing and stabilising China (BBC, 2020).

COVID-19 has had a considerable impact on the global economy, where the WEF postulates that the virus will cost the globe between \$1 - \$2 trillion (WEF, 2020). One can only model a potential; it is unclear right now what the total economic damage will be. It is clear, however, that vulnerable economies, including the European economy (as it was showing signs of decline in 2019), will suffer serious economic damage. The WHO and the IMF have responded to the global crisis in the following ways: the IMF has offered debt relief through cooperation between the WHO, the IMF and the World Bank; \$11 trillion of emergency financing has been opened up by the IMF to help stabilise economies; and debt services (with co-operation of the World Bank and other financial services) remain at a standstill to alleviate the pressure (Bank, 2022; Murphy, 2020). Kristalina Georgieva of the IMF at a WHO press conference stated that the pandemic will cause a recession that would be worse than the global financial crisis in 2007-2008 (PTI, 2020).

To counter this, the BRICS coalition responded to the global pandemic as a united front. The NDB has offered \$700 million in loans to support public health care systems in China. Leslie Maasdorp, Chief Financial Officer of the NDB, states that the NDB can offer up to \$1 billion if need be (Maasdorp, 2020). Whilst not the same weight as what the IMF can offer, the

financial assistance remains intrinsic and bolsters the support and validity of the unit to work together. The package offered by the NDB, long term, as aforementioned focuses on infrastructure, etc. However, the short-term goals of the NDB are to offer the necessary financial assistance to assist in member countries' medical support in order to curb the virus. The main purpose of the NDB is to support member nations; however, it is currently looking to expand its support to other emerging economies.

The current pandemic has blurred the future of many countries and global structures. However, what has been made very clear by many countries' insistence, the WHO and the NDB: multilateralism is what needs to come to the fore in order for countries and the global economy to survive. Ferguson (2004) postulates that possibly there is no emerging hegemon to take over the current one of the US. With the impact of COVID-19, this may be possible, especially in terms of China's now tarnished image. He seconds this by stating that the EU is not strong enough to counter the US. This can be seen in terms of the impact the virus has had on particularly EU countries. Öniş & Kutlay (2013) and Armijo (2007) have stated that the future of the global hegemony lies in a multipolar world. This is highlighted further by Breslin (2013), who states that in order to combat common problems amongst countries, multilateralism is needed.

1.2.5 Challenges to BRICS

There are many challenges for each member of the BRICS bloc that could alter the trajectory of the group. China's pollution problem and shortage of natural resources are a concern for China's potential (Armijo, 2007). Additionally, despite China having underdeveloped human resources, it has swiftly moved towards a more liberal free market despite little to no political restructurings taking place. In 2018, the WEF noted one (in particular) hindrance to its economic growth: its poor institutional framework (Schwab, 2018). Another challenge for China can be seen in the way it is perceived by western world (Breslin, 2013). China's 1990s victim rhetoric has since changed towards what Breslin refers to as a *great power mentality*; however, there is growing perception that China does not want the responsibility nor the accountability that comes with being a great power (Breslin, 2013). This is the responsibility of being a representative or role model to the world within the environmental, economic or political spheres (Breslin, 2013). Despite "peaceful development" becoming a quasi-official ideology in 2011, there are still some opinions, according to Breslin (2013), that China's end

goal is complete global control that would ultimately reflect the values and interests of China. It is important to note the importance of semantic choice. In the 2011 white paper, China's ideology denotes "peaceful development" rather than rise as this appears as less threatening wording (p. 620). Alternatively, some argue that China does not seek complete global control but seeks coalitions that generate practical solutions to common problems (Breslin, 2013; Horesh, 2021).

Both China and Russia face ongoing societal concerns over their Human Rights issues which may pose a problem for foreign investments (Koba, 2011). Russia's corruption and its vulnerability in the wake of its waning superpower status contribute to the challenge it faces (Armijo, 2007). The multi-faceted nature of Russia's corruption extends towards the business environment where the quality of the business environment is being negated due to Russia's poor transparency levels (Schwab, 2018). Moreover, Russia is leaning more towards a liberal free market; however, the on-going corruption, political divisions and religious and ethnic unrest coupled with radical separatists pose a significant disadvantage for Russia's future economic potential (Mostafa & Mahmood, 2015). Human Rights concerns have dominated recent media reports reflecting the authoritarian rule of Vladimir Putin and Xi Jinping for different reasons. International concerns over "free" elections and "freedom of speech" have been highlighted in Russia, specifically with the detainment and arrest of Putin's main political opponent⁹ (BBC, 2021a; Roth, 2021). In China's case, global awareness of and protests over the oppression of the ethnic minority Uighur (Uyghur) Muslims have dominated the news (HRW.org, 2021; Johnson, 2021).

India lacks the necessary infrastructure and is currently consumed by many internal conflicts (ethno-linguistic, cultural, religious, leftist extremists and separatist forces) as well as regional conflicts with its neighbours (Armijo, 2007; Mostafa & Mahmood, 2015). In recent news, India's government under the leadership of Narendra Modi has received a number of criticisms. First, Modi has been criticised for promoting Muslim marginalisation to conversely encourage the growth of Hindu nationalism. This has created a system of oppression of "us" versus "them" (Maizland, 2020; Subramanian, 2020). Secondly, the government has been criticised for its transition into a more authoritarian regime that is focused on pro-Hindu representation. An

⁹ On 24 February 2022, Russia invaded Ukraine. At the time of completion of this PhD, the war with Ukraine is ongoing. The invasion has tested the BRICS partnership and allegiance however, for the most part, BRICS leaders have remained largely silent and at times, neutral, in the global condemnation of Russia.

additional challenge to BRICS is possible in-house fighting. India and China share a border with each other, in the Himalayan region of Ladakh. This has been a decades-long territorial struggle with 20 Indian soldiers being killed in 2020 as a result of this dispute (BBC, 2021c; Ellis-Petersen & Hasson, 2021). The fatal engagement has fractured the already strained relationship that India has with China and possible future fallouts could occur (BBC, 2021c; Ellis-Petersen & Hasson, 2021).

Brazil's deficit lies in its economic inability to grow rapidly despite its large market size (Armijo, 2007; Schwab, 2018). Brazil's limitation lies in its poor ability to integrate into the global markets, alongside severe income disparity, which has led to high import tariffs (Schwab, 2018). Moreover, Brazil's inability to co-ordinate the private and public sectors has additionally hampered its attempt towards global integration which, despite its high innovation rates, according to the WEF, affects its economic growth (Schwab, 2018). Brazil's then-newly elected president (January 2019), Jair Bolsonaro, an ex-army captain, has been criticised for his open approval of a military dictatorship (Anderson, 2020; BBC, 2021b; Fogel, 2020). Bolsonaro has also been critiqued for his position on the 'fake news' rhetoric, akin to his close ally, then-President Donald Trump of the US (Anderson, 2020).

Brazil and South Africa share a common problem which inhibits their economic growth potential. Both countries are experiencing a Gini coefficient of 0.61 which stresses damaging income disparity from a global comparison viewpoint (Bond, 2000). Despite South Africa's potential and global standing on the global stage, it faces many internal struggles. South Africa's mixed economy and its growing high rate of unemployment and poverty as well as its low GDP per capita severely restrict its economic growth potential (Bond, 2000; Koba, 2011; Schwab, 2018). Moreover, there seems to be little improvement geared towards the impoverished and unemployed as the 2018 WEF report indicates that South Africa's Health and Security levels are among the worst in the world. The report also shows that only 54% of adults living in South Africa have access to the internet (Bond, 2000; Schwab, 2018). South Africa's growth and restrictions seem paradoxical as it is praised for having great technological potential; however, 46% of the population are living without internet. To compound this paradox, the WEF report also found that the South Africa's workforce have inadequate digital and critical thinking skills which would further inhibit economic growth potential (Schwab, 2018).

Overall, the BRICS bloc do face the possibility, given the hype surrounding the growth potential of BRICS, of failing to live up to their economic potential (Koba, 2011). Each BRICS member faces its own internal struggle despite their growth potential, and this may play a role in the ultimate hindrance of the overall BRICS growth. Ultimately, the potential hegemonic successors (BRICS, EU, US and China) contain inherent faults that could prevent their sovereign growth and potentially leave a hegemonic bubble open. Gramsci & Antonio (1994) encapsulate this modern transfer of power in this assertion: “The crisis consists precisely in the fact that the old is dying and the new cannot be born.” The ‘new’ is still not yet known as there are too many contentious variables to lock in a definite hegemonic power. However, despite the potential hegemonic bubble in the grand scheme of global world order, South Africa currently, plays an integral role within the contending power bloc of BRICS. Therefore, it is still pertinent to unpack how South Africa sees its counterparts and how the counterparts align themselves to South Africa because South Africa is still in the game of global thrones.

1.2.6 Systemic challenges within South Africa

South Africa’s injection into BRICS has helped to launch South Africa onto the global scene in an unanticipated manner. Whilst South Africa fares well within the scale determined by the WEF, some inherent faults remain within South Africa’s economic system. The economic problems can be seen as inherited problems from before Apartheid, where the wealth of the nation has remained in the hands of a few, thus stemming the economic potential of South Africa.

The inherited problems could also be seen as the reason for the South African government choosing an economic policy of neoliberalism¹⁰. The problem facing the then-newly appointed African National Congress (ANC) (1994) was global integration, and Bond (2000) assert that the neoliberal economic policy was a compromise that needed to be made between the liberation and economic power. Bond (2000) further stipulate that there were two influences that led to this decision: globalisation and tempestuous financial markets. South Africa’s immersion into neoliberalism also instigated its immersion into a macroeconomic policy in order to try and undo Apartheid models. However, this in turn led to its own structural crisis. This structural crisis has led to socio-economic disparity - a legacy of Apartheid – where South

¹⁰ Neoliberalism is an economic ideology based on 19th century ideals which heavily focuses on free-market capitalism

Africa's top 5% consume more than the bottom 85% (Bond, 2000). This uneven development can be traced back to the discovery of diamonds in 1867 and gold in 1886 which established certain ruling companies and classes (Bond, 2000). Furthermore, the inherited problems of the new South Africa, arguably, have been worsened by unfair international economic policies that perpetuate the lingering overproduction problem within South Africa (Bond, 2000; Lee, 2002). South Africa's trade deal with the EU in 1999, whilst catapulting South Africa's integration into the global economy, simultaneously restricted its economic growth potential (Bond, 2000; Lee, 2002). With the rejection of South Africa's status as a developing country due to fear of the competition South African products may engineer, its economic growth potential was hampered in its foetal years (Bond, 2000; Lee, 2002). A criticism of the neoliberal economic problem is the perpetuation of the inherited economic problems. South Africa's 2018 status on income equality remains one of the worst levels in the world (Schwab, 2018). These problems still plague South Africa and so, with BRICS, South Africa's integration onto the global stage is solidified despite its ingrained economic inequalities.

I attended a conference held by the South African BRICS Think Tank (SABTT) hosted by the National Institute of Humanities and Social Sciences (NIHSS) in 2020. This was the second cluster meeting, the first one being held in 2016. The purpose of this conference was two-fold: one, to show the academic world what research was undertaken from the first cluster meeting and two, to generate and encourage more research. This meeting highlighted the five pillars of the BRICS models of co-operation: promoting co-operation for economic growth; political and economic governance; knowledge and innovation; peace and security and social justice, sustainable living and quality of life. Whilst at this meeting a quote was emblazoned on the wall at NIHSS which I feel sums up the premise of BRICS and South Africa's involvement within this power bloc: establishing communities of scholarship, internationalising to strengthen Africa, and South-South collaboration. What this conference emphasised for me was the think tanks and the number of collaborations undertaken by South Africa and the South African academic community. This denotes South Africa's partnership and commitment to the goals and unity of BRICS. What I take away from this is that, at an academic and policy maker level, the goal is to learn more about BRICS and focus on the collaboration amongst BRICS countries or amongst BRICS plus members (other emerging economies of the South i.e., Cuba, Zimbabwe, etc.). However, what do we learn about BRICS or its members at ground level? The indication of how the BRICS countries are represented in the programmatic curriculum

becomes more important in not only helping to answer the above question, but building upon the collaborative undertaking that is already underway.

1.2.7 South Africa's historical link with its BRICS partners

South Africa's historical connection, if any, to its counterparts is important to unpack, even if briefly. The reason for this is that South Africa's history textbooks offer some sort of historical representation of the BRICS members and, therefore, it is important to underline South Africa's relationship or connection with these countries prior to the construction of BRICS.

There is limited historical connection between Brazil and South Africa when compared to the other counterparts; however, it does share some base similarities. Brazil shares a colonial history with South Africa and the inherited inequalities that come with its colonial past. South Africa and Brazil mirror each other in the size of their GDP, and both have severe income disparities (Bond, 2000; Koba, 2011). Both Brazil and South Africa experience similar economic inhibition in the wake of colonialism and corrupt government officials. Furthermore, Brazil and South Africa form part of the South-South cooperation and therefore are joint partners in the emerging markets of southern countries (Vieira & Alden, 2011).

Russia has quite a lengthy and complicated history with South Africa, a surprising fact that I stumbled upon quite naïvely in my master's degree's infant years. Outside of the first documented mention of South Africa in a Russian travel book in 1793, mass immigration to South Africa from Russia only occurred from the late 1880s (Davidson, 1992). Many Russian Jews migrated to South Africa to escape the oppressive and anti-Semitic Tsarist regime. Many Russian Jews came to South Africa because they sympathised with the plight of the Afrikaner struggle against the similarly oppressive British rule. Many Russian Jews formed trade unions from the early 1900s which ultimately led to the establishment of the Communist Party of South Africa (CPSA) which was formed in 1921 (Filatova & Davidson, 2013). The creation of this party by Jews (some of them Russian Jews) and Unionists cemented the connection between Russia and South Africa. Moreover, in 1921 South Africa even became a member of the Communist International (Comintern), a movement spearheaded by Vladimir Lenin to promote Communism internationally.

Additionally, the Soviet Union (now Russia) played a pivotal role within the support framework of the CPSA (which was later renamed the South African Communist Party (SACP)). Russia provided military training and support for SACP member as well as providing military support to the violent wing of the ANC – the Umkhonto We Sizwe (Filatova & Davidson, 2013). The brief overview highlights the deep-rooted historical connection between Russia and South Africa.

Additionally, South Africa has a long and nuanced history with India. South Africa and India share a colonial history and are both partners in the South-South cooperation, along with Brazil. Both countries had been colonised by Britain at one point and were therefore subject to British rule and values. It was under the British rule where South Africa's connections with India began. In British Colonial Natal, indentured labourers from British India were brought to work on the sugar plantations as cheap labour (Vahed, 2018). Additionally, Passenger Indians arrived in Natal from 1860 to set up businesses (Vahed, 2005). Through the British Empire and colonisation, an Indian population settled in South Africa.

An important figure to note is that of Mohandas Gandhi. Gandhi is considered to have played a long-term and pivotal role in the fight against discrimination against Indians (Desai & Vahed, 2015). He is credited with starting both the Natal and Transvaal Indian Congress and initiating many protests against discrimination against Indians in South Africa.

China, historically, has a link with South Africa, but one that is not often engaged with in the South African Curriculum. At the turn of the 20th Century, cheap labour was needed in the mines and so Chinese labour was temporarily imported (Conradie, 2022). Unlike the indenture system, the Chinese labourers were sent back home at the end of the contract. However, in recent history, China has had a largely financial role to play in South Africa, as mentioned earlier.

An important theme needs to be highlighted here. India, Russia and China all contributed, at some point, to South Africa's liberation struggle pre-Apartheid and post-Apartheid. Whilst the liberation struggle is mostly associated with the Apartheid regime, it is important to clarify that systemic discrimination existed in South Africa before the succession of the National Party. South African Indians participated in many protest marches and campaigns against discriminatory legislation in South Africa both pre-Apartheid and during Apartheid.

Furthermore, Russia (then Soviet Union) assisted the banned political parties (the ANC and SACP) both militarily and financially. Chinese South Africans also played a role in the liberation movement in South Africa. A strong historical and political connection is highlighted among 5 of the 6 members of the BRICS group.

Each BRICS member has a historical link or shares some historical similarity with South Africa. This is important as there is a deep-rooted connection between South Africa and its partners, it is necessary to see then how these histories, or the histories of the BRICS countries are presented within the South African historical framework.

1.3 Rationale and Motivation

Living and working in Vietnam afforded me an opportunity to become a member of the global village as well as to bear witness to a globalised world. It was while living abroad that I decided to continue my academic journey. The academic drive is difficult to articulate as it can, at times, be surmised as a love-hate relationship. The choice to pursue a PhD has been a deeply personal one. Over and above my love for history, and in particular Russian history, it has been the intrinsic voice that has motivated me. I selected my topic as it offered an opportunity to expand on my master's topic which focused on both textbook research and Russia. As my master's degree centred around the representation of Russia within Apartheid and post-Apartheid History textbooks¹¹, I wanted to find a way to expand on my existing Russian and textbook research. I selected, what I felt was the most logical extension, looking at how BRICS countries are represented within South African school history textbooks. It is a fairly nuanced topic, more nuanced than I had originally anticipated. South Africa's role within the global power bloc is called into question alongside how South Africa has chosen to represent its powerful partners in its history textbooks.

My study focuses on the representation of the BRICS countries within contemporary South African History textbooks; thus, the phenomenon revolves around *how* Brazil, Russia, India and China are characterised within the contemporary South African context. The research is pertinent as South Africa is intricately intertwined within this economic power group; thus, it is important to see how South Africa represents these countries within the historical context.

¹¹ Halsall, T. & Wassermann, J. 2018. A comparative investigation into the representation of Russia in apartheid and post-apartheid era South African History textbooks. *Yesterday and Today*, 50-65.

There is no research that pertains to how BRICS is represented in South African History textbooks thus providing a niche within the scholarly framework.

The phenomenon that centres around the topic is that of representation. South Africa is a member of this powerful political and economic alliance that is making global waves. South Africa's partnership within this power bloc is important as it has immense impact on the socio-economic state of South Africa. It is then essential to identify how South Africa treats her counterparts within the programmatic curriculum and what image is then provided to the ordinary citizen of South Africa, considering the staggering importance of the role they play globally and the historical implications of the group for South Africa.

1.4 Focus and Purpose

The focus of this study will be to understand how BRICS is represented within South African school history textbooks. The interpretivists paradigm moulds this study as I, as the researcher, seek to understand the world around me. Through contextual circumnavigation, I will focus on how South Africa represents its interconnected economic partners within the South African paradigm.

The purpose of the study is to understand why South Africa represents its economic and political allies in BRICS within the history programmatic curriculum the way it does. South Africa is intertwined within the power bloc of BRICS; therefore, it is pertinent to unpack how South Africa treats (and by extension) represents its counterparts within the programmatic curriculum. There are no studies currently depicting the representation of BRICS countries within South African History textbooks.

1.5 Research Questions

Research questions form the scaffolding of the research as they provide an answerable inquiry into the study. Research questions are an essential foundation of research. The niche in the literature in which the research falls lies in that there is no research on how BRICS countries are represented in South African school history textbooks. It is this gap in literature that allows me to conduct research on the representation of BRICS countries within the South African school history framework. The two research questions posed are:

1. How are BRICS countries represented in South African School History Textbooks?
2. Why are BRICS countries represented the way they are in South African School History Textbooks?

1.6 Research design and methodology

Research design and research methodology are the two poles which underpin the research. The topic “The Representation of BRICS Countries in South African School History Textbooks” seeks to unpack how the South African public learns about South Africa’s important geopolitical BRICS partners.

The research design encompasses the qualitative approach which is underpinned by the interpretivist paradigm. As an interpretivist seeking to understand the world around them, I plan to unpack how and why South Africa presents its political partners the way it does in school history textbooks.

My research methodology is underpinned by qualitative content analysis. Because I am analysing various textbooks and the representation of BRICS countries therein, qualitative content analysis works succinctly with this form of analysis. As qualitative content analysis finds themes through the analysis process, I will be using open coding in order to categorise the themes that emerge from the analysis.

1.7 Outline of thesis

This study contains seven chapters.

Chapter One

In this chapter I have briefly outlined the current shift in global power within the post-Cold War paradigm. It has clearly indicated how the shift from a unilateral approach to that of a multilateral approach has shaped the global structure and power hegemony. The chapter focuses on where the BRICS power falls within this changing paradigm and how it ties to multilateralism.

Chapter Two

This chapter is in the form of a literature review in which I discuss, through the funnel approach existing scholarship pertaining to my research topic. The literature review focuses on the nature

and purpose of textbooks, the nature and purpose of history textbooks, ideological identity in history textbooks, nationalism and myths in history textbooks and finally, power blocs in history textbooks.

Chapter Three

In this chapter, I have underpinned the main theories around power and power structure. The development of and the relationship between power and authority play an integral role within the conceptual framing as it shapes the questions of power, multipolarity, the post-Cold War paradigm, identity and otherness. It is through the lenses of power and authority that one can understand the current global order as well as the current paradigm shift.

Chapter Four

This chapter focuses on the research design and the research methodology. In this chapter the interlacing of research design and research methodology is unpacked. The research design unpacks the interpretivist paradigm and the qualitative approach under which my study falls. Secondly, the research methodology included outlines the research methods used to analyse my data. The chapter frames how qualitative content analysis was used to analyse my data.

Chapter Five

Chapter five is an analysis of BRICS countries in South African school history textbooks. This chapter was divided according to each BRICS country in the order in which they appear in the acronym: Brazil, Russia, India and China. Each division is further divided into subthemes which emerged from the analysis.

Chapter Six

In this chapter, I have brought the findings, found in chapter 5, into discussion with the literature and theories proposed in chapters two and three. This chapter is a critical reflection of the key findings and how they are contextualised within existing scholarship and the South African socio-political context.

Chapter Seven

This is the concluding chapter which ties up the thesis neatly. In this chapter, I spotlight where my research falls within existing scholarship as well as bringing to the fore how my research contributes to the gap in scholarship.

1.8 Conclusion

The shift in the Cold-War paradigm has allowed for the creation of a hegemonic bubble. BRICS, as a contending power bloc, now has legroom within this new hegemonic framework. South Africa's involvement within this power bloc allows for South Africa, as a country, to participate within this new hegemonic battle of power. It is therefore prudent to unpack how South Africa represents her counterparts within the educational historical context. As a unified contending power bloc, South Africa and its counterparts are, for the foreseeable future, locked in a political and socio-economic partnership that ultimately determines South Africa's growth and representation on the global stage.

In this chapter, I have noted the significance of the BRICS power not only on the global stage, but also for South Africa. Notwithstanding the historical connection South Africa has with three of the four BRICS members (Russia, India and China), South Africa's current relationships through BRICS and the South-South co-operation are significant. Because of this substantial political, economic and historical connection, it is vital to see how South Africa then represents important partners in the history programmatic curriculum. It is important to see how the lay public perceive such important geopolitical and historical partners from what has been presented in school history.

The next chapter will encompass a literature review in which I unpack what scholars have said regarding textbook research. First, I will unpack the purpose of the literature review as it is important to have a theoretical underpinning of what a literature review is. Secondly, a generalised overview of the nature of textbooks will take place, and following this, there will be a more specific focus on history textbooks. Within the analysis, I will be looking at the following components of history textbooks: nature and purpose; ideological identity; nationalism; myths and power blocs. Finally, I will be unpacking the research on South African history textbooks. As my study focuses on the representation of partner countries within the South African school history textbooks, it is vital to note the underpinning scholarly research that forms the bedrock of existing textbook research. This will then highlight where the gap in research falls and where my research can be of value.

CHAPTER 2

LITERATURE REVIEW

“Ignoring isn’t the same as ignorance, you have to work at it -” (Atwood, 1985)

2.1 Introduction

The question of power and who holds it is based on a dichotomous construction centred around socio-political dominance (Foucault, 2012; Locke, 2013; Rousseau, 1968). Power is legitimised through authority which can create a collective identity through the dichotomous culture of us versus them (Grotius, 2012). Nietzsche (1874) argued that the act of remembering in itself has political roots and thus the history that is created is deeply political. Concomitantly, globalisation acts as the nexus between allied partnerships and their shared history as it lends itself to the creation of a multipolar and transnational identity (Liebenberg, 2010; Zajda, 2015). Zajda (2015) argues that globalisation has resulted in an intensification between the social, economic and cultural global relation spheres. The resulting intensification of globalisation could have an impact on how a country’s history or its shared history with allied partners is reflected or taught. Zajda (2015) offers a possible reason for this educational shift and historical alignment. The author suggests that globalisation has led to countries experiencing an identity predicament in which they look for a history or symbols that provide a sense of security or belonging (Zajda, 2015). Although BRICS may have had its origins as an economic alliance, it has shifted into a political bloc with deep-rooted connections to South Africa, as outlined in Chapter 1. Because of these now entrenched affiliations, South Africa is tied to its allied members, and so it is crucial to see how this deep-rooted alliance is reflected in the South African programmatic History curriculum (textbooks).

A literature review forms the conceptual and contextual breakdown of any research, thus providing the researcher with their niche in order to advance academia (Henning, 2004; Randolph, 2009). Moreover, the purpose of a literature review is to provide an available framework of the existing literature which conceptualises and contextualises the researcher’s own study (Greetham, 2020; Henning, 2004; Randolph, 2009). Within this review, the framework of existing literature is focused on textbooks, more specifically history textbook research. Additionally, any available literature on power blocs within textbook research is

prudent as this scaffolds the niche where the research topic lies: the Representation of BRICS countries in South African School History Textbooks.

Before the analysis of literature can begin, it is first imperative to outline the purpose of a literature review and its uses. This strengthens the structure and practicality of a literature review as it aligns it to the research. Following this, a funnelled approach to the literature review was undertaken which began with the broad, general aspects of the research which was then narrowed to topic-specific subthemes. Each subsection serves a purpose which encapsulates the relevance of existing scholarly research to this study which simultaneously highlights the gap in research where this study falls. To begin the funnel approach, I started with an outline of available literature on the broad area of textbook research which lends itself to the subheading of *the nature and purpose of textbooks*. History textbooks are not alone on the ideological pedestal which therefore reinforces the importance of understanding *the* textbook in general. This also provides the necessary contextual background of the textbook prior to the next subsection which focuses specifically on the history textbook. The second tier illuminates *the nature and purpose of history textbooks*. This is imperative as it provides the bedrock on the make-up and ideological implication of the history textbook and allows for a more nuanced look at history textbook research in the subsections which follow. Thirdly, *ideological identity* will be unpacked followed by *nationalism in history textbooks*. Both these subsections work hand-in-hand as they look specifically at the issues surrounding identity and nation building within history textbooks. The scope is narrowed further with the inclusion of *myths in history* as myths in history are used to reinforce ideological identity and nationalism. The last component looks at *power blocs in history textbooks*. The purpose of this last element is that it identifies what research has been conducted on power blocs or supranational organisations representation within history textbooks. Through the tiered approach to history textbook scholarship, the gap where the research falls is identified through which its relevance to academia is highlighted and reinforced.

2.2 Conducting a literature review

The success of any research is dependent on the foundational strength of the literature review (Boote & Beile, 2005). The literature review can be a tedious and overwhelming process and thus it is quite easy to overlook its value. It is important to note that the literature review is pertinent to the safeguarding of one's research (Boote & Beile, 2005). The researcher is not an

island unto themselves but part of a greater, connected scholarly ecosystem, thus the researcher cannot perform their duties credibly if they do not have an understanding of the existing research in their field (Denney & Tewksbury, 2013; Randolph, 2009). This understanding of the existing literature in the field reinforces the understanding of the researcher's topic but also identifies the gap into which the new research will fall (Denney & Tewksbury, 2013; Greetham, 2020; Hart, 2018).

A literature review wears many hats in its purposeful role in research. Not only does it provide the necessary scaffolding of existing literature (such as the existing literature on textbooks, in this case), but it, additionally, allows for a fuller understanding of the research topic at hand (Hart, 2018). The literature review, such as the one conducted here, enables the researcher to outline their knowledge about their phenomenon thus spotlighting the gap in which their research falls (Randolph, 2009). The identification and subsequent outlining of the researcher's phenomenon of representation adds to the existing body of literature and collective understanding (Boote & Beile, 2005). Hart (2018), Hofstee (2006) and Denney & Tewksbury (2013) articulate that the literature review ensures academic development through the underpinning of existing theories and their applications thereof. Within this underpinning of existing theories and scholarship, the significance and relevance of one's own research is foregrounded through this systematic inclusion (Denney & Tewksbury, 2013; Hofstee, 2006; Mouton, 2011).

For a literature review to be considered effective, the quality of the review needs to be measured. According to Hart (2018) and Denney & Tewksbury (2013) the measurability of the literature review is determined by the effectiveness of the analysis and synthesis of the review. Denney & Tewksbury (2013) argue that the researcher's credibility is aligned with their ability to synthesise the scholarship well. An important side note is that a literature review does not merely function as a summary tool but rather as an analytical tool that is used to support one's research and to spotlight the gap in research (Boote & Beile, 2005; Hart, 2018; Randolph, 2009). As Bertram & Wassermann (2015) ascertain in their research paper, *South African history textbook research - A review of the scholarly literature*, an overview of the scholarship provides both the reader and the research with a big picture. This big picture reinforces the relevance of one's own research within the academic sphere. Whilst some scholars (Boote & Beile, 2005; Denney & Tewksbury, 2013; Hart, 2018) argue the importance of synthesising scholarship, Greetham (2020) offers the why. Greetham (2020) counters that to synthesise

scholarship is to critically challenge assumptions or ideas from other scholars and in doing so, one gains insight into one's own research question or problem. Effective literature reviews are therefore not summaries of existing work as the review in itself is comprehensive in its coverage whilst remaining critical and allowing for contextualisation to take place (Hofstee, 2006).

A problem may arise in the construction of one's literature review. Denney & Tewksbury (2013) state that scholarship is a vital connection to one's own research and theories and should, as suggested by Wee & Banister (2016), contain up-to-date research. This can prove to be a gargantuan task as collecting of literature and the synthesis of it are tedious and overwhelming in nature. Greetham (2020) outlines some common problems or misdirection that occurs during the literature review component. The author argues that the literature review is plagued by four common problems, the first being the inclusion or filtering of irrelevant material (Greetham, 2020). Many researchers are ensnared by the lure of reading material which is often irrelevant. I, myself, have gotten lost down the rabbit hole many a time. Secondly and thirdly, the dangers of a literature review are that they can possibly lack both depth and synthesis (Greetham, 2020). Finally, there needs to be a link between the literature and the research being investigated (Greetham, 2020).

To try and avoid the common traps as advised by Denney & Tewksbury (2013), one should focus on the structure of the literature review. Denney & Tewksbury (2013) suggest a funnel approach be undertaken when writing the review, starting from the broadest themes to the most specific (whilst being relevant to the topic). As with the literature review, I have opened with the broad understanding of textbook research and then funnelled down to more topic-specific subthemes. The funnel approach, as offered by Denney & Tewksbury (2013), allows for all the main themes and subsequent subthemes to be included within the framework of the research.

2.3 Using the literature review

Literature reviews can be cumbersome and overwhelming in many regards. Finding the relevant literature, excessive note taking and formulating a coherent argument based on the relevant literature can impose a gargantuan task for a lowly researcher. The task of generating a literature review needs to be accomplished in a way that suits the needs and skill of the researcher – in essence, there is no singular way a researcher should tackle a literature review.

For my literature review, I have approached the writing of it from a thematic point of view. With this approach, I have adopted a technique outlined by Hofstee (2006) in which he approaches the literature review using a key card technique. Noted, this particular technique is not an official blanket approach to literature review writing; however, it is a technique that worked really well. The picture below (Figure 1) shows the approach to the key card technique.



(Figure 1: Key card example)

The literature review is broken down into themes of textbook research and thus using the key cards has been helpful in the organisational process. Beginning with an annotated bibliography, certain themes emerged from the literature which were subsequently categorised. The themes created in the annotated bibliography, were then rewritten onto the key card with the associated content. This was a rather lengthy process and was quite time-consuming which can be a deal breaker for many. However, the benefits of this method outweigh the cons, at least from an individual standpoint. It is not always easy to follow this method, and in some instances, key cards get lost; however, the method helped to visually format an argument. The visual

representation illustrated large portions of the argument which helped in the construction of a coherent argument.

An important component of this process is the literature collection. One has to be careful in the organisational and placement process otherwise scholarship can be misplaced. Having access to both the University of Pretoria and Stellenbosch's library databases was a great benefit as what could not be found in the University of Pretoria's system was more often than not found in the library database of Stellenbosch. However, in some rare cases, books or articles were unavailable from either source and so alternative searches needed to be conducted. All literature searched for and obtained was in English. While most articles were in English (or had been translated to English), only having English scholarship did provide some limitations as not all articles were available in English.

Literature reviews provide a window for the reader to recognise the method of the researcher. Not only does it help identify how the research was conducted, but it also helps contextualise the research gap as well as spotlighting the research niche.

2.4 Nature and purpose of textbooks

The by-products of globalisation have not neglected the school textbook; conversely, globalisation has impacted not only the marketability and the accountability of the textbook but the nature of the textbook as well (Zajda, 2015). School textbooks are steeped in societal legitimacy which is further promulgated by society's need to construct an official or legitimated knowledge (Apple & Christian-Smith, 1991; Chisholm, 2015; Crawford, 2004; Engelbrecht, 2006; Fuchs, 2011; Pingel, 2010). Within a global society ideology not only serves to promote a legitimised knowledge but seeks to use it as a way of sustaining and justifying power (Engelbrecht, 2006; Zajda, 2015). It is within this globalised context that the form of legitimised knowledge is underscored through the programmatic curriculum.

Curriculum knowledge and textbook content can be seen as wholly constructed around an agreed upon collective memory that represents certain cultural, economic and societal obligations (Chisholm, 2015; Crawford, 2004; Engelbrecht, 2006; Fuchs, 2011; Zajda, 2015). The school or intended curriculum is not considered a neutral ground and subsequently neither are school textbooks (Apple & Christian-Smith, 1991; Chisholm, 2015). Siebörger (2015), who

has had extensive experience in the history curriculum and textbook selection process in South Africa, notes that the textbook selection process is lengthy within the South African framework. The author states that before school textbooks can be used within the classroom context, the education department needs to vet the textbooks – thus undergoing a politically designated overview (Siebörger, 2015). As such, it is crucial to remember that textbooks are interpretations of an already agreed upon curriculum yet are still receptive to political guarantee. Both curriculum and textbook content can be seen as a pawn in the power battle between dominant powers and can therefore be perceived as a compromise of ideological battles between the dominant hegemonic groups (Crawford, 2004; Fuchs, 2011).

Before continuing with the nature and purpose of the textbook, it is prudent to unpack what the agreed upon definition of a textbook is. A rudimentary search of Google in which the basic question, “what is a textbook” was asked, yielded a number of results, 183 million to be exact). What can be gathered from this rough search is that a textbook is a course book that is a compilation of relevant course content. The basic definition belies the nature and purpose of school textbooks in the construction and perpetuation of ideologies. Katsarska (2007) argues that textbooks form part of state entrenched texts that are found within the education system. Apple & Christian-Smith (1991), evergreen thinkers, assert that there is more to the textbook as the text contained therein is a result of political and economic involvement and are not to be assumed to be a collection of harmless facts. This assertion is further supported when Chisholm (2015) asserts that textbooks are “a genre of official text”, a type of official documentation (p.82).

Textbook research and revision are not new phenomena having begun at the end of World War I under the guise of the League of Nations and, later, the United Nations (Bertram & Wassermann, 2015; Fuchs, 2011; Pingel, 2008; Pingel, 2010). The League of Nations instituted textbook revision in an attempt to prevent future violence amongst European countries in a post-World War I world (Van der Vlies, 2017). Fuchs (2011) argues that the need for textbook revision began on the premise of peace and understanding. Through that overarching narrative, textbooks were then to be freed from (if any) ethnicity bias and strong nationalistic leanings (Fuchs, 2011). After the dissolution of the League of Nations, textbook revision continued under many international bodies such as UNESCO (under the umbrella of the UN) after World War II and the George Eckert Institute from 1951 (Van der Vlies, 2017). Despite this attempt by international bodies to mediate nationalistic narratives, transformation of a narrative is not

always quick or easy. Kaplan (2009), within the context of a post-Soviet world, states that change in discourse is not automatic on the wings of social transformation. Contrastingly, Van der Vlies (2017) argues that great social and political transformations tend to embed the associated agenda within the contents of school history. Content and discourse are two pillars of school history and the subsequent textbooks however, both are politically driven whether it is through change or a reluctance thereof. Kaplan (2009) poses an intriguing question when she asks how changes, such as social or political elements, are integrated into the new and changing discourse. I have attempted to address this question within this literature review.

Anyon (1979), in a dated definition, describes textbooks as being immortalised by the context in which they are found. The longevity of Anyon's statement is reflected in Wojdon (2014) assertion that textbooks, and specifically history textbooks, reflect the world in which they were created and thus can be deemed as era-created historical sources. Thus, textbooks are considered to be representations of their time because they are forged within a situational context and have to be understood within that context. The textbooks analysed in this study are forged within the post-Apartheid South African context which are further underpinned by the 2012 CAPS curriculum. Textbooks act as instruments of education as they are critical in the reinforcement and dissemination of legitimate knowledge and ideologies (Crawford, 2004; Pingel, 2010; Chisholm, 2015). Not only are textbooks a vehicle through which one can disseminate official knowledge, they also present wider cultural messages that are akin to and representative of government policies and documents (Crawford, 2004). The ideological connection between textbooks and their content cannot be divorced and as Apple & Christian-Smith (1991) further indicate, education and power are inextricably linked. This power, as asserted by Rousseau (1968) and Foucault (2012), are ways in which a dominant power can legitimise its authority and therefore retain power. Zajda (2015) suggests that globalisation has played a role in the continuation and reinforcing of the uneven power dynamics which place value on selected societal norms. Power dynamics can be reflected in the system of governance at hand. In the case of South Africa, there are a number of textbook publishing companies (Macmillan, Maskew Miller Longman, Oxford, et cetera); however, before publication, they need to seek approval through the Department of Basic Education (Siebörger, 2015). Once the textbook, and the knowledge contained therein, are accepted, they are available for purchasing by the schools (Siebörger, 2015). As aforementioned, there is a lengthy process involved in textbook production and marketing, which sees the power held by the Department of Basic Education and the perceived marketability of the textbook.

The economics of the textbook play an important role in the production process and are therefore not just political or ideological entities but economic ones too (Apple & Christian-Smith, 1991; Sewall, 2005). The basic drive of publishing houses rests on the marketability and the economic viability of a textbook (Anyon, 1979; Sewall, 2005). The market then can be considered an external agent behind textbook creation. Countries which use a single textbook for each subject are not impacted by marketability in the same way as multi-textbook countries (Repe, 2001). Single textbook countries are defined by the country's parameters (Repe, 2001). In countries where there are multiple publishing houses and multiple options for each subject, there is more textbook marketing competition (Repe, 2001). The marketability and commercial appeal of the textbook play a role in the production of the textbook (Repe, 2001; Sewall, 2005). Textbook production needs to align with the stated aims of the curriculum and be vetted by the powers that be (in the case of South Africa, the Department of Education) prior to production being allowed to take place (Siebörger, 2015). Textbooks and their production are not neutral and are driven by the political nature of education as well as economics (Bertram & Wassermann, 2015; Repe, 2001; Sewall, 2005; Siebörger, 2015).

As technology and technological innovation drives the 4th Industrial Revolution, textbooks as entities fall into a strange paradox. Textbooks reflect traditionalist education methods despite the changing technological paradigm. To, perhaps, bridge this gap, textbooks can be generated as both hard and digital copies. In the case of South Africa, hard copies are predominantly used, but some schools provide the options of digital copies or eBooks. What can be derived from this need to 'technify' the textbook is that textbooks are still a popular method of disseminating and reinforcing dominant cultural and ideological norms (Crawford, 2004). As briefly aforementioned, textbooks contain someone's selection and subsequent interpretation of knowledge (Apple & Christian-Smith, 1991). Textbooks, therefore, need to be contextualised as they reflect knowledge and values that reflect and often times support the dominant hegemonic power which often leads to the creation of an us versus them opposition (Apple & Christian-Smith, 1991; Anyon, 1979; Chisholm, 2015). The concept of us versus them is a construction based on the implied significance of one group over another, thus often leading to the disenfranchising of minority groups – the groups not in power (Apple & Christian-Smith, 1991; Crawford, 2004). Textbooks, therefore, disseminate an agreed upon content that reinforces norms and values of a particular power group. This is done because textbooks are viewed as a powerful tool in the creation and perpetuation of an official national memory (Crawford, 2004; Chisholm, 2015; Fuchs, 2011; Zajda, 2015; Repe, 2001).

Textbook creation is a largely political activity (Apple & Christian-Smith, 1991; Bertram & Wassermann, 2015; Chisholm, 2015; Fuchs, 2011). One cannot ignore this significant influence as the curriculum is not neutral and neither is the textbook (Bertram & Wassermann, 2015; Chisholm, 2015). As popularly argued by Apple & Christian-Smith (1991), textbooks and textbook writing are political as textbooks are written by authors who are not free from bias and so they cannot be deemed neutral on this basis alone. In one written piece, *Discipline and Punish*, Foucault (2012) postulates that the inequalities within society can be traced back to the institutionalisation of society – from the prison system to that of education. Society perpetuates the unequal hierarchical structure through these institutions (Foucault, 2012). This notion can be seen with textbook content creation as specific knowledge is selected. The questions that arise from this knowledge selection reflect the question of power and the subsequent legitimisation of power. Whose knowledge is considered legitimate within that society and as such whose knowledge (or what knowledge) is considered the most worthy (Apple & Christian-Smith, 1991; Apple, 1990)? Beyond the authors of the textbook, one cannot ignore or overlook the external agents that have an influence over not only the curriculum but even the textbook choice (Anyon, 1979).

Bertram (2020), in the recent article *Remaking history: The pedagogic device and shifting discourses in the South African school history curriculum*, uses Bernstein's pedagogic devices to illustrate the construction surrounding the South African curriculum and dissemination of knowledge. Despite the application by Bertram to the South African history context, this can be applied in a holistic sense. In the article, Bertram (2020) states the three fields of practice when it comes to the pedagogic devices. These fields of practice all connect and build off one another in the creation of knowledge. This connection reinforces the political nature of knowledge creation.

Bertram (2020) reflects on the three fields of practice: production, recontextualization and reproduction. The first pedagogic device noted by Bertram (2020) is that of the *field of production*. This pertains to the location of knowledge production (dominant hegemony). The second device, *field of recontextualisation*, notes where knowledge is collected, collated, and organised in the form of curriculum documents or textbooks. Bertram (2020) further postulates that the agents within the field of recontextualization determine the kinds of knowledge that is

selected. This selection process should align with that of the ideological curriculum espoused by the dominant power. The final device, *field of reproduction*, outlines the role of the teachers in transmitting and interpreting the provided knowledge. Within this framework the teachers are responsible for disseminating knowledge and can, in fact, interpret and then adapt the official curriculum within the classroom (Bertram, 2020). These pedagogic devices are significant in that whichever power group which controls the devices has the ability to forge an identity creation and a national consciousness (Bertram, 2020 cites Bernstein and Solomon 1999).

Similarly, Nolgård, Nygren, Tibbitts, Anamika, Bentrovato, Enright, Wassermann & Welply (2020) argue the ideology that acts as the foundation and builds onto the formal curricula which then is open to the teaching and interpretation by the teacher. In their 2020 argument, they use the UN's Human Right's Education as the point of argument for ideology and how it is taught/represented within school history. Both Bertram (2020) and Nolgård et al. (2020) argue the interplay between ideology and curriculum, textbooks and teaching (specifically history teaching). I have adapted the two arguments of Bertram (2020) and Nolgård et al. (2020) to illustrate the three fields of practice and the interplay within the ideological curricula. Here (in Figure 2) I have used and adapted the work of Nolgård et al. (2020) as the foundation whilst integrating the argument by Bertram (2020).

In Figure 2, I illustrate the interconnectedness of identity creation and the forming of narratives within both the formal and programmatic curricula. Identity creation and the forming of national narratives play an integral role in the foundation of both the intended curriculum and textbook creation which reinforces the political nature of textbook production. One aspect that needs to be included is the role of the teacher and students in this process. The teacher interprets and disseminates the curriculum and students are either active or passive agents in this process. The bias and perceptions of both teacher and student play a role in the dissemination and ingestion of the prescribed narrative.

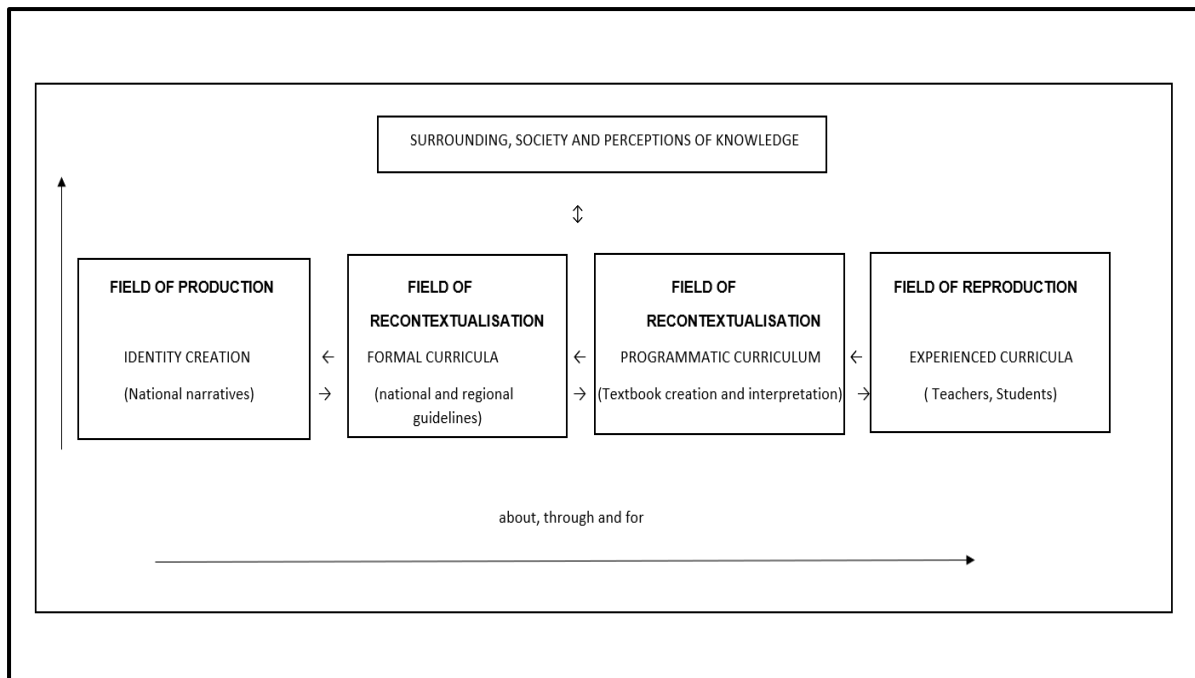


Figure 2: (adapted from Bertram, 2020; Nolgård et al.,2020)

Textbooks then play an ideological and pedagogical role within the dissemination process (Challand, 2009). As illustrated in Figure 2, textbooks have been incorporated into the *field of recontextualisation* as they act as agents within the ideological paradigm to interpret the curriculum. Bertram (2020) argues that prescribed knowledge is incorporated into the formal or official curriculum which is then translated into pedagogy which can be reflected in textbook production.

A key factor in the interplay of textbooks is their use as a pedagogical tool in the classroom. How dominant are textbooks within the framework of pedagogic communication? What is the reliance of textbooks by teachers within the schooling system? Wojdon (2014) and Loewen (2008) state that textbooks are the dominant educational source within the schooling systems of Poland and the US respectively. Similarly, the same can be said of the South African educational context. School textbooks (hard or eBooks) form an important part in the pedagogical dissemination of knowledge within South Africa (Johannesson, 2002; Van Niekerk, 2013)¹². The reliance on textbooks as part of the knowledge process illustrates their importance within the ideological parameters set forth in Figure 2.

¹² The Department of Basic Education places great emphasis on textbooks in South African schools. Aside from a national textbook catalogue, in 2016, Angie Motshekga created a Ministerial Task Team to investigate and evaluate current textbooks. In 2019 the Task Team's findings were released. The findings of the Task Team form a precursor to a possible Textbook Policy (DBE, Department of Basic Education 2019. Minister

2.5 Nature and purpose of history textbooks

In Marvel's *Thor: Ragnarok*, Hela returns from Helheim (Norse mythology's version of hell) to which she had been banished only to find, to her horror, that her father has altered their history to reflect a more benevolent, candy-coated version (Waititi, 2017). This leaves her to utter: "Does no-one remember me? Has no-one been taught our history? Look at these lies!" Arguably, a similar line of questioning could be adopted when looking at historical representation within history textbooks. History textbooks often reflect an ideology and agenda of the dominant hegemon and therefore could echo the prescribed history of a nation (Ahonen, 2007; Apple & Christian-Smith, 1991; Crawford, 2004).

Holistically speaking, textbooks form part of the ideological pedagogical process. What makes the subject of history and by extension, the history textbook, different from other subjects? As with the nature and purpose of textbooks, history textbooks are also subject to socio-political constraints driven by context; however, history textbooks deal specifically with the production (and propagation) of memory (Crawford, 2004; Fuchs, 2011). History textbooks are stalwarts at reflecting and strengthening prescribed societal norms and traditions (Pingel, 2010). Not only do history textbooks have the ability to reflect regional norms within a society, they also undertake a representation of human behaviour and global norms (Pingel, 2010). The significance of history textbooks outside of a societal expectation reinforcement, is the ability of these textbooks to outline origins of peoples which strengthen the constructed national identity and collective memory based on the dominant hegemony (Pingel, 2010). History textbooks control the production of memory and therefore create a national historical identity through a constructed reality (Bertram, 2020; Van der Vlies, 2017; Wojdon, 2014). Within post-conflict societies, such as South Africa, scholars reinforce the importance of history textbooks in the reflection and propagation of a new or adjusted historical narrative and national identity (Chisholm, 2015; Fuchs, 2011; Pingel, 2008; Wojdon, 2014).

The *hows* and the *whys* of a nation's locale can be reflected within the history textbook which in turn engenders a sense of belonging and identity towards that particular territory (Crawford, 2004; Pingel, 2010; Repe, 2001; Van der Vlies, 2017) Van der Vlies (2017) argues that, within the western world, the construction of a socio-cultural context and value-system is a result of

Motshekga launches Ministerial Task Team's Textbook Evaluation Report. *In*: EDUCATION, B. (ed.). Republic of South Africa: Department of Basic Education.

the influence of the emerging 19th century nation-state (Crawford, 2004). As a result of this influence, nation-states were able to generate a memory and a prescribed identity to a constructed community based on their terms (Carretero et al., 2013; Van der Vlies, 2017). The concept of a nation is not an immovable concept within historical discourse; it is a social construct and so the national identity is reflected within this constructed historical memory (Bertram & Wassermann, 2015; Fuchs, 2011; Wojdon, 2014; Crawford, 2004). As such, historical concepts, like history, are fluid and influenced by changing societal and political norms (Bentley, 2005; Bertram & Wassermann, 2015; Carretero & Bermudez, 2012; Carretero et al., 2013; Crawford, 2004). Fuchs (2011) contends that through globalisation the concept and understanding of the term *nation* has changed. This observation by Fuchs is further supported by Nolgård et al. (2020) when they state that the globalising world can be reflected in the movement and fluidity of people and ideas. The significance of the changing nature of historical concepts and the impact of globalisation is its reflection within history education and ideological legitimisation (Zajda, 2015). Carretero et al. (2013) argue that the concept or changing concept of the nation influences not only academia but how students learn and understand their history. Ideological justification and legitimisation is woven into the history textbook as history textbooks are seen as effective forms of pedagogical media (Bertram & Wassermann, 2015; Zajda, 2015). It is important then to investigate how countries not only perceive their own past but that of others within the history textbook narrative. A textbook's historical narrative is influenced by the ideological power of the day and so understanding representation within the programmatic framework is vital to understanding the nature and purpose of history textbooks in education.

History textbook production is often influenced by ideological forces which prescribe a chosen narrative (Crawford, 2004; Pingel, 2010). This is done to perpetuate an idealised national identity based on the ideals of the dominant hegemony (Bertram, 2020). As history, and by extension history textbook writing, caters to memory production so then is the interpretation of it woven into the fray (Bertram, 2020; Van der Vlies, 2017; Wojdon, 2014). The selected narratives, according to Van der Vlies (2017), are in themselves an interpretation of reality and in turn form a reality. What history textbooks offer society is that of a collection of historical interpretations that are dependent on the dominant power group which, by extension, offer insights into particular historical preferences within a nation's textbooks (Edwards, 2008). The power of history textbooks lies in their ability to shape views and construct realities of the past for generations and as a result of this power, the written text is often undisputed within the

classroom setting (Bertram & Wassermann, 2015; Edwards, 2008). Historically, history textbooks have a tendency for highlighting a particular group and shunning another which encourages a mentality of us versus them (Pingel, 2010). An example can be seen during South Africa's apartheid era where a historical narrative was constructed around whites versus non-whites (Engelbrecht, 2006). The dichotomous narrative embedded in the apartheid history curriculum and textbooks greatly favoured white South Africans (specifically Afrikaners) over others, creating an *othering* within the narrative (Engelbrecht, 2006). The nature and purpose of history textbooks can greatly influence the understanding and establishment of the dichotomy us versus them. Through this, contextualisation of the role of identity, nationalism and mythmaking within history textbooks can take place.

As with general textbook research, history textbook research is not a fresh-faced novice within the tentacles of society (Bertram & Wassermann, 2015; Crawford, 2004; Pingel, 2010). After World War I, a reconsideration of history textbook content was necessary in an attempt to avoid a perpetuation of a bias or marginalising ideology (Crawford, 2004; Pingel, 2010). World War I became a turning point in history textbook research on an international scale. History textbook research has been undertaken by individuals globally as well as international bodies such as UNESCO, Council of Europe, Organisation for Security and Co-operation in Europe (OSCE) and the Georg Eckert Institute (Janmaat & Vickers, 2007; Stobart, 1999; Van der Vlies, 2017; Zajda, 2015). Pingel (2008) outlines that history textbook research (through bilateral and multilateral projects) by these international bodies focuses on monitoring the presentation and representation of neighbour histories. Simply put, international textbook monitoring bodies have a keen interest in how one country represents another. In the case of my study, it is significant to outline how South Africa represents its partners within its own textbooks.

Following World War I, according to Stobart (1999), there have been numerous calls and debates about creating a singular history textbook for Europe; one that promotes a single historical narrative. The proposed reasoning behind a one-textbook approach would be to avoid stereotypes and marginalisation of peoples. Often in post-conflict societies, a need arises for a new narrative in order to promote transformation (Katsarska, 2007). A review of embedded marginalising narratives is not new within post-conflict societies. After apartheid, an overhaul of the educational system and specifically history, needed to occur to address the marginalisation that was embedded within the pedagogical framework (Bertram, 2020; Bertram & Wassermann, 2015; Chisholm, 2015; Nishino, 2015). Conversely, a single textbook

is also considered as a monolithic approach that removes the multi-ethnic European voice and can be used as an indoctrination tool (Stobart, 1999). History textbook production and creation is a deeply political activity, thus is quite contentious in nature (Bertram & Wassermann, 2015; Foster, 2011). In 2014, the South African Department of Basic Education proposed a singular textbook option for each subject (Nkosi, 2014). This proposal was widely criticised by both education specialists and publishing houses and was eventually discarded (Nkosi, 2014). The notion of a singular national textbook is not new to history education and countries such as Russia maintain a singular textbook approach to History (Zajda, 2015).

The politics of memory and memory production in history textbooks plays a pivotal role in the promotion and construction of a national identity, nationalistic values and mythmaking (Crawford, 2004). According to the Council of Europe, their values do not align with the us versus them dichotomy and therefore aim to promote a peace education promoted by international co-operation (Europe, 2021). The Council of Europe, according to Zajda (2015), has sponsored history textbook research in both Europe and the Russian Federation from 1993 to 2003. This was an attempt to improve the teaching of history (Zajda, 2015). In 2001, the Council of Europe conducted a report entitled *Learning about the history of Europe in the 20th Century* (Zajda, 2015). The report was conducted and executed based on a need, by the Council of Europe, to promote stronger mutual understanding and it has warned against the use of History as an ideological tool (Zajda, 2015). The findings of this report outlined the role of memory in identity creation and that History is still dominated by myth (Zajda, 2015).

To ignore the *politics* of the textbook and by extension the nature and purpose of the history textbook would be impractical and negligent (Apple & Christian-Smith, 1991). The history textbook plays a number of roles within the classroom and thus cannot be considered as a neutral entity (Bertram & Wassermann, 2015; Foster, 2011; Foster, 2012; Loewen, 2008). History textbooks are pedagogical tools that comprise of agreed upon hegemonic content (Crawford, 2004; Foster, 2012; Paxton, 1999). Additionally, history textbooks still feature prominently within the classroom and are often the only historical texts to which school students are exposed (Paxton, 1999; Foster, 2012). History textbooks are part of the programmatic curriculum and are in themselves an interpretation of history (Apple & Christian-Smith, 1991). As history textbooks are not neutral, Paxton (1999) argues that they can often be criticised as being an obstacle to learning rather than useful sources. Some scholars assert that history textbooks do not always reflect a critical or multi-perspective history or a

history that build a historical consciousness but rather foster a narrow, often ethno-centric world view (Crawford, 2004; Foster, 2012; Fuchs, 2011; Loewen, 2008; Paxton, 1999).

History textbook content often comes under fire due to its unchanging nature (Loewen, 2008). Loewen (2008), who passed away in 2021, argued strongly that history textbooks remain unchanged despite recent scholarship. The author also claims that textbooks, despite being authored by different people, are often very similar in the choice of content and the constructed narrative (Loewen, 2008). Loewen's assertion of similar narratives specifically focuses on the US history textbooks; however, this phenomenon is not isolated to the US. Foster (2012) offers insight into this phenomenon. Whilst history textbooks cannot be generalised entirely, Foster (2012) articulates that many countries with a centralised education system have textbooks that share the same characteristics. Loewen asserts that the content within US history textbooks mirror each other; however, shared characteristics within the textbook content and narrative are equally significant as it also demonstrates the politicisation of history education. These textbooks often reflect a single narrative that strongly supports nationalistic tendencies (Foster, 2012). When writing my own Master's thesis, one of my findings noted, with few exceptions, like women in Russia and more inclusion on Trotsky, that there was very little content change from apartheid history textbooks of the 70s and 80s to the current CAPS history textbooks (Halsall, 2016). My study focused on the representation of Russia within two ideologically different eras. In 40 years (20 of which were post-apartheid) little change occurred in the representation of Russian history (or Russian historical figures) in South African history textbooks (Halsall, 2016). The narrative or perspective of certain key figures altered slightly. For example: Tsar Nicholas II and Stalin both experienced negative portrayal in both apartheid and post-apartheid history textbooks (Halsall, 2016). However, the representation of communism adjusted from highly dangerous in apartheid history textbooks to a more neutral and favourable image in the post-apartheid era (Halsall, 2016). The socio-political context of South Africa played a significant role in the differing representations; however, the overarching findings noted a mostly unchanged approach to the historical content and narrative (Halsall, 2016). As history textbook creation is not an island unto itself, how then do countries represent their own country or the history of others within their education framework (Foster, 2012)? How much is representation impacted by a changing socio-political context especially within post-conflict societies such as South Africa (Chisholm, 2015)?

Historical knowledge or official historical knowledge is a form of situational knowledge which is determined by the socio-political context at that time and therefore can change with time (Bermudez, 2019). School history textbooks contain officially sanctioned historical knowledge (Crawford, 2004; Engelbrecht, 2006; Foster, 2012). Official knowledge, especially relating to national knowledge, can extend to the provenance of a nation and the identity centring around this construction (Fuchs, 2011; Kaplan, 2009). A national identity is then created based on the selected version of history and this narrative perpetuates a collective memory which is then transferred to the history textbook (Foster, 2012). A national identity or collective memory that is formed often simultaneously includes and excludes peoples (Crawford, 2004). Bermudez (2019), reinforced by what social conflicts theorists and other academics espouse, states that the idea of conflict and its origins depend on the interpretation presented within the official knowledge and which often depends on the creation of an us versus them (Dahrendorf, Collins & Further, 2006; Crawford & Foster, 2006; Foster, 2012; Fuchs, 2011; Zajda, 2015).

History and a history of a nation is often romanticised to find the ‘best story’; looked at through a rose-tinted lens (Bermudez, 2019; Carretero et al., 2013; Foster, 2012). This romantic notion of an idealised nation-state, and generated collective memory of that nation-state within history textbooks, reinforces the authority of the dominant hegemony (Foster, 2012; Katsarska, 2007). This reinforcement is then perpetuated through the history curriculum with the establishment of official historical knowledge – what can be known and what should be known (Foster, 2012). The formation and reimagining of collective memory are tied to the ideological curricula which is then transferred to the programmatic curriculum of textbooks. Ideology can play a vital role in the creation of knowledge, the determining of what knowledge (or story) can be known and how this can be anchored into the programmatic curriculum. Foster (2012) asserts that history textbooks are propaganda tools which both reinforce an ideological narrative and determine how students learn the selected history.

2.6 Ideological identity in history textbooks

The construction of a national identity is supported by both the prescribed narrative and defining socio-political ideology (Challand, 2009; Janmaat & Vickers, 2007). Zajda (2015) defines ideology as a set of beliefs or values that are dominant within a specific group. These values and beliefs then infiltrate society which in turn creates the desired societal norms and expectations (Zajda, 2015). Identity and national identity cannot be divorced from nationalism;

however, to see and understand the interconnectedness of this partnership within history textbooks, one has to unpack each of the concepts. I have chosen to begin with the concept of identity as I feel that it provides the necessary structures which scaffold nationalism.

Identity and its strong partnership with ideology play an integral part within a nation as many nations are made up of diasporic peoples and, as such, an identification within the perplexities of a multi-ethnic nation can become challenging (Crawford, 2004; Zajda, 2015). Zajda (2015) draws attention to the parallels between nation building and national identity which is often prescribed by the dominant power. Within such a paradigm, an ‘other’ is created, one that does not fall into the conformed and chosen dominant identity (Crawford, 2004). Carretero et al. (2013) and Challand (2009) highlight both the politicisation of identity creation and the complexities surrounding it. Identity creation is complex; however, a national identity is tied to the creation and propagation of a national narrative. Carretero et al. (2013) argue that there are two main objectives to the national narrative: legitimating the nation-state and the construction of a national identity that connects the citizen to the constructed nation-state. Foster (2011) states that, within the history textbook, historical national narratives are chosen, thus linking power to the propagation of national identity as stipulated by Zajda (2015). Furthermore, national narratives, being a construction, sometimes include historical events or histories that did not exist at the time of the constructed nation-state (Carretero et al., 2013). This reinforces the fictional notion of a national narrative in its attempt to promote an authentic or natural history that links the citizen with the nation (Carretero et al., 2013).

Diasporic societies produce pluralism and diversity and within a globalised world, this is not unusual as only a few nations can claim homogeneity (Crawford, 2004). The problems identified with plurality can lie within assimilation and integration of the constructed ‘other’. The construction of the historical narrative is dependent on the imagined memory and as such, nation-building, is tied strongly to historical narrative (Janmaat & Vickers, 2007). Fuchs (2011) argues that, in recent years, as a direct result of globalisation, there is a tug of war occurring between the demand for previously unheard voices to be included in the historical narrative and the desire for neo-conservative protection against change. The changing nature of society and changing trends in historical memory have led to a custodial battle over memory in history textbooks (Schissler, 2008). Changes to narratives often deal with different memories and/or interpretations of memory (Wojdon, 2014). The new or changing narrative challenges or threatens the safety of an existing and recognised past as it would alter the traditional

perspective of national identity (Crawford, 2004; Fuchs, 2011). The increased demand for previously marginalised voices to be heard has engendered a public debate on whose interpretations should be included within the history textbook (Fuchs, 2011). Identity and the fostering of the ‘other’ rests on nation building through the use of predetermined historical narratives (Janmaat & Vickers, 2007). Historical narratives between ethnic groups in a society can lead to clashes if there is a perceived othering (Pingel, 2008). In 2007, members of the political party the Inkatha Freedom Party (IFP) burned copies of the Grade 12 Oxford History textbook because of its perceived negative representation of their leader, Mangosuthu Buthelezi (Bertram & Wassermann, 2015; Khumalo, 2007). In this example, there is a clash between the narrative presented in the history textbook and the desired narrative of the IFP. In this, Buthelezi argues that it portrays not only his role but the role of the IFP negatively in the creation of a democratic South Africa (Khumalo, 2007).

The fostering of a prescribed identity to facilitate nation building can help to engender a collective memory within society. This collective memory can then be propagated within the pedagogical programmatic curriculum (Wojdon, 2014). Collective memory is not static and can shift with the socio-political context. Fru & Wassermann (2020) discuss the problem with the creation of a new national identity using the example of French and British Cameroon. The authors argue that, through the reunification of French and British Cameroon, a desire for a new, collective Cameroonian identity was needed (Fru & Wassermann, 2020). However, due to its colonial past and division of Anglo-Cameroon and Franco-Cameroon, the creation of an inclusive collective identity was problematic (Fru & Wassermann, 2020). Fuchs (2011) makes an argument that, with the changing nature of historical narrative and the pressure that is attached, there are “history wars” centred around which national narrative to undertake (p.19). Within the Russian Federation, ideological adjustments based on historical concepts and historical narratives have been impacted since the fall of the Soviet bloc (Kaplan, 2009; Zajda, 2015). During Russia’s Communist era (1917 - 1991), concepts such as Socialism had been defined by the Soviet Union historical narrative. In other words, the concepts were heavily tied to the history of the country and could not be divorced (Kaplan, 2009). After the fall of the Soviet Union (starting in 1989), ideological repositioning needed to occur in both historical discourse and the historical narrative (Kaplan, 2009). Under current leader Vladimir Putin the history curriculum has a more patriotic ideology (Zajda, 2015). The identity and the supported constructed narrative are important in the establishment and perpetuation of ideology in history textbooks.

An additional example of identity construction based on changing socio-political dimensions can be seen in the report issued by the History Ministerial Task Team in South Africa¹³ where they outline a new sectional addition in the Brazilian history curriculum (DBE, 2018). The report states that Brazil, in order to strengthen its ties with the African-Brazilian population, has focused on promoting the importance of African-Brazilian relations through a cross-history project instigated by UNESCO (DBE, 2018). Brazil has been facing many challenges in the education system and this introduction of African-Brazilian relations can be seen as an attempt to provide racial unity and historical representation within the Brazilian history (DBE, 2018).

Within the South African context, there has been a long ideological battle with History Education. Ideology has played a significant role in the establishment of a desired national identity. During the Apartheid era (1948 – 1994), national identity was controlled and supplied by the State, and this permeated through the Christian National Education narrative which focused on strengthening the Afrikaner narrative (Bertram, 2020; Bertram & Wassermann, 2015; Chisholm, 2015; Nishino, 2015). During the Apartheid era, very little history textbook research occurred, aligning with the political ideology at the time which did not encourage critiques of the system (Bertram & Wassermann, 2015). After Apartheid there was a need to reconstruct both the History curriculum and history textbooks to align with the new dominant and democratic power (Bertram, 2020; Bertram & Wassermann, 2015; Chisholm, 2015; Nishino, 2015). Chisholm (2015) states that alternative textbooks did emerge within South African education due to social movements. South Africa has experienced many adjusted curricula since the end of Apartheid (Interim Curriculum, Curriculum 2005, Revised National Curriculum Statement and the most recent, CAPS¹⁴) (Bertram, 2006; Bertram, 2020; Chisholm, 2015). A reconstructed national identity, reflected in the History curricula (intended and programmatic), had been determined by both ideological shift and dominant power in charge. Within the nature of history textbooks, a historical narrative needs to be created and, at times, a reinvention of the past is necessary to promote an official history and therefore identity. This

¹³ In 2015, Angie Motshekga initiated a History Ministerial Task Team to conduct an investigation into the possibility of history being made compulsory in South Africa. DBE, Department of Basic Education 2015. National Education Policy Act (Act no 27 of 1996), Establishment of the History Ministerial Task Team. *In: EDUCATION, B. (ed.)*. South Africa: Government Gazette.

¹⁴ There has been a renewed interest by the Department of Basic Education, to promote History as a subject to a compulsory status by 2024. With this, a readjustment of the current CAPS curriculum and the current history textbooks within circulation is also in the works.

reinvention is a concoction heavily reliant upon myth and official knowledge which is anchored by a cultural dominance (Barnard, 2004). The historical narrative is often guided by what is considered the ‘best story’ (Foster, 2012; Ramoroka & Engelbrecht, 2015). The ‘story’ is defined by national narratives that attempt to justify past actions and to foster a sense of imagined nationalism (Bermudez, 2019).

2.7 Nationalism in history textbooks

Nationalism and ethnonationalism is foregrounded by identity and the construction of ‘them’ and ‘others’ (Ahonen, 2007; Crawford, 2004). Ethnocentrism and nationalistic tendencies (overt or covert) are often woven into the textbook content (Crawford, 2004). According to Ahonen (2007), there are two classifications of nationalism and both are geographically founded. Civic nationalism pertains to those of western origin and is considered to be more inclusive and therefore appropriate. Ethnonationalism, on the other hand, is considered to be of eastern origin which has been characterised by the West as exclusive and primitive (Ahonen, 2007). For the purpose of this review, I will use ‘nationalism’ in the general and only specifying origin where necessary. Nationalism is formed from a creation of an identity, an identity formed from culture or a group of people with shared history or imagined history (Ahonen, 2007).

Carretero et al. (2013) establish that the national history of a country is intrinsically connected to the constructed concept of a nation. Through this construction of a nation and national identity, nationalism is created. Within this dominant hegemony, symbols or symbolic content is created around the dominant hegemony to reinforce and justify its authority and place in history (Bertram, 2020; Crawford, 2004). History education serves a purpose through the reinforcement of an imagined national history (Foster, 2011). Through history education and the history textbook, a national narrative is disseminated in order to foster the notion of an imagined history or nationhood which reinforces the national identity and sense of citizenship (Crawford, 2004; Foster, 2011). Crawford (2004) argues that the concept of a nation is in itself a social construction as it is defined only by the imagination and whichever beliefs are held by the people and, as such, national identity draws much of its sustenance and longevity from national images and symbols (Crawford, 2004). Flags, holidays, sports teams, anthems, armies, et cetera, provide the necessary scaffold upon which to create and uphold a nation which is reinforced by the history textbook (Crawford, 2004).

With the emergence of the nation state from the 19th century, glorification of one's own nation is often found within history textbooks, often in the guise of patriotism (Loewen, 2008; Pingel, 2010; Foster, 2012). During apartheid, only positive aspects of the Afrikaner past were constructed into the official historical narrative (Engelbrecht, 2006). And through this weaving, a favourable image of the past emerged in comparison to the history presented about non-whites (Engelbrecht, 2006). The construction of an apartheid nationhood was fuelled and reinforced by these selective narratives. In doing so, the creation of the 'other' was deeply embedded within the history curriculum (Engelbrecht, 2006). After apartheid, there emerged a need for a new constructed nation (Pingel, 2008). The term that was coined was the *Rainbow Nation*. South Africa needed a new history – one that included all peoples of South Africa as under apartheid a clear hierarchical division had been created.

The concept of a nation is not necessarily tied to a single country. As mentioned before, after World War I, there was talk of a single textbook to promote a unified European history. This can be seen as a precursor to the establishment of a European identity that is reinforced through the history textbooks. Challand (2009) argues that Europe in itself is a construct. Furthermore, the establishment of NATO, according to Challand (2009) reinforces the concept of Europe which is reinforced further by the Council of Europe. The promotion of a European identity in history education can be traced back to 1955 where it allegedly first appeared in a German textbook. Janmaat & Vickers (2007) argue that international bodies such as NATO, EU, OSCE and the Council of Europe held prestige and recognition and many post-communist states ceded some authority to be able to join the recognised organisations. The concept of a Europe is held by the supranational organisation and this identity is continued through history education.

Philosopher John Locke does not question whether there be power but rather, who has it (Locke, 2013). Within this game of power, a constructed or imagined nationhood is created which ties its citizens to the country. I have used terms such as 'imagined' or 'constructed' to discuss nations and their histories as the integration of fiction into a history to justify or reinforce the power of a dominant hegemon is not uncommon (Carretero & Bermudez, 2012; Foster, 2011; Loewen, 2008).

2.8 Myths in history textbooks

History is socially constructed and within this construction there lies a sprinkle of both fact and fiction (Bentley, 2005; Loewen, 2008; McNeill, 1986). As fiction is woven into history, so is the creation of myths or, as McNeill (1986) puts it, *mythhistory*. Whilst the subject of myth creation within history in national undertakings has been mentioned, I feel it requires its own section in order to unpack it further. Myth creation enhances and reinforces a chosen identity, and it perpetuates a *herofied* versus *vilified* version of history (Loewen, 2008). My question is: can the topic of *herofication* be extended to how power blocs are perceived or represented within history textbooks? Power blocs such as the EU, NATO and UN, et cetera, still play a significant global role in the retention of power and so, how have they been represented in history textbooks? Furthermore, can *herofication* or *vilification* be extended to partner histories? For many students, the history classroom and the history textbooks is often their only exposure to historicity (Johannesson, 2002; Loewen, 2008). As such, for many adults, what they learned at school forms the basis of what they bring into adulthood (Loewen, 2008).

In the book *Lies my teacher told Me: Everything your American History textbook got wrong*, Loewen (2008) outlines the possible reasons for the creation of the ‘selected’ history textbook heroes. The creation or herofication of historical figures implies that these figures are without blemishes or flaws in order to portray a desired or romanticised history. Loewen (2008) states that, in order to create these ideal heroes, omissions, lies or sectioned snapshots of their life are incorporated to produce a desired historical figure to foster a collective memory and national identity. Furthermore, often credit is given to the ‘hero’ or historical figure as opposed to society as a whole (Loewen, 2008). This linking of history and myth-making establishes an idealised version and sometimes a one-sided view of the country’s history – a version that is acceptable to the dominant power group (Bentley, 2005; Carretero & Bermudez, 2012; Carretero et al., 2013).

In his 2013 Master’s dissertation, *The representation of Nelson Mandela in selected grade 12 history textbooks*, Van Niekerk (2013) presents an analysis of the portrayal of Nelson Mandela in Grade 12 South African history textbooks. The author states that throughout the textbooks, the role Mandela played and Mandela the man have been reinforced by myth creation. A result of this is an unflawed, almost messianic, Mandela (Van Niekerk, 2013). The author further asserts that myth creation is not new to South African history and that myths were presented in apartheid history to reinforce the authority and justification of white, Afrikaner minority rule (Van Niekerk, 2013). This is reinforced by Engelbrecht (2006) in that the Afrikaner narrative only showed a favourable image, thus creating a myth around their history.

Idealised or romanticised history enables countries to perpetuate the history they want, a desired past based on myth creation (Carretero & Bermudez, 2012; Carretero et al., 2013). Challand (2009) argues that maintaining the myth or mythical narrative is not easy and requires continuous work. Through this maintenance, the historical significance of the myth is reinforced and propagated (Challand, 2009). The creation of this romantic history reflects the battle between the dichotomy between us versus them, as the desired history does not always include all participants, nor does it necessarily reflect a multi-perspective history. Understanding the creation of a nation, often through myth creation, is important as this desired creation is often reflected in the history textbook. However, are power blocs (or supranational organisations) immune to such mythmaking as they are gatekeepers of textbook quality control?

2.9 Power blocs in history textbooks

Power blocs and who controls them is a central theme underpinning my research on how BRICS countries are represented within the textbook. Power blocs act as international agents and therefore wield significant influence globally. Blocs like the EU, NATO, Warsaw Pact and UN have been fundamental in the creation of ideological support. It is prudent, therefore, to ask how these power blocs, noting the power they have, are portrayed in history textbooks.

The lack of available literature on power blocs within textbooks is quite illuminating as power blocs go beyond that of a political alliance. They act as political, economic and ideological warriors defending their power. How does History portray them? The significance of the lack of literature speaks volumes. Strong political and ideological allegiances have been formed. So how do these allied countries portray their allegiance in history textbooks? How are the power blocs integrated into the legitimate knowledge of the curriculum? As it stands, there is little to no literature available to answer these questions.

Only a few articles have been found regarding power blocs in history textbooks. The articles found are also quite dated, none being written in the last 25 years. This is of significance as it not only shows a significant gap in research but a lack of recent scholarship pertaining to the topic of power blocs. It is important to note that, while there is much research on communism

in textbooks/education by authors such as Wojdon (2012) and Zajda (2015), the focus in this subsection is on power blocs within the history textbook.

McClure (1951) argues that in 1949, UNESCO called on each member nation to investigate their own school textbooks to unpack the nature of the treatment of agents of international co-operation from 1918 to 1951. In the article, McClure (1951) looks at international agency, particularly the UN in American Social Studies textbooks. This yielded a finding that US textbooks imply that the US's portrayal of their own involvement in international co-operation extended even after World War One, even though they had reverted to their policy of isolation. Additionally, the US did not join the international organisation the League of Nations (despite the lobbying done by President Woodrow Wilson); however, the implication of continued international co-operation and allegiance overshadows this refusal. There is very little recent scholarship following this observation, and despite the article being published in 1951, it speaks of omission through vagueness. An implication is not said outright, but it is a suggestion that is never corrected, where the portrayal of the US is that of a benevolent superpower which has always been interested in global co-operation.

The solitary article that I found on the power bloc NATO was published in 1990 by Fritzsche (1990). Contextually, 1990 saw a dramatic shift in ideological power and strength. The Soviet Union and its satellite states were crumbling; thus, the Cold War was over. The ideological power battle between the United State and Russia, Capitalism versus Communism, was theoretically over. Globally, the world was entering a post-Cold War era. What Fritzsche (1990) article unpacks is how the Federal Republic of Germany (FRG) views NATO in its textbooks. In an article comparing history textbooks of the German Democratic Republic (GDR) and apartheid South Africa, Chisholm (2015) unpacks the themes from within the East German textbook. From the article, the focus within the GDR textbook is more aligned with the development of class structures, worker movements and a conceptual understanding of Marxism and socialism than power blocs (Chisholm, 2015).

In his article, Fritzsche (1990) outlines the various themes within a range of history and civic textbooks in order to see to what degree a balanced perspective of NATO is presented. It was difficult to discern the line of argument made by the author, as from the onset, it is implied that there should be a balanced perspective. Additionally, the author continues to note that only with the FRG textbooks is NATO confronted with criticism – thus implying that there should not be. This line of argument shifts as the article progresses to a more objective perspective,

but it was not evident throughout. Furthermore, the outline of the themes and subthemes is not very clear and, at times, was somewhat confusing. What can be made is that a structural framework is provided in which the subthemes are classified into two categories: factual and controversial. Factual relates to the origin, achievements and strategies of NATO whereas arguments, doubts and criticism are classified as controversial. The author points out that in the earlier textbooks, the FRG is seen as predominantly criticising NATO; however, from the 1980s, there is an overall shift in attitude towards NATO. From the 1980s, according to Fritzsche (1990), a more critical view of NATO is taken overall, where the functionality of NATO is questioned. The 1980s saw a significant shift in global politics. The strength of Communism was diminishing and the ideological battle between East and West was also weakening. This shift in global politics could lend itself to the dramatic shift in perception of NATO.

From these accounts, little research exists on how power blocs are presented in history textbooks or how a country, tethered to the power bloc, represents it. This is where my research gap lies. My research focuses on how South Africa has represented its power bloc partners (BRICS) within South African history textbooks. As South Africa is deeply entrenched in this power bloc, it is important to understand how South Africa reflects this partnership and the allied countries within the South African education framework.

2.10 Conclusion

Through the borrowing of myths, national identities help construct agreed upon national histories which are reflected in the programmatic curriculum. The creation of such histories is tied to power – who controls the power, supplies the history. The influence of history textbooks on student understanding of history and the perception they have of other countries is vital. South Africa is part of this important power bloc of BRICS but what do the South African learners learn about the countries within the South African programmatic curriculum?

In this chapter, the importance of history textbooks in the dissemination of a desired historical narrative has been reinforced. The imagined nation and nationhood play an integral role in the creation of a historical narrative and national identity. These elements are crucial when related to this research. In this study I investigate how the BRICS countries are represented within the

programmatic curriculum. What is the narrative that has been constructed around South Africa's allied partners?

In the next chapter the conceptual underpinning of the study is discussed. The research is more than a thematic unpacking of the textbook; it is reinforced by the concepts of power, multipolarity, identity and otherness within the post-cold war paradigm. It is necessary to highlight the conceptual underpinning of the research as it not only guides the phenomenon under study which is that of representation but provides the conceptual landscape necessary for the methodology to occur.

CHAPTER THREE

THEORIES OF POWER

“Power...is something very different from authority. The distinguishing of the latter is that it is exercised only over those who voluntarily accept it: if the rulers gave authority over only a part of their subjects, they may receive from that part a strength sufficient to subject the others to their power.” (de Jouvenal, 2012)

“What nature does not subjugate, it knows to forget” (Nietzsche, 1874)

3.1 Introduction

The fourth industrial revolution has engineered seismic shifts in power, wealth and knowledge on an unprecedented scale (Xu, David & Kim, 2018). This shift in power overlaps with the impact of globalisation and the changing nature of the global power hegemon. It is at this intersection where BRICS as a power bloc falls. There is a marked difference between this, the fourth revolution, and the third revolution – the Information Revolution. The first difference being the speed at which the world is changing and the interconnectedness the fourth revolution has generated and enforced. Xu et al. (2018), Ferguson (2018) and Giddens (2003) state that everything is connected and is part of a networked system and that there is no going back to the way things were before. BRICS forms part of this networked world through its multilateral co-operations. The question of global power, or shifts in global power, are not new to workings of the world. As the current global hegemon shifts, as aforementioned in Chapter 1, the question of a global hegemon and a new reign of power is called into question. It is imperative to unpack the theories of the structure of power and authority and what is imbedded within the concepts of power and authority respectively. The make-up of authority and power and the perception of them is important to the understanding of the development of the global hegemon as well as when as shift to the global hegemon occurs.

Power and authority are interlaced features of control that are woven and embedded into all facets of society (Faulhaber, 1985). The structures of power and authority are integral cogs in the scaffolding of official curriculum and the programmatic curriculum (textbooks). Power and authority are influential in the decision-making process which determines how history appears

in both the official curriculum and the history textbook. Bertram (2021) argues that there is a friction between memory history and disciplinary history within the history textbook and further questions who has the authority to make the decisions regarding the presentation and portrayal of history in the history textbook and where this authority lies. The liminal space between the official curriculum and the recontextualisation of it in the form of the programmatic curriculum is perhaps a place where this authority lies. A question regarding the integration of power and authority into history textbooks and their impact on a history's portrayal therein arises here. Before unravelling the nuances regarding the liminal space and how it is beholden to this power and authority and how it is used within the programmatic curriculum, it is imperative to first understand the theoretical underpinnings of the two concepts, *power* and *authority*.

In this chapter it is first necessary to conceptualise theories of power and authority and how they contribute to multipolarity, identity construction and the creation of others within the post-Cold War paradigm. Following this, the unpacking of how theory has been used in the research will be unpacked. The theories are underpinned and guided by a conceptual framework. The conceptual framework provides the necessary structural scaffolding for the research under study. Additionally, in this chapter I will expand upon power and authority in the South African programmatic curriculum content selection. It is also vital to unpack the authority behind history textbook writing within the South African framework. As my research focuses on how the geo-political bloc BRICS is represented within the programmatic curriculum, it is important to understand the textbook writing process and where the authority lies in the selection and recontextualisation of knowledge and pedagogy.

3.2 Understanding power and authority

Before advancing further with the theories of power and authority, it is first necessary to understand and differentiate the fundamentals of the two concepts: power and authority. There is much scholarly debate regarding the concept of and relationship between power and authority and a definitive consensus is not met. In some instances, power and authority are used interchangeably as authority is seen as synonymous with legitimate power; however, Sanders (1983) argues that there is supposed to be a clear delineation between power and authority (Uphoff, 1989). On the other side of the coin, other scholars argue that while authority cannot be divorced from power and power cannot be divorced from authority, there is a marked

difference between the two concepts and they are not to be used interchangeably (Faulhaber, 1985; Uphoff, 1989). Despite the dated conceptual debate, there does not seem to be an academic consensus as to the exact definition of power or authority nor in terms of the relationship between the two. In order to avoid such a “conceptual labyrinth”, I have attempted to provide some conceptual structure of the two terms (Parsons, 1963; Uphoff, 1989, p. 296). The formalisation between power and authority is needed in order to see how it is reflected in history textbook writing.

Haugaard (2021) cites Bertrand Russel (1938 p.10) in the assertion that power is inextricably linked to the social science. Scaffolded by theorists like Lukes (1974), Foucault (1982) and Weber (1978), Haugaard (2021) argues that there are various dimensions of power which can in turn influence agency and society. Haugaard (2021) further argues that it is first necessary to discern between “power-to”, “power-over” and “power-with” (p.153). These are three distinguishing features of power that lend themselves to a type of power. Power-to suggests a space or an ability for action where power-over is often considered the most dominating form of power in that one person or entity has power over another. Power-with suggests a collaborative form of power (Haugaard, 2021). The suggestion of a form of collaborative power ties in with collaboration of BRICS partner countries into a political and economic collaborative bloc.

According to Haugaard (2021 p. 153), “A world without power would be a world without the agency to do things”. Within this understanding of agency, Haugaard (2021) argues the difference between power and the exercising thereof and the resources at the feet of power. In *The four dimensions of power: conflict and democracy*, Haugaard (2021) reasons that there are three potential resources of power: “violence-cum-coercion, authority and material-cum-economic resources” (p. 154). I won’t go into detail of all three power sources here, however, they will be included in the subsection that follows. In saying this, here, I will unpack the power resource of authority for the reason of differentiation. Haugaard (2021) cites Weber (1978) when he states that authority is tied to a belief and meaning, thus there is a limit to the scope of authority. Furthermore, authority or the scope thereof, is dependent on the positions held by those in power (Haugaard, 2021). The authority is dependent on the perception held by those with less power and through this, those with more power have power-over those with less power (Szelényi, 2016). Power and authority remain if those with less power still perceive the

powerful are working for the collective interest (Haugaard, 2021; Stanton, 2011). Power is thus only maintained through the perceived authority of the dominant hegemon.

Faulhaber (1985) notes the various interpretations as well as confusions centred around the understanding of authority and power. The first interpretation Faulhaber (1985) suggests is that of Hobbes, namely that authority is a kind of power that reinforces and validates what is just. Hobbes suggests, according to Faulhaber (1985), that authority is non-coercive when it is strong but can become forcible when it is weakened. Contrastingly, Haugaard (2021) and Sanders (1983) argue that when power becomes coercive, authority has been lost as violence is often used to maintain power rather than the will of the people.

A second view of authority is that authority is power and through the power a 'right' is established (Faulhaber, 1985). Although Faulhaber (1985) disagrees with the conclusion, he suggests that confusion with authority lies in authoritarianism and that within the post-modern world, authority and democracy lie on two different sides of the same coin. In his argument against this assertion, Faulhaber (1985) suggests a difference between authority and sheer power. In *Of Power and Authority, People and Democracy*, Faulhaber (1985) uses the example of the American War of Independence which refers to *de facto* and *de jure* authority. While the British were the *de jure* authority, the American rebels declared themselves free from British rule and became the *de facto* authority, according to Faulhaber (1985). Through this assertion, Britain had the technical power but not legitimised political authority (Faulhaber, 1985; Rousseau, 1968). Through this example, a clear delineation is made between legitimate authority (or political authority) and its association with power.

Authority and power can thus be observed simultaneously; however, the claim is that authority is a resource for power and its make-up has limitations on its influence (Faulhaber, 1985; Haugaard, 2021). Furthermore, power can be categorised into two factions: *de facto* and *de jure*. In this distinction, the driving force between the two is where the authority lies, therefore, authority legitimises and supports the powerful (Faulhaber, 1985; Haugaard, 2021).

3.3 Theories of power and authority

According to a Greek myth, popularised by Cicero, there was a king named Dionysius (Andrews, 2016). One day he was approached by a commoner, Damocles, who commented on the luxury had by the king because of his power. The king offered Damocles his throne and all

the privileges that came with it for one day. Damocles accepted. Whilst on the throne, Damocles noticed a sword dangling by a single horsehair above the throne (Andrews, 2016). The hair could snap at any moment which would kill the person sitting beneath. Damocles, terrified, asks Dionysius about the sword. King Dionysius claims that being king and having power comes with privileges yes; however, that power is fragile and has the ability to destroy at any moment. Through this narration, Cicero illustrates the precarious nature of power and to subsequently expose the reality behind the ‘truth’ of power (Andrews, 2016). This metaphor describes the shifting nature and illusion of power and by extension authority. In the case of Damocles, power is presented as precarious and perhaps dangerous; however, it was Dionysius who provided Damocles with the power and authority albeit temporarily. Whilst the perception and precariousness of power is valid to this study, the question lies in who has and who does not have power. In the analogy provided, Dionysius offers kingship to Damocles, as he has the authority to do so. The relationship between power and authority is to be further unpacked. It is necessary to see how power and authority are reflected and applied not only to the modern world but in history textbook writing.

When unpacking the nature of power, an overarching theme emerged from the scholarship: a common thread that is either stated or alluded to, and that is the state of nature, or the state of humankind¹⁵ (Grotius, 2012; Hobbes, 2004; Locke, 2013; Rousseau, 1968). I mention this because it has become very clear that there is no collective consensus amongst theorists as to what the state of nature should mean. However, pioneer theorists like Filmer (1991), Grotius (2012), Hobbes (2004) Locke (2013) and Rousseau (1968) have used this as an underpinning certainty to validate their own argument on power and who should have it. The concept of power and the authority to which some think they have to this power has shaped the fight for global order. Power, or the concept thereof, is a human construction and as such, is influenced by the changing nature of society (Foucault, 2012; Rousseau, 1968). It is these interpretations of power (or the question of power) that have influenced the concepts of multipolarity, identity and otherness within the current post-Cold War paradigm. The question of power forms the umbrella under which multipolarity, identity, otherness, and the post-Cold War paradigm falls. It is this umbrella that shapes the understanding of the current global order and the influence BRICS (and by extension, South Africa) has had on this shift.

¹⁵ Whilst theorists originally reported on the state of *man*, the term is archaic and untimely so I will instead be referring to the state of humankind to account for the state of humanity.

The multiple theories that will be discussed in this chapter, have had an irrefutable influence on the concept of power and how people see and use their authority of power. It is these theories that provide the foregrounding of my conceptual focus and their relation to history textbook writing in South Africa. In this chapter, 16th and 17th century ideas on the concepts of power and authority by Machiavelli, Grotius, Hobbes and Filmer will be unpacked. Following this, 17th to 18th century theorists like Locke and Rousseau will be discussed. Thirdly, 19th to 20th century theorists from Nietzsche, Weber, Marx to Foucault will be discussed. I have chosen these theorists in particular because of their varying notions of social power and authority. In addition, many of these theorists have built upon the work by ancient scholars (such as Aristotle and Plato) and other predecessors. Practically speaking, it is not possible to unpack every theorist or theory throughout history. It is necessary, however, to discuss some of the pioneer thinkers on power in how their thinking has influenced and shaped the modern understanding of power and its influence on shaping society.

One of the key arguments in my research relates to power and power relationships. The structure of power and how this theory of structure came to be developed is important to the current global order. Machiavelli, in the 16th century, argued that good leadership is an important component of power (Machiavelli, 2008). He further stated that grandiose ideas alone do not equate to good leadership. Execution of those ideas, and the support of the power base, is essential (Machiavelli, 2008). Machiavelli (2008) does posit that the use of the military is often necessary in order to establish power. While he is not against the use of the military to assert control or even the use of fear to secure power, he does state that there needs to be a balance between power and the use of the military to assert that power (Machiavelli, 2008). Having a good military can create sound and reasonable laws and often successful states are born out of a successful war; nevertheless, he warns that the leader must keep the people's favour and respect (Machiavelli, 2008). Overall, Machiavelli conceptualises power as being influenced by the favour and respect of the people which asserts that the acceptance of the people whom the dominant hegemon oversees is an important component of power (Machiavelli, 2008).

Where Machiavelli states that power derives from good leadership, and the support of the people, Hugo Grotius, on the other hand, brings to the fore the question of war and right and the subsequent right to leadership (Grotius, 2012). He postulates that justice does not form part

of nor can it be found in the definition of war itself as he questions whether war in itself can be considered just at all (Grotius, 2012). This underpins Grotius' opening question: the right of war. The question of *just* wars aside, who then has the power or authority for war itself? To further support Grotius, Rocheleau (2020) states that the determination of what can be considered legitimate authority, is a greatly contested criterion in order for a war to be considered just. Rocheleau (2020) argues that *jus ad bellum* is discussed for a legitimate authorisation of war. In other words, these are the conditions under which states or a leader can resort to a justified war or the use of armed forces. What this does, according to Rocheleau (2020), is that the legitimacy of the authority distinguishes between war as just or lawful versus criminal.

Deciding what is just and unjust within the state of war can be complicated as anything that goes against what Grotius deems *the* nature of society can be considered unjust (Grotius, 2012). Grotius (2012) further monitors the rights or power held by humankind in war because one cannot take away from one person what rightfully belongs to them simply to seek an advantage. In this, Grotius extends a limitation on rights and by extension the power held by a hegemon. Within this society, Grotius speaks about the rights of humanity and the subsequent creation of an authority. Grotius (2012) points out that justice takes place when a society has been founded upon equality. Within this assertion, Grotius outlines the varying levels of equality and the rights associated with each level (Grotius, 2012). Equality, according to Grotius, is seen between brother and citizen as well as between master and servant, parent and child. Within this structure, one owes tribute and thus justice (which is a by-product of equality) takes place either between equals (free people) or between those who are governed and the governing body such as master and slave (Grotius, 2012). Equality, justice and rights are dependent on a power source – they are not natural by-products of society, they are created.

Equality and justice (and whomever decides this) seem to form part of the envisioned society of Grotius. Grotius cites the Greek philosopher Plutarch when he states that humanity is created by nature in order to use justice and law towards that of humankind (Grotius, 2012). Society is governed, in essence, by the laws of nature, according to Grotius (2012). Furthermore, a state or a governing body is representative of those that are considered free and thus are open to equal rights. Those who are considered free suggests an authority behind this consideration – who makes this determination? Grotius (2012) articulates the two arguments surrounding the existence of the law of nature: *a priori* whereby one finds the argument using reason or theory

(like a mathematician uses theory) or *posteriori* whereby one can gain knowledge and understanding through experience. Herein lies the notion of truth and power or essentially how a truth can be decided and who decides it. Truth in essence can then be considered a construction decided by those who have the power. Grotius cites Heraclitus who argues that common reason is the best benchmark for finding ‘truth’ whereas Aristotle and Seneca argue that what is the same for most must equate to the truth (Grotius, 2012). Grotius applies and amalgamates Heraclitus and Aristotle in his assertion of the Law of Nations. In the law of nature which can essentially be renamed to that of the Law of Nations (nations only of the Western world), as the authority of the nation’s rests on the consent of all or at least most (Grotius, 2012).

Grotius analyses the right nations have to war and the subsequent establishment of the authority base whereas Thomas Hobbes argues that humankind naturally searches for peace amongst the chaos they create (Hobbes, 2004). Hobbes, therefore believes that the establishment of a sovereign power is very important to keep the peace (Hobbes, 2004). In this establishment of a sovereign power, the people must then respect the power as it is in place to ensure that humanity does not devolve into his natural states of inherent violence. John Locke, however, has a different interpretation of power. Whilst Locke supports Machiavelli’s assertion that good leadership is important and Hobbes’ assertion that a ruling power is needed, he emphasises the accountability that those in power must hold to the people (Hobbes, 2004; Locke, 2013; Machiavelli, 2008). Locke in his *Two Treatises of Government* challenges Robert Filmer’s *Patriarcha* (Filmer, 1991). In *Patriarcha*, Robert Filmer states that it is the natural state (and biblical) for humankind to be ruled by a monarch and that some people are born for this position whereas the rest are born to be slaves (Filmer, 1991; Locke, 2013). Locke (2013) challenges this by asserting not only that people can rule themselves (an early progressive learning of self-determination) but that political power essentially is supposed to protect its people. Martin (1975) supports both Hobbes’ and Locke’s assertion in that the citizen has an obligation to obey the authority of the government. However, Martin leans more Lockean as he further asserts that whilst the citizen does have the obligation to obey, they only have this obligation inasmuch as the government has the authority to issue orders.

When the ruling power tries to overexert its power on the people, thus forcibly removing liberty and equality, this is now a state of war and the people have a right to overthrow that government (Locke, 2013; Martin, 1975). This is what Haugaard (2021) defines as coercion. A result of

this coercion is the loss of authority perceived by the less powerful which can lead to a change in leadership (Haugaard, 2021). Hobbes argues that the people must accept their sovereign power at all costs, whereas Locke argues that if the ruling power betrays the natural rights and freedom of its people, then the ruling power is no longer performing its duty, which is to protect its people (Locke, 2013; Hobbes, 2004). In this case, there is a loss of authority by those in power.

Jean-Jacques Rousseau in 1762 created a theoretical model on his idea of how humankind should behave, known as *The Social Contract* (Rousseau, 1968). Rousseau (1968) posited that for a power to actually have ‘real’ power, it needs to be legitimate. “Man is born free, but he is everywhere in chains” is a popularised quote (Rousseau, 1968 p.12). Within this statement the ‘chains’ to which he refers figuratively reflect the yielding of natural liberty to a power. The ‘chains’ themselves are not found within the state of nature and are therefore a social construction. This points out that those in power need to become a legitimate political authority in order for them to be recognised. In this analogy, there is an inextricable connection that is made between power and authority. There is no power when there is no authority and so those in power need to become legitimate beacons of authority in order to have the power, if one is to believe Rousseau.

Political authority is gained through legitimacy which means that people relinquish their natural liberty to the legitimate authority (Rousseau, 1968). Sartorius (1981) poses two basic questions which concern political authority. The first question relates to the issue of a moral right and whether any conditions exist in which political authority can equate to a moral right. Secondly, Sartorius (1981) questions the conditions in which the citizen has an obligation to obey those holding political authority. The political authority is bound to the people according to Rousseau (1968) and it is the duty of the powerful to maintain equality amongst the people. In return, the people offer their duty of obedience but only to legitimate powers (Haugaard, 2021; Rousseau, 1968). According to Locke and Rousseau, the government has an obligation to the people and the people can exert some form of control over the said power (Locke, 2013; Rousseau, 1968). Rousseau (1968) further theorises that all legitimate authorities must be based on some form of social contract in which to allow the people some form of their own sovereignty. This is done to protect the people and allow them to have some element of control over the political authority. Contrastingly, Martin (1975) challenges Rousseau (1968) on this notion by stating that the perception of justifying political authority is systematic. According

to Martin (1975), systematic connections exist because of three intertwining elements of political authority: the issuing of rules, which in turn generate an obligation to obey, and lastly, the ability to use coercive force. Political authority therefore rests on these three intertwining elements – the ability to create rule which encourages a compliance with the notion that force could always be a possibility, according to Martin (1975).

Friedrich Nietzsche offers a different perspective on power in which he looks at the role of history within society. Nietzsche argues that the past can play an integral part of the power play (Haugaard, 2021; Nietzsche, 1874). He argues that humankind has to be careful not only how the past affects us or society, but by what perspective the past has been shaped. Nietzsche (1874) asserts that there is an overabundance of historical consciousness and that this can impact present society. Furthermore, Nietzsche argues that society knows how to forget at the right time (in terms of certain perspectives or histories) and in the same breath, it knows how to remember at the right time (Nietzsche, 1874). Within this argument, Nietzsche (1874) asserts that remembering (memory politics) an event can have a political agenda (the politicisation of history) in that a certain historical event can be embellished or beautified to the extent that one cannot differentiate between a historical event and fiction (Miller, 2010). The notion of political memory falls into question of power and authority within history textbook writing. Who has the power or authority to decide what should or should not be remembered? Nietzsche (1874) further outlines the dangers of the past in that the agenda of a person or group can engender the need to select or even rebrand a certain history from the past according to what is deemed of value (Giddens, 1990).

Nietzsche argues the role of power and authority in the creation of the constraints of the past when he states: “The borderline at which the past must be forgotten if it is not to become the gravedigger of the present” (Nietzsche, 1874 p.3). In this statement, the volatile nature of history on present society is unpacked. Nietzsche (1874) claims that at some point the past must be forgotten in order for certain parties not to use it to their advantage to sway political society. He also argues that some people might use an event to their advantage even if the ‘true’ impact was imperceptible, whereas another member of society could have been greatly affected by an event but that historical event falls to the wayside (Nietzsche, 1874). Ultimately, it can be argued that history can sometimes be used a tool for those in power to articulate a certain version of history and could be used to assert the legitimacy of their power (Miller, 2010).

According to Szelényi (2016 p.3) and Uphoff (1989), Max Weber provides a clear distinction between power (*macht*) and authority (*herrschaft*)¹⁶. *Macht* or power is categorised as an agent being in a probable position to carry out their own will with or without resistance (Szelényi, 2016; Uphoff, 1989). *Herrschaft* (authority or domination) works hand-in-hand with power as it determines whether a command will be followed (Szelényi, 2016). Through this a clear connection between power and authority is made: a power needs to be legitimised for it to have any authority (Szelényi, 2016).

Whilst Weber focuses more on the understanding of bureaucracy, he makes a connection between authority and obedience in that those subjugated have some sort of belief in the dominant power (Unknown, 2017; Haugaard, 2021; Szelényi, 2016; Uphoff, 1989). Weber argues alongside Rousseau that power exists only as long as it accepted by the ruled populace (Unknown, 2017; Faulhaber, 1985; Szelényi, 2016). With this acceptance therein lies an obedience, a willing obedience and as such an authority emerges legitimising the dominant hegemon (Unknown, 2017; Szelényi, 2016).

Furthermore, Weber denotes that there are three types of pure authority (Roth & Wittich, 1968). The need for this is simple: it outlines certain types of governance. The first type of authority identified by Weber is that of a traditional authority (Unknown, 2017). This type of authority can be aligned to suit the structure of a feudalistic society in that long-established beliefs or customs are rooted in the authority. Obedience is rather given to the rulers themselves over that of rules as authority is seen as hereditary (Roth & Wittich, 1968). The second type of authority Weber notes is called a charismatic authority (Unknown, 2017). Herein lies a devotion (almost blinding) to a leader deemed exemplary (Roth & Wittich, 1968). Obedience to this authority can be justified because of what this said person has done. Within this type of authority, leadership has been almost deified. This quasi-deity can lead to the establishment of a cult of personality so often seen within dictatorships. The final type of authority is legal-rational authority (Unknown, 2017). With this type of authority, Weber notes a formal kind of legality to it. The rule or authority is impersonal as the rule follows along the lines of a legal code. Unlike the first two types of authority, within this type, the powers that be are either

¹⁶ Max Weber is often considered one of the leading modern authorities on power and authority in society. It is important to note that there have been many translations of Weber's work and many interpretations of the author's work over time. This has led to many inconsistencies amongst scholars regarding the relationship between power and authority. I have not attempted to unpack all the variants of Weber's work; however, I have attempted to find a consensus in the understanding of the relationship and definition of power and authority as discussed by Weber (Uphoff, N. 1989. Distinguishing power, authority & legitimacy: Taking Max Weber at his word by using resources-exchange analysis. *Polity*, 22, 295-322.

appointed or elected thus signifying a willing obedience based on choice (Roth & Wittich, 1968).

In this classification, authority is seen as a social construction dependent on the societal power-framework (Foucault, 2012; Haugaard, 2021). As discussed by Weber, authority, in itself, is a special kind of power (Uphoff, 1989). Weber as cited by Uphoff (1989) in *Distinguishing power, authority & legitimacy: Taking Max Weber at his word by using resources-exchange analysis* argues the inter-relational properties of power, authority and legitimacy. Power, it is argued, can be linked to authority, to some extent, only for as long as legitimacy is given (Uphoff, 1989). To add on to the list of scholars who have cited Weber's definition of power (*macht*), power is described as "the probability that one actor within the social relationship will be in a position to carry out his own will despite resistance" (Szelényi, 2016 p.3). Authority, according to Weber, then rests on the *probability* of obedience (Szelényi, 2016). With the inclusion of *probability*, the definition of power or authority is not all-determining. Thus, there is room for exceptions to the rule, of course. However, in this unpacking of theoretical understandings of power and authority, a repetitive feature of power has been reiterated here, the notion of authority.

Karl Marx, a contemporary of Weber, is another pioneer thinker on societal structure and the workings of it (Giddens, 1990). More specifically, Communism is a socio-economic theory put forward by Karl Marx in 1848 (Marx & Engels, 1967). Subsequent to the writing of *The Communist Manifesto* the theory of communism has been adopted, adapted and politicised by many countries (arguably most notable are Russia and China). The theory of communism questions the real power stakeholders (Marx & Engels, 1967). Marx determined that the real power lies with the working class (proletariat) as they outnumber the upper-middle class (bourgeoisie) whom Marx believes exploits the proletariat (Marx & Engels, 1967).

Communism rests on the premise of a classist oppression and that a classist revolution is imminent (Marx & Engels, 1967). Marx & Engels (1967) believed that the entire capitalist institution (nurtured by the Industrial Revolution) would soon crumble because authority lay with a few whilst the rest of the population suffered in poverty. Within the capitalist system, power rests in the hands of the bourgeois – the oppressor (Marx & Engels, 1967). Marx & Engels (1967) argued that capital is a form of social power as it controls the workforce and reinforces the classist system. The bureaucratic system is the instrument, according to Marx,

that the bourgeois (oppressors) use to exert their dominance over the proletariat (oppressed) (Marx & Engels, 1967; Unknown, 2017). This classist system, it can be argued, has been reinforced by the structures or institutions (factories, laws and so forth) created by the bourgeois (Foucault, 2012).

Michel Foucault's theory of power also rests on a class struggle and the perpetuation of the classist system through institutions. In *Discipline and Punish*, Foucault (2012) unpacks Jeremy Bentham's theory of the panopticon and its application to social institutions such as prisons. Bentham's theory relates to the ubiquitous nature of power and how it can be used to guarantee order in the world (Foucault, 2012). The panopticon theory refers to internal surveillance and the need for power not only to be perceptible but also unverifiable at the same time (Foucault, 2012). This way, order is guaranteed as people (or prisoners in Foucault's analogy) will never know at what moment they are being watched and can only assume they are being watched.

The description of the panopticon prison is essentially a form of discipline, and according to Foucault (2012), discipline is a type of power. He refers to it as the "anatomy of power" (Foucault, 2012 p. 215). Furthermore, all mechanisms used to ensure power and discipline are used, according to Foucault (2012), to mould and to change the individual who does not fit into the agreed upon social ideals. Foucault (2012) argues that discipline mechanisms (institutions) of the 17th and the 18th centuries facilitated the growth of more disciplinary institutions (prisons, police, schools, et cetera) through networking in order to ensure the maintenance of societal norms. It was in 18th century France that Foucault notes the altered nature of the police (Foucault, 2012). Prior to the French Revolution the role of the police was more of a secondary justice whereas during the 18th century, a disciplinary role was enforced (Foucault, 2012). This reinforces the role of the police in enforcing absolute power and the institutions they perpetuate.

It is the societal institutions, through the maintenance of societal norms, that, Foucault argues enforce and perpetuate class oppression (Chomsky & Foucault, 1971). Bentham argues that power is found through the internal surveillance of the populace whereas Foucault argues that power is found within institutions themselves because of their enforcement of a certain ideal (Foucault, 2012; Chomsky & Foucault, 1971). Although the panopticon can ensure the automatic functioning of power without the possibility of a tyrannical takeover, it leads to a society controlled where the maligned are forcibly moulded to suit societal structure (Foucault,

2012). Foucault (2012) further states that within society, prisons resemble factories and schools, and factories and schools resemble prison. This illustration is supported by Foucault's continued assertion that class oppression is caused and perpetuated by these institutions within society: the idea that power is always visible but cannot be determined will ensure a 'well-behaved' society (Foucault, 2012).

In a televised debate with Noam Chomsky, Foucault questioned how human nature can be defined (Chomsky & Foucault, 1971). Earlier it was asserted that the question of the nature of humankind (or the state of humankind) has been contested amongst philosophers, Foucault now questioned the concept of human nature (Chomsky & Foucault, 1971). He argued that concepts such as human nature, kindness and justice are a social construction as they have been created within our own civilisation and our own system of knowledge (Chomsky & Foucault, 1971). This insinuates a scope of limitation as these concepts can only be defined or understood within the construction in which they were created. The scope of limitation and social construction of concepts like human nature, kindness and justice, as espoused by Foucault, can be paralleled with Weber's assertion that authority rests on a societal construction (Haugaard, 2021). Thus, in itself, power and authority are societal creations and constructions.

Contrastingly, power and authority are not separate disconnected entities, rather they are key players in conflict themselves. Conflict theory suggests that conflict is a fundamental component of society and thus, power plays an integral role within the notion of conflict (Dahrendorf et al., 2006). The element of power play is disputed amongst conflict theorists, but the underlying questions remain: who has power and where is it located (Dahrendorf et al., 2006)? The more complicated aspects of conflict and power as a part of society may be argued; however, the underlying premise remains, a premise that has been noted by Rousseau in *The Social Contract*: power needs to be legitimised (Dahrendorf et al., 2006; Rousseau, 1968). Within the post-Cold War paradigm there is, arguably, a shift in power, a changing of the guard, and who will have this power is considered up for grabs.

The connection between power and society is disputed amongst conflict theorists. Some argue that power is a central feature of society rather than it being the glue that holds society together whereas others argue that conflict is not only instinctual but a necessary component of society (Dahrendorf et al., 2006). Furthermore, what is noted by some conflict theorists is that violent conflict often leads to the creation of coalitions – often with unlikely or neutral partners

(Dahrendorf et al., 2006). This can be applied to the creation of BRICS. As aforementioned, the establishment of BRICS is an unlikely pairing of largely different countries. This can be seen as a power conflict with the West or Global North that has forced a coalition between unlikely counterparts to counteract the conflict created by the West.

Karl Marx and Max Weber, suggest that conflict is related to a class conflict which directly relates to status and power of a country (Dahrendorf et al., 2006; Marx & Engels, 1967; Unknown, 2017). Where Marx postulates that the revolution is really a conflict of class, Weber argues that accountability should be reserved for the state and the economy as they both set up the ideal conditions for a class conflict (Dahrendorf et al., 2006; Marx & Engels, 1967; Unknown, 2017). Dahrendorf et al. (2006) and Marx & Engels (1967) argue that society is based on the needs and interests of the powerful elite rather than those of the middle or lower class. This assertion by Marx & Engels (1967) and (Dahrendorf et al., 2006) about who holds power goes against the terms of power outlined by Rousseau (1968) in *The Social Contract*. Furthermore, it reinforces the statement by Foucault (2012) that institutions hold power and perpetuate a class oppression. Weber makes an argument that all systems of oppression need to be legitimised in order for them to have authority and control (Dahrendorf et al., 2006; Unknown, 2017). The issue of a legitimate power or the need to legitimise the power is a recurring theme within the question of power.

According to Dahrendorf et al. (2006), status and power create social inequality, but how does one determine power? Dahrendorf et al. (2006) argue that authority is what truly defines power as it is authority that legitimates power. Society itself is thus made up of different power interests and it is these social relations that are rooted within the structure of authority (Dahrendorf et al., 2006). The societal relations and the power dynamics found within create a collective or a group, an us versus them (Dahrendorf et al., 2006). In order for any collective or group to function within this dynamic, a group boundary based on a collective set of agreed upon ideals needs to be established (Dahrendorf et al., 2006). This in turn creates the boundary into which some people or ideas fit and others do not – us versus them within the social hierarchy. The agreed upon set of beliefs establishes a set of values – a set of societal norms that can be perpetuated by the social group in power (Dahrendorf et al., 2006).

Authority cannot be divorced from power as it is the authority that buttresses the legitimacy of power. The struggle for global power, or at least the history of how global power has changed

hands, rests on which belief system holds the most authority. My question I proffer: how does power and/or authority play a gatekeeping role in the selection of textbook knowledge? When looking at the BRICS countries within South African history textbooks, what content or knowledge is selected or is deemed significant? Who decides on the historical significance as well as the lens under which this significance appears? And under what or whose authority do they do so? The question now of my study is that, given that power and authority both play a key role in history and historical content selection for textbook writing; how does the influence of power and authority relate to the representation of BRICS countries in South African history textbooks? South Africa is not only a member of a major economic and political bloc, but it also has strong historical connections with three of its four partners. Representation is called into question in terms of how South Africa has reflected this deep-rooted socio-political partnership in its own history.

3.4 Using theory

Understanding the theories and understandings of power and authority is one thing but applying them to the framework of my study is another. The theories discussed in the subsections above provide the basis through which my study is scaffolded, and it is the lens through which the data is read.

The theory unpacked above focuses on the relationship between power, authority and legitimisation. These are important lenses through which to read the data of my research as they provide the necessary foundation behind history textbook content selection. The theories of power and authority will help in the understanding of how BRICS countries are portrayed within the South African programmatic curriculum. Additionally, it will help foreground the role of authority in the textbook content selection and its role in legitimising the historical narrative.

Although I have discussed the theoretical components of power and authority and how they are intertwined with history textbook writing, the theories are interconnected with how BRICS countries are portrayed in South African history textbooks. Concepts such as multipolarity, identity and the ‘other’ identities within the post-Cold War paradigm form the focal point of my study which is tied to how BRICS has been portrayed in South African history textbooks. The interconnectedness of the theoretical components and the conceptual emphasis leads to a

foundation of a theoretical underpinning which is then further underscored by a conceptual framework; therefore, my study uses a blended conceptual framework approach.

3.5 Blended conceptual framework

Bordage (2009), Green (2014) and Ravitch & Riggan (2016) state that a conceptual framework provides an organised approach which guides the research. In turn Ravitch & Riggan (2016) argue that a conceptual framework allows for the research to unpack *what* they are looking for and *why* they look for it. Bordage (2009) and Green (2014) reiterate Ravitch through the assertion that conceptual frameworks guide and portray the different ways of thinking about and understanding a study. Furthermore, Bordage (2009) claims that a conceptual framework model can stem from theories. Whilst my study is mostly guided by a conceptual framework, the study is underpinned by the theoretical understanding of power and authority and so my study can be deemed a blended conceptual framework.

The conceptual framing of my study will centre around the notion of multipolarity, identity and the concept of ‘other’ identities within the post-Cold War paradigm. A new world order is unfolding and as the world has been submerged in a paradigm that veers towards multilateralism rather than unilateralism, the decline of the former controlling power bloc, the Global North, is underway (Armijo, 2007; Öniş & Kutlay, 2013). This change in world order affects the conceptual framing of my study as it is through the lens of a post-Cold War society that I will analyse the representation of BRICS countries within South African History textbooks. Identity formation and creation of an ‘other’ within the post-Cold War society can impact the lens through which my study explores as a changing perception of certain roles and countries is underway.

Identity formation and the creation of an ‘other’ is crucial to the conceptual framing of my study as it highlights the concept of identity creation with regards to the perception of the BRICS bloc within the South African history textbook. An identity of BRICS countries is being fashioned through the national framework of the programmatic curriculum i.e. textbooks. This ‘identity’ of the BRICS countries, for many South Africans, would be their only known conceptual understanding of BRICS therefore the concept of identity and identity formation underpin my study. The concept of identity is political in nature and historical narratives are often geared towards the creation of a national identity and by extension, an ‘other’ is created

(Challand, 2009; Janmaat & Vickers, 2007). National identity is often embedded within history textbooks as they are often used as a tool to perpetuate or to encourage an agreed upon collective identity. For South Africa, the creation of a national identity is underscored through the South African national programmatic curriculum and, as such, this forms a consensus identity of the BRICS countries. The concept of identity creation and the ‘other’, therefore, form part of my conceptual framework as identity within a post-Cold War society geared towards multilateralism impacts the notion of identity, specifically towards the BRICS countries.

In my research, I will analyse how BRICS countries are represented within the South African textbook. It is important to see how South Africa’s allied countries are represented in its history books and therefore how their histories are represented. In a global society, there lies an intersection between world order and power blocs. An intersection between those countries who hold autonomy (Global north – affiliated to the Western powers) and the rising countries who lack complete authority within their own autonomy because of dominant powers of the Global North. BRICS lies between these two paradoxes. The composition of BRICS is made up of rising economies and the political nuance of BRICS focuses on the ability for its counterparts to gain a political voice and by extension more autonomy (Öniş & Kutlay, 2013).

The collaboration between the BRICS bloc can be considered as post-modernistic because of the chasm between each country politically and/or socio-economically. South Africa has been a democratic country since 1994 and follows a mixed market economy (neoliberal) and because of its past human rights violations under the Apartheid regime, South Africa is stringent on similar violations occurring once again in the country. Despite this rhetoric against human rights abuses, South Africa has aligned itself to China, which is a Marxist dictatorship which heavily suppresses its people (Armijo, 2007). Additionally, there have been recent violent acts of suppression against pro-democracy protestors in Hong Kong. This violent suppression resulted in more authoritarian laws being enacted in Hong Kong (Maizland & Albert, 2021; Moses, 2021). South Africa has also aligned itself with Russia, while although technically a Federation is moving more towards authoritarianism (Armijo, 2007; Szelényi, 2016). India and Brazil have also started to move towards some sort of authoritarian rule. Under Prime Minister Narendra Modi, in 2019, there has been a significant shift towards strong Hindu nationalist policies that lean towards marginalisation of the Muslim population in India and Bangladesh (Frayer & Khan, 2019; Subramanian, 2020). And in Brazil, former President Bolsonaro’s

policies leant towards a form of militaristic control over Brazil. In 2020 there were allegations against Bolsonaro for sabotaging the effort to slow the spread of COVID-19 (HRW.org, 2020). The alignment with countries that express some degree of authoritarian rule goes against the principles under which the new democracy was formed. With this being said, the economic potential found within the framework of BRICS allows for South Africa to overlook such political contradictions deeming it the personal affairs of that country¹⁷. It is the decision by those who have the power and authority to overlook such constitutional contradictions due to the supposed potential of an economic and political partnership. This concept of mutualistic alignment frames the context of the study as it is under this umbrella of paradoxical partnership that the basis for the representation of the BRICS countries within South African History textbooks is formed.

The concept of a changing global order will provide the framework for my study as it is under this paradigm that BRICS was created. Subsequent to this, the perception or identity formation of the BRICS countries within South African textbooks falls within this paradigm. The identity-creation and selected portrayal of BRICS countries in South African history textbooks is scaffolded by the theoretical framework of power and authority. BRICS offers a new order of multipolarity, a pluralistic view of the world and world socio-economics. The concept of a multilateral world will form the cornerstone of my conceptual framework because it is the concept of multipolarity that allows for the sustaining of BRICS and which, as a result, significantly alters the previous monolithic world view dominated by the Global North. It is this framework which underpins my study; considering the world is falling under a new paradigm, given the context, the representation of such a power body within South Africa's history textbooks is significant. South Africa is part of an order-altering power bloc and thus how the country represents its counterparts (and who authorises this perception), and by extension values their history, is indelible.

3.6 Power and authority of South African history textbooks

Engel (2013) ponders a question of how international policy makers use history when reaching decisions. The same question can be applied to the programmatic curriculum in South Africa. How do policy makers, curriculum developers and textbook authors use and influence the

¹⁷ The 2022 Russian invasion of the Ukraine is an example where South Africa has remained politically neutral despite global political pressure to condemn acts of aggression.

history selected for the programmatic curriculum? Authority and textbook content selection are inter-related for who has the authority to select the content and the subsequent historical narrative? It is within this authoritative space where decisions are made regarding the representation of BRICS countries within South African history textbooks. In this space, who has the final authority on the textbook selection?

Bertram (2020) and Bertram (2021) discuss the liminal space between the formal curricula and programmatic curriculum. There is a clear overlap between the formal or official curricula and the recontextualisation of the programmatic curriculum; however, within this intersection there is a question of authority. As outlined by Siebörger (2015), the history textbook selection by the Department of Basic Education (DBE) in South Africa is a lengthy and not always straightforward process. The textbook selection process is not a unilateral process, thus the inspection into this physical space between intended curricula and interpreted and recontextualised curricula occurs to establish where the final authority lies.

Bertram (2021) discusses the geo-political space within history textbook content. In this geo-political space. Bertram (2021) questions how international history is portrayed in history textbooks. Decisions are made regarding textbook content and the extent to which the history curriculum should cover regional, national and international histories. The authority of knowledge selection is at play within this geo-political space, as, once more, who has the authority to decide not only to what extent BRICS countries are represented in both formal and programmatic curricula but how they are portrayed?

In *The Façade of Legitimacy: Exchange of Power and Authority in Early Modern Russia*, Ostrowski (2002) bemoans the unchanging nature of textbook content and their reluctance to include revisionist histories. Whilst this particular frustration of Ostrowski (2002) pertains specifically to the unchanged concept of absolutism, the same assertion can be applied to the South African context. Is recent scholarship included in the textbook content creation, or is there a perpetuated and regurgitated history portrayal? The authors of the history textbook are not islands unto themselves as they are part of the textbook writing process, but do they have authority when it comes to textbook content selection and interpretation?

Uphoff (1989) claims that authority in itself is not devoid of political activity and as such authority is not neutral. Miller (2010) in *Russia: power and history* discusses the nature of the

politicisation of history. What role does authority play in the politicisation of history in the South African programmatic framework? South African history textbooks, whilst following the CAPS curriculum, are interpretations of it therefore are not mirror images of each other. Not all textbooks are made equally. An intersection emerges between what has been included in the curriculum and who decides how this content is portrayed in the history textbook (Bertram, 2021). Does the authority lie wholly with the Department of Basic Education or the textbook author or publisher? Bertram (2021) goes a step further when she queries when the selection of historical knowledge begins and ends?

With the case of Curriculum 2005 (C2005) in South Africa, history textbook production was not about quality but about speed (Johannesson, 2002). In this example, Johannesson (2002) argues that it was the textbook publishers which were disinterested in quality but more focused on publishing. Compounding this was the lowered budget allocated by the Department of Basic Education which meant that textbooks of poorer quality were selected over good textbooks (Johannesson, 2002). Fiscally speaking, good textbooks cost more to publish and with a restricted budget, poorer quality textbooks are selected at the cost of historical quality (Johannesson, 2002). In this example, authority in the decision-making process is not limited to a single entity or space. The authority at first falls at the feet of the Department of Basic Education which trickles down to publisher and then author.

Siebörger (2015) noted in the 2007 textbook selection process, history textbooks were approved following a criteria checklist. In this discussion, Siebörger (2015) unpacks how textbooks are selected and under what criteria (criteria which Siebörger argues are flawed). This selection process identifies another authority level in the textbook production process: the authority of approval. As identified by Johannesson (2002) earlier, textbook selection is not a solo activity and thus the authority is spread from the top (Department of Basic Education) down to the publisher, authors and then textbook selection committees.

As questioned earlier by Bertram (2021), when does the historical selection process begin? The authority lies in multiple spaces. The official curriculum is decided by the Department of Basic Education and the curriculum (CAPS) is used as the benchmark for history textbook creation. Authority in the historical selection process is trickled down to the publisher which imposes demands and restrictions onto the textbook author. Despite this imposition, each component in the historical writing and publishing process exerts some form of authority in the process. The

textbook publishers authorise the agreed upon textbook structure and the author/s authorise the content (in somewhat alignment to CAPS) and how this content is portrayed. Lastly the authority is then passed to the textbook selection committee which uses constructed criteria to determine the value and use of a history textbook.

3.7 Conclusion

In this chapter, the question of power and authority and its influence in the creation of history textbooks has been discussed. The interplay between power and authority is crucial to the understanding of the mechanisms behind history textbook creation. It is this power and authority that drives history textbook content selection and the subsequent portrayal of South Africa's BRICS partners therein. How does this authority play a role in the selection perpetuation of the selected histories of power bloc BRICS in the South African programmatic framework? Why this question is important is the representation of BRICS countries in South African history textbooks, underlies the construction of concepts like multipolarity, identity and the concept of 'other' identities within the post-Cold War paradigm.

In the next chapter, the research design and research methodology are discussed. The blended conceptual framework of my study will spearhead and drive the research design and subsequent methodologies. As Ravitch & Riggan (2016) state, a weak conceptual framework can influence and weaken a methodology. Thus, coherency and structure are imperative in the connection between my blended conceptual framework and my research design and methodology. The blended conceptual framework and research design will drive and support the research methodology which focuses on history textbook analysis and subsequent thematic development.

CHAPTER 4

RESEARCH DESIGN AND METHODOLOGY

Now myths are really not errors; they are certainly not like the errors in which science abounds: for they always contain reference to some objects and events which could not possibly exist and occur. This being so, there are no statements of observations which could test them scientifically. They are not errors, for their truth, for those who accept them, is preserved for eternity (Cohen, 1969).

4.1 Introduction

The phenomenon which shapes my study is that of representation, specifically how BRICS countries are represented within South African History textbooks. It is this phenomenon and my subsequent research questions which influence the model of my research design and the research methodology. In chapters 2 and 3, power and authority are stated to play an explicit role within the establishment and perpetuation of power blocs such as BRICS; therefore, both the global and South African context play a crucial role in the creation of my research design and research methodology. The situational context plays an integral role in shaping the type of research and associated methodologies used. Because the situational context is influential, the qualitative approach underpinned by the interpretivist paradigm has been selected and, as such, the research methodology needs to work in conjunction with the research design. My methodological choice is that of qualitative content analysis. Both the design and the methods need to be able to work in partnership for the reinforcement of methodological principles.

This chapter will be divided into two separate but interlinked components: research design and research methodology. The research design functions as a platform that will clearly outline the approach I have undertaken, the paradigm under which my research falls, and, finally, will detail the ontological and epistemological assumptions of my study. The subsequent research methodology component outlines the methodological approaches used in my data analysis. This includes detailing my underpinning methodological qualitative content analysis approach, the sampling methods used, and its supported open coding system used in the analysis. Although, the research design and research methodology are outlined as separate sections, they cannot be divorced from each other (Flick, 2014b). Where the research design provides the

necessary theoretical underpinnings of my research, research methodology outlines the methods used. It is essential that both components are clearly unpacked in the chapter in order to clearly identify where my research falls, how it is scaffolded and the trustworthiness of it.

A strong methodological approach is vital in academia to ensure the legitimacy and trustworthiness of the research which is dependent on a cohesive and interlinked research design and research methodology. The efficacy of my research into the representation of BRICS countries in South African School History Textbooks is thus scaffolded through my research framework and its subsequent supported methodological methods.

4.2 Research design

The research design is an integral component of the research as it provides not only the theoretical plan which would scaffold the study, but it also clearly outlines the purpose of the study (Crotty, 1998; Denzin & Lincoln, 2018; Mouton, 2011). According to Denzin & Lincoln (2018), a key purpose of the research design is to provide a clear focus on the research questions set forth which is guided by a flexible set of goals which in turn link to the selected paradigm (Denzin & Lincoln, 2011). Furthermore, the research design provides the integral connection between theory and strategy (Flick, 2014b).

There is a responsibility that is placed on the researcher in order to generate sound research. Various strategies need to be integrated for sound research to occur. Solid research requires the researcher to establish a clear and coherent research design (Fossey, Harvey, McDermott & Davidson, 2002). Secondly, the research design should support the selected paradigm because of its congruency with the alignment of the nature of reality and that of the researcher (Mills, Bonner & Francis, 2006). Thirdly, Crotty (1998) outlines the significance of including the ontological and epistemological assumptions within the research blueprint. Crotty (1998) argues that researchers bring their own assumptions into their choice of methodology and so these assumptions need to be both acknowledged and addressed as it presupposes a knowledge starting point. Finally, the research design is created parallel to the research strategies which outline the data collection, analysis and interpretation of the findings thereof (Flick, 2014b; Fossey et al., 2002).

Schreier (2012) asserts that the research design shows not only the layout of a study, but also highlights the sequence of steps involved in the research in order to answer the research question. Schreier's articulation is further supported by Mouton (2001) and Denzin & Lincoln (2018) when they assert that choosing an appropriate research design is predicated on the research problem or, in the case of my study, the research questions posed. My research questions centre on *how* the BRICS countries are represented in South African School History Textbooks and *why* they are represented in that way. My research design is, therefore, a plan that outlines how I am going to answer the questions and the research strategies employed to answer the questions.

As the research design outlines the sequence of events that takes place, it is then prudent to unpack the steps undertaken within the theoretical blueprint in order to answer my research questions posed. My research design will outline my research approach and how it supports its aligned paradigm: the qualitative approach and the interpretivist paradigm respectively. Furthermore, the epistemological and ontological assumptions need to be explored in this section in order to outline how my existing assumptions have shaped my research and how these assumptions will answer my research questions. Each of these components provide the necessary theoretical foregrounding to enable the research methodology to take place.

The research design provides the necessary foundation in order for the research and data analysis to take place. It provides a clear, streamlined process that contextualises the research but also signifies its relevance to the academic process. With a clearly articulated research design in place, the practical aspects involved in the research methodology can take place in a streamlined manner. With the assurance of a smooth approach and a clearly articulated research design, methodological standards and academic rigour are maintained.

4.3 Qualitative approach

The type of approach selected for a study needs to have a symbiotic relationship between the two elements, namely: the research topic and the selected paradigm. I have selected the qualitative approach as it focuses more on the construction of meaning and reality and connects with its associated paradigm – interpretivism (Schreier, 2012; Strauss & Corbin, 1998; Yilmaz, 2013). As my study seeks to understand how the BRICS countries are represented within the contemporary framework of South African School History Textbooks, understanding the

‘reality’ in which they are found is pertinent. The construction and the interpretation of this ‘reality’ is an important component of my research which is why it needs to be underscored by the interpretivist paradigm. Qualitative research works hand-in-hand with the interpretivist paradigm as it centres on understanding situational context and the construction of this context (Schreier, 2012; Schreier, 2014; Strauss & Corbin, 1998; Yilmaz, 2013). In turn, the qualitative approach allows for a more flexible approach to my study as the agency focuses on the construction of meaning rather than the proving of a hypothesis (Maxwell, 2013; Schreier, 2012). As South Africa’s inception into BRICS predates the CAPS curriculum, this can affect the ‘reality’ in which the history and subsequent representation is found. In saying this, the socio-political context (situational context) and timeframe of the curriculum and the coalescing of South Africa within the BRICS power bloc are significant when trying to cognize the representation of the BRICS counterparts (construction of ‘reality’).

Fossey et al. (2002) argue that qualitative research, as a whole, is a broad term used to describe methodologies that are focused on the experiences of a person and the context experienced. Schreier (2012) further reiterates this stance in the assertion that situational context is vital in the make-up of qualitative research. As aforementioned, the qualitative approach is strongly aligned with the interpretivist paradigm as *interpretation* forms a key component of qualitative research (Schreier, 2012). It is through this interpretation that the situational context, or social construction is understood (Denzin & Lincoln, 2018; Guba & Lincoln, 1994). Qualitative researchers do not seek to create universal laws that can be applied to the general masses; rather they look to understand the contexts and how the context influences a society or a people (Porta & Keating, 2008). As qualitative researchers believe that the concept of reality is a social construction, so the researcher attempts to understand this construction, through interpretation (Denzin & Lincoln, 2018; Flick, 2014a; Yilmaz, 2013). The epistemological and ontological assumptions of the researcher need to be considered and acknowledged during qualitative research as the basis of the research relates to the researcher’s interpretation of a social reality (Cresswell, 2009; Crotty, 1998; Yilmaz, 2013).

Denzin & Lincoln (2018) and Yilmaz (2013 p.312) state that qualitative research should focus on the connection between the researcher (“the knower”) and the observed (“the known”). Qualitative researchers understand the social construction of reality and therefore seek to interpret the meanings given by societies or cultures (Denzin & Lincoln, 2018). The construction of a reality or a reality that is determined by a historical or cultural context,

reinforces the phenomenon of representation. The BRICS power bloc is a human construction, and the perspective of the histories of Brazil, Russia, India and China is portrayed through the South African construction. The use of qualitative research will help conceptualise the social frameworks of the current South Africa and how they impact the representation of the BRICS countries. South Africa is undergoing a vast socio-economic change with its partnership within the power bloc BRICS. It is important to identify how this deep-rooted alliance has influenced the historical 'reality' found within the textbooks. How does this representation play itself out within the Curriculum Assessment Policy Statement (CAPS) education as well as within programmatic education (textbooks)? Qualitative research is important to this research as I am not only trying to understand a certain reality, but I am also trying to understand why the BRICS counterparts are represented in a certain way as part of this reality. This in turn highlights the constructed reality that is formed through those in power and authority. How and why is the selected historical reality perpetuated and who has the authority to determine perpetuation, especially as the given social reality is that of a significant geo-political partnership.

Unlike quantitative research where data is more standardised and used to answer hypotheses, qualitative research is less standardised, and the data is influenced by situational context and interpretation (Denzin & Lincoln, 2018; Schreier, 2012). Within my study, the situational context plays a vital role in how the BRICS countries are represented the way they are and why. The current political trends as well as the deeply historical connections play a vital role in how the BRICS countries are represented and subsequently perceived by the South African student. Schreier (2012) argues that qualitative research is interpretive because of the following three features. First, qualitative research focuses on data that requires interpretation and is often symbolic to a situational context. Secondly, the data that is interpreted is not bound to a single interpretation. In other words, there can be multiple interpretations of the same data. One interpretation does not necessarily mean the other interpretation is 'wrong'. And finally, qualitative research uses the research questions posed to answer meanings about the social reality (Schreier, 2012; Willig, 2014).

A concern about interpretation is that it can yield different results depending on the types of questions asked (Schreier, 2012; Willig, 2014). Agenda, experience, background and politicisation all play a role in the interpretation process and cannot be discarded (Willig, 2014). This same process needs to be applied to that of the historian. Historians interpret history through a value-laden lens and could therefore impact the interpretation of the past or even the

reinterpretation of the past due to a current political agenda (Porta & Keating, 2008). The key takeaway from this is that each interpretation is essentially underpinned by an ontological or epistemological assumption (Crotty, 1998; Willig, 2014). How this impacts the researcher depends on the positions taken by the researcher before the research has begun (Willig, 2014). The researcher decides what is important and necessary to relay; however, this creates a gatekeeper of worth out of the researcher (Willig, 2014). Furthermore, qualitative research enables the perspectives of the observed to become known (Fossey et al., 2002). A level of subjectivity is a by-product of qualitative research as one's lens interprets the meaning and the context of those being observed (Fossey et al., 2002). As interpretation can be guided and influenced by existing ontological and epistemological assumptions, it is necessary then for the researcher to be aware of his or her own position. Positionality is key, and as the researcher, I need to be aware of how my own existing assumptions could influence the interpretation of the data when analysing how BRICS countries are represented the way they are in South African History textbooks. This is vital in not only ensuring the trustworthiness of the data but in ensuring the maintenance of academic rigour.

According to Porta & Keating (2008), there seems to be an ongoing argument amongst scholars about the lack of academic rigour of qualitative research compared to that of quantitative research. Rigour, for qualitative researchers, is found within the methodological output as well as trustworthiness of the data and the interpretations made of the data (Fossey et al., 2002). Furthermore, qualitative researchers argue that qualitative research offers a human element to research as well as being able to answer the questions that would not form part of the quantitative methodology (Porta & Keating, 2008; Brady, Collier & Seawright, 2004). Qualitative research is approached more inductively as opposed to deductively (Porta & Keating, 2008; Yilmaz, 2013). Inductive research builds on the research questions as research progresses and the researcher constructs meaning from the data collected (Cresswell, 2009; Porta & Keating, 2008). Qualitative research focuses more on empirical evidence and, as such, the inductive approach encapsulates this. The inductive approach begins from an empirical standpoint in order to establish what is relevant and from there, meaning is constructed (Héritier, 2008). In order to ensure academic rigour is maintained, quality of the interpreted data is determined through the coherence of the interpretation – does the interpretation align with the social context (Fossey et al., 2002)?

The intention behind interpretation is that the researcher seeks to create a deeper or richer meaning out of the data. Willig (2014) asserts that there are five reasons behind the interpretation of a qualitative researcher. First, through interpretation, the qualitative researcher seeks a richer understanding of the author's intentions or intended meaning or unintended meaning. Secondly, one can presume a motivation or reasoning behind the unintended meaning of the author. Thirdly, the researcher can gain insight into a situational context – be it politically nuanced or historical. Finally, the interpreter can gain a more generalised understanding of a particular concept and finally, the social functions or psychological contributions to a context can be analysed (Willig, 2014).

Interpretation helps the researcher make sense of the data and therefore generates meaning (Schreier, 2012; Willig, 2014; Yilmaz, 2013). The data is only meaningful and relevant once interpretation has taken place. Interpretation and the qualitative approach cannot be divorced, they are wilful companions in the search to bring meaning to the world and situational contexts. How the BRICS countries appear in South African History Textbooks appear as words and content knowledge to be learned. Through interpretation and the application of the socio-political context of South Africa and South Africa on a global scale, the words shift into something of meaning relevant to my research. This approach is easily paired with that of the interpretivist paradigm as the interpretivist understands the social construction of reality.

4.4 Interpretivist paradigm

An underpinning paradigm, which guides the research, needs to align with the selected research approach clearly and inherently. Since I have undertaken the qualitative approach, this in turn aligns with the interpretivist paradigm as interpretivists don't seek out a universally applied truth but rather a truth (Rehman & Alharthi, 2016; Zhao, 2001). My study focuses on the constructed reality of representation. It focuses specifically on how BRICS countries are represented in South African School History Textbooks. The research approach of my study is based on a constructed reality; therefore, it is important to have the reinforcing interpretivist paradigm that is interdependent and reciprocal. As my study seeks to contextually understand the representation of BRICS countries through a South African lens, it links well with the interpretivist paradigm as interpretivists seek to understand socially constructed reality (Cresswell, 2009; Grbich, 2013; Mills et al., 2006; Willis, 2007).

To begin with, it is first necessary to ascertain the make-up of a paradigm and its necessity and influence on a study. A paradigm constitutes a constructed belief system that is used to reflect or represent the researcher's world view (Grbich, 2013; Guba & Lincoln, 1994; Fossey et al., 2002). Flick (2018) and Fossey et al. (2002) state that a paradigm is a set of basic assumptions or ideas founded upon the researcher's world view. In essence, as a paradigm is a construction of a world view, it, in itself, is a human construction (Guba & Lincoln, 1994). Furthermore, Fossey et al. (2002) argue that the belief systems reinforce academic rigour. (Flick, 2014b) reasons further that a paradigm creates the necessary scaffolding platform needed to guide the research. The theoretical composition of a paradigm helps the researcher to make sense of the research and to find its place in the world (Guba & Lincoln, 1994). Reality itself is a social construction and so, we find, are the theoretical underpinnings of a paradigm (Guba & Lincoln, 1994). A paradigm is not only vital in offering the needed guide for researchers and their congruent belief system, but it also provides the necessary link to epistemology and ontology (Alharahsheh & Pius, 2020; Denzin & Lincoln, 2018; Guba & Lincoln, 1994). Paradigms, according to Guba & Lincoln (1994), reinforce belief systems that are founded and supported by epistemological, ontological and methodological assumptions. The paradigm, therefore, needs to align and work in congruence with these assumptions.

Interpretivists search to understand the world through contextualisation of historical, socio-economic and cultural lenses (Alharahsheh & Pius, 2020; Cresswell, 2009; Porta & Keating, 2008). The relationship between the research and the researched is the central theme underpinning the interpretivist paradigm (Porta & Keating, 2008). The situational context of my study can be determined by the current socio-political climate of South Africa and the historical relationship South Africa has with its coalition partners. These are the lenses through which understanding the phenomenon of representation will take place. The legacies of the past and how they influence the current South African context is important when looking at how South Africa views its geo-political partners. The relationship between the researcher (me, a South African citizen) and the researched (BRICS countries in South African History textbooks) is underscored through the interpretivist paradigm.

The components of the interpretivist paradigm can be broken down into seven interconnecting features outlined by Grbich (2013). Interpretivism is based on an assumption that research is subjective and therefore there can be no clear objective knowledge (Grbich, 2013). Mills et al.

(2006) support this notion when they postulate that within interpretivism¹⁸, there is no objective reality as interpretivists believe that reality is socially constructed. Secondly, interpretivism accepts the notion that reality is a construction and differs depending on a range of factors (Grbich, 2013). Thirdly, reality is not static, it is dependent on many factors and can vary according to the observer and the observer's reality. Thus knowledge is a construction and is dependent on the researcher and the researched (Grbich, 2013). A fourth component of interpretivism lies in the reiteration that knowledge is a construction and immersed in subjectivity. Knowledge construction is often based on shared symbols that are recognised by specific members of a specific culture therefore reality is dependent on context (Grbich, 2013). Knowledge is then subject to the constructed reality (Grbich, 2013). Furthermore, interpretivism acknowledges that multiple realities exist and are further presumed. People experience reality differently and thus one person's reality is different from another's (Grbich, 2013). The final two aspects focus on construction. Interpretivists, in order to make sense of the environment and their experiences, interpret these experiences through the context of broader socio-political or economic and cultural schemes. As such, these contexts contribute to the creation of a certain reality (Grbich, 2013). Lastly, interpretivists seek to understand the world through their own interpretation. The paradigm is limited by the researcher's own background and possible belief system which could influence the interpretation. Additionally, a researcher's own life experiences or lack thereof can be seen as a limitation due to the subjective nature of the paradigm (Grbich, 2013).

Interpretivists do not seek to discover universal laws, nor establish them but rather, seek to understand relationships and human nature through a contextualised lens (Porta & Keating, 2008). In other words, interpretivists attempt to take stock of human experiences or actions through the situational context (Fossey et al., 2002). Cresswell (2009) further postulates that the role of the interpretivist is to rather attempt to understand the world in which they live. This is not an objective approach as this lens is guided by the researcher's or interpretivist's own epistemological and ontological assumptions and experiences (Cresswell, 2009; Guba & Lincoln, 1994). Ultimately, the interpretivist tries to make sense of meanings or make sense of the observed reality (Cresswell, 2009).

¹⁸ There is semantic discrepancy amongst scholars with the terms constructivism and interpretivism. Some scholars are preferential to the term constructivism over that of interpretivism; however, they both involve interpretation of a socially constructed reality. It has been my preference to use interpretivism over constructivism in the naming of my paradigm.

The interpretivist paradigm moulds itself to my research, and my own epistemological and ontological assumptions, as I aim to understand the representation of the BRICS bloc from a South African vantage point. Considering the deeply political relationship South Africa has with its counterparts, it is prudent to understand the perceived reality or history of the power bloc counterparts as, for many South Africans, this would be the only occasion for them to learn the history of South Africa's economic counterparts. This ties in with my paradigm as not only is reality a social construction, but it is also often subjective and thus can be transferred to a subjective or perhaps even nuanced historical reality that would impact the image of the four countries. According to the interpretivist paradigm, reality is often assumed to be influenced by the socio-political forces (Cresswell, 2009; Guba & Lincoln, 1994; Willis, 2007). Supposing that the assumption is correct, I plan to identify how South Africa has interpreted the histories of the countries with which it is aligned to further understand how South Africa, as the smallest contributing component of the power bloc, portrays its partners.

4.5 Epistemological and ontological assumptions

Ontological and epistemological assumptions manage the intricacies of knowledge that are based on one's research approach and paradigm. Ontology reflects the nature of knowledge and what can be known in the world where epistemology refers to the relationship between the knower and the known; how we know knowledge (Alharahsheh & Pius, 2020; Cresswell, 2009; Guba & Lincoln, 1994). Cohen, Manion & Morrison (2007) argue that ontological assumptions lead to epistemological assumptions which ultimately give rise to methodological reflections. The ontological assumption of my research is that reality is a version offered by the current socio-political climate of South Africa. Epistemologically, my research pertains to the representation of the BRICS counterparts within the current South African historical context.

Crotty (1998 p.10) notes that ontology focuses on the "what is" of research and, as such, looks at the composition of reality. Since ontology seeks to find what can be known, the question of reality and a social reality comes to the fore (Guba & Lincoln, 1994). An ontological issue raises the question of the nature of social reality and whether reality can be known or whether a social reality really exists (Porta & Keating, 2008). Objectivity and subjectivity can be intrinsically linked and so this can affect whether reality, or a social reality can be knowable (Porta & Keating, 2008). Ontology encompasses what is knowledge, what can be known and

how the world fits together (Cresswell, 2009; Porta & Keating, 2008). Furthermore, Crotty (1998) asserts that, combined, ontological and epistemological assumptions allow for the construction of a reality to emerge.

Epistemology addresses the limitations of knowledge in that it can identify not only what we know but how we know it (Crotty, 1998; Porta & Keating, 2008). It reflects on the relationship that the researcher has with the research and the subjective nature of this relationship (Guba & Lincoln, 1994; Porta & Keating, 2008). Epistemological assumptions build on from the ontological assumption of what knowledge is to how knowledge can be known and the kinds of knowledge available (Crotty, 1998; Porta & Keating, 2008). Because epistemology is focused on the relationship between the observer and the observed, the epistemological assumption is then not considered objective (Mills et al., 2006). Thus, epistemological assumptions are foregrounded by existing values and beliefs of the researcher which help in the construction of the reality (Mills et al., 2006).

My ontological and epistemological assumptions need to be clearly outlined at the onset of the research (Porta & Keating, 2008). There are two facets that need to be considered prior to the onset of research. The first is my own set of ontological and epistemological assumptions and the influence these can have on my study. Second are the ontological and epistemological assumptions that can influence the nature of knowledge and the nature of reality within my study.

As reality is a social construction so then is interpretation (Willig, 2014). Ontology reflects a constructed reality based on what can be known (Creswell & Poth, 2016; Crotty, 1998; Guba & Lincoln, 1994). Therefore, what can be deduced then is what is the nature of my, the researcher's knowledge? An understanding of my own knowledge construction is needed in order to see how my ontological assumptions can be reflected in the interpretation of the research. As I am a South African citizen, my knowledge construction is formulated through that lens; that the reality of knowledge that I interpret is seen through the lens of a South African context. Epistemology centres on the relationship between the observer and the observed (Crotty, 1998; Guba & Lincoln, 1994; Creswell & Poth, 2016). My existing values, beliefs and knowledge can in turn impact the interpretation of the data. Ontological and epistemological assumptions build on each other to create an existing framework that is guided by the

researcher's own knowledge and belief structure. It is important that these aspects be acknowledged in order to ensure trustworthiness in the interpretation of the data.

The question of a reality and what we know exists is reflected within the philosophies of ontology. Within my research, the focus is on how BRICS countries are represented within South African History Textbooks. Power is a social construction and is reality dependent and it is this foundation of power and reality that moulds my research. The reality through which the BRICS countries are represented would be through a South African lens. The ontological assumption of my study would be to look at the representation of BRICS with the underpinning assertion that power and power blocs are a social construction and reflect a specific reality which is not static.

The epistemological assumptions of my study rest on the premise of how we know reality is a construction and how this impacts what we can know about the BRICS countries. Power blocs exist and South Africa's insertion onto the global stage can be known. However, there are limitations to the reality found. Power blocs are a human construction and their power rests on a historically constructed reality which puts a particular hegemony at the forefront of global power. BRICS offers an alternative form of power giving power to emerging economies as opposed to the already existing power magnates. These power relations are embedded in a cultural and historical ideological battle of which South Africa is a part. Additionally, South Africa is part of this power bloc, but how has South Africa portrayed her counterparts within history textbooks – what can the lay South African learn about Brazil, Russia, India and China? What is the reality represented within the textbooks and what are the limitations of this reality?

4.6 Research methodology

Research methodology outlines the practical strategy undertaken to collect and analyse the data (Alharahsheh & Pius, 2020; Mouton, 2001). Previously, the research design provided the theoretical framework for what will be researched and why. Research methodology is the practical application of the theories aforementioned with an outline of the tools used to analyse the data. The outline of the practical application for this study is imperative as it discusses *how* the data will be analysed, thus ensuring the trustworthiness of the data and analytical process. It is vital that both the research design and research methodology work in congruence with each other as to ensure the continuance of academic rigour and trustworthiness. A clear outline

of what tools or methods I used in order to answer my posed research questions during the analytical process is important to ensure the trustworthiness of the study.

In this component, I have outlined the various research strategies employed in order to answer my research questions. It is first necessary to outline the selected methodological approach to my research as this will help determine the data analysis process. Because my phenomenon pertains to the representation of specific countries from a South African context, I have chosen to use qualitative content analysis as my methodological approach to analyse the sections in which the selected countries appear. Secondly, I have included the section on my analysis process where I discuss how I analysed my data using the open coding approach. This process is vital in assuring academic rigour as it details the step-by-step procedure I undertook during the entire analytical process. Following this, my sampling section, through purposive sampling, is outlined. The sampling component not only outlines the sampling approach I used in order to select the necessary history textbooks, but it also provides a detailed outline of the sections of the textbooks that were analysed. As part of the methodology process, it is vital that I included all aspects of the strategy application process to ensure the trustworthiness of the academic research undertaken. This will be further underscored by the components ethical clearance and trustworthiness. Ethical clearance will underline my ethical clearance as well as my ethical approach to my research. Trustworthiness will discuss the various issues of trustworthiness and their application to my study.

The purpose of research and subsequently research methodology is to ensure that the finding can be trusted (Fossey et al., 2002). The methodological strategy needs to be well-defined and articulated in order for research to be trusted. The academic integrity is maintained through the practical applications which are further reinforced by the supporting research design. Both platforms work concurrently to ensure academic integrity is maintained.

4.7 Content analysis

Content analysis is a method that is used to analyse data (Forman & Damschroder, 2007; Hsieh & Shannon, 2005). Although content analysis was initially created and developed for quantitative analysis, it has since moved towards the qualitative paradigm in conjunction with interpretation (Graneheim, Lindgren & Lundman, 2017). The purpose of content analysis is to provide a scaffold for the phenomena which then form the basis for understanding of said

phenomena which for my study is representation (Elo & Kyngäs, 2008; Hsieh & Shannon, 2005). Content analysis is a flexible approach that is used for data analysis as it is used to understand phenomenon and multiple realities (Hsieh & Shannon, 2005).

Written, verbal and visual text can all be analysed under content analysis (Elo & Kyngäs, 2008; Forman & Damschroder, 2007; Hsieh & Shannon, 2005). I will be incorporating both syntactical and semantic facets of content analysis within my study as I am only dealing with specific sections and not always whole chapters it would not be sufficient to focus only on the semantic division (Bauer, Gaskell & Allum, 2000).

Content analysis can act as the umbrella as there are several types of content analysis (Forman & Damschroder, 2007). Qualitative content analysis is a subdivision of content analysis which involves an inductive study of the text which includes a subjective interpretation of the content of the text through the systematic classification process of coding and identifying themes or patterns (Elo & Kyngäs, 2008; Hsieh & Shannon, 2005). While content analysis forms the backbone to qualitative content analysis, my methodological approach is focused only on qualitative content analysis as it is better suited to my data analysis process and the use of open coding.

4.8 Qualitative content analysis

There has been an increased use of and research into qualitative content analysis in recent years (Denzin & Lincoln, 2018; Flick, 2014c; Flick, 2014b; Schreier, 2014). In addition to increased scholarship, there is an expansion in the fields which use qualitative content analysis as part of their research methodology. In my research I have found some discrepancies in terminology with regards to qualitative content analysis. For some scholars, qualitative content analysis is often used interchangeably with thematic analysis. This can mostly be associated with early 2000s scholarship; however, qualitative content analysis is the term most widely used, and which will be used in my study. As such, there has been much more focus and academic seriousness that has been allocated to qualitative content analysis as an academic and trustworthy research methodology. I have opted to use qualitative content analysis as my methodological approach as I will be interpreting a variety of textbooks and the content held within. Thus, through this interpretation, themes will emerge in terms of how BRICS countries

are represented within the different textbooks. The emergence of themes and categories is aligned to the methodological framework of qualitative content analysis.

Although qualitative content analysis is a subset of content analysis, it performs a specific duty. Qualitative content analysis is a method that is used to analyse textual data and discern meaning from the text which is then categorised (Forman & Damschroder, 2007; Graneheim et al., 2017; Mayring, 2004; Schreier, 2012). It is through this discernment that categories or themes are formed which establish a coding frame (Schreier, 2012). Schreier (2012) argues that the creation of the coding frame is central to the methodological framework of qualitative content analysis. Category formation (through the coding frame) is an essential component of qualitative content analysis.

Mayring (2004) postulates that there are elements of quantitative content analysis that can be applied to qualitative content analysis. The first element being that researchers will need to discern which part of the data analysed will need inferences. In addition, the researcher will need to be cognisant of the situational context in which the data is found. Secondly, the data needs to be analysed step-by-step. Through this, categories and themes are formed. The final element reinforces the notion that categories are central to the analysis process (Mayring, 2004).

As the creation of categories is central to the scope of qualitative content analysis, it is then important to unpack the process of the category formation. Data, as an entity, does not speak; it requires the researcher to interpret the meaning or provide meaning to the data (Schreier, 2012). Just as qualitative research seeks to understand a social construction, so then the same can be applied to interpretation. As meaning is thus given to the data, the interpretation is a construction (Graneheim et al., 2017; Schreier, 2012). Qualitative content analysis focuses on analysing both manifest content and latent content (Graneheim et al., 2017). According to Graneheim et al. (2017), manifest content relates to content that only needs to be described whereas latent content refers to the underlying meaning of the data which then needs to be interpreted. In my research, I will be incorporating the use of both manifest and latent content. As my research centres around how the BRICS countries are represented in South African history *textbooks*, there will be a need for both manifest and latent content to be unpacked. As manifest content looks at the descriptive content, this will align with statements or perceptions that are clearly articulated within the written and verbal text. Therefore, only a description of what is being depicted is needed. However, latent content refers to the perception found within

the sub-text. Implications are made through the omission of content, choice of words or even through the use of passive voice. The understanding and unpacking of sub-text heavily rely on interpretation.

Qualitative content analysis does inculcate challenges to the existing ontological and epistemological beliefs (Graneheim et al., 2017). Ontologically, the data is entirely dependent on the interpretation by the researcher thus there is not one set of results (Graneheim et al., 2017). The data itself is open to variation depending on the interpretation. Epistemologically, (Graneheim et al., 2017) note that data and the interpretation thereof are establishments triangulated between the observer, the observed and the interpreted. Qualitative research and qualitative content analysis work together as both work under the assumption that knowledge is socially constructed (Graneheim et al., 2017). The social construction of reality and knowledge do implicate challenges to the ontological and epistemological assumptions of the researcher. The researcher's own ontological and epistemological assumptions can influence the interpretation of the data. However, in saying this, qualitative research does not focus on the creation of universal laws but rather on understanding social construction (Alharahsheh & Pius, 2020). Furthermore, the purpose of qualitative research is to understand phenomena and the reality in which it is bound – which can only be done through interpretation (Forman & Damschroder, 2007).

Because qualitative content analysis creates categories as a result of the emergence of patterns in the data, an inductive approach to data analysis is needed (Forman & Damschroder, 2007; Graneheim et al., 2017). Where the deductive approach is used to test existing theories, the inductive approach is used to generate categories (Graneheim et al., 2017). The inductive approach is used in the analysis period as it provides the necessary steps and framework for the researcher to create the thematic categories. Using the inductive approach allows for the researcher to look for similarities and differences in the text which in turn help create themes or categories (Graneheim et al., 2017). Secondly, it allows the researcher to have a broader scope of the data as it helps the researcher have a broader theoretical understanding of the categories (Graneheim et al., 2017).

There is no set way or method that is used to generate categories or patterns (Forman & Damschroder, 2007). The variety of techniques and the lack of a signature technique is often argued by scholars (Forman & Damschroder, 2007). Although an inductive approach is used

within qualitative content analysis it does not provide sacrosanct techniques that must be followed. This enables the researcher to attend to the data and the creation of patterns in their own way. Schreier (2012) postulates that qualitative content analysis in nature allows for a less standardised approach as the data is open to interpretation. A result of the interpretation allows for some freedom in how the data is viewed. The data, by nature, is viewed open-endedly to allow for a more in-depth look at the construction of the context in which the data was found (Forman & Damschroder, 2007).

4.9 Analysis

I have selected to use open coding for my textbook analysis process. The open coding process ties in with not only qualitative research but also my selected methodological approach of qualitative content analysis. Qualitative content analysis encourages more open-ended questioning and an understanding of a social reality rather than the testing of a hypothesis (Forman & Damschroder, 2007). Open coding aligns with the framework of qualitative content analysis as the researcher interprets themes and categories that emerge from the data (Khandkar, 2009). I will be using open coding to interpret themes and concepts that emerge from the Grades 4-12 CAPS textbooks and how these concepts reflect the representation of BRICS countries.

Open coding has its roots in Grounded Theory; however, it has been adapted in order to align with the needs of qualitative content analysis (Schreier, 2012; Williams & Moser, 2019). Coding and open coding are designed to analyse text (Khandkar, 2009). Flick (2014b) articulates that the aim of the open coding is to break down a text in order to understand and interpret it. It is through this process that categories are then developed and attached to the text (Flick, 2014b). It is through the coding process where themes emerge and so it can be deduced that the coding process reveals the themes or categories that exist in the text already (Williams & Moser, 2019).

Qualitative content analysis involves a descriptive and interpretive approach through induction (Schreier, 2012). This is supported through open coding as open coding develops inductive themes or categories (Schreier, 2012). Strauss & Corbin (1998) outline 3 steps in the open coding process: *conceptualising*, *defining categories* and *developing categories*. The first step involves identifying key aspects of the data that the researcher identifies as relevant and

important. The step involves repeatedly perusing the data identifying key and relevant information and identifying similarities and differences (Schreier, 2012; Strauss & Corbin, 1998). The second step sees the *defining of categories* as grouping similar concepts identified in step one (Khandkar, 2009; Schreier, 2012; Strauss & Corbin, 1998). The grouping of similar concepts is done to identify similarities, not necessarily to explain the similarities (Schreier, 2012; Strauss & Corbin, 1998). The third and final step, *developing categories*, pertains to the building of the coding frame. This step builds the coding frame through the creation of main categories and sub-categories and places them on a hierarchical scale (Flick, 2014b; Schreier, 2012; Strauss & Corbin, 1998).

Flick (2014b) states that the result of open coding sees a list of codes and categories that are attached to and supported by the code notes that were taken during the process. The process of note taking is an integral part of the open coding process. According to Flick (2014b), the text being analysed can be analysed according to how the researcher sees fit. It can be analysed, line-by-line or sentence by sentence or by paragraph (Flick, 2014b p.406). Although Khandkar (2009) accurately states that analysing line-by-line is tedious, it is a vital part of the analytical process and as such, formed a crucial part of my own analysis.

I analysed 18 different textbooks in my study. The analysis process for each textbook followed more or less the same route. I indicate 'more or less' as some textbooks required a deeper analytical process than other. The senior textbooks (Grades 10 - 12) were more content heavy than the junior textbooks (Grades 4, 8 and 9) and, therefore, the analytical process took longer as a result. During the analytical process, I adopted the method outlined by Strauss & Corbin (1998).

The first step: conceptualising. This was a very tedious and lengthy part of the whole process. I preferred starting this step off by reading through required text as a whole first and then going through it line by line. This process was done multiple times before themes began to emerge. Any themes or categories were identified, either through highlighting the section or by making notes in the margin of the textbook. This part was very time-consuming; however, it allowed for the category formation process to begin and as a result of this process, patterns emerged from the data. The notes in the margin were then transferred to my separate notes in order to now identify the emerging patterns and categories.

In the second step, *defining categories*, I formulated categories based on the patterns identified in the first step. This process began when there was no more possible extraction that could take place from line-by-line analysis. Similarities or overlaps in concepts identified were organised into categories. Conceptualising an overlap needed to be worked on carefully to avoid repetition. Two patterns could emerge from a single image, so formulating an appropriate category was needed. This step involved organising the emerged patterns into categories. This was done where similar ideas or patterns were grouped into a category.

The final step, *developing categories*, involved building the specific coding frame. As my topic relates to the phenomena of representation and how BRICS countries are represented, the coding frame needed to be central in understanding this phenomenon. Through step one and two, categories were found that might not relate specifically to representation but rather reveal the nature of textbook content. The themes and categories that were created were formalised to a coding frame. I tried to create the frame in a hierarchical way starting with the focus on representation and representation of the BRICS countries. The unexpected patterns that emerged that didn't necessarily align with representation or with the BRICS countries were placed on the lower end of the scale. This is not to downplay significance but rather to keep the focus of the phenomenon at the forefront.

4.10 Sampling

Sampling is an integral part of the research process as it is not possible to sample each and every person or, in my study, every textbook. The aim of sampling is to be able to garner a portion of the population that would be able to act as a representative (Etikan, Musa & Alkassim, 2016). Selecting a sampling method is a choice made by the researcher which needs to be based on the specific needs of researcher (Flick, 2014b). Furthermore, the sampling method needs to align with the ontological and epistemological guidelines that have been established (Campbell, Greenwood, Prior, Shearer, Walkem, Young, Bywaters & Walker, 2020). I have selected purposive sampling for my study as it is best suited to garner a wider understanding of my research topic: the representation of BRICS countries in South African History Textbooks.

In my study, I selected three different CAPS history textbooks from Grade 4 to Grade 12. I only selected to use grades that directly deal with or mention BRICS countries. The selected

grades are Grade 4, Grade 8, Grade 9, Grade 10, Grade 11 and Grade 12. According to the Department of Basic Education guidelines, from Grades 4 – 9 History is combined with Geography, to form the subject Social Sciences. It will be within the historical section of those Social Science textbooks where I extracted the relevant content regarding the BRICS countries. I chose to incorporate all the grades from when the learners begin studying History because it would help towards obtaining a more holistic and reliable representation of the histories depicted in all age groups of South Africa and if or where the depiction of BRIC countries fell. Although examining three textbooks from each grade appears cumbersome, I only examined sections where the BRICS countries appear, which did not include all the grades. As a result of the inclusion of textbooks ranging from Grades 4-12, I incorporated three separate phases namely: the Intermediate Phase (Grade 4-6); the Senior FET phase or GET phase (Grade 7-9) and the FET phase (Grade 10-12).

Purposive sampling is a deliberate choice on the part of the researcher (Campbell et al., 2020; Etikan et al., 2016; Flick, 2014b). Flick (2014b) argues that at some level purposive sampling adds an element of convenience as the samples are specifically chosen based on the requirements of the researcher. Purposive sampling is a deliberate decision and so constitutes a non-random technique (Etikan et al., 2016). Furthermore, the aim of purposive sampling is to gain an in-depth understanding based on a sample representation rather than a wide or shallow overview. My textbook selection is based on the purposive approach as I tried to select textbooks that had the same publishers or publishing houses from Grade 4 -12 in order to perpetuate consistency. Not all textbooks were consistent across the grades. In addition, I selected textbooks that have been approved by the Department of Basic Education and appear on the approved Grade 12 textbook list. The reason for this choice lies not only in ensuring trustworthiness of the data collected but also ensures that the textbook sample is representative of widely used textbooks. As I opted to use purposive sampling, it is important that the criteria encompass textbooks that are widely used in schools across South Africa in order to get an accurate representation of how the lay South African learns about the South Africa's economic and political partners in BRICS.

Before I discuss my sampling, it is imperative that I reflect briefly upon the CAPS curriculum as my textbook grade choices are directly aligned with the CAPS curriculum. My research will assert the representation of BRICS (Brazil, Russia, India and China) countries within South African history textbooks, therefore reference to any of these countries needs to be made within

CAPS document. I only selected the grades in which any of the BRICS countries have been *directly* mentioned in CAPS. For instance, in the Grade 6 curriculum, the document outlines a list of inventions that will be discussed of which gunpowder is a part. The document does not specifically mention China and therefore will not be included as part of the study.

As part of the Intermediate Phase (Grade 4-6) the only grade that was used was that of grade 4 as it was the only grade to have any mention of the BRICS countries when it outlined a case study on Mahatma Gandhi (India). Within the Senior FET Phase (Grade 7-9), only Grade 7 was removed from my study. Within the Grade 8 curriculum, there was mention of India as a British colony, indentured labour and Passenger Indians from 1869 onwards as well as Anti-Indian Legislation. Grade 9 saw a far lengthier inclusion of BRICS countries. The Grade 9 curriculum detailed Japanese expansion and atrocities in China; USSR (communism) versus USA (capitalism); the Cold War and the end of the Cold War and the fall of the Soviet Union. A notation needs to be made here: although the section on the Cold War does not explicitly mention the USSR, it can be safe to assume that the universal understanding of the term ‘Cold War’ refers directly to the competition between the USA and the USSR which is why I chose to include that particular section in my study. Within the Grade 10 curriculum there were two sections which pertain to Ming China and Mughal India respectively. In addition to these sections, I also noted a small section on Indian indentured labourers in Natal. In Grade 11, Term 1 allocated lengthy content and time to Communism in Russia from 1900-1940. For Grade 12, there is an abundance of information available. The Grade 12 curriculum outlines: The Cold War; how China rose to a world power after 1949; Africa in the Cold War: USSR, USA, Cuba, China and South Africa; end of the Cold War and a new world order from 1989 onwards. The final section that outlines a post-Cold War paradigm further frame what can be expected within that section: South-South relations, North-South relations as well as BRICS.

When conducting research, it is impossible to incorporate the entire research population, thus a selection or sample of the representative group is initialised in order to gain a solid representation. Every study needs a sample for data to be analysed and it is the approach the study has chosen that will determine the size of the sample needed for the study. A sample is essentially a smaller representation of what is under study, and it is intended to encapsulate a smaller representation of the population. For my study, I used purposive sampling to select my textbooks. Purposive sampling suggests that the samples are handpicked for specific needs (Cohen et al., 2007). I have selected textbooks within the same publishing house across all the

selected grades barring Grade 10 Solutions for All. As *Solutions for All* did not have a grade 10 textbook, I had to replace that one with another textbook from the official textbook list: *New Generation History*. In order to have a clear and consistent sample of textbooks analysed, I opted to replace the one textbook rather than replace all three. Not all publishing houses encompass all the grades from grade 4 so I attempted to select textbooks that would best offer the range from Grade 4 to 12 as best I could. I chose to do this as this created a sense of continuum and consistency which would add to the solidity of the study.

I have chosen to tabulate my selected textbook choices as three textbooks per grade might become cumbersome and therefore clarity might be affected. Following the timetable, I have outlined the sections that will be analysed within each selected textbook. The following table (Figure 3) details the selected textbooks for each aforementioned grade:

GRADE	SELECTED TEXTBOOKS		
Grade 4	<i>Oxford Successful Social Sciences</i> , (2012), Oxford University Press	<i>Platinum Social Sciences</i> , (2013), Pearson.	<i>Solutions For All Social Studies</i> , (2013), Macmillan
Grade 8	<i>Oxford Successful Social Sciences</i> , (2012), Oxford University Press	<i>Platinum Social Sciences</i> , (2013), Pearson.	<i>Solutions For All Social Studies</i> , (2013), Macmillan
Grade 9	<i>Oxford Successful Social Sciences</i> , (2013), Oxford University Press	<i>Platinum Social Sciences</i> , (2013), Pearson.	<i>Solutions For All Social Studies</i> , (2013), Macmillan
Grade 10	<i>Oxford In Search Of History</i> , (2013), Oxford University Press	<i>Focus History</i> , (2011), Maskew Miller Longman (Pearson Pty Ltd)	<i>New Generation History</i> , (2011), New Generation Publishers

Grade 11	<i>Oxford In Search Of History</i> , (2013), Oxford university Press	<i>Focus History</i> , (2011), Maskew Miller Longman (Pearson Pty Ltd)	<i>Solutions For All History</i> , (2012), Macmillan
Grade 12	<i>Oxford In Search Of History</i> , (2013), Oxford university Press	<i>Focus History</i> , (2011), Maskew Miller Longman (Pearson Pty Ltd)	<i>Solutions For All History</i> , (2012), Macmillan

(Figure 3: Tabulation of selected textbooks analysed)

Below is a breakdown of what was analysed in each textbook. I have labelled the sections according to how they appear in the table of contents in each textbook.

Grade 4 Red Textbook: *Oxford Successful Social Sciences Grade 4 Learner’s Book* (Dilley, Monteith, Nunneley, Proctor & Weldon, 2012)

Term 2: Module 4 *Learning from Leaders* (pp.55 - 70). While this section was quite broad, the focus under analysis looked specifically at Mahatma Gandhi on pages 63 -67. I included both the summary and any revision activities or exam practice as part of the analysis on pages 68-70.

Grade 4 Blue Textbook: *Platinum Social Sciences Grade 4 Learner’s Book* (Ranby, Johannesson, Versfeld & Keats, 2012)

Term 2: *Topic Learning from Leaders* (pp. 98 - 115). Unit 3: *Mahatma Gandhi* (pp. 108 - 111) was analysed. Included in the analysis was the Term Assessment Exemplar (Term 2) (pp. 112 - 115).

Grade 4 Green Textbook: *Solutions for All Social Sciences Grade 4 Learner’s Book* (Ranby, 2012)

Topic 4: *Learning from Leaders* (pp. 55 - 68). Both Unit 3: *The life story of Mahatma Gandhi* (pp. 62 - 65) and Unit 4: *What can we learn from Mandela and Gandhi?* (p. 66) was analysed. Included in the analysis was the *Topic summary* (p. 67) and *Formal assessment tasks* (p. 68).

Grade 8 Red Textbook: *Oxford Successful Social Sciences Grade 8 Learner's Book* (Bottaro, Cohen, Dilley, Versfeld & Visser, 2013)

Term 1: Module 2 *The Industrial Revolution in Britain and southern Africa from 1860* (pp. 27 - 46). The unit within Module 2 which was analysed was Unit 2: *Southern Africa by 1860* (pp.37 - 40). This unit is further subcategorised into the subtopic: *Indentured labour from India to work on sugar plantations in the British colony of Natal* (pp. 38 - 40). Included in the analysis was any revision and revision activities on pages 45 – 46.

Term 2: Module 4 *The Mineral Revolution in South Africa* (pp. 71 - 92). Unit 2: *Deep-level gold mining on the Witwatersrand: 1886 onwards* (pp. 77 – 90) was part of the analysis. Added to the analysis was both the Revision and Exam practice section at the end of the unit (pp. 91 - 92) and the Exam practice section (specifically *Part 2: History*) that was found at the end of the textbook on pages 183 – 184.

Grade 8 Blue Textbook: *Platinum Social Sciences Grade 8 Learner's Book* (Ranby, Johannesson & Monteith, 2013)

Term 1: Topic 1 *The Industrial Revolution in Britain and southern Africa from 1860* (pp. 110 - 139). The analytical focus was on Sub-topic 2: *Southern Africa by 1860* (pp. 126 - 130) with specific focus on Unit 2: *Indentured labour from India to work on the sugar plantations in British colony of Natal* (pp. 127 - 130). The analysis included the revision and assessment section on pages 138 and 139.

Term 2: Topic 2 *The Mineral Revolution in South Africa* (pp. 140 - 165). Two sub-topics within this section were analysed. Sub-topic 2: *Deep-level gold mining on the Witwatersrand 1886 onwards* (pp. 145 - 161) with the focus on Unit 9: *Anti-Indian legislation* (p.59). Sub-topic 3: *The Mineral Revolution as a turning point in South African history* (pp. 162 - 165) with the focus only on Unit 1 (pp. 162 - 164). No subheadings were provided for Unit 1, only a series of events unpacked within the unit. Included in the analysis was the revision and assessment for Topic 2 (pp. 166 - 167) as well as the Term 2 Exemplar Test (pp. 228 - 230) and the Term 4 Exemplar Test (pp. 235 - 238).

Grade 8 Green Textbook: *Solutions for All Social Sciences Grade 8 Learner's Book* (Ranby, Varga & Friedman, 2012)

Term 1: Topic 5 The Industrial Revolution in Britain and southern Africa from 1860 (pp. 107 - 136). Unit 2 Southern Africa by 1860 (pp. 123 - 127) was analysed. Included in the analysis was the *Summary* (p. 134) and the *Formal Assessment Task* (pp. 135 - 136).

Term 2: Topic 6 *The Mineral Revolution in South Africa* (pp. 137 - 170). Unit 2 *Deep-level gold mining on the Witwatersrand 1886 onwards* (pp. 148 - 168) was analysed however, only pages 157, 164 and 166 needed analyses. Both the *Summary* (p. 169) and the *Formal Assessment Task* (p. 170) were included in the analysis.

A Grade 8 Social Science Examination (pp. 230 - 238) appeared at the end of all the topics. The exam included both Geography and History sections. Only the History component (Section B) was part of the analysis (pp. 234 - 238).

Grade 9 Red Textbook: Oxford Successful Social Sciences Grade 9 Learner's Book (Bottaro, Cohen, Dilley, Duffett & Visser)

As this textbook was an online version, no page numbers were available.

Term 1: Module 2 *World War II (1919 - 1945)*. Only Unit 3: *World War II in the Pacific* and the *Revision* component were analysed.

Term 2: Module 4 *The Nuclear Age and the Cold War*. Four out of the five units within Module 4 were analysed. Unit 1: *Increasing tension between the Allies after the end of World War II in Europe*; Unit 3: *Definition of the superpowers and the Cold War*; Unit 4: *Areas of conflict and competition between the superpowers in the Cold War* and Unit 5: *The end of the Cold War, 1989*. Included in the analysis was the *Revision* component.

Two exemplar tests were included in the analysis: the exemplar mid-year exam and the exemplar end of year exam. Only the History sections were analysed.

Grade 9 Blue Textbook: Platinum Social Sciences Grade 9 Learner's Book (Ranby & Johannesson, 2013)

Term 1: Topic 1: *World War II (1919-1945)* (pp. 106 - 135). Sub-topic 3: *World War II in the Pacific* (pp. 128 - 135) was analysed.

Term 2: Topic 2: *The Nuclear Age and the Cold War* (pp. 136 - 167). Four out the five sub-topics were analysed. Sub-topic 1: *Increasing tension between the Allies after the end of World War II in Europe* (pp. 138 - 142); Sub-topic 3: *Definition of the Superpowers and the meaning of the 'Cold War'* (pp. 151 - 162); Sub-topic 4: *Areas of conflict and competition between the Superpowers in the Cold War* (pp. 153 - 162) and Sub-topic 5: *The end of the Cold War, 1989* (pp. 163 - 165). *The Revision and Assessment* (pp. 166 - 167) component was also included in the analysis.

Both Term 2 (pp. 248 - 250) and Term 4 (pp. 256 - 264) Exemplar Tests were also part of the analysis. The analysis only included the history components.

Grade 9 Green Textbook: Solutions for All Grade 9 Learner's Book (Ranby, Varga & Friedman, 2013)

Term 1: Topic 5 *World War II (1919 -1945)* (pp. 105 - 138). Unit 3: *World War II in the Pacific* (pp. 131 - 134) was the only unit in Term 1 to be analysed. Included in the analysis were the summary and formal assessment tasks for Term 1 (pp. 135 - 138).

Term 2: Topic 6 *The Nuclear Age and the Cold War* (pp. 139 - 168). Four units were analysed: Unit 1 *Increasing tension between the Allies after the end of World War II in Europe* (pp. 140 - 145); Unit 3 *Definition of the superpowers and the meaning of 'Cold War'* (pp. 152 - 153); Unit 4 *Areas of conflict and competition between the superpowers in the Cold War* (pp. 154 - 163) and Unit 5 *The end of the Cold War in 1989* (pp. 164 - 165). Both the summary and the Formal assessment task (pp. 166 - 168) for Term 2 were included in the analysis.

Grade 10 Red Textbook: Oxford in Search of History Grade 10 Learner's Book (Bottaro, Visser & Worden, 2011)

Term 1: *The World around 1600* (pp. 6 - 33). Unit 1.1 *China: A world power between the 14th and 17th centuries (1368 - 1644)* (pp. 9-13) and Unit 1.3 *Mughal India (1526 - 1858)* (pp. 20-25) were analysed. Included in the analysis were the *Revision and Assessment* components (pp. 32-33).

Term 2: Topic 2: *European expansion and conquest in the 15th to 18th centuries* (pp. 34 - 63). Only a select few pages from two units were analysed. Only pages 43, 49 and 50 from Unit 2.2 *The Spanish conquest of America* and page 53 from Unit 2.3 *Africa: Portugal and the destruction of Indian Ocean Trade* were analysed.

Term 3: Topic 5: *Colonial expansion after 1750* (pp. 134 - 159). Only Unit 5.2 *The Zulu Kingdom and the colony of Natal* (pp. 144 - 149) were analysed. Included in the analysis were the Revision and Assessment components (pp. 157-159).

Grade 10 Blue Textbook: Focus History Learner's Book Grade 10 (Johannesson, Fernandez, Roberts, Jacobs & Seleti, 2011)

Term 1: Topic 1 *The world around 1600* (pp. 12 - 34). Two chapters were covered in Topic 1: Chapter 1: *China: A power in the 14th and 15th centuries* (1368 - 1644) (pp. 14 - 18) and Chapter 3: *The Mughal Empire in India (1526 - 1858)* (pp. 24 - 27). The content summary and the exam practice sections were also be included in the analysis (pp. 36 - 37).

Term 3: Topic 5 *Colonial Expansion after 1750* (pp. 169 - 202). Only two pages (pp. 198 - 199) were analysed in Chapter 2: *The Zulu Kingdom and the colony of Natal*; Unit 1: *The need for a controlled labour force* (pp. 196 - 199).

Grade 10 Green Textbook: New Generation History Grade 10 Learner's Book (Stephenson, Sikhakhane, Frank, Hlongwane, Subramony, Virasamy, Collier, Govender & Mbansini, 2011)

Topic One: *The world around 1600* (pp. 1 - 39). Two topics were analysed in this section: 1.1 *China: a world power in the 14th and 15th centuries* (1368 - 1644) (pp. 2 - 8) and 1.3 *India (Mughal) (1526 - 1858)* (pp. 14 - 20). At the end of this section, there was a Self-Study and Enrichment component (pp. 37 - 39) which was included in the analysis. This component was not reflected in the table of contents and so it was identified separately.

Topic Five: *Colonial Expansion after 1750* (pp. 150 - 193). Within the component 5.2 *Zulu Kingdom and the colony of Natal* (pp. 164 - 183) there was a subsection that dealt with indentured labour (pp. 165 - 173) in Natal which was also included in the analysis.

Grade 11 Red Textbook: Oxford In Search of History Grade 11 Learner's Book (Bottaro, Visser & Worden, 2012)

Term 1: Topic 1: *Communism in Russia 1900 – 1940* (pp. 6 - 41). The entire topic was analysed.

Grade 11 Blue Textbook: Focus History Grade 11 Learner's Book (Fernandez, Friedman, Jacobs, Johannesson & Wesson, 2012)

Topic 1: *Communist Russia, 1900 to 1940* (pp. 12 - 95). The entire topic, including the content summary and exam practice sections. was included in the analysis.

Grade 11 Green Textbook: Solutions for All History Grade 11 (Brink, Fowler, Grundlingh, Varga & Verner, 2012)

Topic 1: *Communism in Russia 1900 to 1940* (pp. 1 - 90). The entire topic, including the Formal Assessment Tasks, was analysed.

Grade 12 Red Textbook: Oxford In Search of History Grade 12 Learner's book (Bottaro, Visser & Worden, 2013)

Term 1: Topic 1: *The Cold War* (pp. 6 - 67). Both Unit 1.1 *The Origins of the Cold War* (pp. 6 - 27) and Unit 1.2 *The extension of the Cold War: China* (pp. 28 - 47) were analysed in their entirety. Only page 50 from Unit 1.3 *The extension of the Cold War: Vietnam* (pp. 48 - 63) was analysed. Included in the analysis was the *Assessment* component (pp. 64 - 67).

Term 1: Topic 2: *Independent Africa* (pp. 68 - 115). Only two units were analysed in Topic 2. Unit 2.2 *Comparative case studies (1960 to 1980): the Congo and Tanzania* and Unit 2.4: *Africa in the Cold War: What was the impact of the internal and external factors on African during the time?* (pp. 100 - 112).

Term 3: Topic 6: *The end of the Cold War and a new world order: 1989 to the present* (pp. 232 - 280). The topic in its entirety was analysed.

Term 4: *Topic summaries for revision* (pp. 281 - 286) and both mid-year (pp. 288 - 293) and September (pp. 300 - 314) exemplar examinations were analysed.

Grade 12 Blue Textbook: Focus History Grade 12 Learner's Book (Fernandez et al., 2012)

Topic 1: *The Cold War* (pp. 2 - 75). Both Chapter 1 *The origins of the Cold War* (pp. 4 - 21) and Chapter 2 *Extension of the Cold War – How did China rise to power after 1949?* (pp. 22 - 50) were analysed. Included in the analysis was the *Content summary* component (pp. 74 - 75).

Topic 2: *Independent Africa* (pp. 76 - 149). Chapter 6 *Comparative case studies to illustrate the political, economic, social and cultural successes and challenges in independent Africa (1960 to 1980)* included three units (pp. 84 - 90). Only Unit 1: *Comparative case study: the Congo and Tanzania* (pp. 84 - 85) and Unit 2: *The Congo became a tool of the Cold War* (pp. 86 - 89) were analysed. Chapter 8: *What was the impact of internal and external factors on Africa during the 1960s and 1970s?* (pp. 123 - 144) was also be included in the analysis. Included in the analysis were *the Content summary* (p. 145) and *Exam practice* (pp. 148 - 149) components.

Topic 6: *The end of the Cold War and a new world order, 1989 to the present* was analysed. Included in the analysis were the *Content summary* (p. 383) and *exam practice* (pp. 384 - 385) components.

Grade 12 Green Textbook: Solutions for All History Grade 12 Learner's book (Brink, de Nobrega, Malinga, Verner & Willemse, 2013)

Topic 1: *The Cold War* (pp. 1 - 50). The topics were not officially subdivided into sub-topics but rather all fell under the umbrella of Topic 1. It was easier then, in the case of Topic 1, to state what had been excluded. Only one topic was not included in the analysis: *Extension of the Cold War – Case Study: Vietnam* (pp. 35 - 45).

Topic 2: *Independent Africa* (pp. 51 - 90). Only the subsection: *Africa in the Cold War: USSR, USA, Cuba, China and South Africa* (pp. 78 - 85) was analysed.

Topic 6: *The end of the Cold War, 1989 to present* (pp. 247 - 286). The section in its entirety was analysed.

Included in the overall analysis was the *Sample examinations* component (pp. 287 - 308).

4.11 Ethical issues

As with any research, the researcher is bound by ethical standards in order to safeguard not only the researcher but the participants and the institution (Flick, 2014b; Orb, Eisenhauer & Wynaden, 2001). Ethical issues and elaborating on any ethical issues is a vital and necessary component of any research (Flick, 2014b; Orb et al., 2001). Ethical codes and standards need to be maintained to protect the participants as there has been deliberate misuse of research and science in the past (Flick, 2014b; Orb et al., 2001). My research uses textbooks that are part of the public domain and are thus available to anyone. No human participants were interviewed in the process of my research as my research only focuses on textbook content analysis.

Although in my research I only used school history textbooks that were part of the public domain, I still had to adhere to ethical standards set forth by the University of Pretoria. I applied for the necessary ethical clearance which enabled me to commence with my research. No problems or issues were highlighted as school textbooks fall within the public domain and as such are available to all members of the public.

4.12 Trustworthiness

Academic integrity is maintained through the trustworthiness of the data collected and analysed (Fossey et al., 2002). Trustworthiness is an integral part of qualitative research but as qualitative research is interpretive and can be influenced by the researcher's own ontological and epistemological assumptions, how can academic trustworthiness be applied and maintained (Guba & Lincoln, 1994; Morrow, 2005)?

Elo, Kääriäinen, Kanste, Pölkki, Utriainen & Kyngäs (2014) stipulate that trustworthiness needs to be maintained in each phase of the qualitative research process. This process is broken down into three phases: preparation phase, organisation phase and the reporting phase (Elo et al., 2014). First and foremost, Elo et al. (2014), argue that the researcher needs to be certain of their data collection method, sampling strategy and selected unit of analysis (appropriateness). My data collection method has been clearly identified and explained. The method has also been clearly connected to not only the theoretical design but also connects with the sampling strategy. In addition, I selected the purposive sampling approach which aligned with my choice of textbooks (units of analysis). The appropriateness of the units has been clearly identified in

chapter 4 in addition to appearing on the officially approved textbook list determined by the Department of Education. This ensures that the data is not a narrow selection but rather can be representative of a larger textbook sample in South Africa.

Secondly, during the preparation phase, Elo et al. (2014) state that the researcher needs to put thought into how data is collected. This does not only pertain to the selected analytical process but the category creation. As my research uses history textbooks available in the public domain, my collection encompasses three different South African history textbooks ranging from Grades 4-12. The data analysis process and abstraction were clearly identified and discussed within chapter 4. My ontological and epistemological assumptions, which could influence category creation and representativeness have also been clearly outlined within the scope of the chapter to ensure trustworthiness.

Thirdly, regarding the reporting phase, Elo et al. (2014) argue that to ensure trustworthiness is maintained, the researcher needs to ensure the data is sequential, and logical whilst ensuring connections have been made. In addition, Elo et al. (2014) state that a full description of the analysis process and reporting process needs to be included. I have clearly outlined my analysis process, and the reporting of the findings will follow in the succeeding chapter 5.

Qualitative research is subjective in nature and one's own basic assumptions can influence one's research. It is thus vital to employ various methods to ensure that trustworthiness is maintained. A challenge for my research is to be made aware of my own ontological and epistemological challenges to my research. I have a pre-existing fondness for Russia history, and this limitation needs to be made clear from the onset in order to ensure trustworthiness is maintained. In addition, my own positionality as a South African citizen has been made clear in order to identify the lens through which the interpretation takes place.

In order to ensure trustworthiness and maintenance of academic rigour, it is important to garner outside lenses to ensure that no bias is being subconsciously applied to the interpretation. My research thesis has undergone an extensive editing process through myself, my thesis supervisor as well as by my language editor. Any bias or biased-terminology should have been ironed out within this process. It is the active cognisance on my part as a researcher and my supervisor's constant oversight that ensures that academic integrity and academic trustworthiness have been maintained.

4.13 Conclusion

In this chapter I have outlined both the theoretical design of my research as well as the practical application of the selected methods. Both interlinking components have been clearly discussed as well as how they can answer my posed research questions. The social context in which my selected textbooks are located play an integral role in the creation of my research design as well as its supporting research methodologies. The researcher is not always an objective observer in the case of qualitative research and so it has been prudent to outline not only the qualitative approach and its aligned paradigm but how these can be foregrounded by epistemological, ontological and methodological standards.

These processes are vital as they allow for the creation of theoretical and practical scaffolding which enables the next step to occur. Chapter 5 will focus on the data analysis of each history textbook mentioned in chapter 4. In this chapter I will use methods indicated in the analysis subsection. It was through this process that the categories and themes were identified but it is through chapter 5 where they will be unpacked and discussed. Chapter 5 focuses primarily on the findings of the data analysis which will answer the one research question: How are BRICS countries represented in South African School History Textbooks?

CHAPTER 5

DATA ANALYSIS

“Whether novel is history or history is novel, is a tantalising point”- (Liebenberg, 2010)

5.1 Introduction

South Africa’s insertion into the socio-political and economic power bloc of BRICS has thrust South Africa onto the global stage since the latter half of 2010. A significant period of time has now elapsed since this power bloc inclusion and so it is pertinent to unpack what is learned and what is silenced regarding South Africa’s BRICS partners in the school curriculum. In the previous chapter, I outlined in my research design and research methodology how I answered my research questions: how BRICS countries are represented in South African school history textbook and why are they represented this way.

South Africa has been a member of the political and economic bloc BRICS for over a decade. It is therefore important to analyse how South Africa represents its partners within the history textbooks. As South Africa is a long-standing member of this significant global power bloc, it is pertinent to unpack what exactly South African school learners learn about Brazil, Russia, India and China at both exit levels grade 9 and grade 12 and how their histories are represented in the programmatic curriculum. As outlined in Chapter 1, South Africa shares a long history with Russia, India and China but also shares many historical similarities with Brazil. It is not just a contemporary alliance that marks how South Africa has depicted its partners’ histories, but a deeply historical one too. Regarding this intricate relationship, how then are the histories of these supposedly important countries unpacked in the school history textbook?

In this chapter I will be focusing specifically on Brazil, Russia, India and China and how they have been represented in the purposively selected Grades 4, 8, 9, 10, 11 and 12 South African history textbooks. I have broken this chapter down into four separate parts that represent each of the BRIC countries. This way, it would be easier to follow the countries’ representations in the various grades both thematically and numerically. Chapter 5 is quite extensive and so breaking down the chapter into four separate parts (representing each country) provides the

best and clearest way to present the data analysis. Furthermore, I have analysed each country by grade. I have incorporated all three textbooks within a conversational framing but have divided the countries per grade. I opted to analyse per grade as it offers structure whilst seeing the interplay between the three textbooks. Moreover, the historical geo-political nature of the countries is important to identify and conceptualise first. The geo-political climate of the country will be addressed in each section in an attempt to avoid confusion. Lastly, in this chapter, following the data analysis of the four countries, I have included a separate section which looks specifically at BRICS as a power bloc. In the Grade 12 textbook, there is a component that looks at BRICS in the post-Cold War World and so I have kept that as a separate section as it will be analysed as a power bloc rather than as individual countries.

The textbooks under study pertain directly to the CAPS curriculum and range from the Intermediate Phase to the FET phase. It must be noted that history, as a compulsory subject, is only studied from grades 4-9 where it is amalgamated with Geography to form Social Sciences. From grades 10-12, History is an elective subject. This is an important distinction because what students learn in the compulsory phase regarding South Africa's BRICS partners will set the basis of knowledge as not all students select history as a subject in the FET. This is further reinforced through Grade 9 being a possible exit year for students, thus Grades 9 and 12 are considered South Africa's exit years. What students learn about the BRICS partners within two possible educational spaces needs to be considered.

PART ONE: BRAZIL AS REPRESENTED IN SOUTH AFRICAN SCHOOL HISTORY TEXTBOOKS

5.2 Introduction

Brazil¹⁹ is not a major focus in the South African CAPS-history curriculum. Within the CAPS document itself, there is no mention of Brazil specifically. The textbooks include or allude to Brazil despite the lack of inclusion in the intended curriculum. The only connection to Brazil is made through Portuguese exploration in the Grade 10 textbooks.

5.2.1 Analysis

In line with the CAPS-History curriculum, the history textbooks, as the programmatic curriculum, have a very limited representation of Brazil. Brazil is only mentioned in the Grade 10 Red and Green Textbooks whereas the Blue Textbook makes no mention of Brazil or any connection to colonial Brazil's slave history. Brazil's geographic location is only identified in both the Red and Green Textbook. Outside of the geographic location (through the use of maps), Brazil is primarily represented as a Portuguese colony in the Red and Green Textbook.

Where the Red Textbook represents Brazil as a Portuguese colony and as the biggest market for West African slaves, the Green Textbook only mentions Brazil as a Portuguese colony in passing. Only a single sentence is allotted directly to Brazil in the Green Textbook: *The Portuguese enforced a monopoly of the transport of African slaves to their colony of Brazil* (p.65). The Green Textbook briefly mentions the Treaty of Tordesillas and the division between the Spanish and Portuguese Empires. Through this statement, Brazil is identified as a colony of Portugal.

The Red Textbook takes the representation of Brazil a step further than the others in that it includes Brazil's role in the slave trade and its subsequent link to Africa (p.49). Whilst the Green Textbook does make a limited mention of African slaves going to Brazil, there is no

¹⁹ The term 'Brazil' is in reference to the current geo-political state of Brazil as of 2023. Brazil is identified as Portuguese colony; however, I have opted to continue the use of the current name in order to avoid confusion. The geo-political make-up may shift when referring to the Portuguese colony however, since this is not addressed in any textbook, I have opted to continue the use of the term *Brazil* in both past and present-day occurrences.

expansion on this statement. The lack of elaboration further emphasises the lack of critical discourse on Brazil. Furthermore, the term “Brazil” has been mentioned four times in three sentences (excluding the mention of Portuguese Brazil in Source A) in the Red Textbook, in comparison to the singular mention of Brazil in the Green Textbook. In addition, the Red Textbook reinforces the connection of Brazil to Africa through one activity question that asks students to explain Brazilian culture being influenced by Africa. Although the reinforcement is limited and very little development of the Brazil-Africa connection is continued outside of this singular instance, there is a slavery connection that has been identified which does not occur in the Blue Textbook.

5.2.3 Conclusion

An extremely limited representation of Brazil is created within the programmatic curriculum. Despite a shared slave and colonial history across the Global South, the South African history textbooks only vaguely create an image of Brazil outside of its geographic location. However, this image is not evident across all three textbooks. Brazil is almost completely omitted with the foregrounding being that of the Portuguese expansion. It is only with the Red Textbook where a connection to slave history in Africa is presented, thus signalling a lack of overall inter-textbook continuity.

PART TWO: RUSSIA AS PORTRAYED IN SOUTH AFRICAN SCHOOL HISTORY TEXTBOOKS

5.3 Introduction

South African history textbooks include an extensive history on Russia. The focus on Russia begins at Grade 9 level and extends to Grade 12. Two points are important to consider here: Russia appears at both school-leaving intersections. Grade 9 is considered as the first possible exit year, followed by Grade 12. Grade 9, Grade 11 and Grade 12 are the focus grades within this analysis. It must be noted that this is the largest section of analysis as the content dedicated to Russia is quite extensive.

It is first important to establish the concept of Russia in its geo-political space. I have used both the Soviet Union, USSR and Russia interchangeably. Whilst the USSR and the Soviet Union specifically reference Communist Russia, I have opted to use the term *Russia* in conjunction as the representation of modern-day Russia is impacted through images created in each textbook. Thus, going forward, I have referred to the representation of Russia as a whole, in an attempt to link to the current geo-political state of Russia.

5.3.1 Russia in the Grade 9 history textbooks

An extensive image of Russia²⁰ in the Grade 9 textbooks emerges. The sections pertaining to Russia fall within the unit, *The Nuclear Age and the Cold War*. The Red Textbook allocates 20 pages to *The Nuclear Age and the Cold War* whereas the Blue Textbook uses 24 pages, and the Green Textbook uses 27 pages. The entirety of the unit is not analysed; only those sections dealing with Russia specifically have been analysed. Before the analysis is unpacked, two key elements need to be discussed: the concept of Russia as well as the use of sources within the textbooks.

The geo-political concept of *Russia* is important in the understanding of the political nuances of the country and surrounding regions. The Red and Blue Textbook use the terms *Russia*,

²⁰ The term *Russia* will be used to describe both Tsarist, Communist and post-Communist eras. Specific mention of the USSR and the Soviet Union will still be used; however, it will be used insofar as it has been used in the textbooks.

USSR and the *Soviet Union* interchangeably. The image that emerges is that Russia is the Soviet Union, and the Soviet Union is Russia. There is little discussion regarding the geo-political make-up of the Soviet Union and so a distorted image of both Russia and the Soviet Union emerges. The Green Textbook only uses the terms SU and USSR interchangeably and the term Russia does not appear in the textbook. The Red and Green Textbooks elaborate on the make-up of the Soviet Union however, this elaboration only occurs in the last paragraph on the last page. The Blue Textbook only mentions the geo-political make-up in passing stating that the Russian State consisted of 15 Soviet Socialist Republics however, it does not expand on what this means. Thus, both the Red and Blue Textbooks continue the distorted image of the concept of Russia throughout the unit.

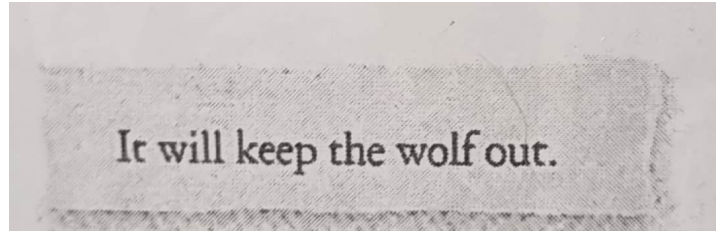
A number of visual images have been used within this unit. Within the 20 pages of the Red Textbook, 15 visual images are used. Both textbook content and visual imagery are balanced with space not being sacrificed in favour of one. The Green Textbook includes 27 pages and of those pages, there are 24 visual images. Although some images occupy larger sections within the textbook, there is a balanced inclusion of both images and written content. The Blue Textbook, however, has 24 pages and those pages include 37 visual images. The visual images dominate the unit at the expense of the written text which results in a gross imbalance between written text and visual text.

Another consideration is the type of written sources included in the textbooks. In comparison to the visual images, the textbooks do not include as many written sources. The Red Textbook only includes two written sources whilst the Green Textbook has seven. The Green Textbook's sources are all referenced whereas the Red Textbook purposefully avoids referencing the two written sources as part of a source analysis exercise. The Blue Textbook includes 11 written sources; however, five of the written sources are two sentences and four of the sources are one sentence long. Furthermore, only seven of the 11 are referenced. Nine of the 11 sources have very little sustenance yet are used as part of source analysis attempts. This severe limitation provides a very restricted view of the sources, often without any context or provenance and so one must trust the authority of the textbook in their own contextualisation (see figure 4).

The following images in figure 4 depict sources N and O (p. 162) from the Blue Textbook which emphasise the nature of the source limitations in the textbook. Source N can be found

under South African History online but through *wikiquotes* and source O is an adaptation of what Kennedy allegedly stated (SAHO, no year). The provenance and authority of the sources is extremely limited therefore their reliability is questionable.

Source N: Khrushchev, the leader of the USSR, referring to the Berlin Wall.



Source O: President Kennedy, the leader of the USA, referring to the Berlin Wall.

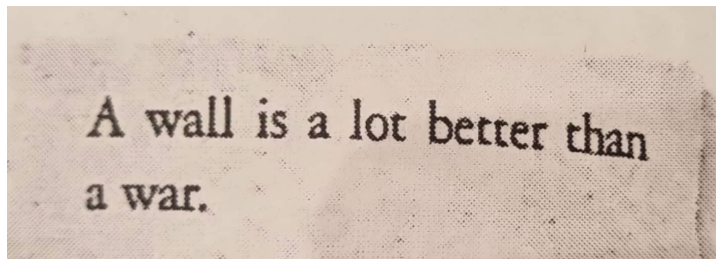


Figure 4: An example of sources included in the Blue Textbook.

5.3.1.1 The representation of Russia in Grade 9 history textbooks

Russia is largely represented as a superpower alongside the US in all three textbooks; however, the representation of Russia is different in the three books. The Russian section in the Grade 9 textbooks pertains mostly to Communist Russia in the post-World War and Cold War era with the historical background being mostly neglected.

Historical background and context are limited or misleading in all three textbooks. The Red and the Green Textbook include only one sentence on the historical background of Russia and the lead up to Communist Russia. The Blue textbook, however, provides half a page of background. With this being said, a vague contextualisation of Russia's history occurs with an obvious preference towards the move to communism. The Blue Textbook includes more historical background information in comparison to its two counterparts. However, there are a number of misleading or inaccurate points within the textbook. Overall, the textbook has attempted to oversimplify the history which has led to a distorted image of Russia. The Blue

Textbook reinforces the important role of men within Russia's history by noting that communism was developed by great male thinkers like Marx, Lenin and Trotsky (p. 141). A narrow, masculine history emerges from this representation. Furthermore, the textbook notes that a "great change" (p. 141) occurred following the Russian Revolution. This alludes to positivity and reinforces the bias undertone in favour of communism within the Blue Textbook. There are a number of omissions which occur through the oversimplification process such as the immediate takeover of the communist government following the overthrow of the Russian king²¹ and the immediate ascension of Stalin following the death of Lenin. The omissions create a distorted and largely vague view of Russia.

The Red Textbook portrays a balanced approach between both the US and Russia and so points out that the tension between the two was not one-sided and both sides contributed. Furthermore, both Russia and the US are viewed in an unfavourable light due to their constant competitive nature. The Blue Textbook portrays Russia's status as one that rivalled that of the US as well as unpacking the distrust between both parties. Furthermore, the Blue Textbook does portray the distrust between the US and Russia in a balanced way in that both sides are unpacked rather than distrust only being focused on Russia. However, there is a slight favourable undertone towards Russia. The Green Textbook represents Russia through the lens of the US. The image that emerges within the Green Textbook is a negative portrayal of Russia. As the US lens is omnipresent, the representation of Russia is only seen through how the US perceived Russia, thus Russia is represented to be an outsider, untrustworthy and seeking control of the Eastern Europe. The textbook uses the term *control* six times to describe soviet expansion which has been further qualified on several occasions. This reinforcement heavily suggests a negative view of soviet expansion in comparison to US involvement. Furthermore, the textbook uses four sources to discuss this expansion, three of which reinforce the negative view of Russia. While the textbook does indicate that Russia may have had reasons for expansion, they do not elaborate or discuss these reasons which maintains the outwardly negative view of Russia.

It must be noted that the Red and the Green Textbook both offer a revision or summary section in which they summarise each unit. The Blue Textbook does not offer this section.

²¹ The term *King* has been used in the Blue Textbook as opposed to the historically and culturally appropriate term *Tsar*.

The Red Textbook offers two pages of bullet points whereas the Green Textbook offers one page of bullet points. The bullet points serve as a summary of what has been considered the main points within the units.

5.3.1.2 The representation of the US as the counterfoil to Russia in the Grade 9 history textbooks

As the unit, *The Nuclear Age and the Cold War*, expressly focuses on the Cold War, Russia is depicted alongside the US and thus an image of the US emerges in relation to the SU. The Cold War section does illustrate the competition between the two nations; however, both the Red and the Blue Textbooks adopt a somewhat neutral or balanced approach to this representation where the Green Textbook includes an overt pro-US leaning as its narrative of Russia.

The Red and Blue Textbooks offer a more neutral and balanced stance. The Red Textbook follows a revisionist approach as it blames both the US and the SU for the Cold War and perpetuates an unfavourable representation of both countries throughout. The textbook also describes the US as a major military and industrial power within the West. It is explicit in the differentiation between the West and the US – they are not viewed as one and the same. The Arms Race in particular is not viewed very favourably by the Red Textbook; furthermore, it shifts more blame onto the US for intensifying the Cold War due to the development of nuclear power. The Blue Textbook offers a very limited representation of the US. It views the US as a capitalist superpower and leader of the Western Allies. Although the textbook places emphasis on the distrust between the two countries, both are depicted in a neutral fashion. The Green Textbook follows an explicitly pro-US narrative. It views the US as powerful, wealthy, democratic and the land of the free with an emphasis placed on the many individual freedoms. Furthermore, the textbook does not distinguish between the West and the US. The US and the West appear as one and the same in that the US represents the West as well as capitalism. There is a strong overlapping imagery between the US and capitalism within the Green Textbook. The Truman Doctrine and the Marshall Plan as economic policies are highlighted in the textbook to emphasise the benevolent and heroic nature of the US in helping the struggling, post-War European countries. The implications and effect of these policies are not elaborated on which creates a narrow image of the US only offering economic assistance to help rather than as a political tool. The SU economic assistance

however, is discussed as a means to extend Soviet control and expansion thus reinforcing the negative imagery associated with the SU in contrast to the benevolence of the West.

5.3.1.3 Representation of competing ideologies communism and capitalism in Grade 9 history textbooks.

The Red and Green Textbooks offer a comparative tabulation of both communism and capitalism; however, the Green Textbook arguably portrays an uneven representation of both ideologies. The Red Textbook outlines the ideological differences in a balanced way. In addition, the textbook includes a broad unpacking of each of the ideologies and both communism and capitalism are viewed as the driving forces behind the tension between the US and Russia. The Green Textbook, although it provides a comparative table, does not provide as much information and subsequently little clarity. The Green Textbook attempts to provide some objectivity; however, there is significant emphasis on individual freedoms which overshadows any attempt at objectivity. Furthermore, this is reinforced by the six points outlining communism of which only two could be interpreted as positive. The textbook does indicate the unequal distribution of wealth on the part of capitalism; however, the heavy positive emphasis overshadows this negativity. The focus on individual freedoms extends beyond the comparative table. The textbook includes an image by Norman Rockwell (p. 140) which highlights the different types of freedoms offered by capitalism as well as the class activity (p.141) which directly focuses on the benefits of individual freedoms. This heavy focus provides an overt bias in favour of capitalism which is in keeping with the textbook's pro-US stance.

The Blue Textbook, although it only includes a brief unpacking of both ideologies, leans favourably towards communism and unfavourably against capitalism. The textbook highlights the favouritism by stating that communism is a "highly sophisticated" (p. 141) ideology which was created by great thinkers (male). Added to that, communism is stated as having a large global following due to its popularity amongst poor people. The textbook notes that it is the West which views communism negatively and through this, the West appears a bully. Furthermore, the textbook allocates seven points to describe communism with only one which could be interpreted as negative. On the other hand, capitalism is depicted negatively in a number of offhand ways. In its initial unpacking, the textbook includes six points of which three can be construed as negative. In addition, the textbook

states that it is acceptable for people to be very rich and for others to be poor. This can imply a sarcastic undertone. Although sarcasm is difficult to interpret without inflection, it can be implied that under capitalism, according to the Blue Textbook, it is acceptable for there to be an unequal distribution of wealth. Furthermore, the textbook states that the communism is more sophisticated than fascism; however, the textbook states that some capitalist countries can also be fascist. This is a backhanded comment which indirectly reinforces the negativity associated with capitalism.

5.3.1.4 The representation of the Cold War in Grade 9 history textbooks

Although this unit specifically deals with *The Nuclear Age and the Cold War*, the Cold War is viewed through the lens of the competition between the US and the SU which is underpinned by their ideological battle. Key events that underpin the Cold War, according to the textbooks, are: Arms race, Space race and the Division of Germany.

All three textbooks state that the Cold War was a period of tense rivalry between the US and SU; however, each textbook has represented the event differently. The Green Textbook represents the areas of conflict matter-of-factly with only slight anti-Russian tendencies. The Blue Textbook, however, tends to omit or dilute negative events associated with Russia which perpetuates its pro-Russia narrative. The Red Textbook represents the Cold War unfavourably with blame mostly being placed on both powers. Furthermore, the textbook looks at the holistic nature of the Cold War and its global implications. Although global implications are somewhat mentioned in the Green and Blue Textbook (rarely), the Red Textbook is quite explicit in this connection.

The Red Textbook reiterates that millions of lives were lost as a result of the rivalry between the two powers. The global consequence of the Cold War is the key focus for the Red Textbook despite the inclusion of the main areas of conflict: arms race, space race and division of Germany. In both the arms and space race, the textbook provides little information although it does highlight that these areas were highly competitive which contributed to global tension. The arms race is depicted very unfavourably with more blame being shifted to Russia. The textbook views the arms race extremely unfavourably as a whole but places more blame on Russia as Russia is considered to have worsened the global tension when it developed nuclear weapons. The Red Textbook blames Russia's insecurities on this

development whilst stating that the world became much more dangerous as a result. All three textbooks note the increase in nuclear tension when Russia began building; however, it is the Red Textbook which adds the global danger to the fray.

Both the Blue and the Green Textbooks use the Cuban Missile Crisis as an example to discuss the global impact of the arms race. The Red Textbook only makes note of the world becoming more dangerous but does not include an example. Whilst the Green Textbook approaches the Cuban Missile Crisis in a balanced way, the Blue Textbook depicts the US unfavourably. Although the Crisis is mostly viewed in a balanced way, the Blue Textbook does suggest that the US is a fearful bully with Russia only trying to help a country in need which furthers the pro-Russian narrative.

In Grade 9, the space race is included as a way to depict competition in the areas of science and technology. All three textbooks state that the US was shocked at the advancement of Russia's technology which essentially spurred on the space race. The space race is only viewed as a highly competitive area from both sides and does not denote violence. Content space is varied amongst the textbooks regarding this section. The Red Textbook includes half a page, whilst the Green Textbook uses two pages, and the Blue utilises three pages. Despite the lack of urgency, the space race is still provided with a large allocation of space in both the Blue (p. 157-159) and Green Textbooks (p. 158-159), two of the three textbooks, in order to emphasise the competition between the two powers across all spheres.

A fair bit of content space is allocated to the division of Germany and the fall of the Soviet Union within all three textbooks; however, each textbook represents it differently. The Red and Blue Textbooks allocate seven pages each whereas the Green Textbook uses six pages to represent the division of Germany. The focus here is placed on the Berlin Blockade and the Berlin Wall as the information on the fall of the Soviet Union is extremely limited. The division of Germany is viewed unfavourably with more criticism placed on Russia. Both the Berlin Blockade and Berlin Wall sections view Russia in an unfavourable light as they argue that it was Russia who wanted this split between East and West. The blame is not squarely on Russia as the Berlin Blockade, as a whole, is viewed negatively.

The Red Textbook refers to the Blockade as a crisis and as the textbook suggests, it was one of many crises to come (Korea, Vietnam and Angola) which led to more death. This

reinforces the global impact of the Cold War tension between the two powers. The blame of the Berlin Wall construction is placed squarely at the feet of Russia in the Red Textbook. The textbook states that millions of East Germans were escaping to West Germany. The use of the word ‘escaping’ suggests desperation which worsens the image of a communist regime as a ruling entity. The textbook does depict the East German government as being a different entity to Russia as it states that it was the East German government that wanted to put a stop to people escaping and asked the Soviet Union for support. This does not put outright blame on Russia, but indicates Russia’s motives.

The Blue Textbook, however, omits as much negativity as possible associated with Russia. Only the construction of the Berlin Wall is viewed somewhat negatively. The textbook implies life between the East and West zones was peaceful and the transition was smooth and peaceful. The Berlin Blockade is completely omitted in the Blue Textbook. Historical context is further distorted when the textbook claims that the only tension began with the construction of the Berlin Wall. The textbook reiterates this further by stating that prior to the construction of the Wall, people moved freely between zones which drastically distorts the historical context and existing political and ideological tension. Furthermore, the textbook states that upward of 3 million people “emigrated” to West Berlin (from East Berlin) (p. 160). This emigration caused damage to the East German economy. First, the term “emigration” suggests choice and further removes any negative association between the East and West zones. Furthermore, the blame being shifted to emigration creates a scapegoat and blame is removed from communist principles and, by extension, Russia. A change of tone occurs in the textbook once the Berlin Wall was built. The textbook refers to people moving from East to West as “defectors” (p. 162). This dramatic shift away from emigration adds to the change in tone regarding the Berlin Wall. Although the textbook states that the building of the Wall outraged the West (East German opinions omitted) it uses two sources from US President Kennedy and USSR leader Khrushchev to suggest support for the wall from both sides. The sources are both unreferenced and are six and nine words respectively. The lack of source reliability and content adds to the perpetuated historical distortion of this period. The Blue Textbook includes more information on the end of the Cold War and fall of the Berlin Wall than its two counterparts. In this representation, under Gorbachev, Russia is described as having new freedoms. This is the only mention in the Blue Textbook to suggest the Russians, under communism, had limited freedom thus perpetuating a pro-communist and pro-Russian stance.

The Green Textbook attempts to unpack the division of Germany as objectively as possible; however, there are a number of anti-Stalin and anti-Russian leanings included. The textbook places blame for the tension between East and West Berlin and the subsequent Berlin Blockade on Stalin himself rather than Russia, thus focusing specifically on leadership rather than the country as a whole. Furthermore, only an anti-Russia source is included in the section pertaining to the Berlin Blockade which suggests a pro-West and anti-Russian leaning.

5.3.1.5 The representation of Russian leaders in the Grade 9 history textbooks

Each textbook has responded to Russian leaders prior to 1917 and the fall of the Berlin Wall differently. The Red Textbook only mentions two leaders by name, Stalin and Gorbachev, and as such, Russia's leadership emerges as largely faceless. Little to no emphasis is placed on singular leadership but rather on the response by the country (and by extension government) itself. The Blue and Green Textbooks indicate specific Russian leadership far more liberally than the Red Textbook.

The Blue Textbook makes mention of five different leaders by name (Tsar Nicholas II, Lenin, Stalin, Khrushchev and Gorbachev) whereas the Green Textbook includes four leaders by name (Lenin, Stalin, Khrushchev and Gorbachev). The Green Textbook mentions communist leaders by name but only the title of the tsar is included. A faceless image of pre-Communist Russia emerges from the Green Textbook and importance is only placed on selected communist leaders. Whilst other leaders are mentioned in the Blue and the Green Textbooks, the focus is largely on Stalin. Where the Green Textbook only mentions the communist leaders in their leadership capacity, the Blue Textbook personalises both Lenin and Stalin. In the Blue Textbook Lenin is regarded as both a great thinker and as the saviour of Russia whereas Stalin is regarded extremely negatively. His rule is regarded as harsh and violent and he is considered a "ruthless dictator" (p. 141). A stark contrast between rulers is identified in the Blue Textbook which spotlights the bias in favour of Lenin's leadership as opposed to that of Stalin. No other leader's personal attributes are highlighted in the Blue Textbook. Stalin is the key focus in both the Blue and the Green textbook. The Blue Textbook mentions the name Stalin seven times whilst the Green Textbook mentions Stalin 12 times (the Red Textbook only mentions Stalin by name once). Both the Blue and Green Textbooks focus on

some form of leadership. The Blue Textbook focuses on the leadership characteristics of Stalin whereas the Green Textbook focuses more on the specific leadership decisions made by Stalin as the leader of the USSR. Although the specific leadership decisions of Stalin are focused on in the Green Textbook, the Blue Textbook looks at the type of leader Stalin was.

5.3.1.6 How assessment influences representation of Russia in Grade 9 history textbooks

Numerous activities are included across all three textbooks; however, the question levels (according to CAPS requirement) remain uneven. The Red Textbook includes 14 activities with 11 being specific to Russia. The activities promote source analysis, political cartoon analysis and historical thinking skills. The Red Textbook largely approaches the content comparatively. In other words, for the most part, perspectives of the West (or US) and Russia are included in the activities providing a mostly balanced approach to the content. Activity 8 on page 89 includes one leading question where it questions the students as to what made the world a more dangerous place. This is in direct reference to Russia making the H-bomb a year after that of the US. The question does allocate blame on Russia and omits the US creation of the first H-bomb. The Blue Textbook includes ten activities of which eight relate to Russia. Although there is an attempt at source analysis and political cartoon analysis, the textbook mostly utilises level one (basic) style questions. The Green Textbook includes an overall of 14 activities which have been labelled as *classroom activities* and *homework activities*. Whilst there is an attempt at a balanced source-based approach, there have been some activities which indicate a bias. There are three specific activities which suggest a pro-US and anti-Russia leaning. The first activity suggests a pro-capitalist leaning as the questions ask students to only focus on the positives of the freedoms associated with capitalism. However, this activity is later countered (on the same page – p.141) as the homework task asks students to discuss the pros and cons of both communism and capitalism. Secondly, the classroom activity centred around Cuba mostly focuses on Russia's threat to the US which omits any blame on the part of the US (p.157). Finally, the classroom activity discussing the Berlin Wall suggests a negative attitude towards Stalin and Russia as a whole. Each of these sources, through their questioning, guide the student's response which emphasises the biased leaning of the sources.

5.3.2 Russia in Grade 11 history textbooks

The Grade 11 Russian section is quite large and very text dense. This has led to the Russian section being staggered. Thematically, it can be seen as being divided according to its political transitions which is often guided or influenced by certain events rather than chronological. At times, the text appears haphazard and repetitive. The political transitional periods in Russia can be defined under Tsarist Russia, Communist Russia under Lenin and Communist Russia under Stalin. Each transitional period symbolises four different styles of government and thus represents four separate political phases in Russia. The reason for this split is that a different representation of Russia is gained under each political transition. Within these phases, four leaders are the main focus: Tsar Nicholas II, Lenin, Trotsky and Stalin.

The Red Textbook includes 32 pages, and the Green Textbook uses 40 pages to unpack the Grade 11 Russian section. The Blue Textbook utilises the most by far as it allocates 79 pages to the Russian section. These totals exclude the summary or revision section and revision task at the end of the unit. This is an extensive allocation which indicates a significant focus on Russia as a whole.

The use of sources is also an important factor to unpack in this section. I have only included sources labelled as sources which are often used as part of the textbook activities. There are more written and visual sources used outside of the ‘official’ sources. However, it would be too cumbersome and confusing to include both official and unofficially labelled sources. The Red Textbook uses 18 official sources in their 32 pages where the Green Textbook uses 26 within their 40 pages of content. The Blue Textbook, however, uses 95 ‘official’ sources in their 79 pages of content. There are more sources used than pages of content in the Blue Textbook. Added to this, there is very little range that has been utilised. Authors of sources have been repeated abundantly and at times the same author has been used to describe a single event in a variety of ways. For example, on pages 28 and 29, there are seven ‘different’ sources; however, six of the seven come from *T. Fiehn, Russia and the USSR 1905-1941, London: John Murray, 1996*. Furthermore, of the official sources, the above author has been utilised a total of 55 times in the Blue Textbook. The Blue Textbook has also used dual referencing on a number of occasions. An author has been used below the quote while the caption references another source. This causes provenance confusion. The Red and the Green

Textbook reference their written sources but do not reference their visual sources (tables, cartoons, maps et cetera).

5.3.2.1 The representation of Tsarist Russia in Grade 11 history textbooks

Tsarist Russia is mostly represented as autocratic and backward. The Red and Blue Textbook represent Tsarist Russia in varying details whereas the Green Textbook does not show a very clear image of Tsarist Russia. The Red Textbook is clear in its representation of the leadership of Russia during this time, while the Blue and Green Textbooks show a somewhat faceless leadership of Tsarist Russia which creates a distorted and limited view of Russia. Tsarist Russia is defined by three key events: the Russo-Japanese War, the 1905 Revolution and the February Revolution.

The Red Textbook emphasises the backwardness in both political, agricultural and industrial sectors. Furthermore, the textbook highlights the poverty, hardships and exploitation experienced by the peasants and the workers. The Tsarist regime is represented as autocratic as it used brutality to get rid of any opposition or to put an end to protest action. The textbook repeatedly uses the term *crushed* to describe Tsarist regime response to opposition or unrest. The Blue Textbook describes the poor conditions of both the peasants and the working class; however, it provides a vague understanding of the leadership of Tsarist Russia. The leadership appears as a faceless regime, similar to that of the Green Textbook. Through this omission, the Blue and the Green Textbooks purport that the importance of Tsarist Russia lies in the unrest and oppression rather than specific leadership. The Green Textbook provides a vague and distorted image of Tsarist Russia. The textbook begins with the 1905 revolution and so little context and political structure is provided. In addition, there is more direct focus placed on the peasants and their unhappiness rather than workers. Furthermore, the textbook reiterates that it was the educated men of Russia who were determined to help peasants and therefore organised political parties such as the Russian Social Democratic Party. Through this inclusion, one can assume that this party was focused on helping the peasants specifically as opposed to workers. The Green Textbook uses highly emotive language in its representation of the peasants and the influence of communism. An example can be seen on page 12: “Marx’s ideas appealed to the poor peasants who were eager to lose their chains of debt”. This highly emotive sentence emphasises the impoverished lives of the peasants but

overlooks the role of the workers which creates a distorted image of not only the demographics of Russia but the political context and leanings of class groups.

The Russo-Japanese War is a key feature in the Blue and Green Textbooks as a way of defining the Tsar's leadership as well as being treated as one of the causes of the 1905 Revolution. The Red Textbook does not mention the Russo-Japanese war, but instead goes straight into the details of the 1905 Revolution. The Blue Textbook includes six sources, four of which are from the same author as well as an activity explicitly for the 1905 Revolution. Overall, there is a lack of textbook consistency in their view of the Russo-Japanese War as a contributing factor in the 1905 Revolution.

An important notation needs to be made regarding the finality of the Tsar and his family. Only the Red Textbook indicates that the Tsar and his family died during the Civil War. No indication of how or by whom is provided. However, the Red Textbook is the only textbook to offer any detail of the outcome of the Tsar or his family. This omission by two of the textbooks reinforces the lack of importance placed on pre-communist Russia.

5.3.2.2 The representation of Communist Russia under Lenin in Grade 11 history textbooks

Lenin's control of Russia is represented in three significant phases: the Bolsheviks as the vanguard of the proletariat, the Civil War and the New Economic Policy (NEP). Through these different phases, a view of both Russia and Lenin are formed. Communist Russia is represented as undergoing a number of different political changes during this time and it is from these changes that a representation of both Lenin and Russia emerges. Chronologically, the Red Textbook is the only textbook to follow the changes in Russia post-October Revolution. It discusses Lenin's ideological adaptation of communism, the Bolsheviks taking control of the state and the concept of the Bolsheviks being the vanguard or the proletariat. Following this, the textbook launches into the Civil War. The Blue and the Green textbook, however, discuss the Civil War before unpacking post-October Revolution changes which alters the historical timeline and creates a historical confusion.

The emergence of a communist Russia is told differently in all three textbooks. Within the post-October Revolution timeframe both the Red and Blue Textbooks discuss the emergence

of communist Russia after the end of the Constituent Assembly. The Green Textbook makes no mention of the Constituent Assembly, and it appears, according to the Green Textbook, that the Bolsheviks merely announced they were in charge which drastically overlooks and downplays the removal of a democratic proceeding. Whilst the Red and Blue Textbooks do make mention of the Constituent Assembly and its forced closure, the placement of blame differs between the two. The Red Textbook specifically indicates that Lenin sent troops to shut down the assembly providing leadership accountability; however, the Blue Textbook only states that the troops who were loyal to the Bolsheviks were responsible for shutting down the assembly. Lenin played no role. This omission negates any agency on the part of the leadership and omits any negativity associated with this move on the part of Lenin.

Only the Red Textbook is consistent in the mention of other political groups prior to the shutdown of the Constituent Assembly. It makes specific mention of other opposition groups from the beginning of the section whereas the Blue Textbook focuses more on the Bolsheviks with a vague background, often without context, of other political groups. The Green Textbook, from the beginning, focuses on the emergence of the Bolsheviks and does not mention other political groups outside of the Mensheviks. This lack of continuation amongst the textbooks retains a key focal point that the Bolsheviks were the main opposition and an authoritative group.

Lenin's leadership during this time is inconsistent amongst the three textbooks. The Red Textbook does view Lenin as the main leader and he is the main focus. However, it also allows for responsibility to fall under the umbrella of Lenin. The textbook makes mention of both good and bad aspects of Bolshevik rule and thus an objective representation emerges. The Blue Textbook largely associates positive policies or events under the umbrella of Lenin; however, when negative policy is applied, only vague leadership is mentioned thus there is a continued association with positivity and Lenin. This is extended when the textbook does make mention of Lenin's position as the vanguard of the proletariat, and justifies the ruthless manner by stating that Lenin believed in the ends justifying the means and so an excuse for any negativity is formulated. The Green Textbook specifically focuses on Lenin's leadership as it even includes a main heading: *Lenin* (p.29). The textbook offers a sanitised view of Lenin through omission of many details about leadership. The image that emerges from the Green Textbook is that Lenin is a hero; however, it was circumstance which forced his hand at times.

The creation of a secret police is also inconsistent throughout the textbooks. However, it is in keeping with how the textbooks have presented Lenin and/or the Bolsheviks. The Red Textbook includes the creation of the Cheka (secret police) in order to maintain the Bolshevik power and remove opposition. This is in keeping with the Red Textbook's largely balanced portrayal of positive and negative attributes to Communist Russia under Lenin. The Blue Textbook makes mention of the Cheka, only during the Civil War; however, it does not provide any context or explanation as to what it was, thus providing a vague understanding of this group. A mention of a secret police is indicated later but no association with the Cheka is made. Furthermore, when the Cheka is represented, albeit briefly, it is represented both negatively and broadly. Finally, the Green Textbook omits the Cheka altogether. This is in keeping with the Green Textbook's sanitised view of Lenin and the Bolsheviks' rule.

The Civil War is another key element represented during Lenin's reign. Each textbook details the Civil War in various capacities. The Red Textbook uses two and a half pages, two official sources and one activity; whereas the Green Textbook uses four pages mostly made up of the four sources and an activity. The Blue Textbook, however, uses seven pages, seven official sources (six of which are the same reference) and one activity. Within the Civil War, the policy of War Communism emerges which is treated as a separate policy within the Civil War section.

The Red and Blue Textbooks do provide some details of the Civil War; however, it is, vaguely depicted within the Green Textbook. The Green Textbook displays an extreme favouring of and support of the Bolsheviks during the war. It drastically underplays the severity of the Civil War as no mention of the Red Terror or famine are included in the representation of the Civil War. The peasants and the workers within the Civil War are also represented as strong and unwavering supporters of the Reds (Bolsheviks) and it was this support which ensured the victory of the Bolsheviks. This view is in stark contrast to the Red and Blue Textbook.

Despite more details being supplied in the Red and Blue Textbooks, there is still an overall vague image of the Civil War and the impact the war had on the people. Both Lenin and Trotsky are depicted as powerful and effective leaders during the civil war in the Red

Textbook. Within the Blue textbook, Trotsky appears to be more in control and Lenin's role is mostly sidelined; however, this is in keeping with maintaining a positive reflection of Lenin's leadership. The Green Textbook determines leadership through Trotsky only through mentioning Trotsky's army. No further details are provided, and no other mention of leadership emerges. The textbook is extremely emotive in its representation of both Bolsheviks and unwavering Bolshevik support. It references the continued support offered by peasant despite their own hardship. At no point in the Green Textbook is it indicated or suggested that there was any terror on the part of the Bolsheviks or any protest action against the Bolsheviks (page 31 states that peasants *threatened* to revolt only). This lack of detail reinforces the romanticised Bolshevik history which is perpetuated throughout the Green Textbook.

The Red and the Blue Textbooks do state that both sides committed brutal acts which suggests that neither side was innocent. Both textbooks purely state this and no further detail of these acts is provided, thus a vague image of the war emerges. The Green Textbook overlooks any mention of brutality and terror which creates a romanticised image of the Bolsheviks during the civil war. Only the Red Textbook indicates the Tsar and his family died during the civil war; however, no details are provided and so no accountability is provided which suggests either a lack of importance or a lack of discussion regarding brutality.

5.3.2.3 The representation of Communist Russia in Grade 11 history textbooks

Communist Russia under Stalin can be divided into three main phases: the power struggle between Stalin and Trotsky, Collectivisation and Industrialisation of Russia. The Green Textbook offers an extremely limited and vague view of Russia under Stalin whereas a clearer view is provided by the Red and the Blue Textbooks. The Red and Blue Textbooks describe Communist Russia under Stalin as a dictatorship and controlled using fear, terror and censorship. Although some improvements to life are included, an overall poor and negative image of Stalin's Russia emerges.

All three textbooks view Trotsky as either the most obvious choice or Lenin's first choice. Stalin only appears as a legitimate equal contender in the Blue Textbook whereas the Red Textbook outlines Stalin as an average politician. All three textbooks make note of Trotsky's

power and the fear of it which ultimately led to more support for Stalin. The Green Textbook provides a very vague overview of the power struggle, and as such, only the Blue and the Red Textbooks include a mention of Trotsky's death orchestrated by Stalin.

Both Collectivisation and Industrialisation (two policies introduced by Stalin) are the key focus in all three textbooks. The Red Textbook allocates one page, one source and shared activity to Collectivisation. The Blue Textbook allocates four and a half pages, six sources and one activity whereas the Green Textbook uses half a page and one source to describe Collectivisation. Overall, Collectivisation is viewed negatively in the Red and Blue Textbook; however, each of these textbooks differ in terms of production success. The Red and Blue textbooks both state that agricultural production only rose much later (approximately 20 years); however, the Blue Textbook provides a distorted and unclear image of this assertion. Initially, the textbook states that agricultural production rose enormously which is in contradiction to the problems which arose as a result of it as well as its statements later that the production levels were slow to rise. Overall, the Blue Textbook reinforces a negative image of Collectivisation; however, it is still in contradiction to its first, opening statement. Both the Red and the Blue Textbook view Collectivisation as extremely harsh and brutal with the inclusion of peasant revolts. Where the Red Textbook lists brutality, famine and the human cost, the Blue Textbook represents these negativities in sources only. Five out of six sources display Collectivisation as extremely negative. The Green Textbook, however, is extremely vague in its representation of the policy. Whilst, overall, it does have a negative undertone, it is only in reference to the elimination of an effective farming group – the kulaks. Whilst there is mention of opposition to Collectivisation, very little detail is provided. No dates or detail are provided and so the introduction of this policy appears seamless with little to no adaptations over the years. Furthermore, the textbook completely omits the brutality, famine and the human cost and so a sanitised view of Collectivisation emerges.

Another term for the Industrialisation of Russia is Stalin's three Five Year Plans. The Red Textbook allocates just over a page, two sources and one shared activity whereas the Green Textbook allocates half a page and one source. The Blue Textbook allocates the most in terms of space with its five pages, six sources (all from the same source) and one activity. The Red and the Green Textbooks offer a vague image of the Five Year Plans. Whilst the Red Textbook does briefly discuss the first two Five Year Plans, the Green Textbook only

makes mention of the first Five Year Plan. This lack of discussion adds to the vague image of industrialised Russia. Whilst a number of positive outcomes do emerge from the textbooks overall, industrialisation in Russia is viewed as largely negative. Only the Blue Textbook mentions all three Five Year Plans.

The three textbooks do stipulate that adult literacy rates improved dramatically, and that the industrialisation transformed the economy which turned Russia into a leading power; however, this progress came at a cost. The Blue Textbook does briefly outline this cost; however, the Green Textbook only alludes to such. It only states on page 37 “Whatever the hardships and problems the industrialisation did take place and laid a foundation which helped to make Russia a superpower by 1945”. The Green Textbook alludes to hardships but heavily underplays the effects of it. It also justifies the hardships as it led to Russia becoming a superpower. The Blue Textbook focuses more on the hardships and the negative toll of the industrialisation period. Of the six sources, five depict the Five Year Plans unfavourably. Furthermore, the textbook breaks down each individual Plan in detail. In addition, the textbook includes detail regarding the terror that was used in order to achieve success in Russia. The success of the Five Year Plans can be seen in Russia’s survival of both World War Two and Germany’s invasion of Russia. However, this success does not overshadow the negatives of the Plans.

Stalin’s reign, and subsequently Stalin’s Russia, is marked by the political terror he instituted according to the three textbooks. Although the Green Textbook is extremely vague in its representation of the political terror, all three textbooks place specific blame for the terror directly at the feet of Stalin. The Red and the Blue Textbooks allocate the most space to the sectionalised political terror in Russia under Stalin. The Red Textbook allocates two pages and three sources where the Blue allocates six pages, eight sources (six of which are from the same citation) and one activity. The Green Textbook offers only half a page, one page and one shared activity. The Red and the Blue Textbooks go into a fair amount of detail regarding the purges and political terror and the brutality of these events. The Green Textbook, however, provides an extremely limited view of the event. While it does indicate that there were deaths, the event is described extremely vaguely and no numbers of the estimated number of those targeted is targeted, reinforcing the vague, incomplete and sanitised image. The textbook includes a cartoon (p. 38) which shows the pyramids of Russia forged out of the skulls of those who died during the purges. Only this source suggests a severe or high death

toll. This separation of cartoon and content leaves an uneven and sectionalised representation of Stalin in an attempt to exclude an unsanitary history.

Each textbook creates a section that unpacks the effects of Stalin's policies on the people. This type of reflective summary is not included in the representation of Lenin. The Red and the Blue Textbooks summarise the effects of the policies and state that while some positives did emerge under Stalin, overall, his policies had an extremely negative effect on people's lives. The Green Textbook, however, uses this space to reinforce the difference in attitude Soviet people had during the civil war versus under Stalin. It reminds the reader that the Soviet people "fought courageously during the civil war"; however under Stalin they became "submissive" (p. 39). This inclusion reinforces the narrative that the people wholly and undeniably supported the Civil War which is in stark contrast to Stalin's reign suggesting a lack of support. Furthermore, the Green Textbook does not really discuss the effect of the policies but rather summarises a source that is used to unpack Stalin's leadership. This source does not unpack all of Stalin's policies but merely focuses on the purge and the cult of personality. This lack of focus and content inclusion further perpetuates the sanitised history evident throughout the Green Textbook.

5.3.2.4 The representation of Russian leaders in the Grade 11 history textbooks

Leadership is a main focus within Russia across all three textbooks. There are four main leaders who appear consistently throughout and represent the key political periods of Russia: Tsar Nicholas II, Lenin, Trotsky and Stalin.

5.3.2.4.1 Tsar Nicholas II

Despite being leader of Russia at the time of the Russian Revolution, there is limited mention of Tsar Nicholas II across the three textbooks. The Blue and the Green Textbooks prefer to maintain a faceless image of the Tsarist regime, with the Red Textbook, although more direct than the Blue and the Green, only offering limited detail.

The Red Textbook provides a clear face to the leadership of Russia prior to the Revolutions as it identifies Tsar Nicholas II as the leader of Russia from the beginning. This is in contrast to both the Blue and the Green Textbooks. Whilst there is an eventual mention of Tsar

Nicholas II by name, the inclusion is not direct nor is it immediate. Prior to his mention by name in the textbook content, Tsar Nicholas II, as leader of Russia, is mentioned obscurely by sources prior to any significant mention in the content. This suggests a lack of importance of Nicholas II's leadership. In addition, Tsar Nicholas' name, in official textbook content, only appears once. It must be noted that the Green Textbook provides a preamble section where it provides a chronological timeline of Russia within the global context as well including details and pictures of the four key role players in the Russian section. Tsar Nicholas II only appears once in the timeline and not as a key player which reaffirms the earlier suggestion that the exclusion of Tsar Nicolas from textbook content relates to significance. However, interestingly, it must be noted that Lenin, Trotsky, Stalin and Kerensky are selected as key players in the section. The addition of Kerensky as a key player above the Tsar is a strange selection especially as Kerensky is only mentioned by name in a source and not once within the textbook content – yet appears as a *key* player.

Despite the limited mention, an image of the Tsar emerges from each textbook. The Tsar is largely viewed as autocratic, unpopular and with minimal positive characteristics. Both the Red and the Blue Textbook state that Tsar Nicholas is viewed as a good husband and a family man; however, as a leader, he is not positively viewed. The Red Textbook highlights that Tsar Nicholas had a lack of foresight and was oblivious to the changes needed in Russia.

The death of the Tsar and his family is obscurely mentioned in all three textbooks and little to no detail is supplied following the Tsar's abdication. The Red Textbook notes that the Tsar and his family did not survive the Civil War; however, no detail is provided. The Blue Textbook only states that Tsar's death (and omits the family's death) through an obscure painting that is an unofficial source in the textbook. The caption only mentions the death of the Tsar despite the inclusion of his family in the painting.

Tsar Nicholas II is only detailed in the Red Textbook. The Blue and Green Textbooks include him as an obligatory mention at some point. This relates to the perpetuated theme of a faceless Tsarist regime within these two textbooks. No mention of the Tsar or his family following his abdication appears in the Green Textbook reaffirming the lack of significance of the Tsar in the textbook.

5.3.2.4.2 Lenin

The representation of Lenin differs extensively amongst the three textbooks. Overall, Lenin is described as the leader of the Bolsheviks and is considered quite politically savvy; however, in the face of negativity, Lenin's agency is not always clear. All three textbooks clearly demarcate Lenin to be the main leader of Communist Russia and Russia's first Communist leader; however, the Green Textbook often shifts between Lenin and Trotsky. Lenin and Trotsky often appear together and so, although Lenin is stated to be the leader of Communist Russia, Trotsky's influence and authority seem to be alongside that of Lenin which overshadows Lenin's role as leader. It appears as if the textbooks don't know how to place Lenin in the grand scheme of historical morality. Lenin appears to be on the fence at best amongst the three textbooks with an attempt at moral obscurity. Overall, the Red Textbook attempts a balanced view of Lenin but has pro-Lenin tendencies (especially when compared with Stalin) whereas the Blue Textbook, although it attempts to be balanced, is obvious in its support of Lenin. The Green Textbook offers a general rose-tinted view of Russia through omission and ambiguity; the same applies to its representation of Lenin.

All three textbooks mention Lenin from the start of the section, establishing his importance and his role in Russia. The Red and the Blue Textbooks include a preamble which discusses the global introduction to the communist ideology, and it is in this preamble where Lenin, the first leader of Communist Russia, appears. The Green Textbook does not include a preamble on the introduction of Communism but rather includes a timeline of key events in Russia as well as including a brief description of four key players in Russia – of which Lenin is the first key player. It must be noted that more adjectival enhancers are provided to represent Stalin and Trotsky in these biographical blurbs than on Lenin. Lenin's biographical blurb appears extremely limited and clinical.

Lenin's role in the October Revolution, the Civil War and the establishment of the NEP and Communist Russia is ambiguous. In the Red and the Blue Textbooks his role in the October Revolution is clear and undeniable; however, in the initial Green Textbook content Lenin's role in the revolution is omitted. In the summary later, the Green Textbook states that it was Lenin's "fanatical desire to see it happen. He was the driving force behind the move to overthrow the Provisional Government..." (p.24). This statement is in direct contrast to what appears in the content as only Trotsky's name appears during this section which lends itself

to a confused image of both Lenin and the historical timeline. Following the October Revolution, the Bolsheviks forced takeover of the Constituent Assembly. Whilst this takeover is omitted completely in the Green Textbook, the agency is different between the Blue and Red Textbook. The Red Textbook explicitly states that it was Lenin who sent troops to shut down the Constituent Assembly, effectively turning Russia into a one-party state. However, the Blue Textbook only states that it was the troops loyal to Lenin who shut down the Assembly, effectively removing any agency and accountability on the part of Lenin. The difference in interpretation changes the representation of direct involvement of Lenin.

There are two features of the Civil War which characterise Lenin's role or the representation of his role: War Communism and the Kronstadt Rebellion. Faceless leadership largely emerges from all three textbooks regarding Lenin's role in the Civil War. The Red and the Blue Textbooks largely, and to a limited extent the Green Textbook, view the war negatively. Due to this negativity, there is a clear attempt to ignore or evade Lenin's negative role or perhaps justify it. The Red Textbook continues with a faceless government when unpacking the Civil War and only notes Lenin by name when the textbook suggests it was Lenin who realised policies needed to change – keeping a positive light on Lenin and his leadership. The Blue Textbook mostly mentions a faceless government but does embroil Lenin in some negativity; however, there is a subtle justification included in the Blue Textbook regarding Lenin's belief: that the end justified the means (p. 52). The Green textbook suggests that Lenin had no choice but to institute the “harsh” policy of War Communism but that as soon as he was able, he “acted quickly” to ease the life of the peasants (p.26). The image that emerges here is one of Lenin always having the people in mind. The Kronstadt Rebellion was a mutiny conducted by previously loyal Kronstadt sailors in response to the Civil War and War Communism. This mutiny was brutally stopped by Trotsky and the Red Army. Lenin's agency in the crushing of the protest is ambiguous at best in the Blue and the Red Textbook. The Green Textbook omits this rebellion altogether maintaining its rose-tinted view of the Bolsheviks and Communist Russia. The language used by the Blue and Red Textbooks is noted as it is the language which directs Lenin's agency. The Blue Textbook states that Trotsky was sent by Lenin (p.45) to crush the protest. Lenin's role in the crushing is identified; however, the textbook uses passive voice to describe Lenin's role thus reducing his accountability and role. The Red Textbook follows a similar line. In its sentence, “Their mutiny and all other uprisings were brutally crushed on Lenin's orders” (p. 21), the textbook uses a qualifying adverbial phrase to depict the *how*. The placement of *on Lenin's orders* at

the end of the sentence diminishes Lenin's involvement and subsequently his accountability. The use of these language techniques in both the Red and the Blue Textbooks suggest an avoidance of blame placement on Lenin.

All three textbooks share a common thread in their representation of the NEP. The NEP is described as Lenin's brainchild and was created specifically to relieve the suffering of the people. The NEP is depicted quite positively in all three textbooks with the only negativity around its move away from communism and subsequent internal criticism. The Blue Textbook heavily emphasises its pro-Lenin stance in its representation of Lenin's choice in moving away from communism. The textbook states that Lenin called it a strategic retreat and that this was the most honest speech given by a leader. This description creates a positive reflection of Lenin as a leader who can reflect on his mistakes.

Overall, Lenin's role in establishing a Communist Russia is viewed favourably in each of the textbooks. From the onset, the Red Textbook makes mention of both Lenin's and Stalin's leadership styles and where Stalin comes across as rigid and dictatorial, Lenin appears flexible and benevolent. Language choice in the Red Textbook is crucial in the image-making of Lenin. The Red Textbook states that Lenin led Russia to a successful communist revolution where he established complete control. In contrast, the textbook states that Stalin took over later as dictator. Whilst complete control and *dictator* offer similarities in that they overlap in meaning, the connotation associated with dictator is harsher. The Green Textbook argues that Lenin was a good speaker and a hard worker; however, a precursor to the Red Terror occurred under his watch as a result of several assassination attempts on Lenin's life. This is the only negative comment regarding Lenin's rule. The Blue Textbook reflects Lenin's reign through a revisionist perspective as it establishes a debate whether, historically, Lenin could be considered a dictator. The textbook does outline some negative occurrences or contributions made by Lenin; however, ultimately, the textbook argues strongly that Lenin cannot be considered a total dictator. Furthermore, the textbook highlights the beloved nature of Lenin as it states that when Lenin died there was mass mourning. The textbook adds to this by including a visual source of the queue of people waiting to view Lenin's corpse at his funeral. These inclusions further add to the textbook's pro-Lenin leanings despite its attempt at a balanced view.

5.3.2.4.3 Trotsky

Trotsky is viewed favourably across all three textbooks. His role in pre-revolutionary Russia and communist Russia under Lenin is undeniable and highly influential, according to all three textbooks. Despite this extensive and influential role, Trotsky's contributions do not appear in the summary of either textbook and only the Blue textbook identifies Trotsky at all, but only in the power struggle with Stalin.

Trotsky is described as the obvious successor to Lenin, leader of the Petrograd Soviet, the organiser of the October or Bolshevik Revolution, leader of the Red Army. The Red Textbook notes that Trotsky was recognised by the people as an outstanding leader. Trotsky's great leadership abilities are carried across all three textbooks especially when discussing his command of the Red Army. His role throughout the textbooks is one of influence and his influence is described from the early 1900s, suggesting a strong role from the beginning. All three textbooks note that Trotsky was the obvious successor to Lenin; however, the Blue and the Red Textbooks note that other members of the Party were concerned with how much power Trotsky had and were subsequently nervous of him becoming a dictator.

Despite all the heavy-handed inclusions of Trotsky's influence, he is not mentioned in the overall section summary. The lack of selection suggests Trotsky's overall contributions are still overshadowed by Lenin and Stalin despite being indispensable to the Bolshevik cause in both pre-revolutionary Russia and the consolidation of Bolshevik power.

5.3.2.4.4 Stalin

The Red and Blue Textbooks are very descriptive of Stalin as a leader whilst the Green Textbook offers a vague description of Stalin. According to the Red and the Blue Textbooks, Stalin is described as manipulating political allegiances to rise to power, ruthless, dictatorial, and responsible for the death of many people. The Red Textbook focuses more than any other on the personal characteristics of Stalin and goes into significant detail regarding his character and his rule. Furthermore, the Red Textbook provides a brief inclusion of how historians regard Stalin: distrustful, anxious and power-hungry. Neither the Red nor the Blue Textbook includes any notation of Stalin's influence in pre-Revolutionary Russia and Russia under Stalin. The Green Textbook provides a brief biographical space in which it includes

some details of Stalin's earlier contributions. Despite this inclusion, the contributions are mentioned separately to the textbook content and thus Stalin's contributions are absent from the main textbook content.

From the first page of the section, the Red Textbook identifies Stalin as both ruthless and a dictator – which is in stark contrast to that of Lenin. This provides the reader with a pre-determined view of Stalin as a leader – a negative one at that. As indicated earlier, the Red Textbook provides much detail on Stalin's character and leadership thus heavily emphasising his dictatorial attributes and cult of personality. In the Red Textbook, specific mention is made of Stalin's decisions, specifically his negative decisions. This indication once again reasserts the textbook's opinion of Stalin as a dictator. Not only does the Red Textbook identify Stalin as using the famine to his advantage, leading to the death of millions, but it includes very specific statistics about the number of people who died or were imprisoned during the purges. There is no ambiguity with regards to Stalin's role in the deaths of millions – blame is clearly attached to Stalin. Despite this negativity, the textbook does state that industrialisation eventually led Russia to becoming a leading world power – however at a price.

The Blue Textbook does indicate that Stalin removed opposition and personally approved the deaths of many during the political terror; however, little else is included in the textbook regarding his personality and rule. The textbook largely focuses on Stalin's personal involvement in the purges rather than negativities associated with other policies. This line of argument is continued even in the summary when the cost of Stalin's policies is overlooked but rather the focus remains on the purges.

The Green Textbook introduces Stalin as a key player from the beginning but in the brief biography, the textbook states that Stalin made himself important and pushed his way into power. This suggests that Stalin did not legitimately belong as leader. Very little specific detail is provided regarding Stalin's policies as well as the purges. The textbook indicates that Stalin developed a cult of personality and that it was difficult for citizens to change their views as it had been so deeply ingrained. This is the most stress placed on an attribute of Stalin's – his ability to enforce his ideology and cult of personality onto the people. Outside of this, little coverage is provided which undermines his role in Russia's history. Furthermore, the summary references the purges as being a harsh measure which was bad.

This is a severe understatement of what the purges were and the impact this had on the Russian people.

Overall, there is an overarching focus on leadership across all three textbooks. Lenin is viewed as the heroic saviour whereas Stalin is viewed as a ruthless dictator. There is very little cross-textbook consistency, however, although the amount of detail may vary, the overall representation of Lenin and Stalin (and to a lesser extent, Trotsky) remains consistent across the three textbooks.

5.3.2.4.4 The representation of Tsar Nicholas II, Lenin, Trotsky and Stalin in the summary section of the Grade 11 history textbooks

Each textbook provides a summary of the Russian section to a varying degree. The Red and the Green Textbooks provide roughly the same number of bullet points (16 and 13 respectively); however, the Blue Textbook uses 72 bullet points to summarise the section. It provides the most in-depth summary of the Russian section of the three textbooks. I will first discuss the summaries of the Red and Blue Textbook and focus on the Green Textbook separately as it is largely inconsistent with its content as well as providing an obvious favouring of Stalin.

The Red Textbook divides its section according to the following subheadings: *Communism, Russia in 1917, Lenin and Stalin*. The Blue Textbook divides the summary according to the chapters in which the sections appear. The Tsar is omitted from the Red Textbook completely and a vague flailing image of Russia emerges from the summary. Although Russia's image is not necessarily improved by the Blue Textbook, Tsar Nicholas and the changes which occurred are detailed within the textbook. The Red Textbook leans favourably towards Lenin, although this is indirect. Whilst the Blue Textbook does state that Lenin instituted rigid control and established a totalitarian state, it does share one thing in common with the Red Textbook. Both textbooks omit the human cost of the Civil War and gloss over the extent of War Communism. Only the Red Textbook mentions the famine that occurred; however, it fails to link the causation with that of War Communism. The Blue Textbook does highlight the rebellion that occurred as a result of War Communism and the brutality with which it was repressed; however, this is a reaction to the policy and does not add to consequences of the policy on ordinary people. The Red Textbook indicates the policy of War Communism and

subsequent victory of the Bolsheviks as a victory that is tied to Lenin alone whereas the Blue Textbook provides a largely faceless leadership during the Civil War and War Communism policy. A strongly unfavourable image of Stalin emerges from the Red Textbook whereas the Blue Textbook provides an unfavourable leaning with an attempt at a balanced view. The Red Textbook specifies the extreme levels of control under Stalin, the regressive women's rights policies and outrightly states that millions died as a direct result of Stalin's policies. The Blue Textbook initially overlooks the human cost of Stalin's policies and goes so far as to state "Millions paid a heavy price for the Soviet Union's rapid industrial advances, sometimes with their lives" (p. 91). This strongly diminishes the human cost of Stalin's rule and the human cost of Collectivisation and Five Year Plans. Further in the summary, the Blue Textbook notes the purges but once again downplays the human cost. Lastly, the textbook states that although much progression was achieved, ultimately life for the ordinary citizen did not improve.

The Green Textbook provides an alternative view of Russia in comparison to the Red and Blue Textbook. In the summary, the textbook does not make mention of women, deaths as a result of policies or any harshness of policies. The textbook states that WWI directly caused the March Revolution which omits the underlying issues already experienced by the people and as such creates an image of Russia not having any major problems prior to the War. Furthermore, the textbook makes mention of "the Kornilov affair" (p. 44). Whilst the textbook content does include an uprising caused by Kornilov, it does not identify it as "the Kornilov affair" thus creating a break in content continuation. Lenin and Stalin are viewed quite differently in the Green Textbook. The Green Textbook views Lenin negatively in the summary as it states that Lenin "forced his will" (p. 44) on the people instead of accepting a coalition which is a negative take on Lenin's take over. Although not much else is included regarding Lenin directly, it sets the scene for the blame of the Civil War to be placed at Lenin's door. Whilst the Blue Textbook notes the power struggle which took place after Lenin's death, the Green Textbook refers to it as a struggle, generalising the struggle and diminishing the extent of the fight for control. The textbook only states that Stalin won this battle, overlooking the political navigation during this time period. Stalin's policies are mostly viewed favourably in the summary. The textbook outright states that Industrialisation under Stalin was good; however the purges which followed were bad. Because the textbook uses vague adjectives such as "good" and "bad" (p.44) it drastically underplays not only the

severity of the purges but also overlooks any deaths or negativity associated with the industrialisation process. In addition, the textbook states that Stalin “encouraged” (p.44) industrialisation which inaccurately depicts both Collectivisation and Industrialisation as instituted government policies by which any protestors were killed or deported to the gulags.

5.3.2.5 Comparative representation of February and October Revolution in Grade 11 history textbooks

The 1905 revolution is viewed as the precursor to the 1917 revolution across all three textbooks; however, each textbook unpacks the event differently. Each textbook provides a subheading that states: *The link(s) between the 1905 and 1917 revolutions*. This subheading reinforces the connection between the 1905 and 1917 revolutions as well reinforcing the importance of the 1905 revolution. A faceless leadership emerges within all three textbooks. Only the Blue Textbook mentions the Tsar by name but only after the October Manifesto was signed. The Red and Green textbook do not include the Tsar by name within the unpacking of the 1905 Revolution, thus emphasising the faceless leadership of the Tsarist regime. The Textbook only makes note of Tsar Nicholas in a source and not within the textbook content itself. Furthermore, only the Blue Textbook includes an in-textbook content mention of the leader of the protest: Father Gapon. The Green Textbook only makes note within a single source whereas the Red Textbook omits him altogether. The Red Textbook, however, places more emphasis on the communist leadership of Trotsky and Lenin which emerged as a result of the 1905 revolution. The Blue Textbook also makes mention of communist leader Trotsky but with less emphasis. The Green Textbook makes no such connection. The purpose of the inclusion of this revolution provides the context and sets up the conditions for the February Revolution of 1917.

The two 1917 revolutions are unpacked to describe the Bolshevik rise to power in Russia. The revolutions take place under two different political umbrellas. The February Revolution occurs during the Tsarist Regime whereas the October Revolution takes place under the control of the Provisional Government. Within the Red and the Blue Textbook, more space is allocated to the October Revolution whereas the Green Textbook allocates the same space for both revolutions. It must be noted that the Green Textbook is the only textbook to label the two revolutions according to the Gregorian calendar dates thus uses the March and November dates. All three textbooks acknowledge the discrepancy in Russian dates as opposed to the

rest of the world, but the Green Textbook uses the Gregorian calendar. For the sake of consistency, I shall refer to the revolutions as February and October as two out of the three textbooks use those dates; in addition, those were the dates used at the time in Russia.

Only three sentences, and one diagrammatic summary is used to depict the February Revolution in the Red Textbook; however, two pages, one source and one shared activity are provided for the October Revolution. What must be noted is that, despite two pages of space being allocated, only seven sentences of textbook content are given for the October Revolution itself. The Green Textbook allocates one and a half pages, two sources and one activity for each revolution. The Blue Textbook allocates the most in terms of space. The February Revolution has four pages, five sources and two activities allocated to it whereas the October Revolution has six pages, six sources and two activities dedicated to it. The Blue Textbook has incorporated the Provisional Government rule under the same subheading of the October Revolution where the Red and the Green Textbooks have treated them as separate entities. All three textbooks offer some form of overall summary following each revolution.

The February Revolution is mostly viewed as spontaneous and was kickstarted by the growing unrest caused by World War One. Only the Blue Textbook notes the revolution beginning as a result of a women's protest. The Green Textbook mentions women's role in the revolution separately and only under the banner of *Women in the Revolution*. Both textbooks view this protest action undertaken by women differently through semantic choice. This will be discussed further on. The revolution is largely viewed as a working-class revolution, but the Red Textbook does not provide much information in the way of the causes of the revolution and people involved. Although, under the February 1917 Revolution heading (p. 30), the Blue Textbook notes both the peasant and worker involvement in the revolution, it later (under The October 1917 Revolution heading (p.34)) stipulates that the liberals and workers were responsible for the February Revolution. This creates a large discrepancy in the consistency of the history depicted. The Green Textbook is haphazard in its content approach and so the February Revolution appears in a dishevelled fashion; however, it states that it was the growing unrest of the working class which added to the protest action.

All three textbooks link, to varying degrees, World War One to the February Revolution. Although all three textbooks do include, to differing extents, the economic strain due to the war, the representation of the war differs within all three textbooks as they each focus on different aspects. The Red Textbook states that Russia was ill-prepared for the war and the soldiers suffered under terrible conditions along with poor leadership. As a result, according to the Red Textbook, the war added to the existing economic strain. The Blue Textbook mostly looks at the political turmoil as a result of Tsarina Alexandra as well as the added economic strain of the war. The Green Textbook focuses on Russia's military defeats, unpopularity of the Tsar and the economic strain. The Red Textbook integrates the role of World War One into the February Revolution content whereas the Blue and the Green have separate sections. The Blue Textbook includes a detailed section on World War One which is three pages in length and includes seven sources. It must be noted that one visual source is unreferenced and the remaining six are from the same author. Despite this lengthy inclusion, the textbook content fails to mention the military defeats in the textbook content but rather includes them in the sources. Furthermore, the textbook states that "the war turned sharply against Russia" (p. 27) removing any agency on the part of Russia. The Green Textbook does not provide as much detail as the Blue Textbook but does identify the war as probably contributing to the success of the revolution. One of the side effects of the war was Tsar Nicholas II heading to the front as identified in both the Green and Blue Textbook. Both textbooks subsequently blame the political failure of Russia solely on Alexandra who was left in charge.

All three textbooks offer a summary for both revolutions. The Red Textbook only includes a brief diagrammatic summary whereas the Blue and Green Textbooks offer slightly more. For the February Revolution, the Red Textbook's summary focuses largely on World War One as a major contributing factor specifically. In its half a page of coverage, the Green Textbook brings in new information that was not included originally and so the summary is used more as a space to add more information rather than as a reinforcement. In this supposed summary, large blame is placed on Alexandra and Rasputin for the cause of the revolution. The Green Textbook's summary focuses on the political turmoil caused by Alexandra and the worsening living conditions of the people. The Blue Textbook's summary expands its timeframe to include 1905. The summary highlights the Duma's lack of authority, Alexandra and Rasputin's poor choices as well as the pre-existing conditions that were worsened by World War One.

The October Revolution takes place under the control of the Provisional Government. The Red and the Green Textbooks focus on Russia under the Provisional Government under a different umbrella to that of the October Revolution whereas the Blue Textbook integrates it under the same heading as the October Revolution. The role of the provisional government is tethered to the rise of the Bolsheviks and thus the two cannot be divorced. In the Red Textbook, an almost full page of content is provided for Russia under the provisional government whereas seven sentences (excluding summary) are provided for the October Revolution thus suggesting the build up to the revolution is more significant than the actual revolution itself. One source is included under the October Revolution, and it shares an activity with the February Revolution. The Blue Textbook merges Russia under the Provisional Government and the October Revolution as one thus it uses six pages (including summary), six sources and two activities. The Green Textbook allocates roughly two and a half pages (including summary), one source and one activity to the October Revolution whereas the content on the Provisional Government rule is roughly half a page.

All three textbooks discuss the failure of the Provisional Government in dealing with the emergent problems facing the majority of the population and it was this failure which was capitalised on by the Bolsheviks. Furthermore, each of the textbooks do note the chaos and lawlessness of Russia during the rule of the Provisional Government. The Red Textbook states that the government was largely unpopular and lacked any real authority. The Blue Textbook reinforces this but adds that subsequent to the abdication of the Tsar, Russia was under a shared (dual) authority between the Provisional Government and the Petrograd Soviet. Despite this supposed shared rule, the textbook states that it was the Petrograd Soviet which had more authority. The Green Textbook highlights the failure of the government in dealing with the emergent problems which it deems as ‘mistakes’ on the part of the government. All three textbooks fail to outright mention, within context, any leadership of the Provisional Government so, in large, it appears as a faceless body. Only offhandedly do the Blue and Green Textbooks mention Kerensky as the leader but it is without context and appears as an obligatory addition rather than a necessity. The Red and Blue Textbooks are the only ones to identify some positive elements to the Provisional Government reign. Whilst the Red Textbook notes that there were some liberal reforms, ultimately Russia ended up in chaos; the Blue Textbook takes note of the freedom allowed by the government. It goes on to

add that Russia, during the Provisional Government rule, was the freest country in Europe at the time (p. 34). However, it then notes that this was perhaps too much freedom, and it was this freedom which ultimately led to the chaos and lawlessness. It is an interesting notation by the Blue Textbook to suggest a limitation to freedom as a positive.

Very little information regarding the October Revolution is included in each textbook, the main focal point being on the orchestration of the revolution and those involved. The Red Textbook states that the orchestration of the October Revolution was a result of both Lenin and Trotsky. Both leaders share responsibility and orchestration. The Blue Textbook does include both Lenin and Trotsky in the planning and orchestrating of the revolution; however, only Lenin appears in the summary suggesting more importance of Lenin. The Green Textbook, in the content, states that it was Trotsky who organised the revolution and he was merely encouraged by Lenin. However, this is then contradicted in the summary where it states that the revolution occurred due to Lenin's "fanatical desire to see it happen" (p. 24) and as such he was the "driving force" (p. 24) behind the revolution. Thus, an uneven and confusing image emerges regarding the leadership behind the October Revolution. Both the Blue and Green Textbooks, despite the inclusion of Trotsky, still maintain Lenin as the primary role player in the revolution.

5.3.2.6 Second World War representation in the Grade 11 history textbooks

Only the Red and the Blue Textbooks indicate that Russia survived World War II as a result of Stalin's industrialisation. The Green Textbook only states that Russia was able to emerge stronger than it was before. All three textbooks provide a brief historical account of the relationship between Germany and Russia; however, very little is noted regarding Russia's situation at the time which suggests a break in continuity. The Red Textbook offers the most in the way of continuity as it states that Russia was in a weak position at the start of the German invasion because of the purges. All three textbooks indicate the human loss suffered during the war but all three offer different estimations. The Red Textbook states that 25 million died but the Blue Textbook states approximately 20 million. In the grand scheme both the Red and Blue Textbook are quite close however, the Green Textbook, in a source, states that 10 million died. The Green Textbook's statistic is in stark contrast to both the Red and the Blue Textbooks and this highlights the lack of overall textbook agreement and continuity.

5.3.2.7 The representation of communism in Grade 11 history textbooks

There is no agreed upon definition of communism amongst the three textbooks. The Red Textbook views it as both an economic and political system whereas the Blue Textbook states that it is a belief in which the country's wealth is shared as equally as possible. The Green Textbook views communism as an economic system and modern-day communism is based on an interpretation of Marx's ideas by Lenin. All three discuss different aspects of the ideology.

The Red Textbook offers more of a balanced approach. It states that communism is both a political and economic system based on a political idea alternative to capitalism. The textbook includes a neutral list of key features of communism as well as a brief unpacking of the writings of Marx which focuses on his beliefs. The Blue Textbook does not indicate which type of system communism is; however, it does indicate that Russia failed to achieve true communism hence its name, Union of Soviet *Socialist* Republics. The textbook mostly focuses on communism meaning that there is greater equality in wealth and how this could be achieved. No features of the system appear in the textbook. The Green Textbook states the communism is an economic system, but that socialism is both an economic and political system. The textbook does provide a tabulation of the features of both capitalism and communism; however, the main focus of the Green Textbook is on Marx and his ideas. The textbook largely emphasises Marx's ideas of the dangers of capitalism. Furthermore, the textbook iterates that Marx was the most important thinker of his time further emphasising the focus on Marx.

5.3.2.8 The representation of women in Russia in the Grade 11 history textbooks

Women and women's contributions are sectionalised within each of the textbooks. There are two specific sections pertaining to women's contribution within two different time periods: women's contributions during the Russian Revolution and Women under Stalin. Excluding the Red Textbook, the first section mostly includes contributions made by women leading up to the Revolution and beyond; however, the second section only lists the society in which the women lived. A vague inclusion of Tsarina Alexandra appears within the textbook content; however, this image appears inconsistent amongst the three textbooks. The Red and the Blue

Textbooks provide some images of overall life for women. They both argue that despite changes (and some freedoms) made during and after the Russian Revolutions, overall, life for women remained burdensome and heavy. This representation is omitted in the Green Textbook and furthermore, the textbook heavily emphasises the equality of women under Stalin. This equality or changes under Lenin are omitted thus further emphasising the equality under Stalin.

During the Russian Revolution, women's contributions are described differently in each of the textbooks. The Red Textbook provides a largely balanced but faceless view of women's contributions and views them as an integral component of the Bolshevik opposition. A similar view emerges from the Blue Textbook, although more emphasis is placed on women's role during the February Revolution which is omitted in the Red Textbook. The Blue Textbook indicates that the February Revolution began due to women protesting their conditions on International Women's Day (IWD). The textbook implies this date was selected purposefully to "commemorate" IWD (p. 30). The Green Textbook also indicates that women began protesting on IWD; however, it describes women as firstly "celebrating" and secondly, to show protest (p. 33). Emphasis is placed on celebration over and above protest action in the Green Textbook. Furthermore, the Green Textbook only includes women's contributions in the February Revolution in the specific section for women and excludes it from the main textbook content thus creating a break in content continuity. Whilst the Red and Blue Textbooks make mention of women's overall integrated role during and after the revolution, the Green Textbook reiterates the separateness of the men and women. This can be seen when depicting the February Revolution when it states that women marched alongside that of the men, reminding readers of men's contributions. Furthermore, the textbook states "Perhaps the last significant role played by women in the Revolution..." (p.33). This strongly leans towards women's contributions being countable and few as the textbook has listed supposedly specific action taken by women. This removes women's contributions as integrated part of the Russian Revolution, and it has reduced it to a countable list of actions.

The Red and the Blue Textbooks both make mention of Alexandra Kollontai, a Bolshevik leader and women's rights activist. The Green Textbook only makes mention of one woman, Fanya Kaplan, whose only contribution was her attempt at assassinating Lenin. Outside of this solitary mention, no other specific women are identified in the sectionalised history.

Alexandra Kollontai is mentioned by both the Red and Blue Textbooks; however, only the Red Textbook includes her contribution under Stalin. Kollontai is described as a member of the Bolshevik Committee and a believer in ‘free love’ in the Red Textbook, whereas the Blue Textbook is more liberal in its adjectival depiction. It refers to Kollontai as both a Bolshevik leader and a champion of women’s rights. Despite these clear leadership attributes, very little detail is included. Furthermore, only the Blue Textbook includes a visual image of Kollontai. The Red Textbook provides the most information in that it states that Kollontai headed up the women’s department within the Bolshevik Central Committee. Both the Red and the Blue Textbooks mention Kollontai’s view of free love which ties in with the increase of women’s rights under Lenin’s leadership; however, only the Red Textbook indicates the forced change to Kollontai’s view under Stalin’s leadership as it went against his traditional family values. One source in the Red Textbook makes mention of Kollontai’s leadership within the women’s department; outside of this separate inclusion, very little detail is provided about her leadership despite her status.

The section pertaining to women during Stalin’s rule largely pertains to how women were treated or their societal living and as such, little to no contributions are discussed. The focus is largely on the hardships experienced by women, most of whom were both mothers and industrial workers. In the Red Textbook, Krupskaya (no first name is given) is mentioned as Lenin’s wife and a leading revolutionary. She is mentioned alongside Kollontai as the two had to denounce their views on women’s rights under Stalin’s regime. Despite being a “leading revolutionary” (p. 35) there is no detail provided about her contributions and, furthermore, the first characteristic describes her as Lenin’s wife; therefore, she is first and foremost a wife and then revolutionary. Furthermore, no first name is provided, which further reiterates the lack of importance. The two women are mentioned to highlight the regressive shift in values under Stalin’s rule in comparison to life under Stalin. Although not outrightly stated, the Red and Blue Textbooks indicate a shift in treatment of women under Stalin’s rule. The Blue Textbook indicates that the Bolsheviks improved life for women; however, under Stalin’s rule, the emphasis on the family unit was harshly implemented and women still faced discrimination. The textbook has provided two challenging views of women’s life under Stalin which furthers the balanced direction of the textbook. The Green Textbook is outwardly favourable toward Stalin’s Russia. In the previous women’s section, the textbook lists some accomplishments specifically achieved by women; however, under Stalin the textbook repeatedly emphasises the equality women shared with men as a direct result of

moral values instituted by Stalin. Although only eight sentences, the Green Textbook reiterates that Stalin set the standards for women and thus there were no accomplishments by women during his rule. It must be noted that, in the Blue Textbook, it includes a visual source depicting soviet female pilots in the 1930s thus suggesting work for women outside of the industrial scope. However, no more information is provided about female pilots and their contributions thus reaffirming the image of the woman as an overworked mother and industrial worker.

Tsarina Alexandra is the only woman to be integrated into the textbook content in all three textbooks. Her role is largely viewed as wife to Tsar Nicholas; however, the Blue and the Green Textbooks place large amounts of blame on her. The Red Textbook only includes a single picture of her to which she is merely referred to as Tsar Nicholas' wife. No agency is provided. The Blue and the Green Textbooks indicate that she was left in charge for a small time period and thus it was her fault the government failed – despite the inclusion of failed leadership appearing in the content prior to her taking charge. The Red and the Blue Textbooks are the only ones to include an image of the Tsarina (alongside her family).

I have decided to include some elements of the summarised chapters here as they indicate each textbook's view of women's contributions as part of key issues that are identified. The Green Textbook omits women in Russia completely. The Red Textbook indicates that Stalin overturned progressive reforms instituted by the Bolsheviks which suggests good reform at one point prior to Stalin. The Blue Textbook indicates both aspects: that the Bolsheviks instituted women's rights reforms and Stalin undid these policies once he came to power. Neither textbook includes any specific achievements made by women but rather indicate Bolsheviks (a faceless body) as making reforms which undermines any achievements made by women included in the textbooks.

5.3.2.8 How assessments influence the representation of Russia in Grade 11 history textbooks

Each textbook includes a wealth of assessment activities that are primarily source-based. The Red Textbook includes 13 official activities. It includes a number of "Think and Discuss" questions which are designed to expand critical thought; however, I have excluded them from the number of official activities as they act more as food for thought than as assessment. The

Blue Textbook includes 24 official activities, and the Green Textbook includes 20 official activities and homework tasks. Generally, the activities appear at the end of a section and as the Russian section is large, the number of activities balances with the length of the content.

Included in the tally is the final assessment task included at the end of the unit in every textbook. It is both a source-based task and an essay task. The final assessment in the Red Textbook includes both Lenin, Trotsky and Stalin in its questioning whereas the Blue Textbook only includes the Civil War section (and only Lenin). The Green Textbook includes only Lenin and Stalin in its questioning. While the Red Textbook's mark allocation is largely balanced (slightly heavy-handed), the mark allocation for both the Blue and the Green Textbooks is very heavy-handed and doesn't necessarily align with the question level and expectations.

5.3.3 Russia in Grade 12 history textbooks

In the Grade 12 textbook, Russia appears in *The Cold War* unit. This unit is extensive and includes three case studies: Cuban Missile Crisis (although not identified specifically as a case study), China and Vietnam. I will only analyse sections that are relevant to Russia specifically. Furthermore, the chapter on *Independent Africa* is also included as Russia is a secondary character within the African Independence framework. Only the inclusions of Russia will be discussed within the chapter of Independent Africa.

5.3.3.1 The representation of Russia in Grade 12 history textbooks

It is first and foremost important to define the term "Russia" in the context of this study and more so now within the Grade 12 section. Russia, during the Cold War, was referred to as the Soviet Union or the USSR due to its political ideology and satellite states. The Red and the Blue Textbooks only refer to Russia as either the USSR or the Soviet Union thus clearly defining the geo-political make-up at the time. However, the Green Textbook uses the USSR, Soviet Union and Russia interchangeably thus creating a distorted spatiality of the geo-political climate. The Green Textbook only uses the term *Soviet Union* once within the textbook content; however, it does include the term *Soviet* as an adjectival noun. The term *USSR* is used approximately ten times whereas the term *Russia* has been utilised approximately 22 times in the Green Textbook. This is an important distinction because it

shows the interchangeability of the concepts within the Green Textbook which impacts the image of Russia – the political structure of the time is vital to the context of the Cold War and thus this context is removed through the term selection.

The Green Textbook does not provide a favourable image of Russia in particular. It reinforces an image of a bully, terrorist and sneaky person. This reinforcement is in stark contrast to its favourable view of the US. Furthermore, Russia, or Stalin, appears sneaky and embroiled in sneaky subterfuge. The textbook states that during World War II, Stalin wanted the allies to open another front in order to sneakily assert dominance in Europe while the western powers were distracted. This notation prior to the discussion of the Cold War foregrounds a negative association with that of Russia. Both the Red and Blue Textbooks provide a largely balanced view of both powers and their actions whereas Russia emerges as the villain in the Green Textbook with the US emerging as the hero. Both the US and the USSR are viewed as wanting to extend their political and ideological control using whatever means necessary, in the Blue and Red Textbooks.

5.3.3.2 The representation of the Cold War in Grade 12 history textbooks

The Cold War is somewhat divided into sections. These sections are not clearly demarcated but for the purpose of this analysis, I think it is necessary to use this as clear section for structural purposes. The section will be unpacked as follows: the origins of the Cold War, foreign policy and containment and, the Cuban Missile Crisis.

Each textbook follows a different historical approach in its representation of the Cold War. The Red Textbook follows a more revisionist approach in how it views the Cold War. It is largely consistent in its representation of both powers contributing to the war and as such highlights that the US was not an innocent party. Furthermore, the Red Textbook includes a source outlining the new information available to historians regarding the Cold War which supports the view that the traditional view (US = good and SU = bad) was wrong and that the US is not as innocent as history has made it out to be. This source further supports the line of argument made throughout the Red Textbook: both parties were to blame for the Cold War. The Blue Textbook, although it largely follows a balanced view of the Cold War, ultimately declares a more post-revisionist approach through the declaration of the inevitability of the war. Lastly, the Green Textbook, although it declares a post-revisionist view as it states the

war was inevitable, mostly follows a post-post Revisionist view²². The textbook consistently depicts Russia negatively and largely places the blame on Russia and the US emerges largely blemish free. There is a persistent pro-US leaning evident throughout the Green Textbook. This is in keeping with post-post Revisionism: although the US may have contributed slightly, ultimately the blame falls on Russia.

All three textbooks note the distrust and hostility which developed between the US and the SU. The Red Textbook views the Cold War as having its origins in a mutual mistrust and a mutual dislike of both ideologies. The Red Textbook has a largely negative view of the Cold War as a whole as it states that this mutual mistrust led to military conflict and global political crises. The Blue Textbook shares many similarities with that of the Red Textbook in that it also references the ongoing conflict and the proxy wars as a result of the Cold War. Both textbooks also assert that the Cold War was used to show off superiority in many fields. In the Green Textbook, whilst also stating that the Cold War began because of mutual mistrust, the mistrust is mostly focused on Russia.

As the Cold War is named as such due to the presence of nuclear weapons, it is prudent to unpack how the textbooks view this. The Red Textbook explicitly states that it was the US who developed the atomic bomb first, which added to the existing tension between the US and the USSR. Whilst the Blue Textbook does acknowledge that the US was responsible for the development of nuclear weapons, the sentence in which it appears lessens accountability. In the sentence "...a uniquely destructive weapon, by the Americans" (p. 5), "by the Americans" appears as an adjectival prepositional phrase. Instead of appearing as the subject at the start of the sentence, it appears at the end as a qualified phrase which removes direct accountability. This is later corrected when the textbook describes the "devastating impact" (p. 5) of the atomic bomb which suggests a negative view of the bomb; however, the responsibility for this 'devastation' is not emphasised. The Green Textbook does not mention the creation of the atomic bomb at all, which perpetuates the pro-US leaning stance of the textbook. The textbook includes a chronological timeline of key events, and the development of nuclear warfare does not feature nor does it feature in the origin of the Cold War. The only

²² It must be noted that the Green Textbook includes three separate written sources from various historians, noting Russia's involvement in three different facets of the Cold War. Each source, the textbook claims, is a modern historian's perspective; however, the source provenance refutes this claim. The three sources, in order of appearance, are from 1984, 1980 and 1976, all pre-Soviet fall.

inclusion of the term atomic bomb falls in the biographical introduction under Truman where it states that Truman decided to use atomic bombs on Japan. There is no further unpacking as to what this was or the impact of this decision. The textbook only makes mention of a “nuclear confrontation” on page 6 which is the only suggestion of nuclear warfare having been developed, but no accountability. The only mention of nuclear war is at the end of the Cuban Missile Crisis. This vague and obfuscated view of nuclear technology drastically changes the tone of the blame for the War and also diminishes the intensity of this War on a global scale.

5.3.3.2.1 Foreign Policy and Containment in Grade 12 textbooks

Each textbook notes the sphere of influence for both the USSR and the US. The sections note the SU expansion into Eastern Europe, and the US’s subsequent foreign policy adjustments. The political beliefs and policies of the US and the SU were put into practice during the Berlin Crisis. The US foreign policy includes the Truman Doctrine and the Marshall Plan.

The Red Textbook offers a largely balanced view of the agenda behind each nation and their foreign policies. It argues that it was concern and fear over Soviet expansion which led to change in US foreign policy. Both the Truman Doctrine and the Marshall Plan (more specifically) are viewed largely favourably as they allowed for economic recovery in Western Europe. Whilst the Red Textbook does include the Soviet response to the Marshall Plan, it does so using neutral language. Although the Blue Textbook largely views the Truman Doctrine and the Marshall Plan as favourable, it uses neutral language in its description. However, the textbook does not indicate the soviet response or the soviet equivalent of these policies. The Green Textbook views both the Truman Doctrine and the Marshall Plan positively whilst reiterating the Soviets used these policies to tighten their control in Europe – reiterating the negative representation of Russia. Furthermore, the textbook states the Truman Doctrine was really a policy of “co-existence and containment” (p. 15) furthering reinforcing the pro-US stance and suggesting benevolence.

The Berlin Crises appear in all three textbooks as examples of foreign policy and foreign policy strain. The Red Textbook offers a balanced view of these crises in that it depicts both parties in causing political tension. The Blue Textbook is somewhat balanced with a slight anti-Russia leaning. The Green Textbook continues its pro-US leaning and tends to blame

Russia for the tension. Two of the three key events mentioned will be expanded on: The Berlin Blockade and the Berlin Wall. During the Berlin Blockade, the Red and the Blue Textbooks specifically mention Stalin as being the leader at the time of this blockade. This provides specific leadership and provides accountability. The Green Textbook omits any Russian leadership in the Berlin Blockade. This creates a faceless leadership which contributes to the vague understanding of Russia's role in the Cold War. The creation of the Berlin Wall is another area of discussion. In both the Red and Blue Textbooks, faceless leadership emerges which perhaps is done to ensure the positive image of Khrushchev. The Green Textbook does not make mention of Khrushchev particularly, but does make mention of East German leader, Walter Ulbricht, and so a distorted image emerges of the accountability for the Berlin Wall. All three textbooks state that the result of the Berlin Crisis (Berlin blockade), led to the creation of NATO and the Warsaw Pact. The Red and the Blue Textbooks note that the Warsaw Pact was created in a way to protect Russia; however, the Green Textbook does not include Russian reasons. What emerges is a childish and sulking Russia as opposed to a possible Western threat being a cause.

5.3.3.2 Cuban Missile Crisis representation in Grade 12 history textbooks

The Red Textbook provides a brief background as to why Cuba turned to the US for help, and which subsequently led to the Cuban Missile Crisis (CMC). The US emerges as a bully only interested in maintaining its capitalist hold on Cuba's economy. Castro's turn to the SU for assistance is neither surprising nor viewed negatively. It is largely viewed as a matter of fact following the US's economic embargo. Furthermore, the textbook also asserts that it was the US's reaction to Castro and the failed Bay of Pigs invasion which pushed Castro to align with the SU thus reiterating the US role in the Cuban Missile Crisis. The Blue Textbook also supports this view, but does not do so as strongly – it uses more neutral language. The textbook also states that Cuba had been politically and economically dominated by the US and once Castro came to power they ended relations with Cuba – implying that since they could no longer gain from Cuba, they (the US) decided to punish them. Whilst the Red and the Blue Textbooks assert that the US dominated Cuba's economy, the Green Textbook references US investment in Cuba instead. The change in wording suggests a mutual partnership and one which benefits both parties. Furthermore, it states that at one point, Batista was an acceptable leader to outside countries and was popular amongst the Cuban

people. This is in stark contrast to the Red Textbook's notation that Batista was popular amongst the wealthy landowners of Cuba.

All three textbooks note the failed Bay of Pigs invasion. The Red and the Blue Textbooks directly identify the US' involvement in this invasion; however, the Green Textbook obfuscates their role. Initially, the textbook states that supporters of Batista managed to gain US support and then in April 1961, launched the attack (p. 22). The US's role is heavily diminished and obscured. The textbook, in a later paragraph, states that Russia judged the American leader on this failed invasion. This is the only elaboration and direct indication of US involvement in the invasion in the Green Textbook.

Leadership plays a demonstrable role in the Cuban Missile Crisis. The Cuban Missile Crisis is used as an example of Cold War Brinkmanship and thus leadership of both the US and USSR is emphasised; however, Russian leadership is not always depicted on the same level as that of the US. The Red and the Green Textbooks state that it was Kennedy only who decided on the quarantine that ultimately led to the end of the Cuban Missile Crisis whereas the Blue Textbook acknowledges that it was both Kennedy and his advisors. Although Khrushchev is sidelined somewhat in the Blue Textbook, both the Red and the Blue Textbooks focus on both leaders (Khrushchev and Kennedy) as being actively involved in ending the crisis. Both leaders are acknowledged by name thus explicitly stating both leaders played an active role in not only ending the crisis but both leaders did not want nuclear warfare. A favourable image emerges of both leaders from this example. The Green Textbook, however, only focuses on Kennedy specifically and omits Khrushchev. Khrushchev's name only appears once in the Cuban Missile section and only in relation to a list of options for Kennedy. The textbook states that Russia decided to remove its missiles. The faceless Russian leadership adds more weight to the US leadership as their leader and leader's decisions are made more explicit. Furthermore, both the Blue and Red Textbooks indicate that the US also removed their missiles from Turkey (albeit secretly) thus suggesting a consequence (and compromise) on the part of the US. The Green Textbook omits this information which suggests the maintenance of a strong US force over and above the USSR.

5.3.3.3 Ideological representation in Grade 12 history textbooks

The two main ideologies at play within the Grade 12 history textbooks are communism and capitalism. These two ideologies are represented through the lens of the Cold War and the Cuban Missile Crisis. The response by leadership also supports the emerging image of communism and capitalism.

The Red Textbook does not provide a specific definition of either communism or capitalism but does note both of these as competing social and economic systems with rival political ideologies. The Blue Textbook, however, specifically aligns the US with capitalism which also connects to democracy and individual rights and freedoms. Communism is aligned with the USSR and is synonymous with spreading this belief, the right to rule strictly over people who have very few rights and freedoms. This definition emerges from the start of the chapter, and so a negative image of communism emerges in comparison to that of capitalism. The Green Textbook does not provide a definition of either communism or capitalism. Furthermore, the clash in political ideology is not focused on or mentioned too much in the Green Textbook so an image emerges of the US and the USSR as being rivals but with no indication as to why. The textbook only notes that in the 1930s, the West viewed communism as more of a threat than Nazism. Not only is this a heavy anti-communist leaning but it also reinforces this vague and blurry image of the Cold War and the reasons for it which in turn favours the US.

Whilst the Green Textbook repeatedly follows an anti-Russian view, this in turn presents a negative view of communism. The Red and the Blue Textbooks attempt a balanced view of the two ideologies outlining both positives and negatives of each. In doing so, a more balanced view of communism and capitalism emerges, and both appear as spearheaded by leaders seeking political dominance. It is not necessarily about the ideology per se, but those who are leading and driving the respective ideology. The Blue and the Red Textbooks do state that Eastern European countries under capitalism tended to fare better than their eastern counterpart which suggests a leaning towards capitalism; however, this view is included using sources which provide evidentiary support and not just opinion.

Under the post-Cold War section, communism appears once again but more so as a dying ideology. The collapse of the USSR led to the end of the Cold War and the end of the ideological bipolar competition between the USSR and the West. All three textbooks note the continued anti-communism protests in various Eastern European countries which ultimately

led to the dismantling of the Soviet Union. The Green Textbook, however, asserts that the youth became uninterested in communism in the mid-1980s which added to the eventual collapse due to the loss of interest. The collapse of communism is viewed in all three textbooks as swift and also because there was a reduction in authoritarian control and citizens were allowed to question the state. The representation of communism is indirectly negative as it required strict control in order to succeed.

5.3.3.4 The representation of leaders and leadership in the Grade 12 history textbooks

There are two main Russian leaders and two main US leaders included in the Cold War section: Stalin and Khrushchev and Truman and Kennedy. Gorbachev is the main Russia leader on whom the textbooks focus in post-Cold War Russia. It is these men that provide the main focus of the section. Whilst other leaders do appear, the main focus is on these five men.

Stalin is viewed as a dictator and wanting to exert communist domination across Europe in all three textbooks. Stalin becomes synonymous with the negative aspect of communism: dictatorial leadership. The focus in all three textbooks is on his role in extending the Soviet sphere of influence. The Red and the Blue Textbooks make specific mention of Stalin's leadership during the Berlin Blockade whereas the Green Textbook omits this. The Blue Textbook makes a more obvious move towards an anti-Stalin stance in comparison to the Red Textbook. In its outline of what each country wanted, the Blue Textbook states that Stalin felt "entitled" to more land and that his ultimate goal was to dominate Europe through the spread of communism (p.4). This is contrasted with Truman's desire to set up an international peace-monitoring organization (later the UN). Both representations stand in contrast to one another with Truman coming off as more benevolent and Stalin coming off as power-hungry. Stalin's attempt at expanding the sphere of influence is not regarded positively in either textbook; however, it is viewed highly unfavourably in the Green Textbook. The Green Textbook is obvious in its negative representation of Stalin especially in contrast to the benevolent US leadership.

The Green Textbook is the only textbook to provide a biographical unpacking of what it identifies as the key role players in the Cold War section. Stalin is the first character and the textbook states that he was the founding editor of Pravda in 1912 and was central to the

Bolshevik revolution in 1917. Whilst Stalin was an editor of Pravda in 1912, he was not the founding editor. Secondly, Stalin's role in the Bolshevik Revolution is not mentioned at all in the Grade 11 textbooks. I mention this here, because this inclusion creates a distorted and fragmented view of Russian history across the grades. The inclusion in the Grade 12 textbook also suggests a stronger focus on Stalin's importance and influence in Russia where Grade 11 only focuses on this rule post-Lenin and post-Revolutions.

Khrushchev is viewed more positively in the textbooks. His most favourable attribute occurs during the Cuban Missile Crisis as his desire to avoid nuclear war is admired in the Red and the Blue Textbooks. The reinforcement of Khrushchev being more popular than Stalin in the Red and the Blue Textbooks is further emphasised through the lack of inclusion of Khrushchev's role in the Berlin Wall Crisis. The Green Textbook notes that it was Khrushchev who was responsible for a thaw in the Cold War.

Truman is viewed as the US leader during the origin of the Cold War. He is largely represented as anti-communist and anti-Stalin. The anti-communist stance is reinforced during the creation of the Truman Doctrine. Truman is not represented positively regarding the dropping of the atomic bomb; however, it is limited. The Green Textbook states that Truman made the decision to drop the bomb; however, the Blue Textbook mentions the devastating impact of the atomic bomb, without the mention of leadership. This exclusion leads to a glossed overview of US leadership. Outside of this, very little is mentioned of Truman and his leadership characteristics.

Kennedy's appearance is brief as it only appears during the Cuban Missile Crisis. All three textbooks regard his stance in the crisis to be the correct one and all three admire his desire to avoid nuclear war. The Red and the Green Textbooks credit him specifically for his decision in the crisis.

Gorbachev is viewed very favourably in all three textbooks. He is largely represented as determined, energetic and active. Whilst the Red Textbook mostly focuses on Gorbachev's policies, the Blue (to some extent) and the Green Textbooks largely focus on Gorbachev's characteristics as leader. All three textbooks concur that Russia's economy and political leadership needed to be revitalised and Gorbachev was the leader to do it. The Green Textbook heavily emphasises his leadership qualities by reiterating Gorbachev's drive, determination, and ambition throughout the post-Cold war section. The textbook further

reinforces its favouritism by saying that Gorbachev attempted to restore Lenin's ideals of socialism back into the USSR. As the Green Textbook favours Lenin's leadership, this is deemed as a stamp of quality. The Blue Textbook also favours both Gorbachev and his policies. The textbook argues that Russia had a myriad of problems which required "energetic and creative leadership" (p.331). Furthermore, the Blue Textbook asserts that Gorbachev's reforms were "truly revolutionary" (p.332) as the USSR had not transformed since Stalin. The Red Textbook does assert that Russia was in need of stronger leadership as it states that Gorbachev brought with him a new energy. It also asserts that Gorbachev attempted to solve Russia's many social and economic problems. All three textbooks concur that Gorbachev did not expect his policies to unravel that USSR. Both Gorbachev and his policies are depicted favourably across all three textbooks²³.

5.3.3.5 The representation of Russia in Vietnam in Grade 12 history textbooks

Russia appears in a very limited capacity in all three textbooks. The Vietnam War is largely seen as a clash between the US and Vietcong forces. Communism itself is the ideology at play; however, the focus, in this chapter, is on Russia (however limited), the country rather than the adaptation of communism in other countries. All three textbooks view the Vietnam War as an extension of the Cold War between the political blocs: US and USSR.

Russia is only depicted in the capacity of showing support for communist Northern Vietnam and its leader Ho Chi Minh. The Red Textbook includes Ho Chi Minh as being a member of the Comintern which was established after 1917 creating a connection to the global impact of the Russian revolution. Outside of this inclusion, representation of Russia is extremely limited within the lens of the Vietnam War.

5.3.3.6 The representation of Russia in China in grade 12 history textbooks

Russia's relationship with China is under scrutiny in all three textbooks. The Green and the Red Textbooks suggest that the clash between China and the USSR was largely ideological whereas the Blue Textbook claims it was largely power politics rather than ideological.

²³ The Blue Textbook is the only textbook to mention Gorbachev's wife. It states that prior to Gorbachev, Soviet wives remained in the background but Gorbachev's wife, Raisa, who was highly educated, wore designer clothes and was very attractive became popular in the media.

All three textbooks state that both countries initially had mutual agreement but upon the death of Stalin, tensions increased. The Green Textbook provides a vague list of the reasons for tension between the two former allies but does not expand on them, so a vague image of this tension emerges. The Red Textbook elaborates on the general points of disagreement between the two countries whereas the Blue Textbook mainly focuses on the relationship between Khrushchev and Mao. Whilst all three textbooks state that Mao disliked Khrushchev, the Blue Textbook reinforces this extensively. Both the Blue and the Red Textbooks state that Khrushchev was more interested in a peaceful co-existence with the West which angered Mao. This leaves a negative view of Mao but reinforces the positive view of Khrushchev held by the Red and Blue Textbooks. The Blue Textbook views the problems between the two countries as largely from the side of China.

The Red and the Blue Textbooks include sources and an activity on the relationship between Russia and China. The Red Textbook includes four sources whereas the Blue includes seven. The Green Textbook does not provide any sources, nor does it provide any connecting activity. An activity appears later in the textbook with one question somewhat related to China and Russia but which does not relate to the relationship.

5.3.3.7 The representation of Russia in Africa in Grade 12 history textbooks

Russia's role in Africa is largely viewed as a power play between them and the US. Africa is regarded as a tool of the Cold War so neither country emerges fully unblemished. The Blue Textbook is extremely anti-Cold War in this section as it repeatedly asserts both powers exploiting Africa to extend their own agenda. Whilst the Red and the Green Textbooks do state that both Russia and the US were extending their influence for ideological reasons, it is not as heavily emphasised as the Blue Textbook. To some extent the USSR is mentioned in the Congo, but the large focus is on its support of the People's Movement for the Liberation of Angola (MPLA) in Angola.

All three textbooks suggest that one of Russia's goals was to help Africa break from colonialism. This is emphasised in the Blue Textbook as it states that Russia was a natural ally of Africa as it never had a colony. The Green Textbook, however, suggests that both the US and Russia were anti-colonialism thus repeating its pro-US stance. Furthermore, the

textbook elaborates stating that yes, Russia wanted to help Africa gain independence, but they also wanted to use Africa to expand its markets in order to sell weapons to expand the arms race. The US is viewed as wanting to protect its African investments. Whilst there is a clear economic agenda behind the US, it is not as negative as involving Africa in the arms race.

5.3.3.8 The representation of the post-Cold War Russia in Grade 12 history textbooks

A Post-Cold War Russia is connected to the creation of the extended subheading: *A new world order*. Gorbachev is viewed as instrumental in the creation of the post-Cold War world in all three textbooks. His role is considered unintentional; however, it led to the creation of a new world order which no longer focused on the bipolar competition between the US and the USSR. All three textbooks note the dismantling of the Berlin Wall as the symbolic end of the Soviet Union; however, each textbook views the causes of the fall of the Soviet Union differently.

Whilst all three textbooks examine Gorbachev's reformation policies and their impact in the decline of the SU, the Green Textbook states outright that it was democratisation that led directly to the end of the USSR. The Red Textbook suggests multiple causes, democratisation being one of them. The Blue Textbook suggests all three policies, democratisation, Glasnost and Perestroika, which led to an increase in anti-communist protests. Ultimately, all three textbooks conclude that Gorbachev's policies unintentionally hastened the end of the Soviet Union. The collapse of the Soviet Union led to the sudden end of the Cold War and led to South Africa's National Party's negotiated settlement. Gorbachev, as a leader, becomes synonymous with the end of the Cold War. All textbooks view this transition favourably.

The Green Textbook reinforces that the USSR no longer existed, and it suggests, through a posed question, that Russia was no longer a superpower within the Cold War paradigm (*Which major power was left?* p. 248). The Red Textbook also states that with the end of the Cold War, the US was the only major power left standing. The Blue Textbook, however, suggests that Russia remained a world power as it states that Russia inherited the USSR's global position. It further argues that in the year 2000, Russia further stabilised under new leader Vladimir Putin. Despite these positives it does state that it follows an authoritarian rule

despite it being a capitalist economy with important resources. Lastly, the importance of Russia globally is intensified in the Blue Textbook as it states that Russia is one of the most powerful countries in the world today.

5.3.3.9 The representation of the Russian impact on South Africa in Grade 12 history textbooks

There is an inextricable link between the collapse of the Soviet Union and the collapse of the Apartheid system within all three textbooks. All three textbooks indicate that the Apartheid system could no longer generate anti-communist support after the collapse of the USSR, and thus was ready to negotiate with the ANC. Furthermore, all three textbooks state that the ANC lost an important ally and supporter in the USSR and as such, was ready to negotiate with the National Party. All three textbooks only mention the ANC and the ANC's negotiation stance.

The Green Textbook notes that the National Party viewed the ANC as an agent of Russian communism where the Red Textbook speaks of a communist-controlled ANC. The Blue Textbook is the only textbook to mention the SACP although its primary focus is on the ANC. A distorted image emerges of the South African politics and the opposition groups across the three textbooks. It appears as if the only viable option against the National Party was that of the ANC. This image is heavily emphasised in the Green Textbook where the ANC is depicted as the essential solution to the country's problems. All three textbooks include the support of the USSR for the ANC's liberation movements.

5.3.3.10 How assessments influence the representation of Russia in Grade 12 history textbooks

Both the Blue and the Red Textbooks include largely balanced sources which are accompanied by source analysis assessments. Comparison of viewpoints often emerges from the activities. The Green Textbook attempts source analysis; however, the sources themselves are questionable. Furthermore, some of the assessment questions are leading questions which reinforce its pro-US stance.

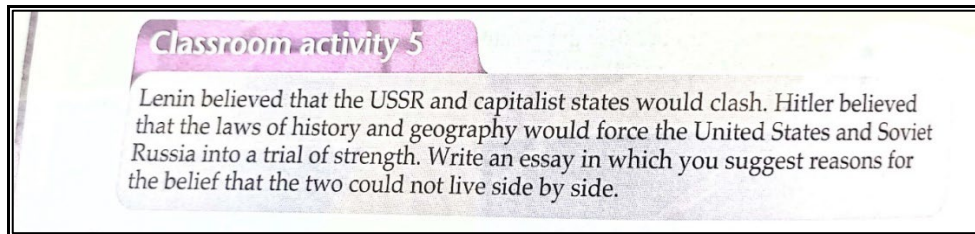
The Green Textbook attempts to use 'modern historians' as sources to discuss the Cold War; however, these sources are dated and were created prior to the fall of the Soviet Union so

little objectivity is reached. Furthermore, the textbook often uses suggestive questions which push a pro-US leaning. Below are two examples:

Was the OEEC set up because the greatest threat to Western Europe was communism/Russian expansion? (p.13)

Was this new threat the reason that the USA recognised that there 'is neither peace nor security for America if Europe is in danger'? (p. 13)

Furthermore, the textbook asserts, through an activity (see Figure 5 below), that these powers (US and USSR) inevitably would not get along which does not allow for the students to achieve this conclusion; rather it facilitates this conclusion (p.14).



(Figure 5: Green Textbook classroom activity example p. 14)

5.3.3.11 Conclusion

There is an overall lack of consistency amongst the textbooks in terms of content inclusion and definitions. Russia, as a country, is viewed inconsistently throughout the grades. Furthermore, perspectives of Russia or the Cold War differ across the three textbooks. There is some connected content between Grade 9 and Grade 12; however, the Grade 11 textbook content often appears disconnected and stands alone in comparison to the established views in Grades 9 and 12. There are multiple forms of Russia that appear in the textbooks: pre-revolutionary Russia, Communist Russia, Cold War Russia and post-Cold War Russia.

Grade 11 Russia appears as a separate entity as it faces different political transitions, and the content focuses on the pre-Cold War era. The image of Russia that emerges is dependent on the political period. Pre-revolutionary Russia appears mostly in the Grade 11 textbooks.

Grade 9 rather leaps into the context of communist and Cold War Russia and leaves behind the pre-revolutionary context. There is limited historical background and what does emerge is an oversimplified (in Blue's case often inaccurate) view of Russia's history and so a distorted view emerges. The Grade 12 textbook relies much on the knowledge gained in Grade 11 to contextualise the Russia that appears in Grade 12; however, very little contextualisation occurs in Grade 9 prior to the Cold War discussion. This diminishes the tension between the US and the SU. As the focal point of the Grade 11 textbooks is the establishment of communist Russia, it does supply some pre-revolutionary Russian context but it is also limited. The theme that emerges from this is that Russia's importance is only validated once it became a communist country. The socio-political context in pre-revolutionary Russia is heavily aligned with the autocratic regime of Tsar Nicholas II. With this being said, the Blue and the Green Textbooks create a largely faceless regime and only identify Nicholas as the leader obscurely. This reinforces the lack of importance placed on pre-revolutionary Russia and its autocratic leadership. Although Russia's history is broken down into a series of political transitions, what can be learned from Tsarist Russia is that it was autocratic, backward, oppressive and with a large, impoverished peasant base.

The establishment of the communist regime in Russia is the main focal point in the Grade 11 textbooks. The representation of communist Russia is largely tied to its leadership. Although the ideology of communism is not always viewed positively, it is often connected to the type of leadership, and thus leadership and application of ideology appears stronger.

The Grade 11 section focuses on communist Russia under both Lenin and Stalin. Two different images of Russia emerge, based on type of leadership. Whilst hardship does appear under the banner of both leaders, it is Russia under Lenin where, it appears, an attempt at improving citizens lives is included. This is largely omitted or obscured under Stalin. Although there were problems like the Civil War, an image of Lenin working hard to improve the lives of the people emerges. Although industrialisation occurred under Stalin's reign, the subsequent cost of human life is the key focus, especially in the Red and Blue Textbooks. The Green Textbook is extremely vague throughout and supplies extremely limited content, and, in some cases, inaccurate information. An extremely sanitised version of Russia emerges as a result of the lack of information. At times, the Green Textbook romanticises the Bolshevik leadership (specifically Lenin) and the support it had from the people in a way that completely omits the uprisings, brutality, and human cost under Lenin.

The Blue Grade 9 textbook does include some information regarding the establishment of communist Russia and includes the leadership qualities of the two main leaders: Lenin and Stalin. The leadership qualities included reinforce a pro-Lenin leaning and anti-Stalin stance which is largely perpetuated in the Grade 11 textbooks. Furthermore, the Blue Grade 9 Textbook reinforces the important role of men, specifically in Russia's history, as it emphasises great *male* thinkers. The emphasis on male leaders specifically perpetuates the notion of a genderised and a masculine history and Russia's history being a largely masculine history. The Red and Blue Grade 11 Textbooks specifically identify Russia under Stalin as being characterised by: dictatorship, fear, control, censorship and political terror. Although the Green Textbook offers a watered-down version of Russia's history, a vaguely negative image of Stalin does emerge. Overall, an extremely negative view of life in Russia under Stalin emerges across the grades and textbooks. Despite the radical changes made under Stalin, the textbooks depict life under Stalin as being dangerous and of poor quality.

The view of Soviet Russia is one that crosses all three grades; however, the Grade 9 and Grade 12 textbooks mostly focus on Soviet Russia within the framing of the Cold War. Within the Grade 9 textbooks, the image that emerges is that Russia is the Soviet Union and the Soviet Union is Russia. However, this imagery is not followed in all three textbooks in Grade 12. The Green Textbook uses the terms *Russia* and *USSR* interchangeably during the Cold War period thus creating a distorted view of the geo-political context of Russia as the concept of Russia and the USSR appear as one and the same. This lack of clarity further clouds the geo-political impact of communism in the global context in general but also, in particular, the Cold War.

As the image of Russia is greatly navigated through the lens of the Cold War, the textbooks tend to focus on specific events in the Cold War and countries' or leaders' responses to the event. The result of this is a limited view of Russia as a whole. All three Grade 9 textbooks heavily indicate that, alongside the US, Russia is considered a superpower thus creating an image of power and strength. Both the Red Grade 9 and 12 Textbooks perpetuate the view that tension existed between both countries and that both countries were responsible for this tension. The Green Textbook ultimately views Russia as a bully and the villain in the Cold War story in both the Grade 9 and Grade 12 textbooks. This role is in complete contrast to how the US has been presented. In Grade 9, the Green Textbook focuses on Russia being untrustworthy and controlling which is reinforced through anti-Russia sources. Both Russia,

as a country, or Stalin overlap, and both are presented as the villain. The Red and Blue Grade 12 Textbooks provide a largely balanced view of Russia in the Cold War. The balance does not excuse or justify Russia's actions thus the Red and Blue Textbook view both Russia and the US largely unfavourably during the Cold War. Both countries are represented as largely to blame for the Cold War.

To a large extent, the image of Cold War Russia is viewed the same in Grade 9 and Grade 12 in the Red and the Green Textbooks. The Red Textbook maintains its balanced, revisionist view of Russia in the Cold War, whereas the Green Textbook maintains its pro-US stance in both Grade 9 and Grade 12. In particular, the Green Grade 9 Textbook views Cold War Russia through the lens of the US and with this lens a negative view of Russia emerges in order to maintain its pro-US leaning. Whilst the Green Grade 12 Textbook does not view the Cold War through the lens of the US, it does heavily maintain a pro-US leaning thus creating a view that Russia was always in the wrong and the US emerges as the saviour. The Blue Textbook is slightly different. Although it offers a somewhat balanced view, in Grade 9 it is slightly pro-Russia (through omissions or diluting of history) whereas this leaning is omitted in Grade 12. The Red and Blue Grade 12 textbooks largely represent a balanced view as both sides are represented as contributing to the Cold War to some degree. The Grade 9 textbooks focus more on the rivalry in different arenas of the Cold War creating a less intense view of the war whereas the Grade 12 textbook spends more time unpacking the tension and the problems it created. The age of the audience is taken into consideration here. Whilst there are some offhand comments made about other arenas of rivalry in Grade 12, the main focuses lie in the political tensions and political decision-making of certain leaders. It must be noted that both the Red and Blue Grade 12 Textbooks focus on the Cold War being based on the creation of nuclear weaponry; however, the Green Textbook largely omits this or glosses over it in part. Only in the Cuban Missile Crisis (CMC) is there mention of nuclear warfare but there is no clear definition or concept clarification of what *nuclear* means.

The three main events indicated in both the Grade 9 and Grade 12 textbooks are the Cuban Missile Crisis, the Berlin Blockade and the Berlin Wall. The Red Grade 9 Textbook does not include the CMC as an example whereas the Red and Blue Grade 9 Textbooks do. The Blue Grade 9 Textbook depicts the US as a bully with Russia trying to help an ally. This image is extended in Grade 12 and also followed by the Red Grade 12 Textbook. Both the Red and Blue (to a lesser extent) Grade 12 Textbooks focus clearly on the leadership of both Kennedy

and Khrushchev, and both are viewed favourably. Whilst the Green Grade 9 Textbook views the CMC in a balanced way, the Green Grade 12 Textbook follows a different trajectory. The Green Grade 12 Textbook only focuses on the leadership of Kennedy which omits any possibly favouring of the Russian leader, Khrushchev. Khrushchev's active decisions or participation in the CMC are overlooked, which adds weight to the pro-US stance followed by the Green Textbook. However, this deviation between the Grade 9 and Grade 12 textbook further suggests a lack of content consistency not only between publishers but within the same publishing house.

The Berlin Blockade and Berlin Wall are two events that are viewed largely inconsistently between the grades. Semantics play a crucial role in image creation within the Grade 9 textbooks. The Red Grade 9 Textbook is critical of Russia during both events and references many East German citizens *escaping* to West Germany. However, the Blue Grade 9 Textbook omits much negativity and represents a peace between the two zones. The Berlin Blockade is omitted altogether. Furthermore, it refers to East German citizens *emigrating* to the Western zone. The choice of words, in comparison to the Red Grade 9 Textbook's, produce two very different images. The imagery perpetuates the lack of historical consistency between textbooks. The Green Grade 9 Textbook reiterates its anti-Russia stance within the division of Germany but reiterates the leadership of Stalin. Furthermore, the Green Textbook allocates only anti-Russian sources in its representation of the division of Germany. The Red Grade 12 Textbook continues its balanced view of the division of Germany whereas the Blue Grade 12 Textbook shifts towards a slight anti-Russian stance. The Green Grade 12 Textbook continues its anti-Russian focus as it outright blames Russia for tension between East and West. The difference within the Green Grade 12 Textbook is that no specific leadership is mentioned. Where the Grade 9 textbook blamed Stalin specifically, faceless leadership emerges from the Grade 12 textbook. The faceless leadership ties in with the vagueness of the historical content within the Grade 11 and Grade 12 textbooks. This is reiterated by the Grade 12 textbook's decision to include an obscure West German leader in the creation of the Berlin Wall, as opposed to Khrushchev. The Red and Blue Grade 12 Textbooks specifically mention Stalin's leadership in the Berlin Blockade, but omit Khrushchev's involvement in the creation of the Berlin Wall. This omission coincides with the positive image formation of Khrushchev during the CMC and this negative association could blemish the perpetuated favourable image.

Russia, as a section, is underpinned by the theory of communism. What is clear is that there is no clear, agreed upon definition of the concept of communism throughout either the Grade 9, Grade 11 or Grade 12 textbooks. Furthermore, there is little consistency in definition amongst the same publishing houses. Communism is often viewed in comparison to that of capitalism across all three grades.

The Red Textbooks offer the most in terms of consistency across the grades. Whilst more information is unpacked and tabulated alongside that of capitalism in the Grade 9 textbook, the balanced view of communism alongside capitalism is consistent. The Blue Textbook is inconsistent in its definition of communism throughout the grades. In Grade 9 it provides a slight favouring of communism whereas neutral language is adopted in Grade 11. In Grade 11, the Blue Textbook focuses on communism's striving for as much equal distribution of wealth as possible. In Grade 12, the Blue Textbook doesn't make mention of wealth as a driving factor behind communism. Instead, it aligns communism with that of the USSR which focuses on control, spreading communism and limiting rights and freedoms. In comparison, the Blue Textbook states that the US is synonymous with capitalism which allows for democracy and individual rights and freedoms. The Green Textbook is also inconsistent in its view of communism across all three grades. In Grade 9, the Green Textbook provides a comparison between communism and capitalism, but strongly aligns itself with repeated emphasis on individual rights and freedoms. In Grade 11, the Green Textbook only states that communism is an economic system and subsequently provides a vague and incomplete image of the ideology. Finally, no definition is provided in Grade 12 nor is there any unpacking of the concept. The textbook makes mention of a rivalry between the US and the SU but does not indicate as to why.

The lack of consistency not only between the grades but publishing houses depict a distorted and inconsistent view of communism and a lack of overall concept clarification. The historical placement of communism and its global effects is unclear as the definition of the concept is inconsistent. It seems the textbooks place more emphasis on the leadership rather than the ideology itself. This could suggest that communism, as an ideology, is not necessarily a problem but rather leadership.

Leadership is a main theme that emerges through this analysis. Whilst the focus is largely on male leaders within Russia, the scope of this theme looks at how leaders have responded to

global events and the implementation of communism. Lenin, Stalin, Khrushchev and Gorbachev appear as the main leaders and are largely consistently represented from Grade 9 to Grade 12. Tsar Nicholas II and Trotsky appear as secondary characters. Whilst Grade 9 textbooks offer a superficial and vague coverage of Russia, including Russian leadership, Grade 11 and Grade 12 textbooks represent Russian leadership throughout. There is some consistency between the grades; however, depth of representation is inconsistent.

The Grade 9 history textbooks offer the least in terms clear leadership. Grade 9 is the last grade where history is compulsory and so, those learners who opt not to take history in the FET phase, do not get a consistent imagery of Russian leadership and, therefore, a holistic view of Russia. The Red Grade 9 Textbook only mentions Stalin and Gorbachev as Russian leadership but rarely; it largely focuses on response by the country as opposed to particular leadership. As a result, a largely faceless leadership emerges. The Green Grade 9 Textbook only makes mention of communist leadership by name thus illustrating the importance of communist leadership. In both the Blue and the Green Grade 9 Textbooks, Stalin appears as the main focus. The Blue Grade 9 Textbook is the only textbook to discuss personality traits of Lenin and Stalin. Lenin is viewed as a great thinker and saviour whereas Stalin is represented as dictatorial, harsh and violent. The Blue Grade 9 Textbook continues this representation of both leaders in grade 11 and is the only textbook to offer some consistency in representation.

There is an extremely limited view of pre-communist leadership in both Grade 9 and Grade 11. Tsar Nicholas II mostly appears obscurely across the grades and thus little information of Imperial Russia is conveyed. What emerges is the view that only leadership from the Communist era is of significance. Key events such as the establishment of Communist Russia, the Civil War and the establishment of the NEP are depicted under Lenin. Although elements of these events (barring the NEP) are viewed to some extent as negative, Lenin's historical positioning and historical agency remains largely positive. Furthermore, the Green Grade 12 Textbook perpetuates its vague coverage of Russia in that it includes a sanitised version of Lenin. Trotsky mostly emerges in the grade 11 textbooks. All three textbooks reiterate his power and effectiveness as a member of leadership; however, his excessive contribution is not mentioned outside of grade 11. A disjointed and incoherent history is perpetuated across the grades thus perpetuating the lack of cohesion in Russian historiography. Stalin's ruthless and dictatorial representation is consistent within all three

Grade 11 textbooks as well as in the Blue Grade 9 Textbook. All three Grade 11 textbooks do not make any reference to Stalin's pre-revolutionary contributions; however, within the Green Grade 12 biographical section, the textbook indicates that Stalin played an integral role in the Bolshevik Revolution. This is the only mention of Stalin's pre-revolutionary contributions and does not align with the existing narrative. Both Khrushchev and Gorbachev are viewed largely favourably in the Grade 12 textbooks. For Khrushchev, where there might be some negative association, Khrushchev's direct contributions are omitted. This heavily aligns with the focus on leadership and perpetuation of different types of communist leadership. Lenin and Khrushchev are largely viewed favourably despite negative events whereas Stalin is viewed extremely negative throughout the grades. Gorbachev and his policies are overarchingly viewed positively across all three textbooks. Although it is stated as unwitting, Gorbachev's policies are denoted as leading to the end of the Cold War.

As is indicated by the male leadership mentioned above, Russia's history appears largely masculine. While some women are mentioned by name, they are mostly mentioned as a separate section only in the Grade 11 history textbooks. The representation of women and women's contributions are inconsistent amongst all three textbooks thus presenting a possible assumption: there is no agreed upon history of women and their contributions. Furthermore, the use of language in the Green Grade 11 Textbook further downplays women's contributions reinforcing the sectionalised and limited view of women's history.

A key component within the textbooks across the grades is the use of sources. Notably, the sources used in the Grade 9 and Grade 11 textbooks are problematic. The Grade 12 textbooks are largely referenced and largely varied whereas problems emerge from the Grade 9 and Grade 11 textbooks. The Blue Grade 9 and Grade 11 Textbooks appear to use sources problematically. The Blue Grade 9 Textbook utilised 37 visuals which appear to be incorporated to justify the lack of written text by the textbook. Furthermore, in contrast, only 11 written sources appear in the Blue Grade 9 history Textbook. It must be noted that the written sources included are extremely limited in information and heavily distort and limit the image of Russia. In addition, the sources are not well referenced which adds to their lack of trustworthiness. This lack of trustworthiness and lack of effectively used sources impact the quality of the Russian historiography which emerges. The sources' quantity is perpetuated in the Blue Grade 11 Textbook where it uses 95 sources. The sources themselves offer little range as there is a vast repetition of the authors. The same authors are being used to depict

various angles of an event; however, as the provenance emerges from the same place, trustworthiness and reliability of this angle and so-called multiple perspectives is called into question.

A summary section is often included at the end of a unit within the textbooks. On the one hand they are consistent as a summary appears in at least one textbook, but each textbook does not necessarily incorporate a summary section in each grade. The summaries are designed to include the key points that authors have viewed as important from that section. What emerges from this is the idea of memory versus discipline. Are we focusing the discipline of history and the understanding of historiography of Russia or are we testing memorisation of key events and people? In Grade 9, only the Red and Green Textbooks provide a summary. This could be perhaps that very little content emerges from the Blue Textbook and so a summary would not work. All three textbooks utilise a summary section with the Blue Textbook including an in-depth summary in comparison. Only the Red and Blue Grade 12 Textbook provides a summary. The lack of consistency across grades is also indicative of not only a lack of cohesion but perhaps a lack of discipline positionality: what do we learn from history – skills or memory?

Overall, a clear focus on leadership emerges and the leadership within Russia being overtly male. Leadership is the key lens through which most of Russia's history is viewed. In addition, the focus, across the grades, is on communist leadership. An extremely limited view of pre-Communist Russia emerges in all three grades. Furthermore, an inconsistent view of Russia history emerges across all three textbooks which suggests a lack of overall continuity between both the publishers and the grades. Inconsistency is also applied in how each textbook views certain leadership. The Green Textbook has been overtly pro-US across the grades, but provides a vague and romanticised view of the Bolsheviks within the textbook. This is a large inconsistency which further supports the notion that the Grade 11 textbook appears as a disconnected view of Russia in comparison to the Grade 9 and Grade 12 continuity.

PART THREE: INDIA AS REPRESENTED IN SOUTH AFRICAN HISTORY TEXTBOOKS

5.4 Introduction

India directly or indirectly is represented in Grades 4, 8 and 10 in various capacities. South Africa shares a deep colonial history with India, as both are former British colonies. Considering this lengthy and shared history, how then is India represented in Grades 4, 8 and 10? Grade 4 specifically relates to Mahatma Gandhi whereas Grade 8 discusses Indentured labour as well as Anti-Indian legislation. Lastly, Grade 10 focuses on Mughal India as well as indentured labour. Considering most of the sections are sectionalised within existing topics (barring Grade 4 and Mughal India in Grade 10), I will only unpack topics which relate directly or indirectly to India.

The term *India* represents the modern geo-political state of India. Although, at times Mughal India and British India are used within the analysis, they are only done so to represent how India is represented at that specific historical time. They are included because their inclusion has an impact on how modern-day India is represented or what can be learned of modern-day India and its history.

5.4.1 India in the Grade 4 history textbooks

India appears in grade 4 through the representation of the leadership of Mahatma Gandhi in South Africa. It is important to note that although all three textbooks include visual aids, no official sources are used in the Gandhi-specific section of *Learning from Leaders*.

5.4.1.1 The representation of India in Grade 4 history textbooks

The grade 4 textbooks provide a very limited image of India, both conceptually and geographically. The image of India is foregrounded through the image of Gandhi in all three textbooks. The representation that is then relayed is that India is Gandhi and Gandhi is India.

Geographically, the Green Textbook is the only one to provide a map which allows for a visual geo-spatial image of India in the world. The Red Textbook, however, only provides a

vague image of a pre-colonial India divided into kingdoms. Images of colonial India and present-day India are not provided.

Conceptually, a vague image of India appears in all three textbooks. The Red Textbook is the only book to mention the size of India as well as identifying its wealth of resources. Both the Red and Green Textbooks identify India as a British colony; however, the Green Textbook does not specifically use the term *colony* or *colonisation* but rather uses the term *rule* thus only the Red Textbook is specific to the type of administrative rule. Despite this lack of clarity, both the Red and Green Textbook state the British rule as being oppressive. The Blue Textbook does not allude to British rule or occupation but does allude to a lack of human rights; however, this lack is not tethered to anything specific thus an unclear image of India is perpetuated.

Furthermore, religion, or the concept of religion is intertwined in all three textbooks. The Red and Blue Textbooks identify the two main religions in India as Islam and Hinduism; however, the Green Textbook is vague and non-specific and does not identify any religion specifically. The Red and Green Textbooks identify religion as a source of conflict in India whereas the Blue Textbook focuses on Hinduism as it is linked to Gandhi. No textbook offers a conceptual understanding of either Islam or Hinduism. A vague image of religion and its connection to India is perpetuated in all three textbooks.

5.4.1.2 The representation of Gandhi in Grade 4 history textbooks

It is through Gandhi that an image of both India and South Africa emerge. Gandhi is foregrounded in all three textbooks as he is the main subject in the topic *Learning from Leaders*; India and South Africa are backgrounded. All three textbooks focus solely on Gandhi's positive traits to the point where a herofied image is perpetuated.

All three textbooks perpetuate an image of Gandhi as being sacrificial in nature, smart, scholarly, revered, a protector, a teacher and an advocate for equal rights. Both the Red and Green Textbooks highlight that Gandhi's fame and influence extended beyond the realm of India and South Africa and suggest that Gandhi was revered globally. Furthermore, all three textbooks state that Gandhi organised many peaceful protests and fostered the development of Satyagraha, a form of peaceful protest action. Gandhi's influence and style of protesting influenced other activists in South Africa, according to both the Red and Blue Textbook. The

over-emphasis of Gandhi's positive traits reiterates that glorification and the herofication of Gandhi. The central focus of Gandhi's hero status is evident in all three textbooks.

All three textbooks have elements of vagueness when discussing Gandhi's role in either India or South Africa. The Green Textbook offers an overall vagueness in Gandhi's role in both India and South Africa as it uses a different style in comparison to the Blue and Red Textbook. It uses a comic-like life story cycle to discuss the important events in Gandhi's life. The result of this is a vague unpacking of Gandhi's role in both South Africa and India. The Red Textbook discusses in detail Gandhi's role in India; however, his role in South Africa is limited, whereas the Blue Textbook, offers more detail on Gandhi's role in South Africa but almost omits his role in India altogether. Both the Red and Blue Textbook analyse different protests. The common thread in all three textbooks is Gandhi's supposed catalyst moment when he was thrown off a train for sitting in a 'Whites only' section. This moment is catalogued in all three textbooks but with greater emphasis in the Blue Textbook. The Blue Textbook dedicates one page, 11 sentences, ($\frac{1}{4}$ of the textbook content) to describe this catalyst moment. In contrast, the Green and Red Textbooks assert that the train incident was an important part albeit vaguely depicted. All three textbooks fail to include any dates despite the supposed significance of the event, thus creating a vaguely contextualised event which imposes a mythical and deified tint to the image. Despite the lack of specific details, all three textbooks place emphasis on Gandhi and Gandhi alone, organising protests and teaching people how to protest. This leads to a question as to whether protest action had ever occurred prior to Gandhi's influence.

Gandhi's work in South Africa is mentioned in all three textbooks though in greater detail in the Blue Textbook. There is a discrepancy in the Red and Green Textbook as to the duration of Gandhi's stay in South Africa. The Red Textbook asserts that Gandhi spent 22 years in South Africa as a lawyer, where the Green Textbook states that Gandhi spent 21 years in South Africa. The Red Textbook offers a limited glimpse into Gandhi's role in South Africa. The only specific mention focuses on the train incident and how it was this incident which encouraged Gandhi to galvanise the Indian community. In the Blue Textbook there is heavy focus on Gandhi's role in South Africa. Outside of the train incident, the Blue Textbook mentions The Great March. In comparison to the train incident (11 sentences), the discussion on The Great March is only four sentences, thus the content is limited. In addition, there are

no dates and no specific outcomes provided. Both the Blue and the Red Textbooks are heavy-handed in the emphasis on Gandhi's use of non-violent protests.

The Red Textbook is the only textbook to specifically mention protest action led by Gandhi in India. The textbook focuses on The Great Salt March. The detail of this march reinforces the glorified and revered representation of Gandhi. Gandhi's sacrificial nature is reinforced in the Red Textbook as well as how Gandhi was revered by the people, especially the poor.

India's independence is mentioned in all three textbooks; however, it is closely linked to Gandhi and his influence. Gandhi and India's independence are inextricably linked. Can you have an independent India without Gandhi? The Red Textbook references India's independence as Gandhi's dream and alludes to Gandhi being the architect of India's independence.

Finally, Gandhi's death is noted only in the Red and Green Textbooks. There is no mention of Gandhi's death in the Blue Textbook. Only the Green Textbook mentions the term "assassination". Both the Red and Green Textbooks create a sympathetic tone to Gandhi's death. The Red Textbook states that Gandhi was killed on his way to prayer where the Green Textbook states he was killed because of his beliefs in equality and tolerance. These images both reinforce the herofied and glorified image of Gandhi's sacrificial nature. The details surrounding his death or any controversy around Gandhi himself have been omitted.

Only the Red and Green Textbooks offer a summary of the section. These summaries relate directly to Gandhi. The Red Textbook's summary is just under one and a half pages with a total of 23 bullet points. Seven of these bullet points relate to the section on Gandhi. The Red Textbook's summary focuses mainly on Gandhi's role in India. Gandhi's image remains herofied within the seven summary points as it reiterates Gandhi's saviour and teacher role. One summary point included in the Red Textbook does not appear in the main content. This point states that Gandhi specifically protested oppressive laws which marginalised both Indian and black South Africans. The bullet point specifies that Gandhi supported both Indian and black South Africans which reinforces the herofied image of Gandhi as well as his rhetoric of equality for all. The Green Textbook offers a summary in which it focuses on both Mandela and Gandhi as transcendent historical figures. One point appears in the summary which does not appear in the module content. The textbook states that it is alleged that Gandhi liked Indian people more than black people. This point appears under possible flaws

of leaders however it is not expanded upon. In contrast, the Green Textbook also states that people all over the world thought both Gandhi and Mandela were great world leaders. This statement negates the earlier alleged belief and thus re-focuses the narrative on Gandhi's herofied status.

5.4.1.3 The representation of Britain as a colonial power in Grade 4 history textbooks

In all three textbooks, either overtly or covertly, India is depicted as being a colony of Britain. Despite this, only the Red Textbook creates an image of what British rule entailed for India. The Blue Textbook makes no mention or allusion to Britain as a colonial power where the Green Textbook, although it does not directly mention Britain as a colonial power, does allude to some problems in British India through the mention of Gandhi leading protests against British rule. Only a singular image of Britain as a colonial power emerges from the Green Textbook while no image emerges from the Blue Textbook. Although the Red Textbook does provide detail of British rule, there is an inconsistency and ambiguity in its representation. There is a lack of clarity regarding the British trading companies versus the British Empire which creates a disconnection. The prevailing theme through all three textbooks centres around a clear lack of colonial discourse.

Although there is clear transparency that it was the British trading companies that were exploitative, how they relate to the Empire or if they do, is unclear. More blame is placed on the British trading companies as opposed to the Empire itself as the textbook is very specific in its statement that it was the British trading companies which were exploitative. This lessens any direct blame on the British Empire. This reduced image is further reinforced by the lack of inclusion of the term *colonisation* as the Red Textbook only uses the term *British rule* instead of *colonisation* which further limits negative associations with the British Empire.

In the Red Textbook, British trading companies are represented as exploitative of both the people of India and its resources. The Red Textbook states that it was the British trading companies that gained wealth from India. The clear statement of who gained wealth and an omission of Britain, creates a clear distinction between the British trading companies and the British Empire with a negative leaning on the trading companies. The Red Textbook further emphasises the trading companies' exploitative tendencies through its labour practices, lack

of rights available to the people of India as well as the inclusion of obscure laws. It was this exploitation that led to protests, according to the Red Textbook. However, it was the British government who sent police to squash the protests which the Red Textbook describes as brutal. This is the only negative, direct mention of British government.

Only one textbook includes, to a varying degree, a representation of colonial India. A lack of colonial discourse is reinforced by the Red Textbook through its vague and blameless image of the British Empire. The shift in blame to the British trading companies creates an overall distorted image of Britain as a colonial power.

5.4.1.4 The representation of South Africa in Grade 4 history textbooks

An image of South Africa is created through the lens of Gandhi and his life in South Africa in all three textbooks. Despite the focus on Gandhi in South Africa, a vague, almost accidental image of South Africa is represented in all three textbooks. While the Red Textbook is the only textbook to specifically state that South Africa was under British rule, all three textbooks perpetuate a vague and unclear geo-political image of a colonial South Africa which suggests a lack of colonial discourse.

All three textbooks discuss, to varying degrees, oppressive laws that were in place in South Africa during the time of Gandhi's residence. The Red Textbook states that it was under the British where the oppressive laws were instituted; however, the Blue Textbook only specifies the "white government (p. 108)" which is a vague and non-specific term. The Green Textbook makes no indication of any colonial attachments in South Africa, so a silenced image of governance is perpetuated. Whilst both the Red and Green Textbooks use the term *oppressive* to describe the discriminatory laws in South Africa, the Blue Textbook uses the term *unfair*. The textbook repeats the word *unfair* five times in four pages yet does not go into any specific detail about any 'unfair' laws.

The Green Textbook includes a small notation regarding Gandhi's involvement in the South African War, specifically between the British and the Boers. Thus, a small image of warfare between the British and the Boers is created however, there is no detail regarding what the war was and any other participants.

A very limited view of South Africa appears in all three textbooks despite the focal point being on Gandhi's resistance in South Africa. Inclusion of any details create a distorted and

unfinished geo-political image of South Africa which reinforces an almost accidental inclusion undertaken in each textbook.

5.4.1.5 How assessments influence the representation of India in Grade 4 history textbooks

All three textbooks provide activities for the *Learning from Leaders* section. The Red and Green Textbook includes four tasks each while the Blue Textbook offers three. The Red Textbook offers two Gandhi-specific and two combined (Mandela and Gandhi) activities where the Green Textbook provides three Gandhi-specific tasks and one combined task. The Blue Textbook offers two Gandhi-specific tasks and one combined. This where the similarities end. The types of questions and content focus differ between textbooks.

The Red Textbook's questions focus specifically on the British laws, Gandhi's resistance to said laws and the qualities that make Gandhi a good leader. There is a variety of focus in the Red Textbook; however, several of the questions are leading in that they expect very specific answers from the learner. The Green Textbook focuses mainly on the qualities that make Gandhi a good leader and his possible character flaws. Only level one and two questions are used. The Blue Textbook only includes basic level one questions which requires basic recall in the form of multiple choice, one-word answers and complete the sentence questions.

5.4.2 India in Grade 8 history textbooks

The focus is on Indentured labour, Passenger Indians and Anti-Indian legislation in the Grade 8 textbooks. None of these features as a main topic but feature either as their own subheading or within the framework of another subheading. This is important as it indicates that only sections pertaining to India will be discussed, even as a small intersection within another main component.

Furthermore, the use of sources within the textbooks range. No textbook provides sources for Passenger Indians and only the Blue Textbook provides sources for Anti-Indian legislation. It provides two sources: one written and one visual. Only the written source is fully referenced. Each textbook provides some sources for the indentured labour section. The Red Textbook only provides two visual sources, neither of which are referenced. The Blue Textbook offers

images, but they do not form part of the official sources (sources that are labelled as such). The textbook provides two written sources, both of which are extracts from the same source. Finally, the Green Textbook includes one unreferenced visual source, three written sources, two of which come from the same author (same source but different publications). Both the Red and the Green Textbook share the same visual image²⁴.

5.4.2.1 The representation of India in Grade 8 history textbooks

All three textbooks focus on India through the lens of its British colonial status. A limited scope of India as a country is thus revealed in all three textbooks because of this specific focus. Despite the selective lens, all three textbooks omit details of British occupation in India. The result dissolves any negativity associated with British rule which, in turn, fosters a pro-British approach. Only the Red and Blue Textbooks offer any visual and geographical representation of India in the form of a map. The lack of consistency amongst textbooks in terms of basic geographic knowledge of India reinforces an idea that knowledge of India is incidental.

As all three textbooks focus on India as a British colony, little else is learned about India. The Blue Textbook offers slightly more basic information regarding the picture of India; however, this information is one dimensional and no further detail is provided. The Red and Green Textbooks discuss the wealth of resources in India and how these resources contributed to the wealth expansion of the British Empire and the BEIC²⁵. An indication is made in all three textbooks that India's population is mostly poor, interspersed with some wealthy citizens. The textbooks stipulate that it was the poorer class that opted for indentured labour in Natal whereas Passenger Indians were made up of the wealthier class. The Blue Textbook lists a number of attributes tied to India: Gandhi is from there; rice is a staple food; three main languages, namely Tamil, Telegu and Gujarati. The Blue Textbook is the only textbook to make any mention of language although both the Blue and the Green Textbooks indicate that Hindu and Islam are the two main religions.

²⁴ The same source is repeated in both the Red and the Blue Grade 10 Textbooks

²⁵ Both the Blue and Green Textbooks refer to the British East India Company (BEIC); however, the Red Textbook uses the term English East India Company (EEIC). Both names are correct and can be used interchangeably. For the sake of brevity and to avoid confusion, I will use BEIC throughout as that is the most commonly used term.

All three textbooks note that the British government took over from the BEIC; however, this takeover is depicted differently within each of the three textbooks. Between the Red and the Blue Textbooks, there is very little clarification between the BEIC and the British government. They are noted as separate only in so far as it was the British government which took over from the BEIC. Only the Green Textbook offers a bit of clarity as to what the BEIC was and how it differed. The Blue Textbook states that Britain took over in 1784 by means of the India Act. It is the only textbook to include the India Act as well as omit the 1857 uprising completely. The Red and Green Textbooks note that it was the poor leadership of the BEIC which ultimately led to the 1857 uprising. It was this uprising which led to the British government arriving and ending it and taking over control from the BEIC. This takeover meant that India came under British colonial rule. Outside of the Green Textbook stipulating that it was an 18-month uprising by Indian soldiers in the BEIC, no textbook details are provided on what the uprising was about nor what happened. The details regarding how the British government ended the uprising are also omitted. The British involvement in the takeover is vague at best. The subsequent colonial rule is not detailed and so a saviour-like image emerges as it was the British government which ‘rescued’ India from the harsh BEIC rule. The Blue Textbook extends this image by stating that it was only under colonial rule where India became unified. Prior to the takeover, India was made up of a collection of states, thus signifying colonial rule positively unified the country as one. Furthermore, the Blue Textbook inextricably links India with Britain by asserting that once India became a British colony, it became known as British India with Queen Victoria becoming Empress of India. The Blue Textbook heavily reinforces the colonial image of India in comparison to the vague colonial detail in the Green Textbook. The Red Textbook, however, further supports the colonial image through the inclusion that Indian soldiers acted as enforcers of British colonialism in other colonies.

There is very little detail regarding British colonial takeover. Only a small indication is made in the Red Textbook that British rule was not entirely positive. The Red Textbook notes that Gandhi returned to India to oppose British rule, the indication being that there was a problem with the British leadership; however, no further details are provided. All three textbooks thus underscore British colonial takeover as being the most historically significant as it the consistent focal point in all three.

5.4.2.2 The representation of indentured labour in Grade 8 history textbooks

Differing images of indentured labour emerges from the textbooks. Both the Red and the Green Textbooks describe an exploitative practice that lent itself to brutal hardships, violence and unsanitary conditions. The Blue Textbook, however, provides a rose-tinted and extremely limited view of indentured labour. Whilst the Red and Green Textbook include just over 2 pages on indentured labour specifically, the Blue Textbooks includes 3 and a half pages. Despite this, there is limited textbook content as the information on indentured labour emerges from sources or additional visual images included.

Only the Red Textbook explains why people from India would indenture themselves, thus providing a brief glimpse into India's socio-economic dynamic. Furthermore, the Red Textbook is the only textbook to not only provide an estimation of how many indentured came to Natal over the indenture period, but it is also the only one to state that one quarter were women. Through imagery and one written source, women are seen in the Blue Textbook; however, women's role or arrival is not explicitly stated. The Green Textbook does not mention women at all. Masculine pronouns are also used to describe the duties so indentured labour appears as an only male event.

The Red and the Green Textbooks explicitly state that conditions were harsh for indentured labourers. So much so, that the Green Textbook states that India eventually stopped sending labourers due to the brutal conditions. The Blue Textbook, however, provides a rose-tinted view and thus a distorted view of indentured labour. The textbook describes how the employers "had to" provide "free" houses to the workers (p.129). Additionally, employers "had to" provide food rations for their workers too. The image that is perpetuated is that the workers received free shelter and food and were thus well taken care of by their employers as they were obligated to provide such amenities. The textbook does not indicate to whom there were any obligations, so a faceless entity emerges. In response to this 'generosity', the workers went on strike "because they wanted rice" and not the free mielie meal that was freely provided (p.129). In response to this, the employers provided land for the workers. The blue Textbook uses the term "compensate" (p. 29) when referring to the land provided thus emphasising the generous image of the employers. The image that is created is that the workers were ungrateful despite all that had been provided for them. A generous and positive image is provided of the employers whereas a negative and ungrateful image is presented of the worker. This omits any negativity surrounding the living and working conditions of the indentured labourer and puts the blame on the labourers.

The Blue and the Green Textbooks mention what happens after the indenture contract and references ‘free’ Indians. No explanation is provided as to why the word free is written in an inverted comma, and so an assumption emerges that after the contract, Indian people were not free; however, this is not contextualised.

5.4.2.3 The representation of Passenger Indians in Grade 8 history textbooks

There is very limited detail in all three textbooks regarding Passenger Indians and their position in South African history. All three textbooks note the arrival of Passenger Indians as a wealthy merchant class in 1869; however only the Red and Blue Textbooks note their arrival in Natal. The Green Textbook only states that Passenger Indians arrived in South Africa, thus giving a vague image of the historical positioning of the Passenger Indians.

Each textbook has one key focus with regards to Passenger Indians albeit limited. The Red Textbook’s focal point is the heavy reinforcement of the success of the Passenger Indians as merchants over that of the indentured labourers. Although the Blue Textbook mentions the wealth made by Passenger Indians, it also includes the move inland after the discovery of diamonds. The Green Textbook focuses on the target market (indentured labourers and Africans) as well as highlighting the classification of Passenger Indians as the Indian merchant class. The Green Textbook asserts that it was this merchant class which protested against supposed discriminatory laws. Despite this statement, the Green Textbook doesn’t detail what is discriminatory.

The Red and Blue Textbooks mention Gandhi. Whilst both textbooks do not explicitly state that Gandhi was a Passenger Indian, it insinuates a connection to the Passenger Indians. This inclusion reinforces the success of the Passenger Indians. Despite some inclusions of Passenger Indians and suggestions of success in the textbook content, it does not translate to the summary section offered by the Red and Green Textbooks. Passenger Indians are not included in the topic summary which indicates the overall lack of continuity, and it may suggest Passenger Indian history is not as important.

5.4.2.4 The representation of Britain as a colonial power in Grade 8 history textbooks

A representation of British colonial power emerges through the lens of the Indentured labour system in Natal and through the lens of South Africa. A subtle pro-British undertone appears within all three textbooks via omission. With no definitions of the terms *colony* or *colonial power* being provided in any textbook, a lack of contextual and conceptual understanding further underscores a pro-British undertone as any negative associations with colonisation is omitted, thus removing agency.

When negative associations emerge within South African history, there is a disconnect between the colonial nature of South Africa and the independent South Africa in all three textbooks. This passivity maintains a pro-British undertone through this omission. The pro-British undertone is further reinforced by each textbook's representation of British occupation in either India or South Africa. The Green Textbook creates an image of Britain rescuing India through its occupation where the Blue Textbook mentions how Britain unified a fractured India creating not only a heroic image but also one of a seamless political transition. The Red Textbook also identifies Britain as unifying South Africa after the South African War. The similar imagery cuts across three different textbooks producing a consistent pro-British stance.

The Red Textbook is the only textbook to provide a map identifying other British colonies globally thus showing the full extent of British control. In addition, the Red Textbook creates a representation of a mutualistic relationship between Colonial India and Colonist Britain. Furthermore, Britain is depicted as wealthy and using the resources of the colonies to their advantage. It is not depicted negatively but rather neutrally which further emphasises the mutualistic representation of Britain and its colonies.

5.4.2.5 The representation of South Africa in Grade 8 history textbooks

A vague and incidental image of South Africa appears in all three textbooks, with the Red Textbook offering the most insight. The Red Textbook alludes to a fractious image of South Africa – one that is either a British colony or an independent entity. Although the Blue and Green Textbooks only present an image of a colonial South Africa, all three textbooks present this colonial image favourably. When any negativity is mentioned, the association with Britain is dropped thus removing any agency on the part of Britain.

The Red Textbook clearly differentiates that both the Cape and Natal were colonies, and it was only after the British defeated the Boers did South Africa as a whole fall under the control of Britain. Little is mentioned as to what this control entailed and so an empty image of what colonial South Africa looked like structurally emerges. This empty image of South Africa's colonial structure is further evidenced in both the Green and the Blue Textbooks. The Blue Textbook makes a clear delineation between colonial Natal and the Transvaal especially when emphasising the anti-Indian rhetoric in the Transvaal. This clear demarcation is indicative of a divided South Africa – a British and an Afrikaner one (the latter, being the discriminatory one). This specification removes any negativity associated with Britain. The Green Textbook does state that South Africa as a whole was discriminatory against Indians and Indian immigration; however, it clearly omits any British correlation thus further removing agency. In addition, the Red Textbook highlights a number of resistance movements, although they are vague in detail. A keynote here is that the resistance movements occurred in South Africa and once again, any colonial tether is omitted, thus removing the agency from Britain.

5.4.2.6 The representation of Anti-Indian legislation in Grade 8 history textbooks

There is an overarching anti-Afrikaner and anti-Transvaal narrative in all three textbooks in Grade 8. When discussing anti-Indian legislation in South Africa, all three textbooks focus solely on the Transvaal (the Green Textbook makes mention of the Orange Free State but focuses mainly on the Transvaal). Only a small insertion that alludes to discrimination in Natal is included in all three textbooks; otherwise the focus is heavily on anti-Indian legislation in the Transvaal or Boer Republics only.

Each textbook makes mention of the number of laws that specifically targeted Indian people; however, very little regarding each law is provided. The Red Textbook mentions resistance to the Pass Law; however, very little regarding the law is mentioned. The Green Textbook does make note, however, that discriminatory laws were in place prior to 1900 but were harshened after 1900. Details of these discriminatory laws remain vague despite their discriminatory purpose being emphasised. The Green Textbook does note that the reason for the discriminatory laws were two-fold: they did not like foreigners, and they did not like foreigners who were not Christian. Earlier in the textbook, the textbook noted that white traders did not like the Indian traders because they encroached on their clientele; now the reasons being stipulated lean towards xenophobia rather than the economical. Furthermore,

the Green Textbook states that Gandhi helped fight discrimination in both Natal and the Transvaal. No further details are provided thus only a small indication can be noted that references any negativity on the part of colonial Natal.

Resistance to the anti-Indian legislation is mentioned in all three textbooks with the focus being on the Transvaal Indian Congress (TIC) and the Satyagraha Campaign almost exclusively. Only the Blue Textbook makes a small indication of the Natal Indian Congress (NIC) as the first Indian Congress; however, the focus remains on the TIC. With the focus being exclusively on the TIC, the anti-Transvaal narrative is reinforced as it emphasises the need for the formation of this congress specifically in the Transvaal. It also reinforces the image that the Transvaal (or Boer Republics) were solely responsible for any anti-Indian sentiment. All three textbooks identify Gandhi as being the sole leader of both the TIC and the Satyagraha Campaign. Although the Red and the Green Textbooks do note other leader involvement in the Satyagraha campaign, it does not specify anyone by name. The Green Textbook is also inconsistent with its representation of the foundation of the TIC as on one occasion it identifies Gandhi as having formed the TIC where on a second occasion it states that he helped found the TIC. The latter statement alludes to other possible leaders, but nothing is stated outright. Whilst the Red and the Blue Textbook focus specifically on Gandhi's leadership, no details are provided in all three textbooks about what kind of success was achieved or what was changed. The reader is just made aware that there was success.

Anti-Indian legislation appears within the summary section of the Red and Green Textbooks. The Red Textbook includes two bullet points on anti-Indian legislation where the Green Textbook only includes one. This, once again, reinforces a vague historical narrative of Indian history in Natal and reinforces the narrative that it is of little importance. The Red Textbook includes a mention of political resistance only with the inclusion of the Satyagraha campaign (NIC and TIC are excluded) where the Green Textbook fails to include anything regarding political resistance. Both textbooks vaguely include a point on the discriminatory laws in place in the Transvaal but with very little substance.

5.4.2.7 Gender representation in India in the Grade 8 history textbooks

A strongly male dominated history is associated with Indian history in Grade 8 as there is little to no mention of women involvement in all three textbooks. The Green Textbook makes no mention of women in any capacity (indentured labour, Passenger Indians and as

protestors). The solely male focus is reinforced by the textbook's mention that the plantation owners only wanted strong young men to work for them. This statement creates an impression that Indian women were not involved in any capacity in South Africa and India's shared and collective memory. The Blue and Red Textbooks include only a limited portrayal of Indian women.

Both the Red and Blue Textbooks only make mention of females during the indentured labour system and no other place. Both textbooks offer a limited inclusion of women within the labour system; however, the Blue Textbook includes specific source material which offers a glimpse of the female indentured labourer perspective. The Blue Textbook does include a picture of a woman outside of the indentured labour system. The picture centres on Gandhi and the woman is an incidental inclusion; however, it does indicate, in a very limited capacity, women involved in the resistance against anti-Indian legislation. Only the Blue Textbook portrays an Indian woman, albeit in a severely limited capacity, within the resistance movement. Both the Red and Green Textbooks heavily silence women's involvement in the resistance campaigns.

5.4.2.8 How assessments influence the representation of India in Grade 8 history textbooks

Some form of activity or assessment is included in all three textbooks. There are activities and formal assessment tasks (these often act as a form of revision). In all three textbooks, indentured labour seems to be the primary focus in the assessments with a minimal mention on anti-Indian legislation and resistance. Questions or activities pertaining to Passenger Indians do not appear in any of the textbooks.

The Red Textbook focuses mainly on Indentured labour as only one question exists that references anti-Indian legislation. The formal assessment or revision task only features two lower-level questions on indentured labour – other Indian history is omitted. The Blue Textbook also mainly focuses on indentured labour with a small focus on resistance (Satyagraha Campaign and the TIC respectively). Only one question on Indian history appears in the exam revision assessment. All the questions pertaining to Indian history appear to be lower-level questions. Finally, the Red Textbook has three activities dealing with indentured labour, one dealing with anti-Indian legislation and one pertaining to resistance. The final assessment task includes a source on Gandhi along with five questions pertaining to

indentured labour. The questions are a range of levels. Only the Green Textbook offers a wide range of questions on indentured labour as the Red and Blue Textbooks include indentured labour as an incidental inclusion.

5.4.3 India in Grade 10 history textbooks

The India here focuses primarily on Mughal India with a small focus on indentured labour which emerges later in the textbooks. The Red and the Green²⁶ Textbooks include six pages of content whereas the Blue Textbook includes four pages. Sources appear disjointed within all three textbooks within the Mughal India section. The Red Textbook includes three written sources, which are mostly referenced; it includes eight unofficial visuals within the textbook but none act as a source. No visuals are referenced. The Blue Textbook includes a referenced written sources and five visual sources, none of which are referenced. Finally, the Green Textbook has no written sources and only includes visual sources in the Mughal India section. Little to no referencing occurs in the Green Textbook.

5.4.3.1 Representation of India in Grade 10 history textbooks

The representation of India is viewed through the lens of Mughal India, British occupation and indentured labour. Images of three Indias are provided: modern-day India, Mughal India and colonial India. The Red and Green Textbooks provide a fuller image of India in comparison to the Blue Textbook as it offers very little imagery prior to or post Mughal rule. Nevertheless, the Green Textbook alludes to a superior Mughal India in comparison to India.

5.4.3.1.1 The representation of modern-day India in Grade 10 history textbooks

A limited image of India is compiled within all three textbooks. India is depicted as extremely valuable because of its abundant resources. Both the Red and the Green Textbooks emphasise the value of India (because of its geographical location and resources) through its many historical invasions. Neither textbook references any negativity associated with these invasions. The Green Textbook asserts that these invasions led to the creation of the Mughal Empire which later became an asset to the British Empire. The Red Textbook notes that the result of these invasion led India to become the multi-cultural, multi-linguistic and religiously

²⁶ A reminder that the Green Textbook is smaller than its two counterparts as it is only A5 in size. This must be taken into account when looking at textbook pages and content coverage.

pluralistic country it is today. Despite this multi-cultural pluralism, all three textbooks only focus on Hindu and Islam as religious components of India. Little to no explanation of either religion is provided in all three textbooks. The Green Textbook is the only textbook to provide a small indication of another religion within India. The textbook notes on page 16 a Sikh rebellion which occurred. There is no detail about the rebellion itself and furthermore, no detail about the religion. This lack of focus reinforces the dominant theme that India's religious pluralism is rather a religious duality. In addition to a limited view on religion, all three textbooks shift towards a pro-Muslim narrative through the specific focus of Muslim or Mughal achievements.

The geographic location is considered quite important in both the Red and Green Textbook. All three textbooks provide at least one map²⁷ (mostly indicative of Mughal India) which emphasises India's optimal trade route access. India's trade route access is highlighted extensively during the Mughal period but within the modern-day context, India's geographic location and abundant resources have not changed.

5.4.3.1.2 Representation of Mughal India in Grade 10 history textbooks

Mughal India is described as containing extremely valuable, abundant resources and also boasted impressive cultural, scientific and intellectual achievements, specifically at the helm of Akbar. The Red Textbook comparatively argues the significance of Mughal India's achievements by European standards. A recurring theme is evident in all three textbook which highlights and underscores Mughal or Muslim contributions muting Hindu or other contributors. The selected semantics implicitly portray a pro-Muslim narrative.²⁸

The Blue and Green Textbooks discuss the possible provenance of the Mughal reign. The Blue Textbook states the Mughals were a powerful Muslim family which hailed from Afghanistan and Uzbekistan. The Green Textbook however, states that the Mughals were of Mongolian decent, originally from Afghanistan. Furthermore, the textbook emphasises the Mughals were descendants of powerful Muslim warriors. Both the Blue and the Green Textbooks place heavy emphasis on the power of the Mughals prior to any unpacking in the content; thus a heavily one-sided image emerges. The Blue Textbook is the only textbook of

²⁷ The Green Textbook has three redrawn maps of India. As a result, there is no referencing that has been included as there is no copyright infringement occurring.

²⁸ A notation needs to be made regarding editing errors and historical ambiguity on part of the Green Textbook.

the three to offer some background information, albeit brief, as to how the Mughal empire began.

Whilst several other emperors are briefly mentioned in each textbook, the consensus between the three textbooks is that Akbar is highly revered. Emperor Akbar and his contribution to the success of Mughal reign is heavily focused on. It creates an image that suggests Akbar is the Mughal Empire and the Mughal Empire is Akbar. Akbar is considered to be brave, ambitious, highly effective and to have contributed to the flourishing trade. However, the trait that is heavily emphasised in all three textbooks is that of his encouragement of religious tolerance. Religious tolerance is laid on thick in all three textbooks, so much so that the Red Textbook even blames Mughal decline on the move away from religious tolerance.

Scientific, cultural and intellectual contributions are included in all three textbooks in varying detail. The general image is that scholars were highly achieving. However, in the Blue and Green Textbooks there is a pro-Muslim undertone through its emphasis on Mughal scholars and muting of other contributors. For example, the Red Textbook explicitly refers to Muslim or Mughal contributors but is general/ neutral in other examples. This creates a muted image of other possible contributors to the achievements of the Empire and implicitly creates more of a focal point on Muslim achievements despite religious plurality.

Three separate reasons are provided for the cause of the decline of the Empire. The Red Textbook blames the move away from religious tolerance which led to internal struggles. The Blue Textbook places the blame squarely on the shoulders of Emperor Aurangzeb, but very little detail is provided. The Green Textbook blames poor political management. It was this political mismanagement that garnered the interest of the BEIC and according to the textbook, prior to the decline of political management, the BEIC had no interest in Mughal politics.

5.4.3.1.3 The representation of British India in Grade 10 history textbooks

In all three textbooks there is very little focus on British occupation but rather on that of the BEIC (EIC in Red Textbook). As such, there is often a distorted view of the difference between the two whilst offering a limited perspective on British colonisation and the impact it had on India. The Green Textbook offers only two lines regarding British occupation, while the Blue Textbook offers a very limited representation of British rule. The Red Textbook

includes four maps illustrating the evolution of British India from 1765 – 1857. The textbook uses the term *British India* in its illustration; however, it primarily focuses on the BEIC and only provides one sentence regarding India becoming a British colony. The Green Textbook has a favourable view of the BEIC. It reinforces this image by stating that it was only when the Mughal Empire declined that the BEIC were interested politically. This creates an image of an innocuous trade agreement. This image is reinforced by the Blue Textbook as it reinforces that the BEIC was only interested in trade initially and it was only with the decline of Mughal Empire when the BEIC became powerful.

There is very little explanation of the BEIC and as such there is often an overlap between them and the British government in the way of representation. There is an overall lack of detail in each textbook which severely underplays treatment of Indians by other the BEIC or the British government. The Green Textbook, on page 19, states, “this extension of British influence was widely resented by the Indians”. Through the use of passive voice, agency is removed on the part of the Indian population. Secondly, there is no differentiation between British governmental influence or BEIC influence. Thirdly, this statement underplays and obfuscates the impact of colonial expansion as it is referred to as “influence”.

Only the Blue and Green Textbooks include the Sepoy Uprising (1857 – 1858) which ultimately led to British takeover. The Red Textbook mentions a revolt but no name or detail is provided. Despite the Sepoy Uprising being a negative connection to the BEIC, only the Blue Textbook acknowledges this negativity. The Green Textbook overlooks any negativity on the part of the BEIC as any deaths or violence mentioned are placed at the feet of the Indians thus removing blame on the part of the BEIC. The Blue Textbook (through a written and a visual source) outrightly includes brutal imagery of the British response to the uprising. However, there is a lack of other examples of British treatment which creates doubt about whether this brutality was an isolated incident or not. Whilst the Green Textbook stipulates that the uprising became known as India’s first War of Independence, both the Blue and Green Textbooks offer very little in the way of detail of the rebellion, so a superficial and unfinished image is perpetuated. The Red and Green Textbooks note that, after this uprising, India became a British colony; however, the Blue Textbook makes no such notation. No textbook discusses British rule and ramifications of said rule any further. The Blue Textbook includes an activity (activity 3 p. 27) where the students need to list three events which contributed to British takeover. The responses needed relate solely to Mughal responsibility

thus place full blame on the Mughals for British occupation which obfuscates British accountability.

5.4.3.2 The representation of indentured labour and Passenger Indians in Grade 10 history textbooks

There is an overall limited view of indentured labour and a severely limited view of Passenger Indians in all three textbooks. The Red Textbook offers a more holistic view of indentured labour as it includes details of indentured life during and after the indentured contract. The Green Textbook is the only textbook to include brief details of indentured labour in other sectors such as transport and mining. Furthermore, the Green Textbook offers more in the way of concept clarity in that it discusses the etymological definition of the term *coolie* as well as including a brief description of the *sirdar*. The Red Textbook offers more in the description of poor living and working conditions closely followed by the Green Textbook²⁹. The Blue Textbook only allocates a single sentence to the working and living conditions of the indentured labourers which severely underplays the treatment of the Indentured labourers. Both the Blue and the Green Textbooks state that the indentured labour system ended in 1911 with only the Green Textbook explaining why.

There is conflicting information regarding the images of indentured labourers in the Green and Red Textbooks. The Red Textbook indicates that most indentured labourers were Hindu whereas the Green Textbook portrays an image of Muslim indentured labourers.

Passenger Indians are grossly under-represented in each of the three textbooks. Both the Green and the Blue Textbooks only offer two sentences to Passenger Indians where the Red Textbook offers three lines. The Blue Textbook offers an even vaguer image through its representation of Passenger Indians as “non-indentured migrants”.

5.4.2.3 Gender representation in India Grade 10 history textbooks

Mughal India, indentured labour and Passenger Indians follow a male-dominated rhetoric. There is no female representation when discussing Passenger Indians and a limited perspective is offered in the Mughal India and indentured labour sections.

²⁹ The Green Textbook uses sources (both written and visual) as content pieces. The sources are not used as a form of source analysis. In addition, very little referencing of the sources occurs which impacts the reliability of the sources. Very few sources that are referenced to include a date or provenance which further impacts the reliability of the sources.

Within Mughal India, the Green Textbook allocates four sentences to the role of women whereas in the Blue Textbook, women in Mughal India appear as an afterthought. Only one source and a small *Did you know* box provide any information on the role of women in Mughal India. The Red Textbook offers the most information in that it includes an image and a single paragraph which discusses the role of women in Mughal society.

The Red Textbook elevates Muslim women above Hindu women. The textbook describes Muslim women (aristocratic and harem) as well educated, influential and contributing to society by helping poorer women, funding artistic endeavours, and influencing policy. Hindu women are described as being supporters of their husbands as dictated by their religion – this is a very limited view of Hindu women. The Blue Textbook only includes a brief description of Muslim women. The Blue Textbook does not use any textbook content but rather a single written source and a *Did you know* box. The written source describes the education received by aristocratic women and elevates them above Iranian women at that time. The textbook does not expand on why it has selected Iranian women as a comparative example. In addition, two questions are used to engage with the source. The first question asks in what ways was Akbar’s Empire inclusive of rich Muslim women and why were Mughal women better off than Iranian women. Both questions are leading questions and provide a specific pro-Akbar leaning. Very little critical engagement is expected from these questions; however, the role of men is emphasised in these questions. The questions reinforce an image implied in the source that it was the men who allowed the inclusivity of women and women were better off in Mughal society because of the men. This assertion negates any accomplishments by women highlighted in the Blue Textbook. Secondly, the *Did you know* box states that women built about half of the important monuments under the reign of Shah Jahan. No further explanation is supplied. A superficial image of the importance of women in Mughal society is thus presented. The Green Textbook provides four sentences outlining the role of women. The first sentence on page 15 states that “women played a significant role in India”; however, the textbook only offers three lines to support that statement. The textbook lists activities women were allowed to do or were involved in but does not provide any real detail about their role in society. The textbook makes a side note later that both men and women were involved in the construction of the Taj Mahal; however, this is not elaborated further.

Only one woman is mentioned by name in the Blue and Green Textbooks: Mumtaz Mahal. She is only known as Shah Jahan’s favourite wife and it is her death that is more important as it prompted the construction of the Taj Mahal. No information about her is provided

considering her significance. A vague notation mentioning Akbar's wife is mentioned in the Blue Textbook; however, no name is provided, and she is only mentioned in that capacity of wife and mother as her significance lay in that she gave birth to Akbar's successor.

Only a vague image of women as indentured labourers appears in all three textbooks. The Red Textbook does elaborate further on the duties of women outside of farm labour and outlines their duties and responsibilities at home. The Blue and the Green Textbooks offer little in the way of female representation in indentured labour. The Blue Textbook includes an extremely limited view of both men and women in indentured labour and chooses a gender-neutral approach where the Green Textbook includes only a single image of women and a solitary mention in a written source. The source included in the Green Textbook is from the *Natal Mercury* which only focuses on the physique and sexuality of the indentured women arriving in Natal. The inclusion of this source not only provides a limited view of the role women played in indentured society but rather focuses on their looks and how the Natal Government perceived the women. Whilst this can be considered important to some extent, no further substantive information is provided which creates an extremely limiting view of Indian women in indentured society.

5.4.2.4 How assessments influence the representation of India in Grade 10 history textbooks

All three textbooks offer some form of assessment for Mughal India and indentured labour. No assessment activity is provided for Passenger Indians. Both the Red and Blue Textbooks offer three activities relating to Mughal India and one activity for indentured labour whereas the Green Textbook only offers one activity for each component.

Both the Red and Blue Textbooks cover a wide scope of Mughal India in their assessment questions and while the Red Textbook offers more variety in questioning per activity, the Blue Textbook does use multiple questioning techniques overall. The Green Textbook uses two sources as part of its single activity; however, these sources are unreferenced. The sources used in the activity have not been well referenced. Source A is a translation, but it does not state who translated the document. Secondly, no date is provided. Source B is a painting; however, the Green Textbook uses the terms painting and picture interchangeably in its caption. Additionally, no date is provided for the source. Furthermore, the activity appears

in favour of the success of the Mughal Dynasty. The key question of the activity (p. 20): *What made the Mughal rule of India so successful in the 15th century* is problematic in two ways. The first problem lies in the issue of chronology. Mughal India only began in the 16th century not the 15th as the question states. Secondly, the key question presumes success leaving little in the way of challenging the preconception. The questions do incorporate a variety of levels; however, they are geared towards a particular focus: the success of the Mughal India.

The indentured labour scope is different across the three textbooks. The Red Textbook uses multiple question techniques to address indentured labour. The Blue Textbook uses some source work as part of the activity and attempts to utilise all three levels, although a vague image of indentured labourers themselves appears. The Red Textbook uses four sources as part of its activity. However, each source is unreferenced nor do any dates appear, thus the reliability of these sources is questioned. The Green Textbook uses a single activity which includes multiple levels.

5.4.2.5 Conclusion

A consensus appears across the board that India is a large country with lots of resources and lots of outside interest. There is an overall generality with very limited specifics in the representation of India. India is seen through the lens of either Gandhi, colonial rule or indentured labour. Although some maps do appear sporadically through the grades and in various textbooks, there is a lack synchronicity in the geo-political visual representation of India. Furthermore, throughout the grades there is a lack of concept clarification regarding colonialism as well as a lack of critical discourse surrounding the religions of Hinduism and Islam. The lack of critical discourse is important to note as colonialism and both religions feature extensively throughout the grade; however, very little is actually explained, creating vague concepts.

Gandhi is ubiquitous in Grades 4, 8 and 10. There is an over-emphasis on Gandhi's heroic and sacrificial nature across the grades. Grade 4 places heavy emphasis on his herofied image to the extent that Gandhi becomes deified. In grades 8 and 10 Gandhi still appears and his activism is still mentioned. The deduction from this is that Gandhi is ubiquitous in India and as such India is Gandhi and Gandhi is India. In Grade 4, only one textbook details Gandhi's role in India and so Gandhi is strongly connected to South Africa, more so than India. Gandhi

as a leader is clear across the grades and through this any other leader is omitted altogether and so the perception is that Gandhi was the only leader and advocate for equal rights. It also leaves the impression that prior to Gandhi, there was no protest action. Gandhi's leadership image is reinforced through the mention of his activism throughout the grades and his activism, according to the textbooks, includes all marginalised people of colour. Only in a small notation in the Grade 4 Green Textbook is there an indication that Gandhi was anything but an advocate for equal rights for all.

There is a clear lack of colonial discourse evident throughout the textbooks. The textbooks do make notations (albeit inconsistently) that India was a British colony; however, very little else can be gleaned from this. There is no concept clarification that occurs at any point regarding what it meant to be a colony and what colonialism was. Furthermore, the extent of colonial control in India is omitted, thus creating a pro-British narrative. This pro-British narrative is reinforced by the lack of distinction between the BEIC and the British government. However, despite the BEIC and the term *British* being used interchangeably thus clouding distinction, most negativity is placed clearly at the door of the BEIC. The overall omission of blame and lack of negativity reinforces a pro-British narrative. It is only with the Grade 4 Red Textbook and the Grade 10 Blue Textbook where any negativity or brutality at the hands of the British government are mentioned. However, these notations are not key elements and appear as an afterthought which further entrenches the pro-British narrative across the grades.

A detailed description of India only occurs through its ancient counterpart, Mughal India. Mughal India is viewed very positively, especially at the helm of Akbar. Akbar's success is reinforced throughout all three textbooks. It could be assumed that his success and the reason for the focus is his promotion of religious tolerance. Religious tolerance and the promotion thereof appear in the CAPS curriculum and so the promotion of Akbar is heavily linked to this predisposed expectation of history.

Indentured labour is a lens through which we learn about India. In saying this, there is an uneven understanding regarding indentured labour, and it remains overtly male at times. The living and working conditions are not evenly presented across the grades and sometimes overlooked or glossed over completely. In addition, the gender disparity across the textbooks regarding women in indentured labour is uneven. Passenger Indians barely feature within the textbook and as such play a significantly less important role within the textbook. The uneven

and even superficial account of both indentured labour and Passenger Indians reinforces the vague and generalised representation of India in South Africa's history. India and Indian people's contribution to South African history is deemed superficial through its lack of representation in examples such as indentured labour and Passenger Indians.

There is a very obvious silence when it comes to female representation. The inclusion of women appears as an afterthought throughout, including the sections dedicated to women in the Mughal Empire. In Grade 10, the textbooks claim that women played an important role in Mughal society; however very little detail is included. Furthermore, women as indentured labourers appear unevenly in the textbooks throughout. The Green Grade 8 Textbook even omits women altogether in its representation of indentured labour and so indentured labour appears as only a masculine endeavour. What emerges is a superficial image of women's contribution to history as it is shadowed by the male-dominant historical rhetoric.

With the inclusion of the summary in most of the textbooks it creates a battle between memory and skill. The summary sections severely undercut and limit the already limited content within the textbook. This extreme limitation plays into the current historical education debate: is history about memory or critical inquiry? The repeated inclusion of summaries lends itself to the ideas that the textbook authors have specifically deemed selected content as being 'memorable' and dictate then what should be remembered.

PART FOUR: CHINA AS REPRESENTED IN THE SOUTH AFRICA SCHOOL HISTORY TEXTBOOKS

5.5 Introduction

China, or the history of China, is only addressed directly in Grade 10 and Grade 12 and indirectly in Grade 9. Whilst China is not directly discussed in Grade 9, it does make a brief appearance in Grade 9 textbooks in the section pertaining to the Pacific War. Grade 10 focuses directly on China through Ming China which appears in the overall topic: *The world around 1600*. In Grade 12, China's history and China's global position is discussed in a variety of spaces. It is first directly addressed as a case study example of the extension of the Cold War. Secondly, China is indirectly included in the *Independent Africa* section. There is, overall, quite a large coverage of China in varying socio-political time periods. China is only briefly observed in Grade 9, an exit year, and so, the majority of the image China emerges from the FET phase.

5.5.1 China in Grade 9 history textbooks

There is only a small section relating to China in Grade 9 because the primary focus is Japanese aggression. China appears as a pawn to illustrate Japanese aggression rather than as the main character. Despite it being a small section, the Blue and the Green Textbooks offer two sources each. The Red Textbook does not provide any sources. Both the Blue and the Green Textbooks include violent visual sources to depict the Nanking Massacre. The Green Textbook includes both a visual and a written source with the written source being the only one referenced. The Blue Textbook includes one visual/written source combination as well as a second written source. The combined source is not well referenced in that only the URL is provided, and the second source is also not fully referenced.

5.5.1.1 The representation of China in Grade 9 history textbooks

All three textbooks focus on one primary event: the Rape of Nanking (Nanjing). The Rape of Nanking is described by all three textbooks as the worst of the massacres perpetrated by the Japanese when they invaded China in the 1930s. Despite this adage, each textbook's content

and portrayal of the event differs significantly. Each textbook notes the Japanese expansion and suggests aggression outside of Nanking, but very limited detail is provided about any other incident.

The Rape of Nanking is included as a result of a Japanese expansion into China in all three textbooks. The Red and Green Textbooks are on opposite spectrums in terms of how they have unpacked the invasion and massacre whereas the Blue Textbook is more likely considered in-between in comparison. The Red Textbook heavily emphasises the victimhood of China and its brutalisation through the written text and visual imagery. The heavy imagery is emphasised by the repeated use of terms (including root variations of said words): brutal, cruel and inhuman. The term *atrocious* has been included three times within this section, once again highlighting the brutal imagery. In addition, the brutal imagery is perpetuated through the inclusion of specific details of the massacre which involves Japan enforcing slave labour and sex slavery and instituting chemical and medical experimentation. The Red Textbook alludes to another event where Japan took over Manchuria in 1931, but the focus is primarily on the Nanking massacre³⁰. The lack of detail regarding the invasion of Manchuria in comparison to the apparent brutality of the 1937 Nanking massacre highlights what has been considered historically significant by the authors. The Green Textbook conversely provides an extremely limited and vague overall image of China. Whilst the Red and Blue Textbooks portray a helpless China in the face of Japanese aggression, the Green Textbook, although noting Japanese aggression, does not provide much detail on China effectively creating an almost one-dimensional view of China. Similarly to the Red Textbook, the Green Textbook views China mostly through the lens of the Rape of Nanking. Despite this said focus, only half a page, one written and one visual source are dedicated to this section, thus a limited view of the massacre is provided. The Blue Textbook provides a moderate inclusion of the Nanking Massacre; however, the focus is more on Japan and China appears as a passive and obscure agent within Japanese history. The textbook content itself is thin; however, sources are included to provide more detail of the Nanking massacre. Only seven sentences detail the Japanese invasion and the Rape of Nanking. Despite the textbook stating the Nanking was the worst massacre, very little detail is provided. Nanking and Nanjing are

³⁰ It is important to note that the Red Textbook does not reference the Nanking massacre as *The Rape of Nanking*, the historical term used to identify the specific massacre.

used interchangeably (depending on the source) in the Red and Blue Textbooks; however, the Blue Textbook does not provide any conceptual explanation for the difference in spelling.

The Blue Textbook does not include a summary section where the Red and the Green Textbook do. Both the Green and the Red Textbook included an extremely limited view of the Japanese invasion and what is emphasised is that Japan attacked China and committed terrible acts. Little to no further detail is provided thus a reinforcement of China's brutalised image is included in the summaries.

The Rape of Nanking is the key event in all three textbooks; however, the Red and Blue Textbook use the event to emphasise the heroic nature of the US. In both the Red and Blue Textbook, the Japanese invasion and subsequent massacre in Nanking has very little to do with China but is used more as an excuse for US involvement which emphasise Japan as the villain and US as the hero while China is the helpless victim. The Blue Textbook includes China's economic importance and value as another reason for American involvement. Furthermore, the textbook reiterates the economic sanctions placed on China in order to aid China in defence against Japan – an extended image of a heroic US and a helpless China.

5.5.1.2 How assessment influences the representation of China in Grade 9 history textbooks

Each Grade 9 textbook includes one assessment which covers the Japanese invasion of Manchuria but each textbook has approached the topic differently. The Red Textbook focuses on the prejudice held by Japanese against the Chinese whereas the Blue Textbook's assessment is centred on two sources. No provenance is provided for the two sources, yet the assessment relies heavily on source and point of view analysis. The Green Textbook asks the students to compare the Nanking massacre to that of the Nazis and the Holocaust.

5.5.2 China in the Grade 10 textbooks

Both the Grade 10 Red and Blue Textbooks encompass Ming China in five pages whereas the Green Textbook covers it in seven. The inclusion of well-referenced sources has been uneven in both the Green³¹ and the Blue Textbooks. The Blue and the Green Textbooks include multiple sources but not all are fully referenced. The Blue Textbook uses eight sources where

³¹ The Green Textbook is A5 in size and is subsequently smaller in comparison to the Red and Blue Textbook.

only two sources are referenced, and the Green Textbook includes seven visual sources (one of which was used for analysis) and four take up half a page each. Of the seven sources, referencing appears uneven across the board. The Red Textbook only utilises visual sources – there are no written sources which appear in the Ming China section. Little to no referencing occurs in the Red Textbook.

All three textbooks include a preamble which discusses what societies there were in 1600, which includes: Ming China, Songhay (or Songhai), Mughal India and European societies. A map, with varying details, is included in all three textbooks which highlights each of the empires. The Green Textbook's map is more of a juvenile representation. The map labels each continent and highlights the Empires under discussion. Next to the names of the societies identified on the map, a visual image is included. Europe is represented by a castle whereas Ming China and Mughal (Mogul as it is written there) India are represented by stereotypical caricatures. In the preamble, the Blue Textbook further notes that Europe was not very influential or powerful beyond their borders in comparison to other societies at the time. Only from the 1660s did Europe emerge as a dominant power, according to the Blue Textbook. This inclusion reinforces the Eurocentric despite the topic including multiple empires at the time.

5.5.2.1 The representation of China in Grade 10 history textbooks

An overall view of modern-day China is limited within the section as the main focus is on Ming China. In saying this, there is an image of modern-day China that does emerge, albeit unfinished. The Red Textbook references China's extensive history, advanced society (especially in comparison to European society) and notable inventions. In addition, it notes China's active land and ocean trade with multiple trade partners. The Red Textbook provides some specifics regarding Chinese prowess whereas the Blue and the Green Textbook offer limited or vague examples. The Green Textbook makes note of China's large size, large poor population in juxtaposition to its advanced society. The Blue Textbook only states that China is one of the greatest economic and political forces in the world (p. 8). This statement is further supported by the Blue Textbook's note that more will be learned about China in Grade 12, thus providing a scaffolding of connection between Grade 10 and Grade 12 content knowledge. A similar example can be seen in the Green Textbook when the topic of the

Forbidden City is mentioned. The Forbidden City is noted as a World Heritage Site suggesting the longevity and significance of Ming China for today's current China.

5.5.2.2 The representation of Ming China in Grade 10 history textbooks

Ming China is viewed through different angles in all three textbooks. The Red Textbook displays an extremely oversimplified view of the Ming Dynasty where the Blue Textbook displays an overtly favourable view. The Green Textbook depicts the Ming Dynasty somewhat favourably; however, it is overshadowed by the multiple historical inaccuracies and ambiguity throughout.

The Red Textbook does not mention any names of any Emperors. Only Zheng He is mentioned by name, and it is his travels that are the main focal point. Despite this limited overall focus, an image of a sophisticated and a self-sufficient Ming China emerges. The Red Textbook also is very clear in Ming China's superiority over Europe.

The Blue Textbook does include some contextual overlaps with the Green Textbook, but I am going to discuss each book separately to account for the numerous errors and ambiguity in the Green Textbook. The primary focus of the Blue Textbook is the Ming achievements. These achievements have been represented extremely favourably. Within this framework, Emperors Hongwu and Yongle are mentioned; however, they are the only emperors mentioned and their dates of reign and succession are not mentioned. Both Hongwu and Yongle are described mostly favourably with a few negative characteristics attributed to the former. Ming achievements are characterised by the army, navy, expeditions, architecture and trade accomplishments. The Blue Textbook reiterates the trading power of Ming China by including a comparison to European powers to highlight the superiority of Ming China. Brief information is available regarding China's decision to look inward in 1433 and its subsequent decline. The textbook does note some territorial expansion in that time; however, the focus remains on China's isolation from the rest of the world. Furthermore, the textbook states that it took China 400 years for China to reopen. Although a seemingly innocuous statement, it omits any agency on the reason for reopening and suggests China was alone in this decision.

The Green Textbook has four historical inaccuracies within the Ming China section. This is over and above ambiguities found within the textbook. The initial impression of the textbook is one that it is either rushed or poorly researched or both. Because the errors extend across

the section, I will not list them as that might cause chronological confusion. Instead, I will include the errors as the analysis unfolds organically.

The first inaccuracy occurs in the first subheading: *Now we are going to examine how the Ming Dynasty ruled China between 1348 and 1644* (p.2). The Ming Dynasty officially began in 1368. Although this error is corrected in the next line, the section begins with two contradictory dates leading to historical confusion.

The focus of the Green Textbook is on the many achievements of the Ming Dynasty. One page is dedicated to the building of the Forbidden City and three-quarters of a page is given to the Great Wall (largely a picture). Only two emperors are mentioned: Hongwu and Yongle. Both are described as having absolute and great power. The Green Textbook provides a confusing and ambiguous image when discussing the two emperors. The textbook only refers to Emperor Hongwu, which is the imperial title, and not by his name Zhu YuanZang prior to becoming emperor. It provides an ambiguous image in terms of the identity of Hongwu as both emperor and peasant. Furthermore, it neglects Chinese imperial naming tradition. This neglect continues in the representation of Emperor Yongle. The names Emperor Yongle and Emperor Zhu Dhi are used interchangeably, so much so that they appear as separate entities when they are one person. This continued overlapping of names removes the importance of Imperial naming tradition and also provides a confusing image of rulership as Yongle and Zhu Dhi come across as two emperors.

The travel done during the Ming era is vague in detail and so is the inclusion of Zheng He; however, a redrawn map is included to illustrate the travels of Zheng He. The travel section serves to reinforce that China did not want to colonise but merely extend its influence in South-East Asia. This innocuous inclusion overlooks and undermines the polity control China had in South-East Asia. The textbook states that Zheng He's voyages were from 1405 until 1423; however, this is inaccurate. The accepted date is that of 1433. Zheng He died on his last voyage in 1433; however, the textbook states that Emperor Yongle (who died in 1424) put an end to the voyages.

Two more historical errors occur when discussing China's inward move and subsequent decline. The textbook incorrectly states that China began to look inwards in 1423 not 1433. Secondly, the textbook states that the Ming Dynasty was overthrown by Mongol invaders in 1644; however, the Ming Dynasty was overthrown by the Manchus. Mongols (of the Yuan

Dynasty) preceded the Ming Dynasty which is indicated earlier in the Green Textbook. This provides a very confusing and inaccurate image of the decline of the Ming reign. Overall, the number of inaccuracies in the Green Textbook cloud the image of Ming China thus creating a severely distorted image.

A summary section appears in both the Red and the Blue Textbooks. The Red Textbook includes three bullet points whereas the Blue Textbook includes six points. The Blue Textbook includes an inaccuracy in the bullet points as it states that China looked inward in 1423 and not 1433. The inaccuracy in the Blue Textbook highlights the lack of textbook consistency and editing. Furthermore, this inaccuracy creates a distorted image of Ming China within the Blue Textbook.

5.5.2.3 Gender representation in China in the Grade 10 history textbooks

Each section pertaining to women is small and limited across the three textbook sections. The larger section appears in the Red Textbook where two paragraphs are included. The Blue Textbook only includes four sentences dedicated to women in Ming China and the Green Textbook has one bullet point with four sub-points pertaining to women in Ming China. Only the Red Textbook includes a separate section where women in Ming China are included thus separating women's involvement from the rest of the masculine history. The Blue and the Green Textbooks have attempted to integrate women with the rest of Ming China's history; however, it has not been integrated very well and a separation still occurs. Because of the limited information available in the Blue and Green Textbooks, the inclusion and attempted integration of women's history appear more as an afterthought rather than as an inclusive part of history. In all three textbooks, Ming history is largely masculine, and accomplishments made by women are inextricably tied to men. In both the Blue and the Green Textbooks, women are mostly described as wives and mothers thus perpetuating their ties to masculine identity.

Ming China's history is largely male dominated with no specific achievements attributed to women in any textbook. If an achievement is alluded to, no detail and no specifics are provided. An example can be seen in both the Red and the Blue Textbooks. The Red Textbook includes a mention that during Ming China, an anthology was written by 1000 female poets. Despite this contribution to the Arts, no names or any other specifics are included. The Blue Textbook also includes a side notation of female writers and poets but no

names are included. Furthermore, the Red Textbook specifically separates women from the rest of Ming China; however, it does not provide any names nor any specifics regarding female achievements or contributions. The Red Textbook only includes five names within the Ming section but no females are included. The Blue Textbook includes a notation that two women became high ranking officers: General Shen Yunying and Commander-in-Chief Qin Liangyu. Whilst an admirable inclusion, indicating some women's involvement outside of Arts and Literature, the textbook does not extend on the topic. No further details are provided about the women and no achievements are included, which provide a vague image which reiterates the token inclusion of women in Ming China.

To further reiterate the male dominant history of Ming China, any ambitions of women, as identified in the Green and Blue Textbooks, are inextricably tied to men. Furthermore, in both the Blue and the Green Textbooks, women are seen as largely mothers and wives. This creates an image of any female ambitions being entirely dependent on that of the men. The Blue Textbook does acknowledge the dominant male history, but does very little to adjust this perception. Likewise, it states that only in later Ming years did women achieve higher education; however, the textbook only states the reason for this being that mothers wanted to help their sons with the civil service exam. The maternal capability and connection to education is downplayed alongside any female ambition as female ambition aligns only with the achievements of men and sons. This is extended in the Green Textbook where it states that women received an education because of the belief that a well-educated women equated to a good wife and mother. An important semantic choice is made by the Blue Textbook in its description of a dynasty. It states that a dynasty is a line of kings or emperors (p. 16). The masculine proper noun has been used to define a dynasty thus omitting any female contribution or connection to a dynasty, solidifying the masculine history of the Ming Era.

Few societal expectations or roles are mentioned in any textbook thus a vague image of women in Ming society is perpetuated. Only the Red and the Green Textbooks make mention of some societal values affecting women. The Green Textbook alludes to women having to be obedient and conduct household chores whereas the Red Textbook looks at the holistic view of women in society. It makes mention of society's preference for males and the unofficial killing of girl babies as a result. Both the Green and the Red Textbooks make a note of the foot-binding practice. Although there is some indication of societal values and

cultural practices, details are limiting at best and thus an incomplete image of women in Ming society appears across the three textbooks.

5.5.5.2.4 The Eurocentric reflection in the Grade 10 history textbooks

Both the Red and the Green Textbooks compare Ming China with that of Europe. Between the two textbooks there is a constant Eurocentric reflection which idealises a European benchmark. Both textbooks use the European benchmark as a way to compare China's prowess and advancement; however, it provides an image that the only comparable power at that time (or in History) is that of Europe. This imagery is particularly emphasised in the Green Textbook where Europe is the only other power mentioned. The Blue Textbook does not focus on a comparison but rather Europe forms part of the story as opposed to a benchmark.

The Red Textbook only includes five names, none of which are the emperors but three out of the five names included are Western names. This is significant as very few Ming-specific names are included yet the authors opted to include, in some cases, obscure names such as: Marco Polo, Gavin Menzies and Matteo Ricci. Polo and Ricci are included as a way of adding their authority, highlighting Ming China's prowess in many areas. The Blue Textbook does not make mention of any specific European names but Europe is treated as Ming China's sole trading partner. South-East Asia is mentioned but only in the extension of influence and not comparable trading partners. In addition, the textbook mentions how Chinese traders traversed long distances along the Great Silk Road to meet with European traders in the Mediterranean. The discourse creates an image of the Chinese doing the sole work with no sign of reciprocity which places the power at the hands of Europe and alludes to them being a powerful trading partner, worthy of the distance.

All three textbooks include a preamble, but only the Red and the Green Textbooks discuss the Eurocentric focus. The Red Textbook acknowledges historical domination of the North (Europe) whereas the Green Textbook provides an image that the world was isolated prior to European exploration thus strongly emphasising and supporting a Eurocentric focus.

5.5.2.5 How assessment influences the representation of China in the Grade 10 history textbooks

All three textbooks include some form of assessment. The Red Textbook includes three assessments which includes a wide variety of question levels and critical engagement. The Blue Textbook includes four assessments which mostly focus on the positives of Ming China, Hongwu and post-Ming China. An attempt at critical engagement has been made despite the unbalanced question levels. The Green Textbook, however, only includes one assessment and one self-enrichment exercise. The assessment task attempts source analysis but only one, unreferenced source is used.

5.5.3 China in Grade 12 history textbooks

China is a broad section within the Grade 12 section. It appears as a stand-alone section to offer as an extension to the Cold War. Secondly, China appears as a secondary character in Independent Africa's history. China's history can be broken down into two sections: internal history and foreign policy.

A key element to consider in this section relates to the use of the sources in each of the textbooks. Many of the sources used across all three textbooks are western. In addition to the Western-centric nature of the sources, source discrepancy across all three textbooks should be noted. Not all sources are referenced, and often the visual images remain unreferenced. Furthermore, the Red Textbook includes 18 sources, the Blue Textbook includes 31 sources where the Green Textbook only includes five sources.

I have included here an analysis of the source discrepancy using China's internal history as an example. The focus is on China and China's internal history, yet the sources remain largely western-centric. In addition to the western-centric focus, the inclusion of some sources remains noteworthy. The Red Textbook includes five official sources: three visual and two written. The two written sources are western-centric whilst the three visual sources remain unreferenced. The Green Textbook includes three unreferenced visuals; however, they are not used as sources within the textbook. One written, western-centric source is included. The Blue Textbook includes the greatest number of sources: eight written sources and three official, unreferenced visual sources. In addition, the Blue Textbook includes eight in-text citations, seven of which are western-centric. The eight written sources are western-centric; however, it is noted that when J. Green has been referenced, a double reference occurs. The source itself indicates J. Green but the caption provides the original provenance. This adds a confusing element as it is unclear as to which is the provenance intended by the textbook.

Furthermore, it is unclear as to why the textbook did not include the original text if it was quite specific in indicating it within the textbook.

5.5.3.1 The representation of China's internal history in the Grade 12 history textbooks

In all three textbooks, there is some focus on China's own internal history and policies before turning attention to China's foreign policies and relationships with neighbouring countries and the US and SU. The rise of Communist China, the Great Leap Forward and the Cultural Revolution are key aspects discussed in all three textbooks which focus specifically on China's internal development. A varying range of textbook space is dedicated to China's internal policies across the three textbooks: The Red book offers five pages; the Blue Textbook uses seven pages; and the Green Textbook offers two and a half pages. Space allocation, both in written and visual aspects, is a vital component in noting the perceived importance of sections.

Despite having the least amount of space dedicated to China's internal development, the Green Textbook allocates roughly the same amount of textbook space to the establishment of communist China compared to its counterparts. Both the Green and the Red Textbooks offer a page to the establishment of communist China whereas the Blue Textbook allocates two pages. In saying this, the Blue Textbook includes two very large maps within those two pages so very little written text is included overall within the two pages. The Red Textbook is the only textbook to state that the section pertaining to the establishment of communist China is not examinable. All three textbooks have a different focus when unpacking the rise of China's communist party. The Red Textbook focuses on the rise of the Chinese Communist Party (CCP) whereas the Blue Textbook focuses more on US support for the Kuomintang (KMT) which implies a more legitimate authority over that of the CCP. The Green Textbook is chronologically and structurally all over the place; however, the focus is more on the Japanese involvement in China and the KMT response. All three textbooks mention the Chinese Civil War (1927 - 1945); however, the Green Textbook is very unclear about the chronology of this event. No clear dates regarding the start of the Civil War are provided by the Green Textbook; furthermore, the textbook notes in two places a fight with the communists. The first indicates that Chiang-Kai-Shek was now fighting both the communists and the Japanese. However, a few sentences later, it states that after the Japanese were defeated, a Civil War broke out. No dates are provided, and the confusing coverage does not

provide a historically clear image of the Chinese Civil War. The Red and Blue Textbooks indicate the creation of the CCP in 1921; however, the Green Textbook only indicates “the newly formed Chinese Communist Party” on page 26. No abbreviation is provided and unlike the Red and Blue Textbook, the CCP is not mentioned in any other capacity during the establishment of communist China. The Green Textbook uses the blanket term “the communists” throughout as opposed to the use of the CCP. This removes any specific agency and leadership during this particular historical period, and although Mao is mentioned as a leader of “the communists” (p. 26), a vague image of an opposition party is created. This is furthered by the Green Textbook’s choice of words after the loss of Civil War. It does not mention a political group or leader, but refers to “communist China” (p.27). In a single paragraph of seven sentences, the Green Textbook mentions the term *communist China* six times. It is used to distinguish between Nationalist China or Taiwan; however, the textbook mostly refers to Taiwan and so there would be no confusion. The repetition of the term *communist* reinforces a very specific bully-like image which is reinforced negatively in the context of the textbook.

Only the Red Textbook focuses more on the rise of the CCP whilst the Blue and the Green Textbook focus more on the KMT resulting in a perception of legitimate authority that sways in favour of the KMT. All three textbooks note that the West (or US specifically in the Green and Blue Textbooks) supported Taiwan initially as the official authority prior to the 1970s. The Red and Blue Textbooks discuss the creation of two contrasting governments vying for legitimacy; however, the Green Textbook is the only one to merge these separate governments into one unit that is referenced as “two Chinas” (p.27). The textbook offers a contradictory view of the two Chinas. It states that the two Chinas still exist today which suggests that Taiwan is still tethered to or wants to be part of China. However, the textbook also notes that China does not recognise Taiwan as an independent state. A confusing representation of both China and Taiwan and their co-existence as ‘the two Chinas’ is created.

Whilst all three textbooks provide some space and detail regarding the establishment of communist China, there is an overall lack of specifics – especially in regard to the Civil War. The result is that there is a combined view that there was some upheaval between two major political parties at the turn of the 20th Century; however, very little specifics are provided which presents a vague and incomplete image of China’s development.

The Blue Textbook is the only textbook to include the 100 Flowers Campaign instituted by Mao, albeit a brief section. A negative representation of Mao emerges from this section as it illuminates a man willing to allow for criticism in order to identify possible opponents to his regime. The textbook uses terms such as *forced*, *hard labour* and *expelled* (p. 24) to describe consequence for those targeted by Mao. However, very little detail is included, so despite blame being shifted to Mao, an extremely vague and glossed over image of what happened to opponents is formed.

The Great Leap Forward is not well covered in comparison to that of the Cultural Revolution. The Red Textbook stipulates that the Great Leap Forward is not an examinable section which offers some insight as to the reason for the limitation. With this being said, the Blue Textbook offers the most in the way of coverage in its one page, whereas the Red Textbook uses ten sentences, and the Green Textbook contributes two sentences towards the Great Leap Forward.

All three textbooks agree that the Great Leap Forward is considered a failure but the extent of the effects of it differ. The Red and the Green Textbooks both dedicate a single sentence to describing the effects of the policy whereas the Blue Textbook offers a bit more detail. The Red Textbook mentions a famine and the approximate number of deaths but no further detail is provided and so a vague, disconnected image of the negativity emerges. This image is further perpetuated in the Green Textbook as it uses obtuse and vague language to describe the effects. It states that there were many deaths as a result of food shortages (p. 27). Using terms *food shortages* and *many deaths*, it drastically underplays the severity of the Great Leap Forward creating a candy-coated image of the policy. The Blue Textbook does go into relative detail regarding the effects of the policy thus providing a somewhat fuller image in comparison to the Red and Blue Textbooks. Only the Red Textbook makes a note of any civilian opposition to this policy, thus creating an overall incomplete image of the effects and response.

The blame for the Great Leap Forward is placed firmly in the hands of Mao across all three textbooks. All three include Mao's position being lost; however, it works hand-in-hand with the Cultural Revolution, so it appears more in conjunction with that section. Only the Blue Textbook includes a contemporary element as it states that the government has not admitted its mistakes. This is furthered by the reference that civilians refer to the Great Leap Forward

as the Three Bitter Years which downplays the toll it took on China yet emphasises the political malleability of the event.

The detail of the Cultural Revolution differs amongst the three textbooks, despite it being the key focus (examinable). The Red Textbook provides three pages of detail whereas the Blue Textbook provides five pages. The Red and Blue Textbooks greatly outweigh the Green Textbook in terms of content coverage as the Green Textbook only allocates twelve sentences and one source to the Cultural Revolution.

The Blue and the Green Textbooks place some blame on Mao, with the Blue Textbook being more forceful in this placement. The Red Textbook, however, does not initially acknowledge Mao's accountability in the Cultural Revolution but takes a more neutral perspective. There is a slight shift of blame seen in the Green Textbook, where emphasis is placed on the uneducated youth. Although the Red Textbook does indicate that Mao began the Cultural Revolution, the focus is on the Red Guards. In keeping with its neutral approach, the textbook offers two schools of thought regarding the reason for Mao starting the Cultural Revolution. The textbook does not align itself to either reason but merely provides the scholarly postulation.

An overall vagueness and lack of context of the Cultural Revolution occurs across all three textbooks. The involvement of the youth and the implication of *how* young the Red Guards were, is only noted in the Green Textbook. The Blue Textbook offers a vague implication of youth however no ages are mentioned in the textbook content but are implied in the sources. This omission creates a vague representation of the implications of the Cultural Revolution and its impact on society. In addition, both the Green and the Red Textbooks allocate one sentence to the human cost. The Blue Textbook also only includes a single sentence on the human cost; however, more information is provided in a source thus a fuller image is provided at a later stage. This lack of detail overlooks multiple elements and as such downplays the impact of the Cultural Revolution on ordinary citizens.

A key element to consider in this section relates to the use of the sources in each of the textbooks. Many of the sources used across all three textbooks are western. The implication of this is interesting. The focus is on China and China's internal history; yet, the sources remain largely western-centric. In addition to the western-centric focus, the inclusion of some sources remains noteworthy. The Red Textbook includes five official sources: three visual and two written. The two written sources are western-centric whilst the three visual sources

remain unreferenced. The Green Textbook includes three unreferenced visuals but they are not used as sources within the textbook. One written, western-centric source is included. The Blue Textbook includes the greatest number of sources: eight written sources and three official, unreferenced visual sources. In addition, the Blue Textbook includes eight in-text citations, seven of which are western-centric. The eight written sources are western-centric; however, it is noted that when J. Green has been referenced, a double reference occurs. The source itself indicates J. Green but the caption provides the original provenance. This adds a confusing element as it is unclear as to which is the provenance intended by the textbook. Furthermore, it is unclear as to why the textbook did not include the original text if it was quite specific in indicating it within the textbook.

5.5.3.2 The representation of the interplay between China, SU and the US in the Grade 12 history textbooks

Within all three textbooks the relationship between China, the SU and the US reads as an entangled love triangle from a trite romance genre. Each textbook has depicted this interplay between China, SU and the US differently. The Green Textbook offers an exceptionally vague and incomplete image of this interplay in its three pages. The interplay is quite difficult to follow or read due to the textbook's chosen grammatical style which comes across more staccato than actual paragraphing. The content appears more as a list that has neither been elaborated nor contextualised. The Blue Textbook depicts the interplay over seven pages whereas the Red Textbook dedicates just under six pages. The Blue Textbook depicts an extremely negative portrayal of the SU, more specifically Khrushchev, with an overtly favourable attitude to the US. Where the Blue Textbook focuses more on the SU and Khrushchev, the Red Textbook narrows its focus to the relationship between China, the SU and the US. It has a largely unfavourable undertone of the relationship between China and SU in comparison to the more favourable imagery between China and the US. In both the Blue and the Red Textbooks, the US is depicted as the hero in China's story and the more favourable choice.

The Red Textbook depicts a triad between China, SU and the US but it is not a symbiotic triad. As China's relationship with the US improved, so her relationship with the SU soured. The textbook continuously depicts the relationship between China and the SU as frosty and almost toxic over and above the inherent competitive nature between the two. The unfavourable and toxic imagery depicts a China in an abusive relationship with SU as SU is depicted as dominating China and dominating China's implementation and interpretation of

communism. Whilst there is a slight anti-Khrushchev narrative, it is not overwhelming as the textbook mainly focuses on the changing nature of the relationship between China and the SU. In addition, there is a somewhat juvenile representation of China in the Red Textbook. China, at times, appears as the petulant child in the relationship through its demands of Russia. Despite this, China is depicted as better off without Russia, which is a commonality shared amongst all three textbooks. In addition, the Red Textbook perpetuates an uneven view of China. Not only is it often viewed as a petulant child, any governmental wrong-doing or negligence is overlooked in favour of economic success. Furthermore, the Red (and Blue) Textbook mostly focuses on China's representation of SU which leaves a one-sided representation of the relationship between the two.

The Blue Textbook is extremely anti-Khrushchev and focuses more on Khrushchev as opposed to the Soviet Union as a whole. The narrative indicates that the reason for existing tension between China and Russia is as a direct result of the political leadership of Khrushchev. The anti-Khrushchev and anti-Soviet Union reasoning is repeated on four separate occasions thus emphasising the severing of the relationship between the SU and China being the fault of Khrushchev. Through this over-emphasis, it places blame on Russia and its (or Khrushchev's) policies thus highlighting good reasons for China's exit of the relationship. The heavy blame creates a villain within in the trio and China is therefore better off with the heroic US.

The narrative of an eventual mutualistic relationship with the US appears in all three textbooks. This ties in heavily with China's position and relationship with its border countries. The Red Textbook does not offer any consistency in this mutualistic and heroic Sino-US partnership when looking at China's relationship with its neighbours and, by extension, its relationship with the US.

5.5.3.3 The representation of China's global position in the Grade 12 history textbooks

China's position and influence on the global scale is a theme that is present within each textbook. China's relationship with its neighbouring countries as well as China's influence in Africa is focused on. At times, these relationships are discussed in conjunction with the influence of SU and US.

Although all three textbooks include a map illustrating China's border countries, the three textbooks present China's relationship with its border countries differently in both space allocation and representation. The Red Textbook provides the most space when discussing China's relationship with Tibet, India, Vietnam and Taiwan. Tibet and India are allocated one and a half pages each, Vietnam is given just under a page and Taiwan is allocated half a page (five pages total). The Blue Textbook utilised three pages in total and the Green Textbook offers two pages in total for all countries. In addition, the Red Textbook attempts to include a view on earlier China (pre-Mao) in addition to Mao's China. Only a contemporary China is unpacked in the Blue and Green Textbooks.

5.5.3.3.1 The representation of China and Tibet

China is depicted as the aggressor nation in both the Red and the Blue Textbooks; however, the position of Tibetan leader, the Dalai Lama, is questioned in the Green Textbook. The Green Textbook generates a vague image, and sometimes a mixed message, of both China and Tibet's relationship. Chinese blame is largely shifted or omitted within the Green Textbook. Furthermore, the textbook states that Tibet was accepted as part of China but does not stipulate by whom and so agency and historical tension is overlooked. The Green Textbook notes China's attempt to modernise Tibet which led to riots – through the discourse, a positive image of China appears where a negative response by Tibet is included which insinuates a negative portrayal. The negative imagery is extended through a classroom activity on page 34 where the Green Textbook asks students to examine the issues caused by the Dalai Lama's position as it resulted in global tension.

The Red and the Blue Textbooks are clear in their representation of China as the aggressor nation. The Red Textbook emphasises the tension with Tibet as groundwork with tension with India and, subsequently, the US. Both Textbooks note the changing nature of China's relationship over time; however, the Blue Textbook states that the relationship has smoothed due to their economic ties.

Only the Red Textbook offers a historical background of the relationship between the two countries. A rose-tinted history is portrayed as China as the protectorate of Tibet as well as being an ingratiating protectorate which allowed Tibet to continue with their own policies and belief systems.

5.5.3.3.2 The representation of China and India

India's relationship with China appears complex; however, very little expansion is provided by the three textbooks. The tension between China and India appears to be largely territorial and ideological according to the Red and the Blue Textbooks. The Green Textbook only makes a comment regarding 'some' territorial dispute with little expansion (p.30). The Red Textbook alludes to a historical background between the two countries but does not divulge anything further; however, it does state that India and China are considered the two main powers in Asia which suggests an equal footing. Both the Red and Green Textbooks indicate that India was the first to accept 'Mao's China' which reinforces some kind of historical link between the two counterparts. All three textbooks focus on the tension with Tibet and the Dalai Lama as well as some territorial disputes. Whilst the 1962 brief war is indicated in all three textbooks, over territorial dispute, only the Red and the Blue Textbooks view China as the aggressor. The Green Textbook quickly overlooks the 1962 war by stating that since the 1962 war there has not been any real conflict between the two countries. The Blue Textbook indicates the easing of the tension through the international co-operation of BRICS. The Red Textbook indicates India's shift towards the US which caused more tension with China.

5.5.3.3.3 The representation of China and Vietnam

There is a negative portrayal of China with its involvement in Vietnam despite the limited information in each textbook. The Red Textbook depicts China as being a bully and selfish against Vietnam (which is portrayed as a victim). Furthermore, the textbooks show how the US viewed China as more dangerous in the spread of communism in South East Asia than the SU. Thus, a very negative portrayal of China is perpetuated within the Red Textbook. The Blue Textbook does indicate Chinese support for Vietnam against the US; however, it also depicts China as the aggressor when it invaded Vietnam over the Khmer Rouge in Cambodia. Although the information in the Green Textbook is laid out in a confusing manner, China's actions are depicted as hostile.

Only the Red Textbook offers any historical framing of the history between Vietnam and China. Their relationship is viewed in a rose-tinted manner in which the Vietnamese voluntarily "adopted" (p.41) Chinese culture which suggests a contention-free relationship.

5.5.3.3.4 The representation of China and Taiwan

The relationship between China and Taiwan is only discussed in relation to its involvement with the KMT thus the representation is historically limiting. In all three textbooks, Taiwan was viewed at some point as the official government of China by the US and its allies. The Red and the Blue Textbooks discuss the contentions between the two nations and their struggle for the official title of authority of China. The Green Textbook suggests that there have been no issues between China and Taiwan since 1955 (or at least no outright hostility) because of Zhou Enlai. This drastically underplays the tension and the length of this tension between the two nations. Furthermore, the textbook states that the US situated itself geographically close to Taiwan to prevent any aggression from both sides. The Green Textbook overlooks the complicated history between the two countries as well as any aggression on the part of China. The Green Textbook states that only once China's relationship with the US improved, did the relationship with Taiwan improve from 1979 – 1998. This change also shifted the US' political alignment away from Taiwan to that of China. Furthermore, the textbook indicates that the relationship between Taiwan and China declined from 1998 due to the new Taiwanese government – omitting any part played by China and its control over Taiwan.

5.5.3.3.5 The representation of China in Africa

Africa is represented as an independent section and China features as a secondary character. However, the use of Africa in its competitive relationship with the SU is notable. Although, in the Red and Blue Textbooks, the Cold War conflict in Africa primarily focuses on the US and the SU, China does feature as an additional challenger to Soviet expansion in Africa. The Green Textbook does mention the Cold War competition between the US and SU, albeit vaguely. It does not allude to China being a challenger to Soviet control or expansion.

The Red and Blue Textbooks highlight the shift in relationship between China and the SU by emphasising Chinese loyalty to the US in order to prevent Soviet expansion against the US. The Red Textbook indicates that this was after the Sino-Soviet split in 1960 which provides some political context which the Blue Textbook does not include. There is a strong anti-Soviet narrative as a result of China's US alliance. The Red Textbook portrays quite a pro-Chinese narrative in that it focuses more on the humanitarian impact that China had on

Africa. It lists not only the aid but also the technicians and workers that were provided by China who worked alongside the African workers thus earning their respect. Furthermore, the Red Textbook includes that 20 000 Chinese workers helped build the Tan-Zam railway alongside 36 000 African workers, once again emphasising the nature of China's contribution. Lastly, the Red Textbook includes a photograph of a Chinese teacher teaching French-speaking Africans. Within the caption it stipulates that China offered technical knowledge to Africans over and above financial and labour contributions. These inclusions heavily favour Chinese representation and its role in Africa. The Blue Textbook focuses more on China's political engagement through enhancing its economic ties with Africa whilst, in the same breath, limiting the Soviet sphere of influence. The information on China is quite limiting in the Blue Textbook in comparison to the sections provided on the US and the SU. Only five sentences are specifically set aside which unpacks China's role in Africa. Despite two headings which specifically mention China in Africa, the Green Textbook only includes one sentence that pertains to China's involvement in Africa on page 82. It only mentions that China wanted to extend its influence in Africa which was enabled by the conflict in Angola. No further details are provided. A drastic omission occurs in the Green Textbook which serves to emphasise that China has no real part to play in the Cold War conflict in Africa. An interesting point to note, a small notation of China providing aid to Tanzania is mentioned in China's internal history section – far removed from the chapter on Independent Africa. The only country mentioned in the Independent Africa section is Angola, but it is excluded from the Africa discussion in China's internal history section – which suggests a disjointed view on China's history and a lack of overall continuity.

No official sources are used in the Red Textbook to further illustrate China's role; however, China's influence is partly mentioned in two different sources in the Blue Textbook. Additionally, both the Red and the Blue Textbooks have a limited inclusion of activity questions based on China. The Red Textbook only includes one question in one activity whereas the Blue Textbook has two questions in two different activities that pertain directly to China. No sources or activities are provided by the Green Textbook which relate to China.

5.5.3.4 The representation of Mao Zedong in Grade 12 history textbooks

Mao Zedong appears as a central figure and main leader in all three textbooks. Whilst other leaders are mentioned, Mao is the only leader for which content and contextualisation is

provided. The Red Textbook has an overtly favourable view of Mao. The Blue Textbook has a contradictory view of Mao. Where at times it places blame for the Great Leap Forward and Cultural Revolution at the feet of Mao, it supplies a highly positive view of China's international status by the time Mao had died in 1976. In addition, five sources that portray an overtly positive representation of Mao in comparison to the two which show a critical view of Mao. The Green Textbook has a vague imagery of Mao and he almost appears as a vague entity throughout the textbook. Mao is described as being in control and although his leadership is negatively portrayed in the Cultural Revolution, it is countered by the creation of superpower status. However, the creation of superpower status lacks detail in its representation which adds to the overall vagueness.

In the Red Textbook, Mao is China and China is Mao. It primarily focuses on Mao's China and whilst other leaders are mentioned, the portrayal is that Mao was almost solely responsible for China's superpower status. This portrayal is reinforced by the imagery that China was backward and useless prior to Mao's takeover, thus Mao single-handedly laid the foundation for China's superpower status. In addition, after Mao's death, Deng Xiaoping's leadership decisions foregrounded what had already been accomplished by Mao. The human cost to Mao's policies is overlooked in favour of the industrialisation that occurred as a result of Mao's policies thus creating an image that Mao's rule was largely favourable with a few hiccups along the way.

The Blue Textbook offers a contradictory view of Mao's leadership. Mao's policies of the Great Leap Forward and the Cultural Revolution are viewed largely negatively in the content of the textbook; however, when dealing with the overall impact of Mao's reign, there is a largely positive view. This positive portrayal can be found in the uneven representation of sources in the Blue Textbook. Five sources depict Mao favourably and only two are critical of Mao. This is an uneven portrayal in favour of a positive image. In addition to the sources, five of the seven sources were of western provenance which provides an overtly western perspective of Mao. In addition to the sources, the textbook states that, globally, Mao is seen as the leader of world communism which adds a global layer to Mao's role in China.

5.5.3.5 The representation of China in Grade 12 history textbooks

China's global status is viewed as a direct result of Mao Zedong and so the representation of China is that Mao is China and China is Mao. The focus tends to be on China's superpower

status; however, alliances and/or border disputes appear as disconnected entities which ultimately take a back seat. As a result of this, there is a lack of overall continuity (both conceptually and chronologically) when it comes to China's global involvement and its relationship with the US and the SU. Despite this positioning, each textbook repeatedly headlines (as per CAPS document) various subcategories in China's rise as a world power or established superpower.

The Red and Green Textbooks overlap in some areas whereas the Blue Textbook, and its representation of China, is in contrast to both the Red and Green Textbooks. The Red and Green Textbooks view the Pre-Mao era as backward and chaotic and that the success of present-day China is owed to Mao. In addition, the Green Textbook stipulates that the past leaders of China "always" (p. 30) followed an isolationist policy. Through the use of the absolute 'always' it eliminates any possible exceptions to the rule which spotlights Mao's rule and subsequent unique success as a result of his expansionist views. The Blue Textbook, however, whilst it omits any prior history of China, focuses on the upheaval and turmoil in China created by Mao himself. Although the Blue Textbook outlines China's global position as strong, it does not overlook or underplay the problems caused by both the Great Leap Forward and the Cultural Revolution.

The representation of China as a whole is one of overall success in both the Red and the Green Textbooks. Whilst the Great Leap Forward and Cultural Revolution are depicted as negatives, China's political and economic success become the cornerstone of China's history. The Red Textbook favours China's economic success over any social or political problems experienced by China. The Blue and the Red Textbooks do mention the lack of democratic reform in China; however, it is only discussed further in the Blue Textbook. The Red Textbook provides only a limited view of this lack of reform as it maintained the trading power status of China. The Green Textbook does not make mention of any lack of democratic reform but does state that the US overlooked the human rights abuses in China. No further unpacking of this abuse is mentioned, and blame is shifted to the US as they were the onlookers. Furthermore, in the Green Textbook, the success of China is emphasised from the 1970s, the end of the Sino-Soviet split³² and the lessening of tension between the US. Thus,

³² There is an inconsistency in the Green Textbook as to when the Sino-Soviet split took place. It includes two different dates (1960 and 1961 respectively) on two different occasions.

from the early 1970s, a positive political and economic turn is made due to this change in allies.

Although the Green Textbook does emphasise the concept of two Chinas, it does state that in the 1970s, the western allies recognised communist China as the “rightful government” (p.31) of China. The semantics used here indicate that communist China were always the appropriate authority and have now been credited with the title officially by the western powers. This move symbolises the shift in the relationship between China and the West and reasserts China’s move away from the SU as a positive one.

The Blue Textbook offers a juxtaposing view of China. Whilst its economic success is highlighted, they are contrasted against poor working conditions and human rights abuses. The textbook offers a holistic view of China, both positives and negatives. However, it does this as a way of highlighting the dangers of China. The lack of democratic reform is illustrated through the imagery of the Tiananmen Square Massacre. Whilst this event is also mentioned in the Red Textbook, the Blue one offers more detail and uses more emotive terminology in its description. In addition, both textbooks use the same image of Tiananmen Square protests – the image of the lone man standing in front of tanks. However, it is the Blue Textbook which uses this incident to emphasise the lack of democratic reform and the brutality with which China responded to democratic protest action. Furthermore, the Blue Textbook reinforces the dangers of China and its human rights abuses through the inclusion of a warning issued by Thabo Mbeki, warning Africa against a colonial partnership with China. This warning is the last statement made in the Blue Textbook which emphasises the urgency of this warning as the last take away from this section.

The Red Textbook offers a summary at the end of the textbook only. It offers a summary on the entire Cold War section using 24 bullet points with six points dedicated to China. It is a general overview of Mao’s China (excluding the Great Leap Forward) and two points make mention of a post-Mao period. The section on China is summarised in the Blue Textbook using 21 bullet points; however, the entire Cold War section is summarised in the Green Textbook in 17 bullet points of which China occupies four points. The Blue Textbook offers a general overview of all key points mentioned in the textbook whereas the Green Textbook only states that China had an impact on global politics, it had problems with its neighbours and its relationship with the US changed after 1970 (good or bad is not indicated).

China's insertion into Africa is only mentioned in summary format in the Blue Textbook. Only one bullet point is included and that mentions China offering military support to FNLA. Whilst the Red and Green Textbooks do include a summary section, China's involvement in Africa is not included.

5.5.3.6 Gender representation in China in the Grade 12 history textbooks

China's internal and global history is largely male dominated across the three textbooks. Jiang Qing (Mao's wife) is only mentioned in China's internal history but only as an offhand and side-lined figure in the Red and Blue Textbooks. The Green Textbook includes a picture where Jiang Qing is backgrounded; however, she does not appear in the caption and no other inclusion of Jiang Qing, or any other female contribution, is included.

Jiang Qing's primary representation in the Red and Blue Textbooks is that of Mao's widow. Secondary to this is her involvement in the Gang of Four. The Red Textbook states that she was part of the gang where the Blue Textbook notes that she was a leader of the gang. Neither textbook provides any more information regarding her role in the gang or the gang itself (outside of them being described as radical). The Blue Textbook however does include a source which mentions Jiang Qing's role in the launching of the Cultural Revolution. This large role has been omitted in the textbook content of the Blue Textbook and across the other two textbooks. This influential statement appears more as an off-handed comment thus perpetuating Jiang Qing's side-lined role. Whilst the Green Textbook may provide an uncaptioned photo of Jiang Qing (which foregrounds Mao), only the Blue Textbook provides a captioned photograph of her.

Outside of Jiang Qing, women in China remain largely silent across all three textbooks. The Red Textbook does include one visual of a woman agricultural worker which highlights women in the agricultural sector; however that is the extent of this imagery.

5.5.3.7 How assessment influences the representation of China in the Grade 12 history textbooks

The assessment involving China's history is divided into two components: in-content activities and end of section or exam practice questions. The Red Textbook offers the most in-content assessments (nine), the Blue Textbook has six and the Green Textbook has four.

All three textbooks offer three overall/exam practice assessments (two of which appear at the end of the textbook).

The in-content activities generally involve source analysis; however, the Green Textbook offers an extremely limited number of sources. Where the Red and the Blue Textbooks offer multiple sources per section and therefore activity, the Green Textbook only offers one source per section which limits any source analysis. The exam practice activities only include essay questions for China. No source-based question is provided in either textbook. A wide range of subsections are included in the in-content activities; however, the Great Leap Forward is omitted in all three textbooks and only limited questioning is offered on China's involvement in Africa in the Blue and the Red Textbooks. Both the Red and the Blue Textbooks include the Sino-Soviet split whereas all three textbooks focus on the relationship between the US and China. The Red Textbook includes three separate activities which focus on China's neighbours and their relationship. The Blue Textbook does not offer an activity on the relationship China had with its neighbours but largely focused on Mao's legacy and its relationship with the US. The Green Textbook offers two activities related to China's neighbours; however, the second activity places blame on Tibet and the Dalai Lama for the cause of tension between China and India.

5.5.3.8 Conclusion

Grades 9, 10 and 12 create three different Chinas. These three alternative Chinas emphasise an overarching theme evident in all three textbooks: a distinct lack of overall continuity with how China has been depicted. Grade 9 focuses on a victimised and brutalised China in the face of Japanese aggression whereas Grade 10 emphasises Ming China (and its success). Ming China is only relegated to Grade 10 and its prowess as an ancient power is all but forgotten in Grade 12 China. Despite Ming China's being considered a world power, it is only with Mao's China where this is emphasised in Grade 12 and so a distinct lack of continuity between histories is present in all three textbooks.

Grade 9 provides an extremely limited view of China. The content coverage is extremely limited, especially in the Green Textbook, and the sources used lack provenance. Considering grade 9 is the final year of compulsory history, one receives a vague and unimportant view of China. The only imagery pertaining to China is one of victimisation and brutalisation at the hands of the Japanese through the lens of the Rape of Nanking. However, despite this section

depicting Chinese victimisation, Japan and US representation seem to be at the centre of this history which relegates China into obscurity. The textbooks use the Rape of Nanking as a way to reinforce the heroic US and villainous Japan narrative with China as the victimised minor character.

Ming China, in Grade 10, is largely viewed as successful, superior to that of its European counterparts and male. There is little to no integration of Ming China as it is not integrated into Chinese history beyond Grade 10 despite a solitary mention in the Blue Textbook that in Grade 12 more will be learned about China.

There is a constant Eurocentric comparison amongst the textbooks which idealises Europe as a benchmark power. Although *European Societies* is a topic within this section, as the only benchmark for comparison, it suggests that Europe is the only comparable power or the only worthy comparable power in history. This image is enhanced on multiple occasions. In one textbook, Europe is the only other specific power mentioned whereas in another Europe is treated as Ming China's sole trading partner. In addition, one textbook opted to use specific names and out of the five names included in the section, three of those are western names.

The history reflected in Ming China is largely male and largely focused on two main leaders, Emperors Hongwu and Yongle. Despite Hongwu and Yongle's leadership being the key focus (their names specifically mentioned in only two of the textbooks) very little is unpacked about their reign or themselves. In addition, Ming China's key focus is only during the reigns of Hongwu and Yongle; following their reign very little is mentioned thus providing an extremely narrow focus of Ming power. The history that is reflected in the textbooks is largely male and women in Ming China appear as an afterthought in two of the three textbooks. Only the Red Textbook attempts to include some detail regarding women in Ming China's history; however, it appears as a separate section thus severing women from the rest of the masculine history. Women in Ming China appear inextricably linked to men and thus do not have their own identity without the appearance of men. This image is furthered through women being mostly described as wives and mothers in two of the textbooks which perpetuates their ties to masculine identity and subsequently masculine history.

An important notation needs to be made here. The Green Textbook provides an extremely distorted view of Ming China due to a large number of historical inaccuracies and

ambiguities. The reliability therefore of the information contained therein is doubted, more so due to the sheer number of historical inaccuracies.

In Grade 12, China can be broken down into two sections: internal history and policies and foreign policies and involvement³³. Mao Zedong is a central figure within both China's internal history and foreign policies across all three textbooks. This permanence illustrates a trans-textbook narrative that focuses mostly on Mao's China and his role in the creation of a strong China. Both the Green and the Red Textbooks focus on Mao's contribution to a strong China and largely omit any negatives on the part of Mao in this establishment of a strong and successful China. The Blue Textbook is the only textbook to offer a juxtaposing view of China: one as being a successful nation and the other being anti-democratic which constantly violates human rights. This strong emphasis as well as emphasis on the upheaval of Mao's policies provide an image of a different China in comparison to the Red and the Green Textbooks. The image of China is Mao and Mao is China reinforces the largely male narrative held by all three textbooks as there is little to no inclusion of women in Mao's China.

China's internal history has been defined by the rise of the communist China, the Great Leap Forward and the Cultural Revolution in all three textbooks. The Green Textbook, overall, is chronologically and structurally incoherent whilst allocating extremely limiting space to China's history³⁴. There is an overall vagueness across all three textbooks as little specifics are provided about each event. A vague and incomplete image is created which is often combined with the downplaying of the severity of certain key events.

The rise of communist China has different focus points in each individual textbook which highlights a lack of trans-textbook continuity. The Red Textbook is the only textbook to maintain its focus on the rise of Communist China whereas the other two textbooks focus more on the KMT as a legitimate power. Furthermore, the Green Textbook provides a clouded view of the rise of communist China through its lack of clear agency.

³³ The Green Textbook's structure, grammatical choices and chronological placement is problematic. At times the event is chronological incoherent and often appears in a staccato fashion rather than a smooth delivery. In addition to a poor writing technique, the textbook offers extremely limited information on China both in its internal history and foreign involvement.

³⁴ An important inclusion here is Green Textbook's repeated reference to two Chinas (communist China and Nationalist China - Taiwan). This repetition is made not only at the creation of a Nationalist China post-Civil War but the textbook notes that even in the present day, there are two Chinas. This inclusion overlooks the nationalist concerns and self-determination of the current Taiwan.

A muted image of the Great Leap Forward appears in all three textbooks. Whilst considered to be largely unsuccessful, there is a significant downplay of this policy in all three textbooks (the Green Textbook only offering two sentences). The Red Textbook offers an explanation in that the Great Leap Forward is not an examinable section. Despite this lack of information, all three textbooks place blame on Mao. However, very little information regarding the effects and impact of this policy is included and thus a muted blame emerges.

The Cultural Revolution is given more space across all three textbooks; however, there is still a consistent overall vagueness on this event. Whilst the Red and Blue Textbook offer more detail, the Green Textbook still presents the least in terms of content coverage with only 12 sentences. This vagueness is perpetuated through the discussion of the human cost (effects) of the Revolution. All three textbooks include only a single sentence within their textbook content which discusses human cost; however, the Blue Textbook later elaborates through an included source.

Mao's image and role in the Cultural Revolution differs within all three textbooks. The Red Guards (uneducated youth) become the focal point of the Revolution in the Green Textbook and to a lesser extent the Red Textbook. The Red Textbook does indicate the Cultural Revolution began with Mao, so some accountability is included; however, a largely neutral approach is undertaken by the Red Textbook. The Blue Textbook is the only one to place heavy emphasis on Mao's responsibility in the Cultural Revolution.

The second component within the China section pertains to China's foreign involvement and relationships with the foreign powers. One key focus is the relationship between China and the US and China and the SU. The Green Textbook provides very little information thus the key images which emerge stem from the Red and the Blue Textbook. The relationship between China and the SU is viewed as largely negative whilst the relationship with the US is depicted favourably (either explicitly or implicitly). The favourable image of the Sino-US relationship is heavily emphasised in the Blue Textbook whereas it appears in the undertones within the Red Textbook. Both textbooks, however, portray a heroic US within China's story.

Tibet, India, Vietnam and Taiwan are the countries included in all three textbooks which are used to discuss China's border disputes. The image of China differs within each country. The Red and the Blue Textbooks depict an aggressive China with regards to its relationship with Tibet; however, the Green Textbooks places blame on the Dalai Lama and Tibet itself thus creating a mixed message and softening China's image. India and China's relationship is

depicted as tense within all three textbooks; however, the Red and the Blue Textbooks point at China being the aggressor nation in this instance. Limited detail of China's relationship with Vietnam is provided but China is depicted as openly hostile to Vietnam across all three textbooks. Finally, Taiwan's relationship with China is viewed as contentious as it is an issue of authority. The history of Taiwan is largely omitted or overlooked in the Green Textbook; however, very little contemporary history indicating the complexity of China and Taiwan's relationship is overlooked in all three textbooks.

China appears as a secondary character in the *Independent Africa* section. A link has been made in the Blue and the Red Textbook to China's worsening relationship with the SU. The textbooks indicate that China's involvement in Africa stemmed from its worsening relationship with the Soviet Union and therefore it attempted to subvert its expansion into Africa. The Red Textbook follows a very pro-Chinese narrative as its focus is on the humanitarian contributions made by China. The Blue and the Green Textbooks include extremely limited detail of China in Africa.

The first key observation made is that there is a lack of consistency throughout the Grade 12 section on China. This disjointed view of China's history results in a chronological confusion and confusion in terms of the alliances between China and the US, especially through the representation of China's border disputes and involvement in Africa. This perpetuates a disjointed view of history which creates an image of China's history occurring within isolated and disconnected sections.

Secondly, there is an overall concern with sources. Not all sources are referenced and often images remain unreferenced. Sources included in this section are largely Western-centric. Finally, there is a discrepancy in the number of sources included in each textbook. In the entire China section, 18 sources are provided by the Red Textbook, 31 by the Blue Textbook and only 5 by the Green Textbook. This significant gap in the number of sources included in the Green Textbook align with its extremely limited content coverage of this section.

PART FIVE: BRICS AS A CONCEPT IN THE SOUTH AFRICAN SCHOOL HISTORY TEXTBOOKS

5.6 Introduction

The concept of BRICS emerges within the post-Cold War paradigm. It falls within the section *a new world order* which suggests that BRICS is a competing power to the established West. BRICS becomes a key player within the emerging economies and offers a challenge to existing hegemony, according to the three textbooks. The members of BRICS are considered the leading emerging economies according to the Red Textbook. The joint power and influence of all members is emphasised in the Red Textbook which suggests that the strength of BRICS lies in what each member brings to the party. The Green Textbook suggests that a series of economic crises in the West allows for the emergence of alternative power groups which offer alternatives to capitalism in the West. The Blue Textbook highlights South Africa entering the big leagues and emphasises the strength of the other BRICS members in comparison to South Africa. Furthermore, the Blue Textbook strongly favours the decision of South Africa to join the BRICS group as the group signifies the strength and influence that non-western countries could have on the world economy.

5.6.1 Analysis

The BRICS group is viewed as a strong economic bloc and a strong counter to the current global hegemony. Although all three textbooks focus on different aspects of BRICS, all three textbooks concur that BRICS as a concept is strong enough to challenge the current world power. Furthermore, the emphasis on the strength of the BRICS groups reiterates South Africa's move to join as a savvy political and economic move.

5.7 Conclusion

BRICS as a concept and geo-political group is fast evolving within the contemporary framework: textbooks are not keeping up with the changing nature of BRICS. Given this statement: how then have the selected textbooks represented South Africa's geo-political partners within the programmatic curriculum? The above chapter analysed how South African school history textbooks represented the histories of its global partners Brazil, Russia, India

and China. The findings suggest that there is an overall fragmented historical representation of BRICS countries across the textbooks. In addition, there is a distinct imbalance of representation in favour of Russia. Russian history dwarfs that of other BRICS countries with Brazil being the least represented. This suggests that countries with long historical partnership are considered more historically significant than that of ‘newer’ partners. Clear political and ideological relationships are emphasised and secured through their repeated inclusion within the textbooks. Considering the shape of the multipolar world and BRICS’ position within that, what is the ideological positioning of South Africa and how is that presented within the programmatic curriculum?

The ideological positioning and the historical framing of South Africa and its BRICS partners will be further unpacked and critically analysed within the next chapter. As Chapter 5 answered how the BRICS countries are represented in South African school history textbooks, Chapter 6 will seek to answer the why: why are BRICS countries represented the way they are in South African school history textbooks? The two research questions interlink because it reflects how South Africa has constructed this imagined relationship between its geo-political partners based on this historical construction within the programmatic curriculum. South Africa is immersed in this major global bloc, but what does the average South African learn about these countries and about their histories? As the textbooks are often the only space where South Africans will learn of these countries, what is the takeaway and what are the implications of this in the globalised world?

In Chapter 6, I will discuss why South Africa has viewed its BRICS partners the way it has, based on the historical, ideological and political implications. As data cannot speak for itself, it is necessary to contextualise the analysed data within the South African framework in order to answer the second research question using literature and theories underpinned in Chapters 2 and 3. It is within this unpacking where the literature and theories are intertwined with the data analysed, which will in turn help answer the second research question. In addition to amalgamation of existing literature and the new data collected, I will also put forward my own theorisation of BRICS representation in the South African history textbooks.

CHAPTER SIX

DISCUSSION OF FINDINGS

"History textbooks are all about ideology. We react so intensely because we see how editorially they follow the propaganda media — they are not always quite right, but they are never completely wrong." - Sergei Chernyshov (Konstantinova, 2023)

6.1 Introduction

In this chapter, I have attempted to find the intersection between the literature and theories from Chapters 3 and 4 and the findings from Chapter 5. My findings presented an overall view of how the South African programmatic curriculum has constructed and represented the history of the BRICS countries. Differently put, the descriptive analysis of the previous chapter will be analytically analysed to theorise my findings. It is important to remember the holistic undertaking of the thesis in order to propose answers to the research questions. As data (textbooks in my study) does not speak for itself, contextualisation is key in understanding the interpretations of the data. Placing South Africa in the global context, as well as BRICS, within the post-Cold War paradigm, is imperative in trying to understand what the average South African citizen will learn about their BRICS counterparts. There is often a disjuncture between the politics of the real world and ordinary citizens and textbooks can often be at the intersection: where ordinary citizens get exposed to the real-world politics.

The findings from Chapter 5 will be discussed in conjunction with the literature and the theories proposed in Chapters 2 and 3. This is imperative in order to scaffold and argue my thesis statement. The focus and purpose of Chapter 6 is to propose an answer to my second research question: why are the BRICS countries represented the way they are in South African School History Textbooks? Within each subsection, I will address each country separately in order to present a coherent argument. I will begin with the country which is represented the most and move towards the least covered. The order in which the countries will follow is thus, Russia, China, India and lastly, Brazil. In the first two sections I will discuss the scale of the textbook coverage and the scope of the history covered (what is learned). The scale deals with *how much* has been covered where scope details *what* has been covered. It is through this discussion where the next section will continue in which the cross-cutting themes from the scope will be

discussed. Finally, textbook creators and their influence in the content selection and historiography on the BRICS countries will be discussed. Collectively this should provide an understanding of why BRICS countries are represented the way they are in South African history textbooks.

So as to emphasise the context of the study: South Africa is considered the smallest brick within the BRICS bloc. The involvement of South Africa is often deemed out of place considering the economic prowess of the other countries. Despite this, South Africa has been part of this powerful group since the end of 2010. Given this significance, how has South Africa viewed its partners within the historical framework? What does the average South African at both Grade 9 and Grade 12 level learn about the countries?

6.2. The scale of representation of BRICS countries in South African school history textbooks

It is prudent to first unpack the scale of the textbook content in relation to each of the BRICS countries. When I speak of scale, this is in reference to how much space has been allocated to each BRICS country in the textbooks. This is necessary as it denotes how much historical knowledge is provided on each country. The scale of representation spotlights how much emphasis is placed and on what country. The emphasis highlights or alludes to the ontological and epistemological assumptions of the knowledge and thus forms the basis of what the average South African, after having done history at either Grade 9 or Grade 12 level, will know about the BRICS countries. Furthermore, illuminating the scale of the content covered will cast a spotlight on how much historical content is allocated, thus highlighting the historical significance by virtue of content and space allocation.

The scale of the content dedicated to each country is important to discuss as it illustrates a perceived importance of a country and its history. As South Africa is partnered within BRICS, it is important to see how South Africa represents its partnered countries within its own historical framework. The scale of the textbook content carries political and ideological implications. Brazil, Russia, India and China are represented unevenly across the grades, the bulk of the focus being on Russia, then China,³⁵ then India and lastly Brazil. One must acknowledge that textbooks can't cover everything. However, how much and what textbooks

³⁵ This will be discussed at a later point, but it must be spotlighted early on. China as a Cold War case study is on rotation with Vietnam. What this means is that every three years, the case studies are alternated as a Grade 12 topic. Although China's history (specifically within the Grade 12 section) features extensively within the textbooks, the bulk of the content and information on China is only available every three years.

cover, and what could be learned from the content is imperative in understanding the intersection between political reality and official public knowledge³⁶.

In terms of the scale of representation, Russia is the largest as it offers the biggest volume content. Page numbers alone, speak of the scale on Russian history. For Grade 9 textbooks, each textbook content extends across 20, 24 and 27 pages for the Red, Blue and Green Textbooks respectively. Grade 11 and Grade 12 content coverage is considerably more than Grade 9; however, Grade 9 still offers more content coverage when compared to the other BRICS counterparts who are studied at lower grade levels. Grade 11 Russia spans 32 and 40 pages in the Red and Green Textbooks but a whopping 79 pages for the Blue Textbook. Although not as content heavy as Grade 11, Grade 12 Russian content spans two sections with a total of 36 pages for the Red Textbook and 34 pages for the Blue and Green Textbooks respectively. The page numbers dedicated to Russia present a significant glimpse into the weightiness of the Russian historical content and places a greater emphasis on the concentration on Russian history above all other BRICS histories.

The primary focus across the grades is on Communist Russia, although pre-communist and post-communist eras are also included within the coverage. The scale on which Russia is covered suggests a strong historical and ideological connection to Russia and its historiography with South Africa. Whilst Russian history begins at Grade 9, it must be noted that Grade 9 is an exit year³⁷ which further contributes to the importance of understanding the space in terms of scale that Russia occupies. Understanding what all Grade 9 learners will understand of Russia in terms of the space allocated to it in Grade 9 becomes almost symbolic. What then would every South African citizen learn about Russia by the end of Grade 9? Grade 9 offers a summarised glimpse into communist era Russia and post-Cold War era Russia. Acting on the basis that Grade 9 is an exit year, the textbooks primarily focus on the image of Communist Russia and belatedly (in a later section of the textbooks) the end of the Cold War. These components of global history have been decided as being historically significant.

³⁶ A reminder needs to be noted regarding the colour coding of the textbooks used in order to avoid confusion. I have used the same colour codes across the grades to represent the same publishing houses (Red, Blue and Green). In an attempt to streamline this chapter and this process, I will make reference to the grade as a whole and only mention the colour code for a singular textbook when absolutely necessary.

³⁷ History, as part of the Social Science umbrella, is compulsory from Grades 4 – 9. Thereafter, History, as a stand-alone subject, becomes an elective. Grade 9 is also considered an exit year as students can legally leave the schooling system should they want.

Grade 11, in sheer page numbers, outweighs all three grades. Much emphasis is placed on the establishment of Communist Russia and the leadership centred on its establishment. Although Russia in Grade 11 appears as a stand-alone section in comparison to Grades 9 and 12, it is the weightiest section in terms of scale of the three grades. The weightiness in terms of scale is exemplified by the Blue Textbook's 79 pages allocation to the communist Russia section alone (in comparison to the 32 pages of the Red Textbook and the 40 pages of the Green Textbook). Seventy-nine pages is a considerable amount of content coverage for a single section. The implication here is that there is a distinct importance placed in terms of scale, of not only Russian history, but of its establishment as a communist power.

Grade 12 Textbooks extend the coverage which appears in Grade 9. As such, it can be seen as a continuation and re-emphasis. Although the continuity into Grade 12 should reflect a deep analysis of the Cold War, the page numbers do not reflect the scale of content as the Grade 12 textbooks only dedicate 34 (in Blue and Green) and 36 pages (Red) to the Russian section. Furthermore, 34 pages for the Blue Textbook's coverage of Russia is in stark contrast to its Grade 11 representation of 79 pages. In short, the scale of Russia's coverage is immense and lengthy at each point of its inclusion, from Grade 9 to Grade 11 and 12.

But why then this scale of coverage allocated to Russia as a BRICS partner? In Irina Filatova and Apollon Davidson's book, *The Hidden Thread: Russia and South Africa in the Soviet Era*, they discuss South Africa's historic relationship with Russia. In the book they argue:

Soviet ideology still defines the spirit and letter of the main policy documents of the ANC and its allies, the South African Communist Party (SACP) and the Congress of South African Trade Unions (Cosatu). The Soviet mentality, values and vision of the world are still widely spread among the ANC leadership ... without the Soviet stand in the United Nations, without its anti-apartheid propaganda campaigns and without its support for and assistance to the international anti-apartheid movement, apartheid's demise might have come in a different shape and form. And without the changes in Soviet policy under Gorbachev the 'South African miracle' – the negotiated settlement – might not have happened (Filatova & Davidson, 2013 p.2).

The deep and convoluted connection South Africa, and the ANC specifically, share with the Soviet Union (SU) has thus translated to the South African programmatic curriculum. There is a heavy focus on the establishment of Communist Russia as well as Russia within the Cold War (and post-Cold War). Given the assertion by Filatova and Davidson, South Africa is

historically and ideologically tethered to its Russian counterpart, and this weighs heavily in the current textbooks.

The overarching length of Russia's content coverage is also symbolic in that it reinforces South Africa's political and historical relationship. Faulhaber (1985) notes that power and authority are intertwined features which are embedded into both the intended and programmatic curriculum. Despite the many discourses surrounding the concepts of power and authority and their relationship – power and authority are interlinked. In this regard Nietzsche (1874) argues that the past can play a role in the power play of memory politics and what can emerge is a memory-specific, rebranded history. Russia plays a very obvious role in the power-politics of the textbooks and within South Africa's own history. The volume of space allocated to Russia, and particularly communist Russia, reinforces where the historical knowledge power is based when it comes to BRICS countries – Russian history is paramount. Above all other partners within the power bloc BRICS, Russia's history is clearly and overly foregrounded in the programmatic curriculum. This leads to heavy imbalance of historical knowledge in favour of Russia as opposed to the other BRIC counterparts. Although it is not outwardly stated in the textbooks, through Russia's large content coverage, Russia appears as South Africa's powerful partner and perhaps legitimises Russia as South Africa's power-partner.

Kallaway (2012) writes that the CAPS-History document creates a fragmented history which is not sequential and which can lead to confusion. Furthermore, he questions the type of historiography that is presented within the CAPS-History document (Kallaway, 2012). Whilst Kallaway speaks specifically about the intended curriculum, his argument can be applied to that of the programmatic curriculum as it relates to Russia. The fragmented and disjointed history of Russia is clearly evident within the scale of the textbook coverage which in turn will have an impact on the type of historiography presented. Kallaway (2012) questions the knowledge the teachers will have in disseminating CAPS-History topics but he argues that Communist Russia and Cold War history won't be a problem as, generally, teachers will have a background in these topics or at least have access to resources because of its existing historiography (Kallaway, 2012). Even “tried and tested” (pp. 42-43) topics such as Communist Russia and the Cold War: how do they appear within textbook historiography considering their long inclusion within South African history curricula (Kallaway, 2012)? This will be engaged with further down.

Let me now, with reference to scale, turn to China. The bulk of China's scale of coverage appears in Grade 12, Mao's China, followed by Ming China in Grade 10, with the smallest scale being in Grade 9. In sum, three different Chinas emerge across the three grades (Grades 9, 10 and 12). The scale in Grade 9 is only limited to China's role as Japan's victim during the Manchurian Crisis (although this term is never used) where a maximum of one page is dedicated to the event per textbook. The scale of coverage in Grade 10 is extended to incorporate Ancient China where Grade 12 encapsulates China within the Cold War framework, specifically under Mao Zedong. Grade 10's content coverage ranges between five pages (Red and Blue Textbooks) and seven pages (Green Textbook). Grade 12 offers more in terms of scale in terms of page allocation. The Red Textbook uses 20 pages where the Blue Textbook utilises 29 pages. The Green Textbook offers the least in terms of page allocation as only nine pages are allocated to China. Little synchronicity occurs within the scale of China thus the three Chinas appear as separate entities which in turn creates an illusion of a broad scale of coverage in terms of historical eras. In reality, China's scale of coverage is largely seen only in its role in the Cold War in Grade 12 which is rotated within in the curriculum every three years. The implication of this is that China's inclusion in the CAPS-History curriculum is not as important as that of Russia for the South African context.

The lack of importance is emphasised by the curriculum rotation of China. I would like to remind the reader that despite the scale of Grade 12 coverage, what is learned is inconsistent given that China is not a permanent feature in curriculum. Every three years it is rotated with Vietnam as a case study. The power and authority of China as covered in terms of scale focuses almost solely on Mao Zedong within the Cold War. However, this power and authority is intermittent in terms of scale and is not seen as of extreme importance in terms of scale. In addition, during COVID-19 the South African government adopted a recovery plan for teachers due to lost time and as such, certain topics were removed. This recovery programme has continued to 2023, and under the 2023 Annual Teaching Plan (DBE, 2023). China as a victim of Japan is no longer covered. Despite its limited inclusion in the programmatic curriculum, the South African government and the Department of Basic Education have utilised the intended curriculum and adjusted it to suit supposed current needs. What emerges from this is that China is then only learned by those who choose to take history as an elective subject in Grade 10 and possibly in Grade 12 if they fall within a certain cycle. In comparison to the immense scale of Russia, which remained largely unchanged as a result of COVID-19, it speaks to the perceived lesser importance of China as a historical ally.

The focus will now shift to India. Page numbers indicate a limited focus on India across the three grades (Grades 4, 8 and 10) in which it is studied. At times it is difficult to pinpoint exact page numbers due to the fragmented and distributed nature of the coverage of India. The Grade 4 Textbooks focus specifically on Gandhi and thus only those pages have been considered. The Red Textbook uses five pages whereas the Blue and Green Textbooks use four to cover the history of Gandhi. Grade 8, specifically covering indentured labour, is allocated marginal space within the Red and Green Textbooks namely two pages whereas the Blue Textbook uses three and a half pages. I have not included anti-Indian legislation within the page count as that inclusion is minimal at best and does not account for a full page. In the next grade, two sections appear within the Grade 10 textbook: Mughal India and indentured labour. The pages allocated to Mughal India and indentured labour differ across the textbooks. In total, the Red Textbook dedicates six pages and three pages respectively whereas the Blue Textbooks uses four pages and two pages respectively. The Green Textbook incorporates the most in terms of scale. Between Mughal India and indentured labour, it allocates seven pages and nine pages respectively.

Despite India's long-standing history with South Africa and its current political partnership, there is limited coverage in terms of scale of Indian history. In sum, scale-wise, India has received limited coverage as a BRICS partner in the analysed textbooks: Gandhi, indentured labour and ancient India. How much has been allocated to those sections explains where the emphasis lies.

The final BRICS partner to be discussed in terms of the scale of coverage is Brazil. The scale (or lack thereof) of Brazil across the textbooks denotes a lack of importance being placed on Brazil as a historical partner to be studied by young citizens. Despite Brazil being part of the global partnership of BRICS, there is little to no inclusion of Brazil in South African school history textbooks. Brazil is only mentioned in a geographic capacity and labelled as a Portuguese colony with a limited reference to slavery in the Grade 10 Red and Green Textbooks. Very little else is learned of Brazil. As such, in terms of scale, Brazil as a supposed equal partner in BRICS is absent within the South African programmatic curriculum.

Power politics is clear in this: Brazil holds no power or authority within South African history textbooks and holds no place within its educational structures. Despite the BRICS partnership, South Africa rather opts for a continued emphasis on Russia and Russia's historical partnership within South Africa, rather than shifting focus to include other partners on the same scale. This

reinforces the strong bias in favour of Russia with the BRICS partners. The favouritism is seen in the space allocated to each country; Russia dwarfs the other BRICS countries in terms of the representation in scale. This speaks to contemporary politics and historical legacies where a value is placed on Russian history above all other contemporary BRICS partners.

The scale of content covered creates a visual overview of how and where the content is placed within the grades. This overview provides a superficial glance at how much is covered. Now that we have an understanding of the scale of the representation, let us move to what the students need to know by focusing on the historical scope.

6.3 The scope of representation of BRICS countries in South African school history textbooks

Now that we have a sense of the scale of representation, in terms of volume, it is important to understand what has been demarcated in terms of historical knowledge regarding the scope. Scope of representation identifies what knowledge is the key focus (identified in Chapter 5) thus highlighting what has been considered historically significant to study and to know.

The scope of representation is a lengthy section in that it not only identifies what has been covered but includes the historical and ideological implications of such inclusion. Given this, I have split the scope according to each country to streamline the section and to give credence to the scope allocated to each BRICS partner. Furthermore, within each country's demarcation, I will address the content in an order that provides the most cohesion. Due to the disjointed nature of the representation across the textbooks, a chronological approach is not always possible. Russia will be addressed chronologically as it makes the most sense; however, due to the disconnectedness of China's history, China will be unpacked in the order it appears in the textbooks. India will be discussed thematically. Much of India's topic crosses grades and so I have opted for a thematic approach to create a cohesive representation of each theme. The reason for these different approaches is to fully understand the knowledge construction that appears in textbooks and what students learn of key partners within a changing (and expanding)³⁸ world order. Lastly, Brazil is only mentioned in one grade and therefore, its scope of representation will be discussed only insofar as it appears in the single grade.

³⁸ In 2023, six more countries pledged to join BRICS in 2024. They are Argentina, Ethiopia, Egypt, Iran, Saudi Arabia and the United Arab Emirates. This will transform the original BRICS to BRICS+ Ismail, S. 2023. 'A wall of BRICS': The significance of adding six new members to the bloc. *Al Jazeera*.

6.3.1 The scope of representation of Russia in South African school history textbooks

As Russia is the largest section, its scope will be tackled first. Given the scale of representation, how does this impact the scope of representation? In other words, what do students learn about Russia at both exit levels: Grade 9 and Grade 12? Across the grades and textbooks, Russia's history can be broken down into four distinct phases: pre-revolutionary Russia, Communist Russia, Cold War Russia and post-Cold War Russia. Communist Russia and Cold War Russia are treated as separate entities within the global context of the bipolar Cold War world – the response to communism. There is an enormous focus on Communist Russia and Cold War Russia across the grades, although the establishment of communism in Grade 11 appears isolated within the larger Cold War framework.

Pre-revolutionary Russia transcends two grades but is the least represented within Grade 9 and 11 textbooks, with the bulk of this era falling into the Grade 11 textbooks. It does not appear within the Grade 12 textbooks. Although Russia is included in Grade 9, an exceptionally limited, virtually non-existent, image of a pre-revolutionary Russia appears within this scope. Grade 11 textbooks provide a brief image of a backward country with an autocratic regime and a large peasant base. The Blue Grade 9 Textbook is the only Grade 9 textbook to provide some detail of a pre-revolutionary Russia. However, the main focus is on the build-up to the establishment of a Communist Russia, thus focusing primarily on two leaders, Lenin and Stalin. Little to no contextual grounding is provided across Grade 9 in terms of the make-up of a pre-revolutionary landscape suggesting the importance of Russia lies only with the establishment of a communist regime. Two events are spotlighted in the Grade 11 textbooks which frame pre-revolutionary Russia: the 1905 Revolution and World War One. These two events are considered very important as they not only spotlight the existing flaws in Tsarist Russia, but they act as the scaffolding for the rise of Communist Russia. Both the Red and Blue Grade 11 Textbook use the 1905 Revolution to bring to the fore the leadership of Lenin and Trotsky.

Across both Grade 9 and 11, an overarching faceless leadership of the Tsarist regime stretches across the two grades. The Blue Grade 9 Textbook is the only Grade 9 textbook that specifically mentions Tsar Nicholas II by name (however, it later refers to him as the Russian king creating a distortion). Although the Grade 11 textbooks make mention of Tsar Nicholas II specifically,

this is vague and fragmented, creating a largely faceless leadership³⁹. Through this faceless leadership, an anti-Tsarist stance emerges across both Grade 9 and 11 textbooks. An anti-Tsarist sentiment of Tsar Nicholas II is not a new concept within CAPS-History; it is a perpetuation from the Apartheid era (Halsall, 2016; Halsall & Wassermann, 2018). The perpetuation of an anti-Tsarist sentiment may cross ideological eras, as it finds a common intersection within apartheid and post-apartheid ideology. There is some overlap between anti-monarchical sentiment from the Afrikaner in reference to anti-British sentiment and anti-colonial sentiment evident within the post-apartheid era (Halsall, 2016; Halsall & Wassermann, 2018). Within this commonality, the perpetuation of an established historical narrative continued across political eras with minor adjustments. Where Tsar Nicholas II's role in apartheid history textbooks is more explicit to highlight anti-tsarist sentiment (Halsall, 2016; Halsall & Wassermann, 2018), in post-apartheid textbooks his role is largely sidelined or obfuscated creating an historical image which suggests a lack of overall importance. This vagueness contributes to the long-established anti-Tsarist sentiment in South African history textbooks. The anti-Tsarist sentiment crosses more than just leadership but can also be seen in the silences of pre-revolutionary Russia. Little is learned in both Grade 9 and Grade 11 year regarding what pre-revolutionary Russia was like, emphasising anti-tsarist or anti-monarchical sentiment and spotlighting a pro-communist sentiment.

In continuation of the chronological unpacking of the representation of Russia, a distinction needs to be made first between Communist Russia and Cold War Russia. Whilst Russia was still communist, the lens through which those using these textbooks learn of Russia is through the Cold War – hence the separate sections. The primary focus across the three Grade 11 textbooks is the establishment of communism. Communist Russia incorporates the following events: February and October Revolutions of 1917, Russian Civil War, the New Economic Policy, Stalin's takeover, the Five Year Plans and the purges. Although the February Revolution takes place prior to the official establishment of Communist Russia, it is integral in this process which is why I have included it under this banner as the influence of Lenin and the Bolsheviks is promoted. Furthermore, it is from the February Revolution where Lenin and Trotsky are foregrounded – the February Revolution is included only so much as to highlight

³⁹ It must be noted here that even the death of the Tsar and his family is overlooked. Only the Red Grade 11 Textbook indicates that the Tsar and his family were killed. The outcome for the Tsar is omitted completely in the Blue and Green Textbooks further emphasising the lack of importance. Furthermore, even though the Tsar's death is included, there is no mention of agency thus there is no clear image of who did the killing, reiterating the lack of importance on part of the Tsar and protecting the image of the Bolsheviks.

the efforts of Lenin and Trotsky⁴⁰. Both the February and October Revolution are marginally discussed with the focus remaining on the key leadership of Lenin and Trotsky in all three textbooks.

Under the banner of Communist Russia, Lenin and Stalin emerge as the main focal leaders in Grade 11 and (to some extent) the Grade 9 Textbooks. Whilst there are other leaders within Communist Russia such as Trotsky, Lenin and Stalin are foregrounded within the Grade 9⁴¹ and Grade 11 textbooks. Trotsky does appear as a considerable leader up to Stalin's takeover and his expulsion from the Communist Party and Russia. Following his exile, the focus is only on Stalin as the legitimate leader which is why I argue that Trotsky is side-lined as a main leader despite earlier contributions. The perpetuation of Lenin and Stalin as main leaders of Communist Russia (silencing other leaders in the process) transcends Apartheid era textbooks and earlier pre-CAPS post-Apartheid era textbooks (Halsall, 2016; Halsall & Wassermann, 2018). The focus on the leadership attributes of both Lenin and Stalin across the two grades (Grade 9 and 11) reinforce the underlying theme of 'big men' in leadership in South African (Naidoo, 2014). This will be unpacked as part of the scope below.

Communist Russia is represented through the images of Lenin and Stalin in all three Grade 11 textbooks and also marginally through the Grade 9 textbooks. Although there is inconsistency in the history of Russia that is represented across the Grade 11 (and to a smaller extent the Grade 9 textbooks), an agreed upon view of both Lenin and Stalin emerges across all three textbooks. From Grade 9, expressly so in the Blue Grade 9 Textbook, there is a pro-Lenin narrative whilst, conversely, a negative image of Stalin emerges.

Communist Russia under Lenin is represented as largely positive. Lenin's contributions during the October Revolution and the establishment of the New Economic Policy are viewed largely positively by the textbooks. The Red and Blue Textbooks do include some mention of negativity on the part of Lenin, albeit in a limited way. For example, the Red Textbook indicates bluntly that it was Lenin who sent troops to shut down the Constituent Assembly after the October Revolution. However, the Blue Textbook obscures this through language. In the Blue Textbook version, it states that it was the troops which were loyal to Lenin who shut it

⁴⁰ Trotsky is represented as a key figure from the February Revolution to the rise of Stalin in the textbooks. However, the focus is placed on Lenin and Stalin as legitimate leaders which is reinforced by the lack of inclusion of Trotsky in the summary sections.

⁴¹ Lenin is only omitted in the Red Grade 9 Textbook. Within the Red Grade 9 Textbook, only Stalin and Gorbachev are mentioned by name.

down, thus removing any agency on the part of Lenin. The Green Textbook outrightly avoids any negativity on the part of Lenin by means of vagueness. With this being said, all the textbooks obscure, omit or justify Lenin's role in the Civil War and its policy, War Communism. The Green Grade 11 Textbook provides an overall sanitised and romanticised view of the Bolsheviks as a whole. An example of this can be seen in its omission of any terror during the Civil War. Terror was a tactic employed by both the Bolsheviks (Reds) and opposition (Whites). This creates an extremely sanitised view of Russian history, specifically surrounding the leadership of Lenin. Historically speaking, the Kronstadt rebellion and its brutal shutdown is viewed as a key turning point in the decision to move away from War Communism. The Green Textbook omits this rebellion altogether maintaining its rose-tinted view of the Bolsheviks. However, Lenin's role in this rebellion is obscured by language choice in the Red and Blue Textbooks. Through the passive voice in the Red Textbook, and through the use of a qualifying adverbial phrase in the Blue Textbook, Lenin's role in the brutal shut down of the Kronstadt sailor revolt is blurred, assumedly in an attempt to maintain the positive position of Lenin. Although the Blue Textbook does ask learners whether Lenin could be considered a dictator, the textbook decides that, ultimately, he was not. What is therefore clear is that there is distinct alignment between communism and male autocratic leadership.

Stalin is often represented as a polar opposite to Lenin as a leader. Despite the Green Grade 11 Textbook's overtly romanticised view of Lenin and the Bolsheviks, there is some negativity (albeit limited) skewed against Stalin. Although limited, the Green Grade 11 Textbook does make mention of Stalin eliminating the Kulaks during collectivisation and it briefly mentions the purges begun by Stalin, with little to no specifics. The Green Grade 11 Textbook is more forthcoming with its positive depiction of Lenin and subverts the negative representations associated with Stalin whereas the Blue and the Red Textbooks were forthcoming in their positive representation of Lenin and their negative representation of Stalin. Although the Green Textbook does indicate Stalin being at the centre of eliminating the Kulaks and the purges, very little specifics are provided (an example can be seen in the lack of inclusion of human cost). What can be learned is vague overall understanding of Stalin being involved in dubious leadership decisions but with very little understanding of the political reality and human cost of his reign. Source 22 on page 38 of the Green Textbook is the only indication of the human cost of the purges. Overall, a consistent image occurs of two main leaders among communist leaders – one an obvious hero whilst the other is largely viewed as a dictator, although representations differ between textbooks. However, World War Two provides an alternative

view of Stalin. All three textbooks note that Russia was able to emerge stronger than before, with the Red and Blue Textbooks indicating this was, specifically, as a result of Stalin's industrialisation. This shift in view provides a swing in blame and provides a platform for possible justification.

The implementation of communism and the effect on the people is mentioned only through how the leaders directly applied the ideology and is generally backgrounded in the textbooks. The main focus in Communist Russia is that of the leadership. Although there is an attempt by both the Red and the Blue Textbooks to include some recent scholarship on Lenin as a leader, the overall view is in keeping with traditional and long-standing views of both Lenin and Stalin (Halsall, 2016). As Lenin is represented as defying the autocratic and oppressive Tsarist regime, his resistance can be seen as in line with that of anti-apartheid struggles against an oppressive regime as well as the anti-imperialist rhetoric within the Afrikaner narrative (Halsall, 2016; Halsall & Wassermann, 2018). Stalin's position has also remained largely unchanged within both the apartheid and post-apartheid context (Halsall & Wassermann, 2018).

Kaplan (2009) argues that textbooks introduce a new generation of students to agreed-upon versions of culture that present the dominant political ideology. Through the powerful textbook vehicle, students are then exposed to the current social norm and order which is pushed through the textbook (Kaplan, 2009). Apple & Christian-Smith (1991) have in the past argued powerfully that education and power are interconnected and cannot be divorced from each other. The implications of this are reflected in the representations of Russia in the analysed textbooks and its perpetuation of selected male historical characters and the selected historical events from Russian history. This speaks to the argument that history can be redesigned in order to represent what has been deemed valuable (Giddens, 1990). Although the endless emphasis on Lenin and Stalin is repetitive, the redesigning of heroes to suit the current South African societal norms is seen through how Lenin and Stalin are represented as anti-elitist and anti-capitalist respectively.

The key events within the Grade 11 textbook frame the establishment of communist Russia itself as well as the leadership. As the focus is on the rise of Communist Russia and its leaders, the events themselves are minimised due to the preference of 'big men' over specific events (Naidoo, 2014). Although my 2016 dissertation found that the apartheid South African history textbooks repeated the same events which appear in the textbooks used for this study (Halsall,

2016), a theme which emerged in this study is individual leaders contributing to great change in a country over the historical event itself. Both Lenin and Stalin consequently emerged as main instigators in Russia's history which indicates very few changes with regards to textbook historiography, even when ideological eras changed. This thinking is supported by Loewen (2008). What can be found in this scale of the representation of Russia is that leadership, specifically individual leaders (and male leaders), trump historical events. It marks the view that it is only (male) leadership which contributes to change in a country and a country's history. The notion that an individual leader has such agency to impact a country's trajectory is in keeping with the Great Man theory as well as what Naidoo refers to as 'big men' as main instigators and controllers of history (Frisk, 2019; Naidoo, 2014).

The focus on male leadership in the construction of a Communist Russia is strongly and overtly emphasised in the Grade 11 textbooks. Cold War leadership, whilst being an important component, is not as heavily emphasised in either Grade 9 or Grade 12 in comparison to Grade 11. The focus of Cold War Russia is represented through specific events and the response of specific leadership reposes in the textbooks analysed. In order to understand and contextualise the implications of the Cold War on the global scale, an understanding of the soviet sphere and the communist ideology is developed by the textbooks.

It must first be noted that there is very little concept clarification of the Soviet Union as well as the ideological implications across the textbooks and the grades. The main concepts which are identified in Grades 8 and 12 refer to the concept of the Soviet Union and the ideological battle of communism and capitalism. Grades 9 and 12 focus, in terms of scope, on the interchangeable geopolitical concept of Russia being the Soviet Union and the Soviet Union being Russia. However, this geopolitical concept is not clarified nor continued across all grades and all textbooks thus creating a disjointed and unclear image of Russia as a place. Although the Green Grade 9 Textbook is consistent in terminology usage it is not continued in the Green Grade 12 Textbook as it uses the terms Russia and USSR interchangeably. This creates a disjointed view of the Cold War period and the geopolitical nature of the USSR at the time.

The ideological battle of the bi-polar world is foregrounded by communism and capitalism as part of the scope. This ideologically provides the backdrop where the Cold War is placed. There is an overall lack of consistent conceptual framing regarding the communist ideology, as the one part of the bi-polar world, across the Grade 9, 11 and 12 textbooks. Only the Red Textbook offers a balanced continuation of the concept of communism across the grades. The Blue and

Green Textbooks, however, do not follow a consistent line of arguments across their grades. Although, the Green Textbook is inconsistent with its representation of communism, it maintains unwavering pro-US support across the grades and so the emphasis of the bipolar world is with the United States (US). In Grade 9, the Blue Textbook is more favourable towards communism as it refers to it as “highly sophisticated” (p. 141) whereas the Green Textbook is strongly pro-Capitalist as it places heavy emphasis on individual freedoms. From Grade 11, the Blue and Green Textbooks shift focus on their conceptualisations. The Blue Grade 11 Textbook notes that wealth is shared equally but little to no detail regarding the system itself is unpacked where the Green Grade 11 Textbook focuses more on Marx and his ideas and only identifies communism as an economic system. Little conceptual grounding of communism within the Soviet construct emerges. For Grade 12 textbooks, the Green Grade 12 Textbook does not offer any conceptualisation nor is there any focus on ideology throughout. The Blue Grade 12 Textbook, however, ensures that communism is synonymous with both the USSR and the lack of individual rights and freedoms. The Cold War perspective is still viewed through the traditional lens of an ideological battle between capitalism and communism. Despite this ideological lens, there is a very little conceptual grounding which occurs across the bulk of the textbooks which creates a blurred and uneven understanding of communism or even capitalism. Each Grade 9 textbook offers a different foregrounding of communism: one balanced, one pro-communism and the other anti-communist. At the end of Grade 9 history, learners will have a varied and largely imbalanced view of either ideology. Ideologies are deemed important through their inclusion and specification. However, an overall lack of conceptual framing impedes understanding of not only ideologies but also the Cold War.

Beyond ideology, the Cold War is represented by three specific key events. The key events that are focused on are the Cuban Missile Crisis, Berlin Blockade and the fall of the Berlin Wall. These Cold War events (barring the Cuban Missile Crisis in the Red Grade 9 Textbook) are covered in both Grade 9 and Grade 12 textbooks. Although I have stipulated that I would follow a chronological approach, in the case of the Cold War, I will first deal with the Cuban Missile Crisis, followed by Berlin Blockade and then the Berlin Wall. These three events are dealt with separately in the textbooks; however, I have opted to deal with Berlin Crises (blockade and wall) together because that is how they appear in the Grade 9 textbooks despite chronological discontinuity. For the sake of clarity, I have chosen this same thematic order.

The Cold War is the overarching umbrella under which the Cuban Missile Crisis and the Berlin Crises fall. It is important to first get a sense of how the Cold War as an event and concept is represented before looking at its symbolic events. The Cold War is represented through various examples. For Russia, the Cold War is represented through the CMC and the Berlin Crises.

The Cold War is represented differently in Grade 9 in comparison to the Grade 12 textbooks. In Grade 9, there is a 'softer' view of the Cold War as the focus is more on the other competitive spheres between the US and the SU whereas the primary focus in Grade 12 is that of the political focus of nuclear competition/warfare. This 'softer' view of the Cold War in Grade 9 could be because of the age of the learners at Grade 9 level or perhaps it is indicative of the different subjectivities of the textbook authors used for the Grade 9 textbooks compared to the Grade 12 ones. The other spheres of competition are largely sidelined in the Grade 12 Textbooks which reinforces the focus on the nuclear intensity. The political and ideological events foregrounded in the Cold War will be discussed next. Because these events are largely covered across Grade 9 and Grade 12, I will discuss the events from both grade perspectives.

The Cuban Missile Crisis appears as the main event to symbolise the ideological Cold War. Despite the chronological discontinuity, the Cuban Missile Crisis appears as the first symbolic event of the Cold War in both the Grade 9 (barring the Red Grade 9 Textbook) and Grade 12 textbooks which emphasises its historical significance. The Cuban Missile Crisis is used as a symbolic representation of the leadership of Kennedy (US) and Khrushchev (Soviet Union). Both the Red and the Blue Grade 12 Textbook (as well as the Blue Grade 9) represent the SU favourably as opposed to the bully-like representation of the US. The Green Grade 9 Textbook depicts a balanced approach; however, the Grade 12 Textbook is strongly pro-US with a specific focus on Kennedy's leadership only. In addition to symbolising leadership, the Cuban Missile Crisis is used to represent and highlight the tension between the US and the Soviet Union, and it is the only space where the Green Grade 12 Textbook acknowledges and contextualises the nuclear warfare component of the Cold War whereas it obfuscates elsewhere. The leadership response to this event is foregrounded; however, only Russian and US leadership are included. Cuba (and their leadership) is only considered when establishing the context for Russian missiles. Little else is gleaned thus Cuba is silenced. This reinforces the notion of the Cold War being a battle between the two ideological superpowers: Russia and the US.

The next event to be discussed as part of the scope of Russian history as represented in South African history textbooks is the Berlin Blockade. The Berlin Blockade appears at both Grade 9 and Grade 12 level (barring the Blue Grade 9 Textbook). The approach undertaken across the textbooks is inconsistent and sometimes contradictory. The Red Grade 9 Textbook appears largely critical of Russia whereas in Grade 12, it appears largely balanced. The Blue Grade 9 Textbook omits the Berlin Blockade (in order to maintain its pro-Russia stance) whereas the Blue Grade 12 Textbook follows a largely anti-Russian and anti-Stalin approach in its representation of the Berlin Blockade. For both the Green Grade 9 and Grade 12 Textbooks, an anti-Russian stance is followed. This stance is in keeping with its pro-US stance.

The final key event is that of the construction of the Berlin Wall and its collapse (post-Cold War Russia). All three textbooks address this event differently and no cohesive argument exists; however, the three textbooks share a similarity – all three view the Berlin wall construction through a faceless leadership. The lack of specificity silences Khrushchev’s role in the construction and subsequent creation of the physical and literal ‘iron curtain’.

Both the Red and the Green Textbook view the construction of the Berlin Wall unfavourably and both place specific blame on Russia for building the wall in both Grade 9 and 12. The Blue Grade 9 Textbook provides a romanticised version of the life between the East and West Berlin. It provides an image of a peaceful existence between the two sides which is strongly reinforced through its language choice. The textbook states on page 160 that upward of 3 million people “emigrated” to West Berlin. The vocabulary choice severely diminishes the tension between East and West, severely distorting the historical context at the time. Although the construction of the wall itself is not viewed favourably, a distortion of the socio-political context at the time is evident. The Blue Grade 12 Textbook views the construction of the wall as negative and does not include a favourable image of life in the zones.

Finally, post-Cold War Russia⁴² will be addressed. This is a very limited section and is viewed only within Grades 9 and 12. Post-Cold War Russia is largely viewed through the lens of

⁴² Anecdotally, the Berlin Blockade and the fall of the Berlin Wall are not topics that are always covered in class. As the Berlin Blockade and the Berlin Wall fall under the post-Cold War section, time constraints within the classroom do not always allow for the topics to be covered in Grade 9. For Grade 12, the post-Cold War topic is often excluded in favour of other topics. Realistically speaking, there is not enough time to teach all 6 topics in Grade 12 as only four are examined. Siebörger, R. A Reply to Peter Kallaway’s ‘History in High School 2012: A Comment on Curriculum and Assessment Policy Statement. History Grades 10–12’. School of Education, University of Cape Town Seminar, 2012. This is not a unilateral occurrence but merely an anecdotal addition based on my experience. Although this is anecdotal as it not applicable in every school, the fact that some districts opt for this topic not to be taught is indicative of the value placed on post-Cold war Russia and post-Cold War society.

Gorbachev's leadership which allows for the segway into the current post-Cold War society in a globalised world. Post-Cold War Russia is viewed within two spaces only: under Gorbachev and within the new post-Cold War paradigm. The consensus is that it was Gorbachev's policies (unwittingly) that led to the breakdown of the Soviet Union which is largely viewed quite positively. The symbolic representation of the end of the Cold War, as represented in the textbooks, is the fall of the Berlin Wall. The fall of the wall, although minimally discussed, is represented favourably across the textbooks. Post-Cold War Russia is viewed within the new global order where Russia features within BRICS. The transition of the end of the Soviet Union veers into showing where the current Russia features within the new global framework as a partner with South Africa. The Russian transition also occurred at the same time as South African's transition to a democracy in a post-apartheid world – both move away from an autocratic state. The inclusion of a post-Cold War Russia in both Grade 9 and Grade 12 phases illustrates the importance placed upon it. Whilst the topic is not as spotlighted in comparison to the establishment of Russia, Gorbachev's policies had a direct contribution to the end of Apartheid and thus the inclusion of this era in both Grade 9 and 12 suggests the importance of this event in relation to the South African historical framework (Filatova & Davidson, 2013). The Post-Cold War framing allows for each Grade 12 textbook to move to a discussion outlining the contributions made by Russia in South Africa's anti-apartheid struggle, solidifying the historical connection between South Africa and Russia. The move to this discussion attempts at illuminating a historical connection between South Africa and Russia thus promoting relevance. However, this illumination establishes the anti-apartheid struggle through the ANC thus legitimising their power. Russia's inclusion in the anti-apartheid struggle is represented then, not really to promote relevance but to secure authority and power for the ANC power base.

Given the eras discussed it is evident that the establishment of Communist Russia overshadows all other eras. If one compares the space allocated to the establishment of Russia (an entire topic) in comparison to post-Cold War Russia (part of a section), it is evident the power and influence of Russia's history lies in the establishment of Communist Russia. Soon after Russia became communist in 1917, the Communist Party of South Africa (CPSA) (now known as the SACP) was established in South Africa in 1921 (Filatova & Davidson, 2013; Halsall & Wassermann, 2018). The significance of this connection is replicated in the programmatic curriculum through the heavy emphasis on the establishment of communist Russia over other historical areas.

The scale history of Russia extends across Grade 9, 11 and 12. The history that is represented is a juxtaposition as it is both extensive and vague at the same time. There is very little content continuation across all the grades as well as across the textbooks which contribute to a lack of overall conceptual framing which adds to the lack of foundational historiographical backing. The history that emerges may be vast; however, it is uneven, inconsistent and at times, disjointed. In addition, the history that is represented is largely masculine. Russia as a historical topic emerges within Apartheid era textbooks and so Russia and Russian historiography transcends ideological eras thus spotlighting the significant focus on Russia within the South African framework (Halsall & Wassermann, 2018).

6.3.2 The scope of representation of China in South African school history textbooks

China is the second largest country, with reference to scope, represented within South African history textbooks. Because China's history is clearly sectionalised within the textbooks, I will address the scope of China's representation per grade. Chronologically, China's scope is disjointed as China appears in different capacities, which in turn affect the historical image of China when studied by South African learners. Grade 9 China, Grade 10 China and Grade 12 China are all different variations of China and so, in order to avoid confusion, I have chosen to represent the scope of China per grade.

Grade 9 China emerges as a brutalised victim of Japan during the so-called Rape of Nanking. It must be noted here that the Rape of Nanking is chronologically misplaced within this section. It appears within the World War Two section despite the Rape of Nanking beginning in 1937 – two years prior to the start of the war (Sedgwick, 2009). The Rape of Nanking provides very specific brutal imagery, but it is through this imagery where the US's heroism emerges as a key point. Perhaps the reason for inclusion is to push the villainous nature of Japan whilst also highlighting the heroic image of the US? China is represented as a pawn to illustrate Japanese aggression and villainy thus very limited content is available. The Rape of Nanking is provided as an example to heavily emphasise the brutality experienced by China. This brutality is strongly reinforced through the extremely brutal imagery in the included historical evidence in the Blue and Green Textbooks specifically. The brutality of the Rape of Nanking is further emphasised in the Green Grade 9 textbook with a source question asking the students to compare this event with that of the Holocaust. A comparison to the Nazis is a strange choice but further points out the extremely violent image of Japan conveyed. Despite this emphasis,

this event is not mentioned in any other grade which creates a disconnected and truncated history. What is an important consideration is that the brutality of the Rape of Nanking is heavily emphasised; however, any brutality or even cost of human life under Mao, in Grade 12, is glossed over. It appears that brutality at the hands of another is regarded as important, but China's own internal violence is largely silenced thus removing any importance. This will be unpacked further down.

The second China emerges as a part of Ancient China. Grade 10 China relates to the supposedly thriving nature of Ming China particularly under the leadership of Emperors Hongwu and Yongle. Despite the intended focus to be on the achievements of Ming China, assumedly through the two leaders aforementioned, very little specificity appears. The main focus lies in Zheng He's travels. However, outside of that, very little understanding of Ming China emerges. The textbooks leave about a 200-year gap in Ming China and only focus on the earlier leaders: Hongwu and Yongle⁴³. Perhaps a reason for the lack of specificity of Ming history lends itself to the postulation of Kallaway (2012): that there are content areas that could arguably be taught with more critical engagement because of established historiography, established curricula historiography and available support materials. Ming history (included in this is Mughal India) does not fit the criteria as Kallaway (2012) argues that there is a risk of limited support materials available over and above a lack of existing historiography. This assertion of the intended curriculum can be transferred to the programmatic curriculum in that very little specificity is foregrounded but rather a generality of achievements.

Despite the success of Ming China, the placement of Ming China within the curriculum is isolated and thus appears disconnected from the rest of China's history. There is little to no connection made to Ming China elsewhere therefore, it appears in a stand-alone manner. On a side note, it is crucial to also note that the Green Textbook included many inaccuracies within its content such incorrect dates as well as stipulating that Ming China was overthrown by Mongol invaders (instead of Manchu). So, an isolated and inaccurate Ming history emerges within the scope of the Green Textbook. This illuminates that, while Ancient China appears important as it has been selected, it is not of any substantial significance.

⁴³ I use the term 'official' to highlight leadership because Emperor Yongle usurped the power from his nephew when Emperor Hongwu appointed him as his successor. In reality, he is theoretically constituted as the third Emperor.

The final China focuses primarily on Mao's China and China during the Cold War. The case study on China can be separated into two sections: internal history and its foreign policies. Within in this section, I will unpack these sections as separate entities. As the scope of China encompasses quite a range of topics, it will be more cohesive this way. An important notation must be made regarding the Green Grade 12 Textbook: the textbook is chronologically and structurally incoherent which extensively limits the representation of China's history. Whilst there is an overall vagueness of China's historiography, the Green Textbook is exceptionally vague in its coverage which is manifested in the nine pages of content as opposed to the 20 and 29 pages of the Red and Blue Textbook counterparts.

China's internal history is broken down further into three components: rise of communist China⁴⁴, the Great Leap Forward and the Cultural Revolution. Each textbook provides a different focal point within the communist rise to power which further adds to the existing lack of textbook continuity. The Green and the Blue Textbooks both focus on the Kuomintang (KMT), suggesting a bias that leans in favour of the KMT as a legitimate power over that of the Chinese Communist Party (CCP). This extends to Taiwan initially being viewed as the legitimate power over that of mainland China after Mao Zedong came to power. The favouring of the KMT over the CCP is an extension of the apartheid narrative whereby the apartheid South Africa supported Taiwan as the legitimate power rather than the CCP (Anthony, Grimm & Kim, 2013). Anthony et al. (2013) state that it only took place in 1998 when diplomatic relations shifted (within the post-apartheid climate) and China's 'One China' policy was accepted, and Taiwan was de-recognised as a legitimate power; however, this historical past is still evident in some of the textbooks. Despite China's significant political and economic ties post-apartheid, there is still residual apartheid ideological construct reflected in the legitimisation of power.

Although all three Grade 12 textbooks include both the Great Leap Forward and the Cultural Revolution, the focus rests on the Cultural Revolution. It must be noted here that the Great Leap (as a topic) does not feature in the CAPS-History document. All that prefaces the Cultural Revolution is: *introduction: establishment of communist China in 1949 and events leading up to 1949 (not examinable)* (DBE, 2011 p.25). Although Bertram (2020) does indicate that textbook authors were required to maintain strict adherence to the CAPS-History guidelines,

⁴⁴ According to CAPS-History, the rise of communist China is not considered examinable but important enough for context to be applied DBE, Department of Basic Education 2011. Curriculum and Assessment Policy Statement: Grades 10-12: History. In: EDUCATION, B. (ed.). South Africa.

all three textbooks do make some indication of the Great Leap Forward, albeit extremely limited. Barring the Blue Textbook's one page, the Red Textbook uses ten sentences whereas the Green Textbook only uses two sentences to describe the Great Leap Forward. The scale of representation allocated to this topic underscores the lack of historical significance and reinforces its lack of appearance in the CAPS-History document. The question of human cost as an effect of this policy is grossly under-represented in all three textbooks. The Green Textbook maintains its extremely vague coverage of China through obtuse language choices such as the suggestion that an effect of the Great Leap Forward was "food shortages" (p.27) which led to "many deaths" (p.27). The vague and non-specific language severely downplays the effect of this policy and by extension spotlights the lack of historical significance of this topic in the programmatic curriculum.

Despite the favouring of the Cultural Revolution, there is still an overall indistinctness attached to the Revolution. If one considers the Great Leap Forward and the Cultural Revolution, a vague image of internal China emerges. Although the Cultural Revolution is weightier in comparison to the Great Leap Forward, there is still an overall specificity. Whilst there is a depiction of what the Cultural Revolution entailed, a lack of emphasis or context is applied and so the Cultural Revolution appears decontextualised. An example can be seen in the image of the Red Guards. The youth of the guards is not emphasised or clearly discussed; only the Green Textbook makes note of how young the Red Guards were. This may seem like a small discrepancy but understanding the age of the youth and the subsequent events in the Cultural Revolution provides a greater context to its impact and significance. Although blame is ultimately given to Mao, the intensity is inconsistent between the textbooks. The lack of uniformity across the textbooks and imagery speaks to another question – what is the desired focal image – Mao or the policies?

There is one similarity that is shared between both the Great Leap Forward and the Cultural Revolution: the significant downplay of the human cost of both these events. The Blue Textbook is the only textbook to offer marginally more information on the human cost in comparison to the single sentences offered by the Red and Green Textbooks in both sections. The lack of detail regarding the human cost lessens the accountability of Mao and diminishes the impact of these policies on the people. As Mao is the central figure throughout, his role in the policies is inconsistent between the textbooks. The lack of accountability and the lack of human cost is in direct contrast to how the Rape of Nanking is described in the Grade 9

Textbooks. Visceral images and accounts are provided which provide a deeply negative view of Japan to spotlight the ‘goodness’ of the US. In stark contrast, very few accounts or details of the Mao policies are provided despite the high death toll. The effects of Mao’s policies are heavily downplayed which in turn downplays Mao’s accountability, thus keeping a focus on Mao as a strong leader and perhaps “big man” (Naidoo, 2014).

Horesh (2021) argues how China, itself, presents its own history in their current history textbooks. The research found that although there is condemnation of the Great Leap Forward, an overall vagueness occurs as there is no mention of a famine or of the death toll (Horesh, 2021). Similarly, the Cultural Revolution is viewed as a personal mistake of Mao whereby no death toll is discussed (Horesh, 2021). South Africa’s representation of both the Great Leap Forward and the Cultural Revolution is in keeping with how China presents its own history. Anthony et al. (2013) suggest that, policy-wise, South Africa has overcompensated in favour of China and thus has overlooked any questionable acts by China in order to avoid possibly upsetting China or upsetting the current economic relationship within BRICS. This could be translated to the programmatic curriculum where we see a favouring of Mao through omission of human cost and economic implications.

The second element of China’s history is that of foreign policy which looks at China’s relationships with other countries. The foreign policies largely fit within Mao’s reign. Although there is some inclusion of a China post-Mao, the primary focus remains within the reign of Mao. Through the textbooks, China emerges as the prominent figure, and at times, aggressor, in the relationship with its neighbouring countries. Because of this stance, the agency of the neighbouring countries is overlooked in favour of the active role of China. As a result, China is the key focus and the main country which sidelines the neighbouring countries. It is these foreign relationships which are heavily emphasised within the Cold War framework.

China’s relationship with its neighbours includes Tibet, Vietnam, India and Taiwan. Both the Red and Blue Grade 12 Textbook view China’s relationship with Tibet as aggressive; however, in opposition, the Green Textbook places blame on the Dalai Lama. The Red and Blue Textbook argue that China is the aggressor nation in its relationship with India; however, it is not as heavily emphasised as it was with Tibet. The relationship between China and India is largely viewed as tense. There is very little inclusion of China’s role with Vietnam. Despite its long, shared history, very little has been explored. Taiwan’s relationship with China is viewed as contentious especially in relation to the earlier history with the KMT. Its modern-day

contention is not included in the textbooks thus providing very little modern-day connections to historical clashes or a newer historiographical reflection (Loewen, 2008). This is heavily emphasised in the Green Textbook when it stipulates that there have been no issues with Taiwan since 1955. The complexity of the geo-political relations between China's neighbouring countries is largely disregarded, so a vague view of these relationships emerges. Although, at times, Chinese aggression is included, there doesn't seem to be an overall point to these developments. The historical connection is mostly seen in how these relationships were shaped once Sino-US relations improved. Thus, the message here relates more to the ideological relationship between the US and China than of the state of diplomatic relations with China's neighbours. Furthermore, there is a discrepancy amongst the textbooks in how they depict these relations which speaks to the ideological perception of its creators.

Contrastingly to China's sporadic representation as an aggressor in Asia, China is largely viewed as a saviour of Africa. China's role in Africa is described as magnanimous and as a countermeasure to the SU. This view is perhaps because of the overt trade agreements with South Africa and the rest of Africa (Anthony et al., 2013). China's relationship with the Soviet Union is emphasised only so much as to highlight the negativity and subsequently spotlight the heroic nature of the US. The focal point of the US as a hero is secondary to the focus on China; however, it is a continuation of US heroism depicted in Grade 9. The extent of the foreign policies is closely link to Mao's reign and when it falls outside, the leader is obfuscated. There is only a brief post-Mao inclusion thus the image that emerges is that China is Mao and Mao is China.

An ideological element is added in the discussion between the Soviet Union and China and the US. The Sino-US relationship is heavily favoured over that of the Sino-Soviet one in all three textbooks. The blue Grade 12 Textbooks reinforces a strong anti-Khrushchev⁴⁵ reasoning in the souring of the Sino-Soviet relationship. Where the Green Grade 12 Textbook provides an overtly vague reasoning, it stands behind the Red Textbook's assertion of the souring of the Sino-Soviet relationship being ideological.

⁴⁵ The anti-Khrushchev reasoning is in stark contrast to the textbook's favouring of Khrushchev when depicting Communist Russia and the Cuban Missile Crisis. What can be gleaned from this is a lack of textbook continuity and a disconnect between topics.

Very few specific events are used to describe China in the textbooks analysed. This places more emphasis and significance on Russia within South Africa's own historiography. In Grade 9 China, the Rape of Nanking is the lens through which China's victimisation is explored. Grade 10 China, similarly to that of Mughal India, only focuses on achievements and leadership and does not delve into specific events. Zheng He's travels are an important component; however, I would argue they form part of the Ming era due to the large time period rather than as a specific event. Grade 12 is viewed through Mao's China and three key events are discussed: the rise of communist China, the Great Leap Forward and the Cultural Revolution. There is an overarching indistinctness when discussing these events and they are explored in far less detail and intensity than the manner in which Russia is represented. These events are viewed inconsistently across the textbooks and largely at surface level. There is a consistent blind spot when discussing the human cost of Mao's policies which could be a way to focus primarily on Mao's leadership and to downplay the policies.

Whilst China does have an extensive scope, an overall indistinctness is evident within the included content. Within the realm of scope, three different China's emerge across the three different grades; however, a lack of overall continuity and connection occurs which creates a truncated history. This truncation leads to an incomplete image of China. The primary focus and overall content focus lies with Mao and what the textbooks refer to as Mao's China. Despite this focus, and despite the various policies under Mao, both internal and external, an overall vagueness still emerges which further reiterates the incomplete and disconnected image of China.

6.3.3 The scope of representation of India in South African school history textbooks

The third most represented country in terms of scope and scale across the textbooks is India. This section will be addressed thematically as opposed to chronologically or by Grade. The reason for this choice is simple: there is an overlap of topics across the grades and so, to avoid confusion and repetition, it is prudent to address these topics thematically to give a sense how learners will learn it. Gandhi is an omnipresent figure who features across Grades 4, 8 and 10 which emphasises his role as a South African leader. Indentured labour is repeated in Grades 8 and 10 possibly because of its direct history with South Africa and to incorporate a core demographic within textbook historical representation. Mughal India is the only standalone

topic which only appears in Grade 10. Owing to the continuous overlap in themes and a lack of distinct chronology, a thematic approach is needed in the case of the representation of the scope of India.

As Gandhi is a ubiquitous figure across three grades, I will focus on him first. Gandhi appears as a central figure first in Grade 4 as one of two leaders in the topic, *Learning from leaders*. In Grades 8 and 10, Gandhi is not the main focus; however, the inclusion of Gandhi reminds the students of his historical significance and his omnipresent state in South African history. Gandhi's role in South Africa is deified and herofied across the textbooks as he is depicted as the sole activist fighting for equal rights for Indians in South Africa. Gandhi's activism in South Africa is foregrounded in Grades 4, 8 and 10 where his role in India is mostly silenced (only the Red Grade 4 Textbook mentions Gandhi's activism in India). Gandhi's presence across all three grades reinforces the image that Gandhi is India and India is Gandhi as far as history learning about India goes. Desai & Vahed (2015) argue that there is a difference between Gandhi the man and Gandhi the icon. Gandhi the icon was born out of a need to create a new national memory in order to unify South Africa, and Gandhi The Defender was created (Desai & Vahed, 2015). This difference is not found within the textbooks and Gandhi is immortalised as a great male icon. The construction of a herofied and glorified image of Gandhi is evident across ideological eras as the same image of a sacrificial Gandhi appears within apartheid history textbooks (Naidoo, 2014). The perpetuation of a herofied Gandhi further perpetuates the idea of 'big men' in history and leadership being a masculine task (Naidoo, 2014). Through the representation of Gandhi and the reinforcement of Gandhi's activism against oppression, a gap emerges in the perception of resistance prior to Gandhi. Gandhi emerges as the only leader within the struggle against oppression which further emphasises Gandhi's messianic image.

The second theme is that of indentured labour. The scope of representation in both Grade 8 and 10 is poorly and inconsistently covered. There is an inconsistency across not only the grades but the textbooks and so an uneven understanding of indentured labour occurs. There is no clear agreement between textbooks and grades. In terms of Grade 8, context is lacking. For example, The Red and Green Grade 8 Textbooks do mention the brutal hardships of the labourers, but no elaboration of those terms occurs, thus an incomplete image emerges. The Blue Grade 8 Textbook offers a romanticised image of the labourers instead. Only positive imagery is included. Furthermore, the landowners were considered benevolent by describing all that they offered to the labourers. The uneven and ambiguous representation is continued in

the Grade 10 Textbooks. The Green Grade 10 Textbook offers the most in terms of scope of representation. It includes various aspects such as the other spheres of the indentured work and a brief etymology on the term *coolie* which was used at the time. While the Red Grade 10 Textbook does provide a holistic view of indentured labour and its conditions, it does not elaborate on these conditions. The Blue Grade 10 Textbook is vague in its coverage and only offers one sentence to describe the conditions of the indentured labour. There is no consistent detailed unpacking or understanding of indentured labour and its conditions across both Grade 8 and Grade 10. In addition, indentured labour is largely seen as a male endeavour. Although women are pictured or made mention of, women are largely marginalised within the indentured labour history. The Green Grade 8 Textbook omits women altogether and going so far as to only use masculine pronouns. Due to the inconsistency and omission, women appear backgrounded and indentured labour becomes a history of masculinity.

Although indentured labour is the primary focus there is a minor glance at Passenger Indians in Grade 8 and 10 and anti-Indian legislation in Grade 8. I mention these two components separately as they are backgrounded within the South African textbooks and very little is learned. In both Grade 8 and 10 Textbooks, Passenger Indians are described in a few sentences. The historical significance of Passenger Indians is grossly underrepresented as no real detail is provided. Grade 8 textbooks (Red and Blue specifically) optimise on the reinforcement of Gandhi through the history of Passenger Indians. Whilst they do not outright stipulate that Gandhi was a Passenger Indian, it is alluded to due to his inclusion within that component. The Anti-Indian legislation inclusion in the Grade 8 textbooks is also used as a link to Gandhi and his involvement in political resistance (such as the formation of the Transvaal Indian Congress (TIC) and the Satyagraha campaign). The constant circling back to Gandhi within the Grade 8 textbooks (where history is still compulsory) reiterates the perceived historical significance of Gandhi and is constant representation of a hero. Anti-Indian legislation is vague, and the textbooks do not elaborate on this legislation. The section is utilised to both link to Gandhi's political contributions but also to spotlight an anti-Afrikaner or anti-Transvaal narrative. In comparison to Natal, where indenture labour was taking place, the anti-Indian legislation in the Transvaal is heavily criticised – which appears hypocritical. The lack of colonial identity and agency that is attached to colonial Natal is overlooked. The colonial narrative is an element that will be discussed later on but needs to be highlighted here.

Finally, the last topic is that of Mughal India which appears in Grade 10. India, as a country, is only taught from Grade 10, after History has been selected as an elective. Grade 10 Mughal India is detached from the rest of the grades as there is very little attempt to make a connection. South Africa's representation and inclusion of Mughal India is ironic, given that India is currently rewriting its textbooks to exclude Muslim historiography of Mughal India. The decision to remove Muslim history and contributions from history is argued by the government as an attempt to lessen the workload for the students. However, critics argue that this move is a way for Prime Minister Narendra Modi's party to secure the 2024 election with continued Hindu support through the attempt to demonise and belittle the Muslim contribution in Indian society and history (Bhat, 2023; Truschke, 2023). The contrast in how South Africa represents India's history is interesting as it is in direct contrast to the revised history textbooks in India and what history is taught in India. South Africa's Indian population is largely Hindu according to a 2020 article by South African news website, *News24* (Kumar, 2020), yet the South African Grade 10 curriculum follows a pro-Muslim narrative with very little reference to Hindu history outside of Gandhi. An example can be seen in the description of Mughal achievements. The primary focus remains on Mughal/Muslim scholars as key contributors which silences and sidelines other scholars.

Mughal India is largely viewed through its achievements. However, although there is a key leader and key inventions (such as the seamless celestial globe⁴⁶), nothing specifically is foregrounded. Little is foregrounded owing to the superficial and inconsistent coverage across the textbooks. Only one main leader is included across all three textbooks in the representation of Mughal India: Emperor Akbar. There are brief inclusions of other leaders, but character traits or contributions are largely absent. Akbar is repeatedly referred to as a great leader or Mughal India's greatest leader. With this, Mughal history becomes a history of men. Within the textbooks the 'big man' concept is reinforced through the revered image of a brave Akbar, an Akbar who was benevolent because of his promotion of religious tolerance throughout his reign. Although women do appear in a sectionalised space within the textbooks, very little is gleaned. Women are mostly depicted as wives and mothers and their contributions exist only within the masculine narrative. Very little is learned of women within Mughal Indian society except as patrons of the arts and literature. The Blue Grade 10 Textbook includes a single notation that many of the famous buildings built during the Mughal period were designed by

⁴⁶ The seamless (one piece) celestial globe was created during the Mughal era.

women. Despite this significant mention and significant focus on architecture in the topic, no further detail is provided. Specific women are mentioned only in how much they helped their husbands. For example, the death of Shah Jahan's wife led to the creation of the Taj Mahal. All that can be gleaned is that she was his favourite wife and her only noteworthy achievement was her death as it led to the building of the Taj Mahal. Through these limited inclusions, women's contributions are largely silenced and overlooked. This perpetuates the existing narrative that only men can be movers of history and thus history is a masculine endeavour.

The decline of Mughal India is briefly and unevenly represented. The outcome of the decline of Mughal India was the establishment of British India. Colonialism plays as an undertone throughout Mughal India (and indentured labour); however, there is very little foregrounding or conceptual unpacking thus a vague understanding of colonialism emerges. A key identifying moment of British takeover, as represented in the textbooks, was the Sepoy Rebellion. Despite the significance of the rebellion as a representative of the start of colonial India, it is not only haphazardly addressed but the revolt itself and the consequences are heavily underdeveloped thus providing a 'cleaner' image of colonialism and colonial India. Colonialism as a concept is consistently underdeveloped which is highlighted by the lack of critical discourse evident throughout discussions of India.

The colonial history of India is unclearly represented within the textbook despite its perceived importance and inclusion. The omission of the colonial discourse perpetuates a largely pro-British narrative. In Grade 4, Gandhi is vaguely presented as protesting British rule in India; however, only the Red Textbook indicates any protest action. A vague construct of why is established in the Red Textbook, but with little elaboration. The lack of colonial discourse evident in Grade 4 extends across the Grades 8 and 10 as discussed earlier. Through this omission of a colonial discourse, a rose-tinted view of Britain or a pro-British narrative emerges. South Africa's colonial history is tied to its indentured labour history, which is tied to India's history; however, very little is learned of colonial India or colonial South Africa.

The scope of representation of India attempts to be broad; however, very little content emerges regarding India as a country. A lack of synchronicity is evident across the grades as there has been little to no attempt to make a connection. The fragmented history of India lends itself more to memory politics and an attempt to rebrand history (Nietzsche, 1874). Kallaway (2012) asserts that the CAPS curriculum fragments the history and so learners will learn history in bubbles. In terms of the representation of India as BRICS partner, he is correct. The lack of

consistent representation reiterates the power play in history as offered by Nietzsche (1874). He determined that one can know how to forget at the same time. It seems that only certain histories (or people) are being selected for remembrance. This speaks to the power of a perpetuated historiography and the unchanging nature of textbook historiography despite the largescale global changes and changes in academic and historical scholarship (Loewen, 2008).

6.3.4 The scope of Brazil's history in South African school history textbooks

The last BRICS country and the least represented is that of Brazil. Brazil is only mentioned in a very limited capacity in Grade 10. South Africa is embedded in a geo-political partnership with Brazil; however, despite this contemporary partnership, and South-South cooperations, very little is learned of Brazil. Despite the shared historicity of colonialism, Brazil and its history is not considered as historically significant. This lack of significance is spotlighted in the lack of scope of representation of Brazil.

There is a limited mention of Brazil in the Red and Green Grade 10 Textbooks only, and it is mentioned only through its position as a Portuguese colony. The geo-political placement of Brazil on a world map and its role in the slave trade as a Portuguese colony are discussed briefly in the Red and Green Grade 10 Textbooks. Thus, what can be gleaned of Brazil's history is a largely imperialist view. The history of Brazil is largely silenced within South African history textbooks implying a lack of historical significance.

Brazil shares many historical similarities with that of South Africa and parallels can be drawn. Brazil has the largest population of African diaspora in the world. In 2003, African history was made compulsory within the Brazilian history curriculum in order to address the existing racial prejudice and identity construction of a 'Latin America' (DBE, 2018). Considering these parallels of a shared slave and colonial history and a shared struggle for an inclusive identity construction due to imperialist and racial hegemonic influence, South Africa nevertheless omits Brazilian history and historiography from its textbooks. This is significant in that the silence on Brazil speaks to where the power lies in terms of historical partnerships – Brazil has almost no power in terms of being a historical ally.

6.4 Cross-cutting themes on BRICS countries as represented in the South African school history textbooks

Having discussed, in an analytical manner, the representation of the scale and scope of the histories of the BRICS countries, it is now necessary to extrapolate from that the cross-cutting themes that have emerged in the representation of BRICS countries in South African history textbooks. It is within this extrapolation where abstraction and the theory and literature intersect. In sum, this section will highlight the cross-cutting themes which have emerged from the analysis and weave it within the existing literature and theory in order to contextualise the findings.

First and foremost, the most obvious finding is the dominance of Russia in South African History Textbooks; Russia dwarfs its BRICS counterparts. The overemphasis on Russian history in the history textbooks speaks to the level of power and authority Russian history has over South African history and textbook historiography. The dominance of Russia in the textbooks can be seen as a way to emphasise historical sentimentality and reinforce and legitimise historical partnerships. Russian historiography is present in both apartheid and post-apartheid history textbooks and so, its representation transcends ideological eras (Chisholm & Fig, 2019; Halsall, 2016; Halsall & Wassermann, 2018). The historical bearing of the perpetuation of Russian history across ideological eras is two-fold. First, it highlights the power and influence of Russian history within the South African historical framework and, secondly, it underscores the unchanging nature of textbook historiography.

A question must be asked: why is Russia so dominant? The dominance of Russia within the programmatic curriculum informs the existing relationship with South Africa's political reality and it is a reminder of the past. As aforementioned, Russian history transcends ideological eras; what is then representative within those eras? For apartheid South Africa, learning about Russia underscored the need to know thy enemy. South Africa was in the midst of 'Die Rooi Gevaar' (Red Peril) which guided internal and foreign politics and, as such, learning about Russia was more politically motivated, perhaps to justify existing anti-communist policies at the time. Post-apartheid history is reflective of historical sentimentalities. The Soviet Union, historically, provided support for the Umkhonto we Sizwe as well as for those anti-apartheid activists in exile. The textbooks reinforce the image that the ANC was the main opposition, so much so that the Green Textbook heavily suggests that the ANC was the only viable solution to the country's problems. Although this is indicative of how South Africa's history is currently interpreted, Russia appears to have played an indirect role due to ideology. Dahrendorf et al. (2006) and Rousseau (1968) make an assertion that can be applied to Russia in South Africa's

curriculum. They assert that the premise of power lies in its need to be legitimised. South Africa uses its long-standing historical relationship to reinforce the legitimacy of power held by the dominant hegemon.

The heavy emphasis on Russian history stresses contemporary politics and historical legacies. The stress on contemporary politics speaks again to the notion of memory politics and textbooks being the political vehicle used to drive this memory (Apple & Christian-Smith, 1991; Bertram & Wassermann, 2015; Wojdon, 2014). History textbooks and the content therein are constructions which have been developed by real people with real ideological beliefs and biases (Apple & Christian-Smith, 1991). Considering this, it is important to see how this understanding influences the construction of the historical narrative and desired national memory within history textbooks and how this impacts the foregrounding of knowledge for South African citizens pertaining to all the BRICS countries.

Russia is by far the most dominant country represented despite the historical relationships or similarities shared by other BRICS countries. The other BRICS partners play second fiddle to Russia and so the power, in terms of the historical framing, lies with Russia. A question must be considered here: if a learner studies history and the teacher teaches history, what do they learn about BRICS countries on a continuous basis? A simple answer is that learners will undoubtedly learn about Russia on a continuous basis; however, the learning of the histories of Brazil, India and China, and how they are represented is disjointed and fragmented thus suggesting that Russia and its history is more historically significant.

The overemphasis on Russia places Brazil, India and China on the back foot. Whilst Russia does share a long history with South Africa, it is not the only country to share a history. Although China does have a labour history with South Africa, India's history and shared colonial history is much deeper. Both South Africa and India share British settler history and thus, from the colonial viewpoint, more should, in theory, be learned of India. Furthermore, indentured labour as an integral component in South Africa's labour and economic history needs to be considered. Up until recently, the province of KwaZulu-Natal was considered to have the largest population of Indians outside of India. The historical ramifications of India and South Africa's shared colonial history, compounded by the history of indentured labour, should be reflected within the textbooks. It is not. A vague and disconnected view of India and even indentured labour emerges from within the textbooks thus providing an emphasis on the lack of importance placed on India. Furthermore, Gandhi is foregrounded with South Africa's

history and is considered India's most famous export, thus an image of India largely emerges through the lens of Gandhi.

Contemporarily, China maintains one of the strongest economic connections to South Africa as BRICS partners. Despite the historical or contemporary connection, the focus remains on previously established partners, i.e., Russia. I have left Brazil until last. Brazil is mostly silenced within the textbooks thus learners will not learn next to nothing about Brazil. Although Brazil does not share a direct history with South Africa, it shares a similar colonial history and so parallels can be drawn through a shared experience. Furthermore, demographically, Brazil has the highest diaspora of Africans outside of Africa and so further mirrors shared similarities beyond historical. To address the silences and obfuscations around the remainder of the BRICS countries, I will begin with China and India because of the shared history. I will address the silence and omission of Brazil in the curriculum next.

As for many South Africans, exposure to BRICS history is only seen through the history reflected in the textbook. With this being said, what is the history of China and India? The lack of cohesion and chronological alignment indicates that learners will learn a deeply fragmented history with little historical connection. Kallaway (2012) criticises the curriculum for presenting a disjointed and fragmented history in which students will learn history in bubbles. This criticism is reflected within the programmatic curriculum. This lack of cohesion or attempt at a clear chronology highlights the unevenness with which South Africa treats its geo-political partners within the programmatic curriculum. What is clearly evident is that memory politics play a key role in determining not only what is remembered but who is remembered (Bertram, 2020; Wojdon, 2014).

Lastly, Brazil and South Africa share similar historical experiences, yet Brazil is severely underrepresented within the programmatic curriculum. Coloniality is not the only historical space shared by Brazil and South Africa. Brazil can be considered, like South Africa, as a settler state due to the Portuguese colonisation. South African history is mirrored through the settling of first the Dutch in 1652 and then the British from 1795 (Oliver & Oliver, 2017). Secondly, Brazil's indigenous and African diaspora experienced and continue to experience racial oppression, despite different political regimes. Lastly, due to its geo-political location, Brazil was at the centre of the Trans-Atlantic slave trade. Whilst South Africa does not directly share experiences with Brazil specifically, the historical experiences can be mirrored within

South Africa's own historical framework. In addition to their shared historical experiences, Brazil and South Africa share economic similarities and have united through the south-south cooperations. Thus, Brazil and South Africa are emerging global partners, yet Brazil is almost completely omitted within the textbooks. In contrast, Brazil, in 2005, added African history to be formally included within their compulsory curriculum (DBE, 2018). The inclusion was done to specifically deal with racial-ethnic division and conflict in Brazil (DBE, 2018). Within the South African curriculum, no such reciprocity is illustrated or enforced, despite shared experiences and contemporary political and economic alliances. Brazil is mentioned only as an afterthought as the focus within the Portuguese expansion and the slave-trade. Despite CAPS-History incorporating contemporary history within the curriculum, contemporary partnerships are not considered and, in essence, there is a clear preference for historical partners. Brazil's history and Brazil as a compatible historical partner is largely silenced.

The silencing of global partner's history is not the only silence appearing within the textbooks. A clear finding spotlights the masculine history of the BRICS countries. 'Big men' and their contributions to history are heavily foregrounded. A gendered history of 'big men' is represented through powerful male leaders (Naidoo, 2014). The history of the BRICS countries is presented mostly through the male leaders who are represented as heroes. Women and women's contributions are mostly silenced within this gendered history. As such, two points converge within this theme: the masculine reinforcement of 'heroes' and the lack of female representation in textbook historiography.

There are a number of theories surrounding the theory of a (masculine) hero and the institutions which make them; however, the notion postulated by Carlyle (1993) that Great Men are movers of history immortalised from the 19th century, is seen through the representation of masculine leadership within South African history textbooks. Furthermore, (Frisk, 2019) argues that the underlying concept of a hero is masculine in itself and such an inextricable link between the imagined hero and the Great Man theory is constructed.

Frisk argues that there are many ideations regarding the concept and the origin of the hero. The concept of a hero is changing in nature. Thus what can be determined is that the concept of a hero is a societal construction that is born out of the societal needs at the time (Carlyle, 1993; Frisk, 2019). As such, hero and Great Man have become synonymous in some scholarship (Frisk, 2019). This connection between Great Man and hero is largely reinforced throughout

the history textbooks. Frisk (2019) argues that there are examples in post-traditional societies where they have started to recognise female leadership but only through the spotlighting of what is considered female virtues. There is a gap in how men are represented within society and literature versus the representation of women. This gap is also visible through the lens of the history textbook.

In 2016 a Textbook Evaluation Report was conducted by the Ministerial Task Team. The authors of the task team investigated the representation of women and possible gender bias (amongst other biases) within a selection of South African history textbooks. The concern of the authors lay in global research concurring that women are “under-represented, negatively represented and misrepresented” in comparison to their male counterparts (DBE, 2019 p.38). The result of this research reiterates the marginalisation of women in textbooks, often in keeping with the traditional and/or conservative belief systems. The perpetuation of a patriarchal history within South African history textbooks aligns with both unchanging historiography and an understanding of where power and authority is reinforced. Under the apartheid-era grand narrative, history was white Afrikaner male-oriented whereas CAPS-History still perpetuates a patriarchal history through the continuation of male leaders and masculine history. Foucault (2012) and Haugaard (2021) argue that authority is dependent on the power construction within the societal framework. Naidoo (2014) asserts that the relationship between power and gender cannot be divorced from the history curricula. As such, the analysed history textbooks reinforce a patriarchal history where male leaders dominate, emphasising who has authority within the socio-political structure.

Furthermore, ‘big men’ are largely glorified and in turn are memorialised as heroes within the programmatic curriculum. A ramification of this is that the history rather becomes a history of men rather than the history of the people (Wassermann, 2017). Loewen (2008) argues that herofication or even vilification emerges within textbook narrative to reinforce an imagined or desired national history. Gandhi, Lenin, Stalin, Khrushchev, Gorbachev and Mao are heavily foregrounded as ‘big men’ as the history of their country centres around and is guided by them. Through this, little history of ordinary people emerges.

What is strongly evident from the textbooks is that the focus is on leadership and the men who create history rather than the experiences of the ordinary people. There is a vague overview of the casualties during events and crises in the history textbooks. The experiences of ordinary

people are largely silenced or romanticised in order to promote a desired history. The FET CAPS curriculum makes a statement that the studying of history allows for the voices of the ordinary, every-day, people to be heard (DBE, 2011 p.8). Despite this inclusion, there is an overarching silence on the voices of the common person. The voices of the ordinary people have been pushed aside to accommodate the ‘big men’ and their actions or decisions in history.

The lack of voice is reinforced through the lack of detail of human cost under certain policies in various countries. The politics within the gatekeeping of memory comes into play as the imagined hero and great man emerges from within the textbooks, specifically within the unchanging nature of textbook historiography (Loewen, 2008). What is learned is rather a history of ‘big men’ rather than a history of the society. The experiences and impacts of political choices and policies is largely absent thus creating a distorted and rose-tinted version of history. Through ‘big men’ a discourse of obfuscation is evident in its representation of ordinary people. If textbooks are the vehicle through which knowledge is disseminated, then what is learned? Chisholm (2015), Fuchs (2011) and Pingel (2008) argue that within post-conflict society new national narratives are formed. However, whilst there have been curriculum additions and adjustments to the angles of discourse, the masculine herofied narrative from the apartheid era is fortified within the post-apartheid textbooks.

The lack of focus on the ordinary voices through the silencing in favour of the ‘big men’ can be seen as an ideological positioning on the part of South Africa. A notable celebration of Russia and China is seen in the textbooks through the narrow focus on leadership, omitting the experiences and hardships of the ordinary people. This is done despite ‘multiperspective’ curriculum rhetoric. The ideologically positioning within the programmatic curriculum can be cemented by South Africa’s existing foreign policy. Post-apartheid South Africa has strongly declared its governance in line with Human Rights (Jordaan, 2014). This alignment is clear in the CAPS document where it specifies twice that Human Rights is one of the guiding principles of both the National Curriculum Statement and History Education (DBE, 2011). Despite this established rhetoric, the oversight and at times romanticisation of violent history in the programmatic curriculum leads to a different answer: a significant sidelining of human rights issues. One of the core criticisms of South Africa’s alignment with BRICS is the blinkering of Human Rights abuses by Brazil, Russia, India and China (Armijo, 2007; Koba, 2011; Taylor, 2017). Jordaan (2014) posits a question. He questions whether South Africa is prone to shielding oppressive states against their Human Rights abuses thus protecting its (South

Africa's) own agenda. The research undertaken by Jordaan looks at specific examples when South Africa had a voting seat at the UN Human Rights Council (Jordaan, 2014). The study found that despite its political rhetoric, South Africa was prone to protecting oppressive regimes especially through multilateral forums. Furthermore, Jordaan (2014) stipulates that South Africa's foreign policy was not pragmatic and, thus, Human Rights being the guiding principle had to take a backseat to foreign policy. This was alluded to early under Anthony et al. (2013), where they argue that policy-wise, South Africa is lenient with China and panders to their needs given their sizable economic interest and investment in South Africa. Furthermore, whilst Jordaan's study does not reflect BRICS countries, correlations can be drawn.

The lack of focus or critical discourse on the human cost under 'good' leaders lends itself to the foregrounding of leaders, regardless of what has happened. Stalin is the only leader where there is some mention of the human cost; however, this more specifically done within the purges because of Stalin's active and undeniable role in them. However, the human cost during the Five-Year Plans was undermined and later somewhat justified through the assertion that Russia survived the war because of them. Furthermore, recent politics spotlights South Africa's allegiances to its BRICS counterparts. The 2022 Russian Invasion of Ukraine has been met with global condemnation; however, South Africa has refrained from making any public comments⁴⁷ regarding this matter and refrained from any UN votes against Russia. In addition, South Africa, India and Brazil have refused to place sanctions on Brazil (de Oliveira, 2023). Despite the lack of provocation for the war, South Africa has opted to side with its geo-political ally despite human rights abuses occurring. The distinct lack of detail regarding deaths or hardship by key partners speaks more about the ideological positioning of South Africa. South African foreign policy is being reflected in how key economic partners are being represented.

Power politics is evident in the promotion of key historical partners over newer partners. Foreign policy reflection is evident within the textbooks. Anthony et al. (2013) argue that South Africa's diplomatic leniency with China is applied in order to safeguard and sustain their current economic relationship. To a smaller extent this can be viewed through the

⁴⁷ Minister Naledi Pandor, at the start of the invasion, condemned Russia; however, her comments were quickly removed and adjusted to double-down on historic partners. Hunter, Q. 2023. 'We've made it clear that Russia is a friend': Pandor doubles down on SA's Ukraine stance. *News24*. The quick reaction by the South African government against an outlier opinion against its clear ally emphasises where South Africa's allegiance lies.

programmatic curriculum, through the aligning of China's historiography with China (as much as possible) as well as creating a 'softer' version of Mao as a leader (Horesh, 2021). Is safeguarding of contemporary political arrangements also evident within the programmatic curriculum? Or are there ideological underpinnings which influence representation?

The Grade 12 textbooks describe the ANC as the only legitimate opposition party (through the assistance of the Soviet Union) thus creating a de jure power – which is now the de facto power (Faulhaber, 1985). Thus, the inclusion of Russian history has been used to reinforce a political power and thus has been, what Nietzsche refers to as 'rebranded' to suit the contemporary desired political needs (Nietzsche, 1874). Not only does the overemphasis of Russian historiography fortify South Africa's historical partnership with Russia, but it is also used to solidify and legitimise authority of the ANC as the only acceptable hegemonic power. This reinforcement is seen through how symbiotic Russia's anti-apartheid resistance and the ANC were represented – silencing any other key party or key member. What happens then is that it is not only a history of Russia in South Africa but also a history of the ANC. History textbooks are used to fortify and legitimise societal norms based on the dominant hegemon (Apple, 1990; Chisholm, 2015; Engelbrecht, 2006; Pingel, 2010). They do this through the construction of official and legitimised knowledge. Through the propagation of Russia's history, the ANC emerges as the only legitimate authority within a post-apartheid world, thus history textbooks are used to validate and fortify their leadership position (Engelbrecht, 2006; Zajda, 2015).

History textbook content is seen as being a social construction that reflects the required societal obligations, thus textbooks are political entities (Apple & Christian-Smith, 1991; Chisholm, 2015; Crawford & Foster, 2006; Zajda, 2015). Taking into account the economics, the marketability of the textbook, and the textbook writing process, what content is reflected within the officially sanctioned textbooks (Siebörger, 2015)? History textbooks do not spontaneously end up in circulation and at schools: there is a process of acceptance through a DBE-sponsored committee that is required (Siebörger, 2015). With this being said, the content must align with certain criteria that judge various elements of the textbooks. However, despite this process, uneven historiographical representations occur within different textbooks which denote a lack of historical rigour and, at times, academic rigour. Furthermore, ambiguities and contradictions are evident within different textbooks, despite the 'same' event taking place. Ambiguities and contradiction occur in both textbook content and sources across various grades. This reinforces a fragmented history which lacks an overall master narrative.

The use of sources within the textbooks further obfuscates a master narrative on the representation of BRICS countries. Across the grades and textbooks, source referencing is inconsistent and, at times, omitted. Grade 12 textbooks appear to have the most consistent and complete citations whereas there is a large discrepancy in referencing in the junior grades. Furthermore, visual sources⁴⁸ are the least consistently referenced across the grades and textbooks as they go largely unreferenced. This omission and obfuscation in source citation speaks to a bigger problem – how is historical inquiry treated in South African history textbooks? The lack of consistent referencing from early on indicates the lack of historical inquiry that is expected from assessments in the textbooks as well as the pedagogical expectations from the curriculum. The overall image that subsequently emerges is that historical inquiry is on the back burner and more focus is placed on the content and the narrative within.

In addition to a consistency in source citation, is the emphasis of Western-centric sources. Many of the sources reinforce established Western ideals and perspectives which at times is supported in the texts. For example, in both Ming China and Mughal India there is consistent Eurocentric reflection which underpins and to a point undermines the significance of the two empires. The traditional Eurocentric focus, placing value on Western ideals, is evident across the textbooks, even within the sections on Russia and China. This points towards the history textbooks maintaining a colonial impression and an absence of decoloniality. Siebörger (2015) condemns internet use for a ‘quick pick’ of sources within textbooks. Perhaps the sudden availability of sources allows for the lack of source provenance and a lack of critical discourse? However, given the rigour associated with textbook production there are other key factors to take into account. The absence of decoloniality could also be due to existing historiography or the government-sponsored textbook production criteria and publishing houses. A myriad of forces go into the establishment and circulation of textbooks.

As evidence used to deal with the representation of the history of BRICS countries is largely Eurocentric, this issue speaks to the questions centred on coloniality and the perpetuation of existing views. The lack of recent scholarship, country-specific evidence not only speaks to the

⁴⁸ Citations of illustrations occur at the back of the textbooks; however, the same does not apply for the written sources. This means that in order to check provenance, students would have to search through all the visual source citations for each topic. The lack of consistency in source presentation is also problematic.

unchanging nature of textbooks but also the perpetuation of a colonial identity in a post-colonial South Africa. The perpetuation of western-centric views is also evident in the historiography of Russia. Russia is regarded as largely anti-colonial historically, however this anti-coloniality is not evident within the sources of evidence used (Chisholm & Fig, 2019). The sources presented follow a unilateral position of repeated authors and western-centric scholars.

Despite the changing nature of the South African history curriculum, little has changed in terms of historic consideration for established historiography and established Eurocentric views. What has already been discussed pertains to the fragmented history and conceptual underpinnings, the lack of chronology and the lack of historical rigour evident within the programmatic curriculum. Kallaway (2012) asserts that how CAPS-History has approached the historical topics is fragmented and historically isolating. Furthermore, he questions how much teacher knowledge would be available given the lack of available historiography for some topics leading to some over-reliance on textbooks as a teaching tool (Kallaway, 2012). Kallaway's assertions relate to the intended curriculum; however, they are applicable to what has been found within the programmatic curriculum.

DeLury (2022) points out that there is an undeniable connection between the state and the minds of the students within educational spaces. Despite this connection, there is a disjuncture between intended curriculum specifications and what has emerged in the programmatic curriculum in terms of historical thinking and how it relates to the BRICS countries. Historical inquiry and thinking are on the back burner and more focus is placed on the content and the narrative held within. A clear disconnect between what has been proposed in CAPS-History to what emerges in the programmatic curriculum appears which presents a watered-down history (Bertram & Bharath, 2011). Furthermore, Bertram (2006) argues that epistemic tension exists between the intended curriculum and the programmatic curriculum, as despite the rhetoric for multiple perspectives and the proposed 'focus' on the doing of history in CAPS-History, the textbooks reinforce memory over discipline. The lack of historical inquiry reinforces recall and memory over disciplinary knowledge and so, what emerges, in relation to BRICS countries, is a simplified history.

Despite the lack of historical rigour and cohesiveness in terms of details, there are elements of history, in relation to BRICS countries, that are reinforced in both the intended curriculum and the programmatic curriculum. Both Kallaway (2012) and Siebörger (2012) criticise former

curricula for repetition of topics and suggest that CAPS-History has tried to do away with repetition as far as possible. However, this is only so much as it relates to the FET curriculum. There are topics which are repeated across phases. This repetition speaks of a considerable emphasis being placed on what learners need to know. With compulsory history ending at Grade 9 level, from Grades 4-9 history is compulsory under the banner of social science. Thus, decisions were made in terms of what history needs to be included in the compulsory history. The choice of it being repeated at a higher grade, heavily emphasises its historical significance within the South African framework. Russia and the Cold War are repeated at both junctures: compulsory and elective history. The strong reinforcement of Russia and Cold War history at Grade 9 level reinforces the ideological positioning of South Africa with its historical ally. The repetition of this topic at both leaving points in the schooling career speaks to the significance of this topic and what learners must know. If learners were to either leave school at Grade 9 or not take history as a compulsory topic from Grade 10, what then do they need to know about Russia? In addition to Russia, indentured labour is repeated in Grade 8 and Grade 10. Whilst the topic of indentured labour appears as a very historically limiting section, its repetition speaks to the considered importance of indentured labour within the intended curriculum. This importance, whilst evident in the textbooks, is not represented fully within the textbook content. This again speaks to a disjuncture between the intended curriculum and the programmatic curriculum. Despite discrepancies, the repetition of topics across grades, specifically Russia as it is so extensive, speaks to the question of power and how this power is legitimised. The legitimisation of Russia as a historical ally and fortifying component of ANC leadership is heavily reinforced across grades and phases to justify its power in South Africa's historical framework.

The cross-cutting themes suggest that, beyond the scale and scope of textbook content, there lie ideological underpinnings guided by the desire for societal legitimisation but also reinforcing of political ideologies. The history textbooks and the content found within are used as a political tool to reflect the current socio-political state through the construction of a national memory which has been underpinned by the BRICS countries and their current relationship with South Africa.

6.5 Conclusion

The purpose of this chapter was to answer my second research question: why are BRICS countries represented the way they are in South African school history textbooks? There are many cross-cutting themes which have emerged from the analysed textbooks. What has emerged is an ideological positioning of South Africa with historical allies which reinforces their own authority and space within the hegemon. Guided by the rigour of textbook production, the South African history textbooks are products of their time which reflect dominant socio-political allegiances which reinforce the power and authority of the state (Wojdon, 2014).

South Africa is partnered with other power countries in a global partnership. It is therefore important to determine what connection is being made to the political reality of South Africa and to the knowledge of the average South African. As indicated, the textbooks, for some citizens, are the only opportunity for them to learn of BRICS countries and their importance within the South African construct. History textbooks, including South African history textbooks, contain officially sanctioned historical knowledge. Furthermore, textbook content has been determined by a textbook approval committee, assigned by the DBE (Siebörger, 2015). Thus, the content within the textbooks not only contains sanctioned historical knowledge but also reinforces the desired historical construct through the representation of the BRICS countries.

My second research question questioned why BRICS countries are represented the way they are in South African history textbooks. The answer, simply put, is that they are represented the way they are because of political ideology and historical sentimentality coupled with an unchanging textbook historiography rooted in coloniality and a historiography of the past rather than the present. As noted, Russia is extensively discussed which represents South Africa's long-standing historical relationship; however, it extends further than just that. Russia also represents a legitimisation of the ANC as leaders of post-apartheid South Africa thus reinforcing politicisation of textbooks to fortify a desired, and sometimes, imagined collective history. In addition, BRICS history is largely masculine and the histories presented are histories of great men. This perspective perpetuates the notion that men are the movers of history and that history is a masculine affair (Frisk, 2019; Loewen, 2008). Women and women's contributions are largely silenced, despite the inadequate attempt at sectionalising women's contributions in the textbooks. The silence of women and the focus on masculine leadership

reinforces apartheid historiography of ‘big men’ and their contributions to history (Naidoo, 2014).

Given the paradigm shift of the post-Cold War period and the shift of global allegiances (the move away from the stronghold of the West), where do BRICS appear in South Africa’s programmatic historiography? It is evident that little has changed within textbook historiography and so histories which already have a strong, and existing historiography in South Africa are foregrounded over those countries (or time periods) (like Brazil, Ming China and Mughal India) which lack an existing historiography within South Africa’s historical framework. What this all could possibly mean will be addressed in the final chapter.

CHAPTER SEVEN

CONCLUSION OF THE THESIS

Are they an idealization of the past or do they reflect reality? (Vahed, 2005)

7.1 Introduction

In the previous chapter, I have unpacked the scale and scope of the representation of the BRICS countries in South African school history textbooks. Thereafter I have brought the findings into conversation with the literature and the theory and what this means in terms of representation as it relates to power. My findings presented an overall view of how the South African programmatic curriculum has constructed and represented the history of the BRICS countries, the key economic partners in a new multipolar world. Given this globalised and multipolar world, how South Africa represents its partners within this globalised context is important as it spotlights what South African citizens will learn of these key partners.

In this, the concluding chapter of the thesis, the research will come full circle. In this chapter, I will use the contextualised findings of Chapter 5 and 6 in order to put forward my research contribution and the gap I am filling on textbooks as the programmatic curriculum. Following this, reflections on my personal and professional experiences during the thesis process will be undertaken. Reflections are necessary in that they foreground what has been done and experienced during this lengthy process and explain the impact these experiences have had on the study. Next, my own recommendations based on my findings will be discussed followed by the scholarly contributions of my studies to not only South Africa but global textbook research.

7.2 Overview of the study

In my previous chapter, I attempted to find the intersection between the literature and the findings. My findings presented an overall view of how the South African programmatic curriculum has constructed and represented the history of the BRICS countries. In order to fully place the findings of Chapter 6 in the context of the thesis, a backward-looking review of the

previous chapters is necessary to see the development of the study and the lenses through which the research was conducted.

In Chapter 1, I outlined the geo-political placement of BRICS within the multipolar world. It is within this multipolar and multilateral context of the post-Cold War paradigm in which the transference, or at least the disruption of the hegemonic power of the USA, is taking place. Power and authority are intertwining concepts that play a role not only in the defining of global power and authority but also in the construction of representation of global partners within the programmatic curriculum. South Africa is partnered in the major geo-political and economic global bloc, BRICS. This partnership began in 2010 and is still emerging as a power bloc today. In 2023, at the 15th BRICS summit, more countries have now pledged to join in this geo-political bloc from 2024 (forming a BRICS+) (Ismail, 2023; Maihold, 2023). The significance of this is seen within the global political shift away from a unilateral or Western-centric focus to that of a multilateral world (McCann, 2008; Öniş & Kutlay, 2013). As South Africa is part of this major geo-political bloc, how then does it represent its important partners within its programmatic curriculum? As Lopez et al. (2014) state, national identity is moulded and perpetuated through school history and so identity construction is formed. As these constructions are important considerations in the make-up of school history, it is important to then look at how South Africa represents its important geo-political partners within the programmatic curriculum.

In Chapter 2, the programmatic curriculum and how it can create imagined constructions or relationships through historical representations, or through a lack of representation, was unpacked. Given the post-Cold War paradigm and the shift in global allegiances, how this has impacted how South Africa represents its partners within a new world order was reflected on. As such, Chapter 2 attempted to provide the necessary scaffolding of the gaps in existing literature in how countries represent their political or economic partners within history textbooks. Although only limited scholarship has been conducted on how power blocs (or partnered countries) have been represented within history textbooks, there is much research on history textbooks and their role in historical construction. In this regard, with reference to Chapter 2, Lopez et al. (2014) questioned how countries learn the history of other countries and how this does impact the construction of a national identity. Considering South Africa's major alliance with BRICS countries, how then are these supposed important partners

considered within South African history textbooks and what is learned of these countries through the programmatic curriculum were key points of departure. Little to no research has been conducted in terms of how South Africa represents its global partners within the programmatic curriculum, which provided a niche for my thesis. As textbooks are representative of their times, and as the South African history textbooks were created after South Africa joined the BRICS bloc, how then has it represented its partners, was the rhetorical question (Wojdon, 2014). History textbooks are not neutral entities and therefore disseminate an image of a history that has been agreed upon (Apple & Christian-Smith, 1991; Bertram & Wassermann, 2015; Chisholm, 2015). The politicisation of history and history textbooks needed to then be considered in the construction of representations in textbooks.

Chapter 3 unpacked the theoretical underpinnings of the study namely the concepts of power and authority and how these in an interlacing manner framed this study. Different power interests make up society and its norms and values and it is these values and norms that are entrenched within authority (Dahrendorf et al., 2006). In this regard Rousseau (1968) questions not only where power is located but who has it. As such, the question of power and who has it has been a centuries-long debate as many theorists have different understanding of power and authority. Faulhaber (1985) argues that power and authority are intertwined, and all aspects of society are shaped by this power and authority. Furthermore, authority is considered to legitimise those in power, creating either a *de facto* or *de jure* power (Faulhaber, 1985). There are no universal guidelines regarding what power is, as power in itself is a construction which is constantly influenced by the changing nature of society (Foucault, 2012; Rousseau, 1968). These elements of power and authority were used to understand in an interpretivist manner the representation of BRICS countries within the South African programmatic curriculum. Bertram (2020) questions the authority behind the liminal space between the intended curriculum and the recontextualisation of it in the form of the history textbook. As the history textbook is an interpretation of the intended curriculum, who then decides how certain countries or people or events are represented within the textbook? My study was guided by a blended conceptual framework as it not only focuses on representation within the textbook but is also underpinned by theories of power and authority.

The research design and research methodology used in my study were detailed in Chapter 4. My study focused on the constructed reality of representation within South African school history textbooks, specifically on how BRICS countries are represented within them. My study

was qualitative in nature which is underpinned by the interpretivist paradigm. Interpretivists seek to understand reality and the construction in which it is found, therefore, this ties in with my study (Cresswell, 2009; Zhao, 2001). Because my study seeks to understand *how* the BRICS countries are represented within the contemporary framework of South African school history textbooks, understanding the ‘reality’ in which they are found is pertinent. The reality in which the BRICS are found within the programmatic curriculum is germane in understanding the imagined relationship South Africa has, via the analysed history textbooks, with its partners. As my research focuses on a reality in which the representation is found, the construction and the interpretation of this ‘reality’ is an important component of my research. My methodological approach incorporated qualitative content analysis which in turn utilised open-coding. As I did not attempt to answer pre-existing questions, but rather to analyse and interpret textbook content, qualitative content analysis worked for my study. Through the development of open-coding, the textbooks were analysed and cross-cutting themes emerged through this analysis. The themes developed in my finding through my methodological approach helped to propose an answer to the first research question: how are the BRICS countries represented within South African School history textbooks? The emerged themes were discussed in Chapter 5.

Chapter 5 was an extensive chapter. Due to the size, I arranged the chapter into five parts: each part dedicated to a different BRICS country (Brazil, Russia, India, China and the concept of BRICS) and how it appears in the textbooks was analysed. Each section was analysed by grade as that created the necessary structure to identify how the histories have carried through the grades (or if they have). It is through this chapter that themes emerged through the use of open-coding. The themes which emerged from the textbooks enable the first research question to be answered: How are BRICS countries represented in the South African School History Textbooks. As data does not speak for itself, in Chapter 6, I attempt to answer the second research question: Why are the BRICS countries represented the way they are in South African School History Textbooks? Again, it is necessary to point out that it is important to place the findings within the framework of geopolitical power dynamics, historical sentimentality and the programmatic pedagogy.

7.3 The contribution of my study to the scholarship of textbook research

My research was guided by two research questions: how are BRICS countries, as members of a multipolar and multilateral bloc, represented in South African school history textbooks? And why are they represented the way they are, given that, for most South African citizens, they will only learn of these histories through the South African school history textbooks? Through the proposing of answers to my research questions, I am able to identify gaps in the existing scholarship. The contributions to existing scholarship emerged through analysed findings and, as such, not all contributions to existing gaps were intentional.

There is very little recent scholarship available in terms of how power blocs or respective political partners appear or are represented in history textbooks both nationally and internationally. South Africa is no different. Little to no scholarship emerges about how BRICS or BRICS partners appear in South Africa's history textbooks. Whilst there is some limited research on individual countries or specific individuals (Chisholm & Fig, 2019; Halsall, 2016; Halsall & Wassermann, 2018; Naidoo, 2014), little scholarship exists about BRICS partners within South African textbook research. The lack of national and global scholarship on the representation of power blocs within the textbook or how their partner histories are presented speaks to what students will be learning of political allegiances or how their countries represent these political allegiances. Simply put, given political and/or economic partnerships, what do students learn of these partnerships and how does their country reflect their partners in the programmatic curriculum?

Although the unchanging nature of textbook historiography is not new scholarship, the addition to the existing body of knowledge is important as my study speaks to an issue of genderised history and decoloniality (or the absence thereof). The perpetuation of textbook historiography extends beyond just that of reinforcing ideological positioning of South Africa but speaks to how history is presented. The BRICS history represented within textbooks reflects a dominance of masculine heroes whereby the history emerges as a history of men, or 'great men'. The textbooks heavily reinforce a narrative that women are not part of the main historical narrative of BRICS, as partner countries. In some sections, for example the establishment of communist Russia, the textbooks include a sectionalised area where women and their 'contributions' feature. What occurs is a further dividing of the historiography into male and female contribution – consequently (intentionally or not) creating an otherness. Whilst the silencing of women in textbooks is also not new in history textbook scholarship (Chiponda &

Wassermann, 2011), my study adds to the existing scholarship by foregrounding a core focus of male leaders as represented as great movers of history. Secondly, the BRICS countries appear disconnected from the ‘traditional’ (existing academic historiography) content topics which isolates the ‘newer’ historiography. This is foregrounded in the dominance of Russia over other partnered histories. What emerges through this assertion is the issue of decoloniality in history textbooks. Traditional historiography is perhaps selected because of ideological preference but how these historiographies are reinforced in the content and the historical sources, are often through a western-centric view. The ‘traditional’ historiographic lens through which the content is addressed lacks flexibility outside of colonial ideals. Whilst this was not the primary focus of my research, it was a finding that emerged. It is an element of textbook research that pertains to contemporary social issues surrounding the question of decoloniality in education.

Another point of contention is the battle between memory versus school history as a disciplinary discipline or historical thinking as promoted by CAPS-History. A general aim of CAPS-History is: “the ability to undertake a process of historical enquiry based on skills” (DBE, 2011 p.8). Despite this clear general aim, it does not necessarily translate to the programmatic curriculum. Whilst there is a clear attempt by the textbooks to incorporate source analysis to some extent, there is an overall disciplinary gap in this regard. Overall, there is a lack of concern regarding consistent source citation and academic rigour which impacts overall representation of BRICS countries. Bertram & Bharath (2011), in their research of Grade 6 textbooks, argue that CAPS history textbooks tend to focus more on substantive knowledge rather than procedural knowledge. In sum, Bertram & Bharath (2011) stipulate that memory knowledge is favoured over disciplinary knowledge. There is little to no scholarship on the representation of BRICS countries in history textbooks; however, the findings indicate shared similarities with Bertram & Bharath (2011) study in terms of preference for memory. No overarching scholarship exists nationally on how subject knowledge is reflected in all history textbooks (because it would be quite an extensive project); however, my study adds existing research by Bertram & Bharath (2011).

What occurs through the analysed textbooks is a creation of imaginary partner history between South Africa and its BRICS partners. As history can sometimes be a work of fiction, the same idea can be translated to the BRICS countries. What are South African citizens learning about these BRICS partners? What do they end up knowing about the countries with whom they have

an intimate relationship of power and authority? Despite the voluminous content dedicated to Russia, there is an overall elusiveness that occurs. There is very little concept-related clarification and in some cases, like the Green Textbook, there is an overarching sanitisation of Russia's history which protects Lenin and the Bolsheviks through omission. There is an attempt by some textbooks (Red and Blue Grade 11) to include contemporary scholarship surrounding Lenin, but it is inconsistent across the grades. The lack of contemporary scholarship or contemporary historical debates is evident across the countries represented in the textbooks. While some textbooks attempt to make mention of the debates or new scholarship, it is few and far between. An image then emerges of a fragmented and 'old-fashioned' image of history and the history of these countries emerges perpetuating older narratives and reflecting older relations. This is reinforced by the lack of Brazil's inclusion despite shared historical parallels with South Africa. Furthermore, very little contextualisation occurs for each country's history and so a distorted and disconnected view emerges for the learners who consume the analysed books. This reinforces what Kallaway (2012) interprets as historical bubbles – in CAPS-History (the intended curriculum which was used to construct the textbooks were analysed) the history is presented in fragmented elements which is then translated to the programmatic textbook. There is very little historical connection which emerges and so, as previously indicated, a vague and distorted history emerges. The focus points of each country lie in the leadership and the men at the helm of the country. An image of an imaginary partner history is reflected within the textbooks which subsequently informs ideological positioning of the state. The partner history identifies where the historical power lies and who has it. In the case of BRICS, Russia holds the most historical authority and power, whereas Brazil holds the least. The question here is, who holds the authoritative power to determine historical power in the programmatic curriculum?

Bertram (2020) argues that there is not always a clear alignment between the formal curriculum and the interpretation by means of the programmatic curriculum. Between the formation of the curriculum and the creation of the history textbooks, Bertram argues that there is a liminal space of authority (Bertram, 2020). Who decides the history? The publisher or the authors? Or is there a higher power? This is not an easy question to answer and is perhaps not so straightforward. There is a very clear overlap of authors across publishing houses – specifically in the Blue and Green junior Textbooks. Despite this overlap, there are some differences in interpretation which occur in each of the textbooks, so ideology or authorial subjectivity does not necessarily cross publishing houses. A second factor is that the economy of textbooks is a

very real concern for publishing houses and as such, the goal of these publications is to make money. Textbook content is largely repeated across ideological eras reinforcing the scholarship that textbook historiography rarely changes (Loewen, 2008). As a rhetorical question: who is responsible for this change, the South African Department of Basic Education Committee screening textbooks, or someone else? Within textbook authority, there then must be degrees to which each authority is applied. The dominant hegemony has the overseeing authority in that the textbooks must follow the government ideological beliefs but the extent to which they are applied in the textbook is determined by the author or publisher. Within the liminal space, as Bertram refers, is a multi-faceted authoritative construction. No one author has the control to make overarching decisions. The liminal space is representative of the balance between power and authority. As a result of this relationship between power and authority, identity constructions of each of the BRICS countries are formulated based on vague and sometimes distorted and masculine histories. This in turn creates an othering as a result.

There is little to no scholarship that researches how BRICS countries are represented in South African School History Textbooks. My Master's dissertation reflected the representation of Russia in apartheid and post-apartheid history textbooks and prior to completion in 2016, there had been little to no scholarship on this comparative approach (Halsall, 2016). In 2019, Chisholm & Fig (2019) conducted research into Cold War historiography in South African history textbooks. Although Naidoo (2014) dissertation focused on 'big men' in South African history textbooks, he does make mention of Gandhi and thus there is some scholarship on the perception of Gandhi within South African textbook historiography rather than India as a whole. Despite this limiting scholarship, BRICS countries, and a power bloc such as this, are as a whole a neglected topic within South African and global textbook research. Furthermore, there is a global gap in research in how power blocs are represented within the history textbooks. Although my research does not specifically look at BRICS as a power bloc, it forms part of the analysis. Lastly, there is little to no research on how countries perceive or represent their political (or economic) partners within their own historical framework. This is an important element as it stands to question what type of knowledge or image is gained from the history textbooks considering the political context at the time. Filling these gaps, by using a theoretical lens related to power and authority, is my major research contribution.

7.4 Personal-Professional Reflections

My PhD journey has greatly impacted both my personal and professional spheres. To be brutally frank and honest, the PhD was a long haul and sometimes exceptionally challenging, especially in the final stages. The support received is immeasurable and without it, I would not have completed this thesis.

The nature of the PhD is not a solo endeavour. Personally, I would not have been able to complete this thesis without the support I have received. Within the journey of the PhD there lies an ‘ecosystem’ of sorts – the symbiotic relationships between student, supervisor, support, family and life. One cannot survive if there is a missing element.

Whilst support from friends and family has been immeasurable, their understanding of the nature of PhD work hasn’t been complete. I have endured this PhD work for six years. The toll it has taken on my psyche cannot be articulated well and I have found only those with experience in a post-graduate programme can truly understand this toll. Surrounding myself with people who understand the nature of the PhD has been paramount. Having the support of my supervisor, Johan Wassermann, and my PhD ‘support group’ with friends who were on the same journey has been incalculable during this process. Without the endless support of my supervisor, I am not sure if I would have finished.

I began this journey in 2018 and while I am upset at having taken so long, I have to acknowledge the obstacles over the years which have played a part in the PhD taking as long as it did. First and foremost, I must acknowledge my procrastination. Procrastination certainly did play a role, however, there have been other factors which have contributed to the extended duration.

2020 and 2021 were very difficult years in both my personal and professional capacity. In March 2020 I started a new job and new position as a lecturer at Stellenbosch University. 2020 was also the year of national shutdowns due to COVID-19 which made my new position considerably more challenging. My first year, in a completely new position, coincided with a move to remote teaching and learning. Categorically, remote teaching and learning added more work and more strain to my time, mental health and PhD study. The mental toll of 2020 and 2021 created a lot of strain and contributed negatively to my academic progress due to the toll it took on my mental health. Being new to academic work as well as being isolated from the academic support structure, of which I knew very little, exacerbated by workload which in turn

negatively impacted my PhD progress. In 2022 I had my daughter Peyton which added a new familial challenge to finishing my research. I had thought (naïvely in retrospect) that I would be able to complete the bulk of the remaining chapters during my maternity leave; the reality was different. Mom-guilt is a term I had heard about through friends. However, for the experience of this, no-one can rationally prepare you. Rationally, you can deduce that time away to work is normal and acceptable, but then mom-guilt is irrational and at times, debilitating.

Added to the already existing challenges, was the constant loadshedding. Loadshedding plays a formative role in the psyche and work-productivity, especially at night. To put it into perspective, since my daughter was born in July 2022, we have experienced some form of loadshedding almost daily.

The aforementioned were large obstacle that impacted my PhD production. However, an overarching element, that feeds into many areas is that of the imposter syndrome. Although this feeling existed during my Master's studies, it worsened during the PhD. This has been an on-going challenge to manage, and it played a role in procrastination. It's hard to necessarily pinpoint the origin of this feeling but it is something with which I have had a lengthy battle. I am the only person in my family to obtain a university undergraduate degree, never mind an advanced degree. I do not come from a wealthy background or from a family of academics and here I have found myself working towards a PhD whilst working at a top-tier university. I do not feel like I belong in that world. Being a lecturer in a top-tier University surrounded by top academics has not helped this feeling; in fact, it has exacerbated it. In order to cope with (or perhaps ignore) this feeling, I thrust myself into my teaching where I am the most comfortable and have the most sense of belonging. Unfortunately, this comes at the cost of my PhD. In sum, I have felt an overwhelming sense of inadequacy. Despite these challenges, I have grown immensely as a person, not just as a teacher or academic. The gruelling nature of this PhD as a hands-on scholarly apprenticeship and the textbook analysis fortified my love for history but also helped challenge my own beliefs about myself and what I can do. The nature of my PhD is quite holistic and so it challenged my understanding of what I thought I knew about the workings of the world and how it relates to education.

In my professional capacity, this study has helped me grow as an academic and a teacher. It has helped re-shape my views on the workings of world, and it provided me with an in-depth

view of the arguments about power and authority and history education. Through this learning, I have been able to apply this knowledge to the classroom and help push my students more. As an academic, this study has also encouraged other research ideas to manifest and sit and marinate while completing this PhD. As a result, following the submission of this PhD, it opens the doors for other areas of research I would like to undertake.

Whilst the PhD has been an immense project that has not been easy, I can state that I have grown immensely from it in both a personal and professional capacity. The PhD experience has been an ongoing learning experience which in turn has helped add to and inform my teaching. Secondly, it constantly challenges my capabilities of what I think I can or can't achieve within not only the academic realm but within myself. Lastly, it is important for me, working at an academic institution, to constantly grow within academia and to obtain my PhD in order for career progression to take place.

7.5 Recommendations

The current CAPS textbooks within circulation are at least ten years old. There comes a point where history textbooks need to be rewritten or reworked to incorporate current scholarship. The CAPS-History document already incorporates a contemporary history (or ahistorical events) by incorporating BRICS even though it had been, at the time, in historical terms very newly formed. This is not in keeping with historical standards so the 'history' which is incorporated as history appears political and ideological rather than contemporary historical knowledge.

Added to the problems with the outdatedness of the textbooks is that of the historiography that is represented. My first recommendation would be to remove the sectionalised women's history and incorporate it into the main historical narrative. Sectionalising women's history creates the appearance that women's history and their contributions are separate. This reflects both men and women's contributions to the history of that nation rather than viewing women as separate entities and reinforcing the "Great Man" theory. Furthermore, a more comprehensive inclusion and specificity of women and women's contributions in BRICS countries need to be included. The current textbooks mostly relegate women to the role of wives and mothers. Inclusive contributions by women are vague and non-specific thus further downplaying their

contributions. The lack of specificity further silences the representation of women within history.

Secondly, textbooks need to provide greater contextualisation for an event as the content appears rushed, incomplete, fragmented and distorted. This results in a vague and incomplete history of the BRICS countries. Although I understand that it is impossible to include everything in textbooks, there is nevertheless very little concept continuation across the same textbooks which suggest a lack of continuity. The lack of continuity and concept clarification impacts historical context and placing thus creating a superficial understanding of the history. The textbooks could start with this by ensuring concept clarification is clear and concise across all grades and textbooks.

Lastly, a reflection of coloniality and where it is embedded in the programmatic curriculum needs to be reflected. Many of the sources as historical evidence in the textbooks were western-centric. In order to create greater cohesion between the intended curriculum aim of multiple perspectives, and what is reflected in the textbooks, a wider net needs to be cast in terms of sources. Including largely western-centric sources to represent Russia and China, for example, reaffirm a western lens which reaffirms western ideal. These subtle implications indicate a lack of decoloniality within the textbooks. In a decolonising world, how the learners learn of the BRICS countries needs to reflect a decolonial lens – a revision of western-centric source thus needs to be evaluated.

7.7 Conclusion

South Africa may be the smallest member of BRICS; however, its involvement in the global power bloc plays an integral role in current global politics. Considering the financial and expertise support by both Russia and China (specifically) since South Africa's insertion into BRICS, it was important to see how South Africa reflects this important partnership in the history textbooks as the programmatic curriculum. In reality, what do school leavers end up knowing about BRICS or the individual countries at both Grade 9 and Grade 12 exit years? As for many South Africans, their only exposure to the history of these countries is through the history classroom and the history textbook. If we consider the global scale of BRICS as a power bloc, what importance does South Africa place on their historical representation? Furthermore, what image of the power bloc BRICS emerges? The historical representation of each country and the subsequent image of BRICS as a concept is important to identify within the textbook.

The focus of my research entailed analysing South African History textbooks in how they represent BRICS history and why it is represented the way it is. The underpinning findings signify South Africa's ideological positioning within the programmatic curriculum. In terms of representation, Russia dwarfs its BRICS counterparts, thus reinforcing preference for established historical relationships and established historiographies. Secondly, the history of the BRICS countries are overtly masculine and key leaders eclipse that of key historical events thus the history becomes a history of 'great men' where ordinary voices, and the representation of women, are silenced.

South Africa's insertion into BRICS spotlights the multilateral and multipolar framing of the post-Cold War world. Given this shift from a bi-polar world to a multipolar one, how does South Africa address these changing allegiances within its own historical framework? For most South African citizens, their only introduction to BRICS countries is through the history textbook. Hence the importance of understanding not only how BRICS countries are represented but why. Despite the changing nature of global allegiances, there is a significant reliance on existing historiography as opposed to newer relationships. South Africa's comprehensive view of Russia in the textbooks speaks to its own positionality in the reinforcement of the state's hegemonic power and authority. Russia's history within the South African framework reinforces and immortalises the state as a liberator and only possible authority within the post-Cold War World. Thus, South Africa's textbooks are heavily influenced by ideological positioning whilst at the same time keeping the historiographical content – with a shift only in ideological reflection. The ideological positioning of South Africa is strongly reinforced through the perpetuation of history being male and history being created and guided by key political leaders. The perpetuation of the grand masculine narrative is a perpetuation of an apartheid narrative but also ties to the reflection of its ideological positioning. The histories of the BRICS countries are vaguely constructed and so students learn about the history of 'big men' as opposed to a holistic view of history. To conclude, the histories of the BRICS countries are not complete histories but rather official versions. The official versions represent what is sanctioned and what needs to be known and, therefore, it is very telling of where power and authority lies within these versions. It not only tells us where power and authority lie but upon whom it was bestowed and why they have it. These are the

public images that South African learners, as future citizens, will carry in their minds of the BRICS countries.

REFERENCES

- 24, France. 2023. Size, population, GDP: The BRICS nations in numbers. *France 24*, 22/08/23.
- Ahonen, P. 2007. Ethnonationalism in European East–West borderlands: Weltanschauungen in the European Union and Central and Eastern Europe. *Religion, State & Society*, 35, 5-41.
- Alden, C. & Vieira, M. A. 2005. The New Diplomacy of the South: South Africa, Brazil, India and Trilateralism. *Third World Quarterly*, 26, 1077-1095.
- Alharahsheh, H. H. & Pius, A. 2020. A review of key paradigms: Positivism VS interpretivism. *Global Academic Journal of Humanities and Social Sciences*, 2, 39-43.
- Amadeo, K. 2020. *Emerging Market Economies and Their 5 Defining Characteristics* [Online]. the balance. Available: [TheBalance.com/what-are-emerging-markets-3305927](https://www.thebalance.com/what-are-emerging-markets-3305927) [Accessed 2020].
- Anderson, J. L. . 2020. In Brazil, Jair Bolsonaro, Trump's Close Ally, Dangerously Downplays The Coronavirus Risk. *The New Yorker*, 01/04/2020.
- Andrews, E. 2016. *What was the sword of Damocles?* [Online]. History.com. Available: <https://www.history.com/news/what-was-the-sword-of-damocles> [Accessed 2021].
- Anthony, R., Grimm, S. & Kim, Y. 2013. South Africa's relations with China and Taiwan: Economic realism and the 'One China' doctrine.
- Anyon, J. 1979. Ideology and United States History Textbooks. *Harvard Educational Review*, 49, 361-386.
- Apple, M. W. 1990. *Ideology and Curriculum*, Routledge.
- Apple, M. W. & Christian-Smith, L. K. 1991. The Politics of the Textbook. In: APPLE, M. W. & CHRISTIAN-SMITH, L. K. (eds.) *The Politics of the Textbook*. Great Britain: Routledge.
- Armijo, L. E. 2007. The BRICS countries (Brazil, Russia, India, and China) as an analytical category: Mirage or insight? *Asian Perspective*, 31, 7-42.
- Atwood, M. 1985. *The Handmaid's Tale*, Toronto, McClelland and Stewart.
- Bank, World. 2022. *Debt Service Suspension Initiative* [Online]. The World Bank. Available: <https://www.worldbank.org/en/topic/debt/brief/covid-19-debt-service-suspension-initiative#:~:text=From%20May%202020%20to%20December,the%20initiative%20on%20comparable%20terms.> [Accessed 2022].
- Barnard, C. 2004. *Language, ideology and Japanese history textbooks*, Routledge.
- Bauer, M. W., Gaskell, G. & Allum, N. C. 2000. Quality, quantity and knowledge interests: Avoiding confusions. *Qualitative researching with text, image and sound: A practical handbook for social research*. London: Sage.
- BBC. 2020. Chinese economy to overtake US 'by 2028' due to Covid. *BBC*, 26 December 2020.
- BBC. 2021a. Alexei Navalny: Russia's jailed vociferous Putin critic. *BBC*.
- BBC. 2021b. Brazil's Bolsonaro: Only God will remove me from power. *BBC*, September, 2021.
- BBC. 2021c. India - China dispute: The border row explained in 400 words. *BBC*, 25 January 2021.
- Bentley, J. H. 2005. Myths, Wagers, and Some Moral Implications of World History. *Journal of World History*, 16, 51-82.
- Bermudez, A. 2019. The normalization of political violence in history textbooks: Ten narrative keys. *Dialogues on Historical Justice and Memory Network Working Paper Series*, 15, 1-22.
- Bertram, C. 2006. Knowledge, pedagogy and assessment in the old and new Further Education and Training History curriculum documents. *Education as Change*, 10, 33-51.
- Bertram, C. 2020. Remaking history: The pedagogic device and shifting discourses in the South African school history curriculum. *Yesterday and Today*, 1-29.
- Bertram, C. 2021. The recontextualising logics of four post-colonial African school History curriculum documents: Kenya, Rwanda, South Africa and Zimbabwe. *4th AHE-Afrika History Education Conference*. Virtual.

- Bertram, C. & Bharath, P. 2011. Specialised knowledge and everyday knowledge in old and new Grade 6 history textbooks. *Education as Change*, 15, 63-80.
- Bertram, C. & Wassermann, J. 2015. South African history textbook research - A review of the scholarly literature. *Yesterday and Today*, 151-174.
- Bhat, A. 2023. India: History book rewritten by government. *DW News*, 6 June 2023.
- Bond, P. 2000. *Elite transition: From Apartheid to Neoliberalism in South Africa*, London, Pluto Press.
- Boote, D. N. & Beile, P. 2005. Scholars before researchers: On the centrality of the dissertation literature review in research preparation. *Educational Researcher*, 34, 3-15.
- Bordage, G. 2009. Conceptual frameworks to illuminate and magnify. *Medical Education*, 43, 312-319.
- Bottaro, J., Cohen, S., Dilley, L., Duffett, D. & Visser, P. *Oxford Successful Social Sciences Grade 9 Learner's Book*, South Africa, Oxford University Press.
- Bottaro, J., Cohen, S., Dilley, L., Versfeld, R. & Visser, P. 2013. *Oxford Successful Social Sciences Grade 8 Learner's Book*, South Africa, Oxford University Press.
- Bottaro, J., Visser, P. & Worden, N. 2011. *Oxford In Search of History Grade 10 Learner's Book*, South Africa, Oxford University Press.
- Bottaro, J., Visser, P. & Worden, N. 2012. *Oxford In Search of History Grade 11 Learner's Book*, South Africa, Oxford University Press.
- Bottaro, J., Visser, P. & Worden, N. 2013. *Oxford In Search of History Grade 12 Learner's Book*, South Africa, Oxford University Press.
- Brady, H. E., Collier, D. & Seawright, J. 2004. Refocusing the discussion of methodology. *Rethinking social inquiry: Diverse tools, shared standards*, 3-20.
- Breslin, S. 2013. China and the global order: Signalling threat or friendship? *International Affairs*, 89, 615-634.
- Brink, E., de Nobrega, C., Malinga, M., Verner, J. & Willemse, M. 2013. *Solutions for all History Grade 12 Learner's Book*, South Africa, Macmillan Education.
- Brink, E., Fowler, C., Grundlingh, A., Varga, E. & Verner, J. 2012. *Solutions for all Grade 11 Learner's Book*, South Africa, Macmillan Education.
- Brothers, Higher 2017. Made in China. Richie Souf.
- Čajka, P. 2012. Issues of an ageing population in European Union. *Journal of Environmental Science and Engineering B*, 1, 966-970.
- Campbell, S., Greenwood, M., Prior, S., Shearer, T., Walkem, K., Young, S., Bywaters, D. & Walker, K. 2020. Purposive sampling: Complex or simple? Research case examples. *Journal of Research in Nursing*, 25, 652-661.
- Carlyle, T. 1993. *On heroes, hero-worship, and the heroic in history*, University of California Press.
- Carretero, M. & Bermudez, A. 2012. Constructing histories. *Oxford handbook of culture and psychology*, 625-646.
- Carretero, M., Castorina, J. A. & Levinas, M. L. 2013. Conceptual change and historical narratives about the nation: A theoretical and empirical approach. *International handbook of research on conceptual change*, 269-287.
- Challand, B. 2009. European Identity and External Others in History Textbooks (1950-2005). *Journal of educational media, memory, and society*, 1, 60-96.
- Chaulia, S. 2021. In spite of the spite: An Indian view of China and India in BRICS. *Global policy*, 12, 519-523.
- Chiponda, A. & Wassermann, J. 2011. Women in history textbooks: What message does this send to the youth? *Yesterday and Today*, 13-25.
- Chisholm, L. 2015. Comparing history textbooks in apartheid South Africa and the German Democratic Republic, 1950-1990. *Southern African Review of Education with Education with Production*, 21, 80-93.
- Chisholm, L. & Fig, D. 2019. The Cold War in South African History Textbooks. *The cold war in the classroom: International perspectives on textbooks and memory practices*, 207-220.

- Chomsky, N. & Foucault, M. 1971. On Human Nature. In: ELDERS, F. (ed.) *Dutch National Television*. Netherlands: University of Technology.
- Cohen, L., Manion, L. & Morrison, K. 2007. *Research Methods in Education*, Routledge.
- Cohen, P. S. 1969. Theories of myth. *Man*, 4, 337-353.
- Conradie, S. 2022. A well-intentioned impotence? The case of the Qing Dynasty Consuls in the Transvaal Colony. *Historia*, 67, 28-61.
- Crawford, K. Inter Cultural Education: The role of school textbook analysis in shaping a critical discourse on nation and society. UK Pacific Circle Consortium 27th Annual Conference, Hong Kong, 2004. 21-23.
- Crawford, K. & Foster, S. 2006. *The Critical Importance of History Textbook Research: What Shall We Tell The Children?*, Information Age Publisher.
- Cresswell, J. 2009. *Research Design: Qualitative, Quantitative, and Mixed Methods Approaches*, Sage
- Creswell, J. W. & Poth, C. N. 2016. *Qualitative inquiry and research design: Choosing among five approaches*, Sage publications.
- Crotty, M. 1998. *The Foundations of Social Research: Meaning and perspective in the research process*, Routledge.
- Dahrendorf, Ralf, Collins, Randall & Further, Seeing 2006. Conflict and Critical Theories. Available on: http://www.pineforge.com/upm-data/13636_Chapter7.pdf. [Accessed on 6th October 2009].
- Davidson, A. 1992. The Study of South African History in the Soviet Union. *The International Journal of African Historical Studies*, 25, 2-13.
- DBE, Department of Basic Education 2011. Curriculum and Assessment Policy Statement: Grades 10-12: History. In: EDUCATION, B. (ed.). South Africa.
- DBE, Department of Basic Education 2018. Report of the History Ministerial Task Team In: EDUCATION, D. O. B. (ed.). South Africa: Department of Basic Education.
- DBE, Department of Basic Education 2023. 2023/24 ANNUAL TEACHING PLANS: SOCIAL SCIENCES (HISTORY): GRADE 9 (TERM 1). In: EDUCATION, B. (ed.). South Africa: Department of Basic Education.
- DBE, Department of Basic Education 2015. National Education Policy Act (Act no 27 of 1996), Establishment of the History Ministerial Task Team. In: EDUCATION, B. (ed.). South Africa: Government Gazette.
- DBE, Department of Basic Education 2019. Minister Motshekga launches Ministerial Task Team's Textbook Evaluation Report. In: EDUCATION, B. (ed.). Republic of South Africa: Department of Basic Education.
- de Jouvenal, B. 2012. *Sovereignty: An Inquiry Into the Political Good*, Cambridge University Press.
- de Oliveira, A. P. 2023. A new world order? BRICS nations offer alternative to West. *DW*, 04/10/2024.
- DeLury, M. 2022. Social Identity and Conflict Dynamics in Indian History Textbooks. *Journal of Educational Media, Memory, and Society*, 14, 40-57.
- Denney, A. S. & Tewksbury, R. 2013. How to write a literature review. *Journal of criminal justice education*, 24, 218-234.
- Denzin, N. K. & Lincoln, Y. S. 2011. Introduction: Disciplining the Practice of Qualitative Research. In: DENZIN, N. K. & LINCOLN, Y. S. (eds.) *The Sage handbook of qualitative research*. sage.
- Denzin, N. & Lincoln, Y. 2018. Introduction. In: DENZIN, N. & LINCOLN, Y. (eds.) *The SAGE Handbook of Qualitative Research*. Fifth ed. United States of America: Sage.
- Desai, A. & Vahed, G. 2015. *The South African Gandhi: Stretcher-Bearer of Empire*, Stanford University Press.
- Dilley, L., Monteith, M., Nunneley, D., Proctor, A. & Weldon, G. 2012. *Oxford Successful Social Sciences Grade 4 Learner's Book*, South Africa, Oxford University Press.

- Edwards, C. 2008. The how of history: Using old and new textbooks in the classroom to develop disciplinary knowledge. *Teaching History*, 39-45.
- Ellis-Petersen, H. & Hasson, A. 2021. Tensions remain high as hopes dashed for breakthrough in China and India stalemate. *The Guardian*, 18 July 2021.
- Elo, S., Kääriäinen, M., Kanste, O., Pölkki, T., Utriainen, K. & Kyngäs, H. 2014. Qualitative content analysis: A focus on trustworthiness. *SAGE open*, 4, 2158244014522633.
- Elo, S. & Kyngäs, H. 2008. The qualitative content analysis process. *Journal of advanced nursing*, 62, 107-115.
- Engel, J. A. 2013. Bush, Germany, and the Power of Time: How History Makes History. *Diplomatic History*, 37, 639-663.
- Engelbrecht, A. 2006. Textbooks in South Africa from apartheid to post-apartheid: Ideological change revealed by racial stereotyping. *Promoting social cohesion through education: Case studies and tools for using textbooks and curricula*, 71-80.
- Etikan, I., Musa, S. A. & Alkassim, R. S. 2016. Comparison of convenience sampling and purposive sampling. *American journal of theoretical and applied statistics*, 5, 1-4.
- Europe, Council of. 2021. *Learning and teaching about the history of Europe in the 20th century* [Online]. Available: <https://www.coe.int/en/web/history-teaching/learning-and-teaching-about-the-history-of-europe-in-the-20th-century> [Accessed].
- Faulhaber, R. W. 1985. Of Power and Authority, People and Democracy. *Review of Social Economy*, 43, 193-211.
- Ferguson, N. 2004. A World without Power. *Foreign Policy*, 32-39.
- Ferguson, N. 2018. *The Square and the Tower*, Great Britain, Penguin Books.
- Fernandez, M., Friedman, M., Jacobs, M., Johannesson, B. & Wesson, J. 2012. *Focus History Grade 11 Learner's Book*, South Africa, Maskew Miller Longman is an imprint of Pearson.
- Filatova, I. & Davidson, A. 2013. *The Hidden Thread: Russia and South Africa in the Soviet Era*, Jonathan Ball Publishers.
- Filmer, R. 1991. *Filmer: 'Patriarcha' and Other Writings*, Cambridge University Press.
- Flick, U. 2014a. An introduction to qualitative research. *The SAGE handbook of qualitative data analysis*. Sage.
- Flick, U. 2014b. *An Introduction to Qualitative Research*, Sage.
- Flick, U. 2014c. Mapping the field. *The SAGE handbook of qualitative data analysis*. Sage publications.
- Flick, U. 2018. *Managing Quality in Qualitative Research*, Sage.
- Fogel, B. 2020. Jair Bolsonaro: The president who 'ordered his country to die'. Available: <https://mg.co.za/article/2020-04-04-jair-bolsonaro-the-president-who-ordered-his-country-to-die/> [Accessed 05 April 2020].
- Forman, J. & Damschroder, L. 2007. Qualitative content analysis. *Empirical methods for bioethics: A primer*. Emerald Group
- Fossey, E., Harvey, C., McDermott, F. & Davidson, L. 2002. Understanding and evaluating qualitative research. *Australian & New Zealand Journal of Psychiatry*, 36, 717-732.
- Foster, S. 2011. Dominant traditions in international textbook research and revision. *Education inquiry*, 2, 5-20.
- Foster, S. 2012. Re-thinking history textbooks in a globalized world. *History education and the construction of national identities*, 49-62.
- Foucault, M. 2012. *Discipline and punish: The birth of the prison*, Vintage.
- Frayner, L. & Khan, F. L. 2019. *The Powerful Group Shaping The Rise Of Hindu Nationalism In India* [Online]. United States: National Public Radio. Available: <https://www.npr.org/2019/05/03/706808616/the-powerful-group-shaping-the-rise-of-hindu-nationalism-in-india> [Accessed 07/11/21 2021].
- Frisk, K. 2019. What makes a hero? Theorising the social structuring of heroism. *Sociology*, 53, 87-103.

- Fritzsche, K. P. 1990. NATO in History and Civics Textbooks: The West German Case. *Internationale Schulbuchforschung*, 12, 35-47.
- Fru, R. N. & Wassermann, J. 2020. Exploring Silences in History Education: The Case of the Re-Unification of Cameroon in a Francophone Cameroonian History Textbook. *Teaching African History in Schools*. Brill Sense.
- Fuchs, E. 2011. Current trends in history and social studies textbook research. *Journal of International Cooperation in Education*, 14, 17-34.
- Giddens, A. 1990. *The Consequences of Modernity*, United Kingdom, Polity Press.
- Giddens, A. 2003. *Runaway world: How globalization is reshaping our lives*, Taylor & Francis.
- Gramsci, A. & Antonio, G. 1994. *Gramsci: Pre-prison writings*, Cambridge University Press.
- Graneheim, U. H., Lindgren, B-M. & Lundman, B. 2017. Methodological challenges in qualitative content analysis: A discussion paper. *Nurse Education Today*, 56, 29-34.
- Grbich, C. 2013. *Qualitative Data Analysis: An Introduction*, Sage.
- Green, H. E. 2014. Use of theoretical and conceptual frameworks in qualitative research. *Nurse Researcher*, 21.
- Greetham, B. 2020. How to Write Your Literature Review.
- Grotius, H. 2012. *Hugo Grotius on the law of war and peace*, Cambridge University Press.
- Guba, E. G. & Lincoln, Y. S. 1994. Competing Paradigms in Qualitative Research. *Handbook of qualitative research*. Sage.
- Guterres, A. 2020. United Nations: United Nations.
- Halsall, T. 2016. *A Comparative Investigation into the Representation of Russia in Apartheid and Post-Apartheid History Textbooks*. Master's dissertation, University of KwaZulu-Natal.
- Halsall, T. & Wassermann, J. 2018. A comparative investigation into the representation of Russia in apartheid and post-apartheid era South African History textbooks. *Yesterday and Today*, 50-65.
- Hart, C. 2018. *Doing a Literature Review: Releasing the Research Imagination*, Sage.
- Haugaard, M. 2021. The four dimensions of power: Conflict and democracy. *Journal of Political Power*, 14, 153-175.
- Henning, E. 2004. *Finding your way in qualitative research*, Van Schaik.
- Héritier, A. 2008. Casual explanation. In: PORTA, D. D. & KEATING, M. (eds.) *Approaches and Methodologies in the Social Sciences: A Pluralist Perspective*. United States of America: Cambridge University Press.
- Hobbes, T. 2004. *Leviathan*, New York, Barnes & Noble
- Hofstee, E. 2006. *Constructing a good dissertation*, Sandton: Epe.
- Horesh, N. 2021. "ONE COUNTRY, TWO HISTORIES": HOW PRC AND WESTERN NARRATIVES OF CHINA'S PRE-IMPERIAL AND IMPERIAL PAST DIVERGE. *Asian Affairs*, 52, 110-129.
- HRW.org. 2020. *Brazil: Bolsonaro Sabotages Anti-Covid-19 Efforts* [Online]. Human Rights Watch. Available: <https://www.hrw.org/news/2020/04/10/brazil-bolsonaro-sabotages-anti-covid-19-efforts#> [Accessed 07/11/21 2021].
- HRW.org 2021. "Break their lineage, Break their roots" China's crimes against humanity targeting uyghurs and other Turkic Muslims. United States: Human Rights Watch.
- Hsieh, H-F. & Shannon, S. E. 2005. Three Approaches to qualitative content analysis. *Qualitative Health Research*, 15, 1277-1288.
- Hunter, Q. 2023. 'We've made it clear that Russia is a friend': Pandor doubles down on SA's Ukraine stance. *News24*.
- Ismail, S. 2023. 'A wall of BRICS': The significance of adding six new members to the bloc. *Al Jazeera*.
- Jaldi, A. 2023. The Crisis of Multilateralism viewed from the Global South.
- Janmaat, J. & Vickers, E. 2007. Education and identity formation in post-cold war Europe and Asia. *Compare*, 37, 267-275.
- Johannesson, B. 2002. The writing of history textbooks in South Africa. *Internationale Schulbuchforschung*, 24, 89-95.

- Johannesson, B., Fernandez, M., Roberts, B., Jacobs, M. & Seleti, Y. 2011. *Focus Grade 10 History Learner's Book*, South Africa, Maskew Miller Longman (an imprint of Pearson).
- Johnson, S. 2021. China's Uyghurs living in a 'dystopian hellscape', says Amnesty report. *The Guardian*, 10 June 2021.
- Jordaan, E. 2014. South Africa and abusive regimes at the UN Human Rights Council. *Global Governance*, 233-254.
- Kallaway, P. 2012. History in Senior Secondary School CAPS 2012 and beyond: A comment. *Yesterday and Today*, 23-62.
- Kaplan, V. 2009. The vicissitudes of socialism in Russian history textbooks. *History & Memory*, 21, 83-109.
- Katsarska, M. 2007. National Identity in Textbooks and Marginalizing Practices: A Case Study from Bulgaria. *Internationale Schulbuchforschung*, 307-322.
- Khandkar, S. H. 2009. Open coding. *University of Calgary*, 23, 2009.
- Khanna, P. 2019. *The Future is Asian*, Great Britain, Weidenfeld & Nicolson.
- Khumalo, S. 2007. History book angers Buthelezi. *IOL*.
- Koba, M. 2011. *BRICS: CNBC explains* [Online]. CNBC. Available: <https://www.cnbc.com/id/44006382> [Accessed 15 March 2018].
- Konstantinova, M. 2023. Russia: New school history books seek to justify Ukraine war. *DW*.
- Kumar, P. 2020. Part I: Behind the God-swapping in the South African Indian community. *News24*.
- Lee, M. C. 2002. The European Union-South Africa Free Trade Agreement: In whose interest? *Journal of Contemporary African Studies*, 20, 81-106.
- Liebenberg, I. 2010. Viewing 'the other' over a hundred and a score more years: South Africa and Russia (1890-2010). *TD: The Journal for Transdisciplinary Research in Southern Africa*, 6, 428-460.
- Locke, J. 2013. Two Treatises of Government. 1689. *The anthropology of citizenship: A reader*, 43-46.
- Loewen, J. W. 2008. *Lies my teacher told me: Everything your American history textbook got wrong*, The New Press.
- Lopez, C., Carretero, M. & Rodriguez-Moneo, M. 2014. Telling a national narrative that is not your own. Does it enable critical historical consumption? *Culture & Psychology*, 20, 547-571.
- Maasdorp, L. 2020. Covid-19 and banking. In: GUMEDE, A. (ed.) *SABC News*.
- Machiavelli, N. 2008. *The Prince*, Hackett Publishing.
- Maihold, G. 2023. The Geopolitical Moment of the BRICS+. *The BRICS Summit 2023: Seeking an Alternate World Order?* : Council of Councils.
- Maizland, L. 2020. *India's Muslims: An increasingly marginalized population* [Online]. Council on Foreign Relations. Available: <https://www.cfr.org/backgrounder/india-muslims-marginalized-population-bjp-modi> [Accessed].
- Maizland, L. & Albert, E. 2021. *Hong Kong's Freedoms: What China Promised and How It's Cracking Down* [Online]. United States: Council on Foreign Relations. Available: <https://www.cfr.org/backgrounder/hong-kong-freedoms-democracy-protests-china-crackdown> [Accessed].
- Martin, R. 1975. Two models for justifying political authority. *Ethics*, 86, 70-75.
- Marx, K. & Engels, F. 1967. *The Communist Manifesto (1848)*. Trans. Samuel Moore. London: Penguin, 15.
- Maxwell, J. 2013. *Qualitative Research Design: An Interactive Approach*, Sage.
- Mayring, P. 2004. Qualitative content analysis. *A companion to qualitative research*, 1, 159-176.
- McCann, P. 2008. Globalisation, Multinationals and BRICS. *Globalisation and Emerging Economies: Brazil, Russia, India, Indonesia, China and South Africa*. OECD.
- McClure, D. 1951. International Agencies in History Textbooks. *The School Review*, 59, 280-288.
- McNeill, W. 1986. Mythistory, or Truth, Myth, History and Historians. *The American Historical Review*, 91, 1-10.
- Miller, A. 2010. Russia: Power and history. *Russian Politics & Law*, 48, 8-34.

- Mills, J., Bonner, A. & Francis, K. 2006. The development of constructivist grounded theory. *International journal of qualitative methods*, 5, 25-35.
- Miyoshi, M. 1993. A borderless world? From colonialism to transnationalism and the decline of the nation-state. *Critical Inquiry*, 19, 726-751.
- Mokone, T. 2018. SA enters R15bn trade pact with the Bank of China for industrial development [Online]. Business Live. Available: <https://www.businesslive.co.za/bd/economy/2018-09-03-sa-enters-r15bn-trade-pact-with-bank-of-china-for-industrial-investment/> [Accessed 06/01 2019].
- Morazán, P., Knoke, I., Knoblauch, D. & Schäfer, T. 2012. The Role of BRICS in the developing world. *Belgium: European Parliament*.
- Morrow, S. 2005. Quality and Trustworthiness in Qualitative Research in Counseling Psychology. *Journal of Counseling Psychology*, 52, 250-260.
- Moses, C. 2021. China's crackdown on Hong Kong. *New York Times*, 23 June 2021.
- Mostafa, G. & Mahmood, M. 2015. The rise of the BRICS and their challenge to the G7. *International Journal of Emerging Markets*, 10, 156-170.
- Mouton, J. 2001. *How to succeed in your Master's and Doctoral Studies. A South African guide and resource book.*, Van Schaik Publishers.
- Mouton, J. 2011. *How to succeed in your Master's and Doctoral studies: A South African guide and resource book*, Van Schaik Publishers.
- Murphy, D. 2020. G-20 nations have now deployed \$11 trillion to support a post-Covid economic recovery. *CNBC*, 19 November 2020
- Naidoo, A. 2014. *An analysis of the depiction of "big men" in apartheid and post-apartheid school history textbooks*. Master's dissertation, University of KwaZulu-Natal.
- Nietzsche, F. 1874. On the use and abuse of history for life.
- Nishino, R. 2015. Political economy of History textbook publishing during apartheid (1948-1994): Towards further historical enquiry into commercial imperatives. *Yesterday and Today*, 18-40.
- Nkosi, B. 2014. Single textbook option slammed. *The Mail and Guardian*, 10 October 2014.
- Nolgaard, O., Nygren, T., Tibbitts, F., Anamika, A., Bentrovato, D., Enright, P., Wassermann, J. & Welply, O. 2020. A global history in a global world?: Human rights in history education in the Global North and South. *Historical Encounters: A journal of historical consciousness, historical cultures and history education*, 7, 24-49.
- O'Neill, J. 2001. *Building better global economic BRICs*, New York, Goldman Sachs.
- Oliver, E. & Oliver, W. H. 2017. The colonisation of South Africa: A unique case. *HTS: Theological Studies*, 73, 1-8.
- Öniş, Z. & Kutlay, M. 2013. Rising powers in a changing global order: The political economy of Turkey in the age of BRICs. *Third World Quarterly*, 34, 1409-1426.
- Öniş, Z. & Yılmaz, Ş. 2014. The Political Economy of BRICS and near-BRICS in an Emerging Global Order.
- Orb, A., Eisenhauer, L. & Wynaden, D. 2001. Ethics in qualitative research. *Journal of nursing scholarship*, 33, 93-96.
- Ostrowski, D. 2002. The Façade of Legitimacy: Exchange of Power and Authority in Early Modern Russia. *Comparative Studies in Society and History*, 44, 534-563.
- Parsons, T. 1963. On the concept of political power. *Proceedings of the American Philosophical Society*, 107, 232-262.
- Partington, R. 2021. A trade drop of a quarter is just the start of Brexit 'teething problems'. *The Guardian*.
- Paxton, R. 1999. A deafening silence: History textbooks and the students who read them. *Review of Educational Research*, 69, 315-339.
- Phillips, D. 2020. Brazil coronavirus: Medics fear official tally ignores 'a mountain of deaths'. *The Guardian* [Online]. Available: <https://www.theguardian.com/global->

- [development/2020/apr/04/medics-in-brazil-fear-official-coronavirus-tally-ignores-a-mountain-of-deaths](#) [Accessed 04/04/2020].
- Phillips, T. 2021. Brazil's Covid outbreak is global threat that opens door to lethal variants - scientist. *The Guardian*, 3 March 2021.
- Pingel, F. 2008. Can truth be negotiated? History textbook revision as a means to reconciliation. *The ANNALS of the American Academy of Political and Social Science*, 617, 181-198.
- Pingel, F. 2010. *UNESCO guidebook on textbook research and textbook revision*, Unesco.
- Porta, D. D. & Keating, M. 2008. How many approaches in the social sciences? An epistemological introduction. In: PORTA, D. D. & KEATING, M. (eds.) *Approaches and Methodologies in the Social Sciences: A Pluralist Perspective*. United States of America: Cambridge University Press.
- Prashad, V. 2020. *Your Arrow Can Pierce the Sky, But Ours Has Gone Into Orbit: The Third Newsletter* [Online]. Tricontinental: Institute for Social Research. Available: <https://www.thetricontinental.org/newsletterissue/newsletter-3-2020-trade-war/> [Accessed 19/01/ 2020].
- PTI. 2020. IMF chief Kristalina Georgieva: We have entered recession. *The Economic Times*, 28 March 2020.
- Ramoroka, D. & Engelbrecht, A. 2015. The role of History textbooks in promoting historical thinking in South African classrooms. *Yesterday and Today*, 99-124.
- Ranby, P. 2012. *Solutions for all Social Sciences Grade 4 Learner's Book*, South Africa, Macmillan.
- Ranby, P. & Johannesson, B. 2013. *Platinum Grade 9 Social Sciences Learner's Book*, South Africa, Maskew Miller Longman.
- Ranby, P., Johannesson, B. & Monteith, M. 2013. *Platinum Social Sciences Grade 8 Learner's Book*, Maskew Miller Longman (an imprint of Pearson).
- Ranby, P., Johannesson, B., Versfeld, R. & Keats, G. 2012. *Platinum Social Sciences Grade 4 Learner's book*, Maskew Miller Longman (an imprint of Pearson).
- Ranby, P., Varga, E. & Friedman, M. 2012. *Solutions For all Social Sciences Grade 8 Learner's Book*, Macmillan Education.
- Ranby, P., Varga, E. & Friedman, M. 2013. *Solutions for all Social Sciences Grade 9 Learner's Book*, South Africa, Macmillan Education.
- Randolph, J. J. 2009. A guide to writing the dissertation literature review. *Practical Assessment, Research & Evaluation*, 14, 1-13.
- Rapoza, K. 2017. *Face it, China Totally Owns The BRICS* [Online]. Forbes.com. Available: <https://www.google.com/amp/s/www.forbes.com/sites/kenrapoza/2017/09/01/china-owns-the-brics/amp/> [Accessed 4 August 2018].
- Ravitch, S. M & Riggan, M. 2016. *Reason & rigor: How conceptual frameworks guide research*, Sage
- Rehman, A. A. & Alharthi, K. 2016. An introduction to research paradigms. *International Journal of Educational Investigations*, 3, 51-59.
- Repe, B. 2001. The situation regarding history textbooks in SEE. *Teaching the History of Southeastern Europe*, 89-92.
- Rocheleau, J. 2020. Legitimate Authority as a Jus Ad Bellum Condition: Defense of a Procedural Requirement in Just War Theory. *Journal of Military Ethics*, 19, 99-117.
- Roth, A. 2021. Alexei Navalny: 1,000 arrested after protest over jailing of Russian opposition leader. *The Guardian*, 3 February 2021.
- Roth, G. & Wittich, C. 1968. *Max Weber: Economy and society: An Outline of Interpretive Sociology*, New York, Bedminister Press.
- Rousseau, J-J. 1968. *The Social Contract*, Penguin Books.
- SAHO, South African History Online. no year. *Sources task: The Berlin Wall* [Online]. South Africa: South African History Online. Available: <https://www.sahistory.org.za/article/sources-task-berlin-wall> [Accessed].
- Sanders, J. T. 1983. Political Authority. *The Monist*, 66, 545-556.

- Sartorius, R. 1981. Political authority and political obligation. *Virginia Law Review*, 3-17.
- Schissler, H. Navigating a Globalizing World. Thoughts on Developing a World Consciousness. Globalisation and images of the Other. Challenges and new perspectives for history teaching in Europe, 2008 Istanbul, Turkey. Council of Europe and Research Centre for Islamic History, Art and Culture (IRCICA), Islamic Conference, 72-87.
- Schreier, M. 2012. *Qualitative Content Analysis in Practice*, Sage.
- Schreier, M. 2014. Qualitative Content Analysis. In: FLICK, U. (ed.) *The SAGE Handbook of Qualitative Data Analysis*. Sage.
- Schwab, K. 2018. The Global Competitiveness Report. World Economic Forum.
- Sedgwick, J. B. 2009. Memory on Trial: Constructing and Contesting the 'Rape of Nanking' at the International Military Tribunal for the Far East, 1946–1948. *Modern Asian Studies*, 43, 1229-1254.
- Sewall, G. T. 2005. Textbook publishing. *Phi Delta Kappan*, 86, 498-502.
- Siebörger, R. A Reply to Peter Kallaway's 'History in High School 2012: A Comment on Curriculum and Assessment Policy Statement. History Grades 10–12'. School of Education, University of Cape Town Seminar, 2012.
- Siebörger, R. 2015. The dilemmas of textbook selection - the Department of Education's 2007 screening of Grade 12 History textbooks - A case study. *Yesterday and Today*, 41-57.
- Stanton, T. 2011. Authority and freedom in the interpretation of Locke's political theory. *Political theory*, 39, 6-30.
- Stephenson, C-A., Sikhakhane, L., Frank, F., Hlongwane, J., Subramony, R., Virasamy, C., Collier, C., Govender, K. & Mbansini, T. 2011. *New Generation History Grade 10 Learner's Book*, Durban, New Generation Publishers.
- Stobart, M. 1999. Fifty years of European co-operation on history textbooks: The role and contribution of the Council of Europe. *Internationale Schulbuchforschung*, 21, 147-161.
- Strauss, A. & Corbin, J. 1998. *Basics of Qualitative Research Techniques and Procedures for Developing Grounded Theory*, United States of America, Sage.
- Subramanian, S. 2020. How Hindu supermajorities are tearing India apart. *The Guardian*, 20 February 2020.
- Szelényi, I. 2016. Weber's theory of domination and post-communist capitalisms. *Theory and Society*, 45, 1-24.
- Taylor, I. 2017. BRICS in Africa and human rights. In: RAPOSO, P. A., ARASE, D. & CORNELISSEN, S. (eds.) *Routledge Handbook of Africa-Asia Relations*. 1st edition ed. London: Routledge.
- Truschke, A. 2023. How India's Hindu Nationalists Are Weaponizing History Against Muslims. *Time*, 6 October 2023.
- UNICEF 2020. UN releases \$15 Million to help vulnerable countries battle the spread of the coronavirus. UNICEF.
- Unknown 2017. Unit-6 Max Weber's Theory of Bureaucracy. *MPA-012 Administrative Theory Collection*. eGyanKosh: IGNOU.
- Uphoff, N. 1989. Distinguishing power, authority & legitimacy: Taking Max Weber at his word by using resources-exchange analysis. *Polity*, 22, 295-322.
- Vahed, G. 2005. Passengers, partnerships, and promissory notes: Gujarati traders in colonial Natal, 1870-1920. *The International journal of African historical studies*, 38, 449-479.
- Vahed, G. 2018. The Protector, Plantocracy, and Indentured Labour in Natal, 1860–1911. *Pacific Historical Review*, 87, 101-127.
- Van der Pijl, K. 2017. The BRICS—An Involuntary Contender Bloc Under Attack. *Estudos internacionais: revista de relações internacionais da PUC Minas*, 5, 25-46.
- Van der Vlies, T. 2017. Echoing national narratives in English history textbooks. *Palgrave handbook of research in historical culture and education*. Springer.
- Van Niekerk, A. L. 2013. *The representation of Nelson Mandela in selected grade 12 history textbooks*. Master's dissertation, University of KwaZulu-Natal.

- Vieira, M. A. & Alden, C. 2011. India, Brazil, and South Africa (IBSA): South-South cooperation and the paradox of regional leadership. *Global Governance*, 17, 507.
- Thor: Ragnarok*, 2017. Directed by Waititi, T. United States of America: Walt Disney Studios Motion Pictures.
- Walker, A. & Maltby, T. 2012. Active ageing: A strategic policy solution to demographic ageing in the European Union. *International journal of social welfare*, 21, S117-S130.
- Wassermann, J. 2017. The state and the volving of teaching about apartheid in school history in South Africa, circa 1994–2016. *Teaching and learning difficult histories in international contexts. A critical socio cultural approach*. Routledge: London and New York.
- Wee, B. V. & Banister, D. 2016. How to write a literature review paper? *Transport Reviews*, 36, 278-288.
- WEF. 2020. *This is how much the coronavirus will cost the world's economy, according to the UN* [Online]. World Economic Forum
- United Nations. Available: <https://www.weforum.org/agenda/2020/03/coronavirus-covid-19-cost-economy-2020-un-trade-economics-pandemic/> [Accessed 2021].
- WHO. 2020. *Covid-19-China* [Online]. World Health Organization. Available: who.int/emergencies/disease-outbreak-news/item/2020-DOW229 [Accessed 2021].
- Williams, M. & Moser, T. 2019. The art of coding and thematic exploration in qualitative research. *International Management Review*, 15, 45-55.
- Willig, C. 2014. Interpretation and analysis. *The SAGE handbook of qualitative data analysis*, 481.
- Willis, J. 2007. *Foundations of Qualitative Research: Interpretive and Critical Approaches.*, Sage
- Wojdon, J. 2012. The Impact of Communist Rule on History Education in Poland. *Journal of Educational Media, Memory, and Society*, 4, 61-77.
- Wojdon, J. 2014. History textbooks facing controversial issues - case study of the martial law in Poland. *Yesterday and Today*, 75-89.
- Xu, Min, David, Jeanne & Kim, Suk Hi 2018. The Fourth Industrial Revolution. *International Journal of Financial Research*, 9, 90-95.
- Yilmaz, K. 2013. Comparison of quantitative and qualitative research traditions: Epistemological, theoretical, and methodological differences. *European Journal of Education*, 48, 311-325.
- Zajda, J. 2015. Globalisation and the politics of education reforms: History education. *Nation-building and history education in a global culture*. Springer.
- Zhao, S. 2001. Metatheorizing in Sociology. In: RITZER, G. & SMART, B. (eds.) *Handbook of Social Theory*. Sage

