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## National Holidays and Other Socio-Political Rituals in Schools

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## The phenomenon of banished soldiers in Polish schools as an example of the politics of memory

**Ewa Bacia**

Technische Universität Berlin

- The new core curriculum for teaching history in Polish schools is an example of the implementation of the politics of memory.
- The primary purpose of teaching history at schools has become to stir up patriotic emotions.
- This goal is to be reached by promoting distinguished Polish figures, presented as morally impeccable heroes.
- Patriotism is linked to war, the image of which is simplified and trivialised.
- The promotion of a black and white vision of history is a threat to Polish democracy.

**Purpose:** The article intends to analyse the manner in which banished soldiers are presented in the new history curriculum at schools in Poland as an example of the politics of memory.

**Design/methodology/approach:** The analysis is a case study of the phenomenon of banished soldiers in the Polish public discourse. It includes the following issues: the history of banished soldiers, the core history curriculum after the education reform in Poland, its objectives and goals (with particular emphasis on banished soldiers), the manner of presenting the banished soldiers in educational, public and social environments in Poland today, the impact of new historical politics on the Polish society and democracy.

**Findings:** The manner of presenting the issue of banished soldiers in the core curriculum for teaching history in Polish schools exemplifies the efforts to introduce a new political paradigm into the educational context. The primary purposes of teaching history at schools have become to stir up patriotic emotions and strengthen bonds with the Polish nation. These goals are to be reached by promoting distinguished figures in the country. However, any controversies related to the “heroes” are deliberately ignored, which is especially evident in the case of banished soldiers. Patriotism is identified with a black and white vision of history that emphasizes the good acts of “Poles” and the cruel acts of “others”. The simplified vision of history, which expressly ignores controversies and is reluctant to discuss dilemmas, is a real threat to the future of Polish democracy.

**Keywords:** banished soldiers, Polish educational system, history at schools, politics of memory



“The Polish school will teach real history, which makes a clear difference between a traitor and a hero” -  
President of the Republic of Poland Andrzej Duda

The work on the “Strategy for the Polish Politics of Memory” began in November 2015 under the patronage of the President of the Republic of Poland Andrzej Duda (Kancelaria Prezydenta, 2015). The concept of the politics of memory has rather conservative associations in Poland and is understood as “the conscious action of the political class aimed at shaping the scope and character of collective historical memory” (Wolff-Powęska, 2007). Dariusz Gawin, a historian of ideas, described the objectives of the politics of memory even more vividly, defining it as “the use that the democratic (and possibly undemocratic) society makes of their own interpretations of past events to achieve current political goals” (Gawin, 2005).

The main goal of the new politics of memory introduced in Poland by the government of the Law and Justice Party (in Polish Prawo i Sprawiedliwość: PiS), which has been consistently implemented ever since they won the election in 2015, is to emphasize what Poles can be proud of. This corresponds to the longing that a part of society expresses for unambiguously positive historical figures with which they could identify. Soldiers of the anti-communist underground during the post-war years, known as the banished soldiers, were promoted to the rank of such positive historical figures. In the new history curriculum in schools they are presented indiscriminately as morally impeccable heroes and an example of Polish patriotism. And, although these figures were in fact controversial, any controversies are expressly ignored in public discourse.

The article intends to analyse the manner of presenting the figures of banished soldiers in the new history curriculum at schools as an example of the politics of memory implemented by the Law and Justice party. The article will analyse the reasons, manifestations and consequences of this policy in relation to social awareness and democracy in Poland. A brief history of banished soldiers in Poland follows the introduction. The text then describes the origins of the independence movement established after the 2nd World War in Poland and the actions of the banished soldiers, taking into account the social and political background of the post-war period in Poland. Another point to analyse was the revival of the debate on the banished soldiers in the 1990s, after the transition to democracy in Poland. Contemporary examples illustrate the controversies surrounding this subject, which are present in media opposing the current government.

The next part of the text analyses the new core history curriculum in public schools in Poland, introduced together with the education reform by the PiS government in the 2017/2018 school year. Changes in the core curriculum depict a change in the political paradigm and the introduction of the politics of memory to schools. The issue of the banished soldiers is central in the analysis of the objectives for teaching history after the reform, as well as any controversies that have arisen around them.

The third part of the article presents examples of events, situations and contexts in which the banished soldiers are found in Polish education, in addition to the more general social environment - media and popular culture. My analysis is focused on how the way banished

soldiers are presented becomes a part of the new politics of memory and how the creators of this paradigm intend to shape the way Polish patriots think and act.

The last part of the article lists the most important conclusion summing up all of the analyses. It presents the threats to democracy resulting from the introduction of a new paradigm of politics of memory into the Polish education system and social space.

## 1 The Banished Soldiers

In 2011, the Polish parliament introduced a new public holiday by way of legislative act: the National Day of Remembrance of the Banished Soldiers [Narodowy Dzień Pamięci Żołnierzy Wyklętych]. The preamble of the act stipulates that the holiday has been established "to honour the Banished Soldiers - heroes of the anti-communist underground movement, who defended the independent existence of the Polish State, in an armed struggle for the right to self-determination and the realization of democratic aspirations of Polish society, and otherwise opposed Soviet aggression and force imposed on the communist regime" (Ustawa, 2011).

These historical figures are described in the act as national heroes. Polish historians and Polish society do not share this unambiguously positive opinion. In recent years, the subject of the banished soldiers sort of reached myth status, arousing a number of controversies. Doubt is already aroused by the very definition of their name: by whom and when would they have been banished? In order to find a reply to this question, we must understand what Poland was like after the end of Second World War in the 1940s and 1950s, as well as the complex circumstances of the country after the system transformation in the 1990s until today.

In January 1945, when the pre-war territory of Poland was partially occupied by the Germans, and partly by the Soviets, the last commander of the Home Army, General Leopold Okulicki dissolved the Polish armed forces, at the same time encouraging soldiers to continue working "in the spirit of regaining full independence of the state and protecting the Polish people against total destruction" (Biuletyn Informacyjny, 1945). Post-war Poland, remaining under the control of the Soviet authority, was, in the opinion of general Okulicki and many of his contemporaries, not the independent country the Poles fought for during Second World War "We do not want to fight the Soviets, but we will never agree to a life other than one in a completely sovereign and socially righteous independent Polish State," Okulicki explained in his order, and he called on the soldiers to: "Try to guide your nation and fulfil the undertaking to bring back the independent Polish State. In this action each of you is a commander for yourself" (ibid.).

The order of general Okulicki had been interpreted in different ways by the members of the Home Army. Part of them began their work in everyday life, as civilians. Some decided to continue the armed struggle against the Soviets, joining newly formed organizations, such as "Freedom and Independence" [Wolność i Niezawisłość] (Żaryn, 2015). The last leaders of this organization were murdered in November 1947. From then on, the armed activity of the anti-communist underground in Poland was purely arbitrary and spontaneous. Partisans attacked policing and security units, and also fought against partisan communist fighters (Dobrowolski,



2017). Attacks were also directed against civilians, especially national minorities - Jews or Ukrainians who were accused of collaboration with the Soviets. This part of the activity of the banished soldiers is an element that raises controversies. The Institute of National Remembrance [Instytut Pamięci Narodowej: IPN] attributes the retaliatory actions carried out in 1945 and 1946 in Polesie to the category of genocide (IPN, 2005). Some of the partisans carried out plundering activities, attacking villages and murdering civilians, including the elderly, women and children (Sobolewski, 2017; Jurszo, 2017b).

Partisan activities within the context of the struggle against Soviet forces were carried out in Poland until 1953. The last member of the post-war armed struggle died eighteen years after the war in 1963 (Krajewski, & Łabuszewski, 2017). At the time of the People's Republic of Poland, the subject of post-war guerrilla activities was not openly discussed. It was revived in the 1990s, after the transition to democracy in Poland.

The first time the name banished soldiers was used was in 1993. It was introduced by members of the Republican League, who invented it for the title for the exhibition dedicated to the anti-communist underground (Wąsowski, 2011). Over the following years this name has been popularized and commonly used, for instance in the titles of books, articles, films, and theatrical performances (incl. Ślaski, 1995; Żebrowski, & Wąsowski, 1999; IPN, 2007). The term "banished" was to refer to the ruling elites of Poland after 1989, who were accused of failing to restore the memory of the soldiers of the post-war underground communist (Wąsowski, 2011).

In recent years, however, this expression has become obsolete. The current state authorities, associated with the Law and Justice party, intensively support the memory of the banished soldiers, creating a myth around them. There are ceremonial burials of anti-communist underground soldiers, the authorities plan to open two museums, streets, city squares and public schools are named after the soldiers who are a part of the "banished" group, state treasury companies organize knowledge competitions about guerrillas who fought in communist Poland, and television and film productions devoted to the subject of the "banished" are publicly funded - this is how a strong historical cult is built (Majmurek, 2017).

Many circles are speaking out against the creation of this myth. The left-wing "Razem" party, which is not represented in Parliament, notes that the group of soldiers glorified by the authorities includes murderers of civilians (Radio ZET, 2017). Right-wing party leader, Paweł Kukiz, also asks for a reflection on whom we call the real heroes (Jurszo, 2017a). Historians are divided: some support activities that unequivocally glorify the banished soldiers, others call for a critical analysis and reflection (Szewczyk, 2017).

In September 2017, *Gazeta Wyborcza*, a paper expressing critical views about the PiS government, published an "Open Letter to President Andrzej Duda," written by Stanisław Aronson, a Home Army soldier who, in the post-war period belonged to the NIE organization which had been qualified as "banished" in the contemporary interpretation. In his letter, Aronson speaks strongly against the cult of banished soldiers. Relying on his own experiences from the time of the end of the war and post-war, he claims that there is a "story created around the "banished" which is nothing but a lie" (Aronson, 2017).



"This imaginary group started to include very diverse units, organizations and divisions, operating locally, in separation, without command, strategy or tactics (...) Certainly, after 1944-1945 the forest divisions included a whole plethora of partisan fighters: authentic patriots, who decided to undertake activities in armed combat, the soldiers of the Underground who escaped to the forests in fear of being imprisoned, deported or killed, also the young ones who treated the life in the forest as the only possible option and were not able to live in any other way and at the end there were also criminals and ruthless bandits. Mr President (...) I have the right and duty to speak firmly against the cult of the "banished soldiers". A fictitious version of history is being created to the detriment of the magnificent tradition of the Polish Underground State and the Home Army. Unfortunately, my statements and opinions are negatively received by the current authorities, who are creating a myth for their own benefit, leaving the truth and freedom of speech behind. The truth stands in the way of the politics practiced by the government and the alternative facts created to support this politics. They forget that an alternative history is nothing but a lie" (ibid.).

On the same day *Gazeta Wyborcza* published the Open Letter to the President, Andrzej Duda remarked that the soldiers of the national underground belonged to the most valuable fighters for the liberation of Poland against the power and terror of both occupants in a letter to the participants of a celebration at the Warsaw Tomb of the Unknown Soldier. He thanked all, who are contributing to the restoration of the soldiers' reputation. He emphasized that any actions showing the merits of the Polish underground movement increase the awareness of the young generation, who recognize in these soldiers the "followers of the best Polish patriotic traditions and depositories of our national identity, [which] helps in establishing ethos and actively involving citizens to act for the benefit of an independent homeland" (Polityka, 2017).

Two letters written by Stanisław Aronson to President Duda regarding the cult of the banished soldiers remained unanswered.

## **2 Teaching of history in the Polish schools - the new paradigm**

One of the most important pre-election promises of PiS concerned fixing the way history was taught, which - according to members of this party - was wrong, harmful and based on the so-called pedagogy of shame (Mrozowski, Lorenc, & Staniszewski, 2017). On April 30, 2016, President Andrzej Duda explained on the publicly funded cable History station "TVP Historia" that the education of the previous era was a completely "irrational action", which was aimed at taking away from Poles the things they should be proud of. "The others should be ashamed," said Duda, clearly emphasizing the distinctness of "our" history and the history of "others".

The government established after the 2015 Parliamentary Election acted very quickly to change the Polish education system and introduce new public school core curricula for the 2017/2018 school year. The former core curricula were developed in the years 2007/2008, and they were gradually becoming a part of the teaching syllabus from 2009 to 2016, as the process of change was long and subject to many consultations. The PiS government has carried out an education reform at an express pace, crucially changing the paradigm of history teaching.





The President of the Republic of Poland, Andrzej Duda, described the benefits of introducing changes to the history curriculum in the following way: „The Polish school will teach real history, which makes a clear difference between a traitor and a hero” (Duda 2016). This approach to teaching history has been reflected in the core curriculum established by the PiS government.

The new core curriculum is focused on shaping and developing a patriotic attitude. In the commentary on the core curriculum for primary schools issued by the Ministry of National Education, the educational objective has been formulated as follows: “The core of changes within the new core curriculum, in the context of teaching history, is the emphasis on the educational, patriotic and emotional aspect that will influence the creation of national consciousness and historical identity” (MEN, 2017a, p. 26). If an objective is formulated in this manner, teaching history becomes a part of an educational plan for society. The content delivered to the students during history lessons must forge their pride in the achievements of their ancestors with a clear message that emphasizes who deserves this pride and who does not. An analysis of the educational objectives in the context of teaching history according to the new core curriculum, as compared to the former one, shows the introduction of a number of new elements that put the patriotic and emotional aspects of education at the forefront. Moreover, the objective of education is: “Stimulating the development of love for homeland through respect, attachment to tradition and history of own nation, its achievements, culture as well as the mother tongue. (...) Forming the ties with the motherland (...) consolidating the sense of dignity and national pride (MEN, 2017b, p. 1). The new core curriculum repeats some of the objectives formulated in the old curriculum, e.g.: “Becoming familiar with the important events from the history of the Polish nation as well as general history in order to be able to critically refer to the past, to better understand the present and responsibly build the future. (...) Developing historical thinking in addition to moral and aesthetic sensitivity. (...) Teaching (...) the skills (...) to formulate and express own opinions in a critical way” (ibid.). The above-mentioned historical approach and critical view of actually formulating one's own opinions seem to be understood differently in the idea of the creators of the core curriculum than by the creators of the previous basic principle.

The former core curriculum aimed at developing the ability to think critically, according to the opinion of Prof. Jolanta Choińska-Mika, who was the coordinator of work on the past core curriculum. The teacher's role was to present cause-and-effect relationships, different historical perspectives as well as the ups and down of historical events (obtained from an interview conducted on 11/09/2017). The teacher had to follow the principles governing the profession of a historian, know their limitations and avoiding simple explanations of historical events. The facts were to be presented to the students in historical contexts, depicting all the complexities in the political and military as well as social, cultural and economic fields. Based on this, the students were to learn how to draw conclusions and formulate their opinions.

The emphasis of teaching in the new core curriculum is for students to acquire facts and the political and military aspect of history. The creators of the new core curriculum claimed that it was necessary to expand the curriculum by additional facts so that “the students, both in primary as well as secondary school (...) will know more about the mechanisms governing the past, and thus will understand the present better” (PAP, 2017). It remains debatable whether providing students with an additional number of facts is the best method to understand

historical mechanisms. In the opinion of the creators of the old curriculum, the important part consisted in presenting the events from different perspectives and subjecting them to an in-depth reflection (opinions obtained from the interviews conducted).

The coordinator of the team preparing the new core curriculum for teaching history, Prof. Włodzimierz Suleja, thinks that the most important change consists in reformulating our perspective of history, especially domestic history, so that the students will feel emotional about it (PAP, 2017). "The essence of change consists (...) in the fact that we exhibit more - especially when it comes to primary schools - of what we refer to as the homeland topic, the history of the Polish fatherland, where we place the emphasis on knowing this history better across a thousand years' period" (ibid.), explains Suleja. Primary school pupils will only learn about the history of Poland, the first classes in history in the fourth grade will be based on getting to know the biographies of selected historical figures, while learning in the 5th-8th grades will consist of a chronological account of political and military history. The introduction of history through the presentation of historical figures is a very traditional method, dating from the nineteenth century. "In my opinion, there is nothing wrong with that. We want this first contact with history to be made through characters (...) who in fact significantly affected the history of Poland (...). This may, although I do not say that it must, build an emotional relationship between a very young person and history" (ibid.), Suleja argues.

The choice of figures through which a young person is to learn about Polish history is controversial. The formula of teaching history with the use of the pantheon of outstanding figures has been criticized, among others, by the Academic Council of the University of Warsaw Institute of History: "History is not a collection of patriotic episodes or a gallery of heroes. Ignoring controversial and negatively judged figures distorts the image of history" (Uchwała, 2017) - the academics stated as part of the public consultation of the base project. "It is regrettable that the new core curriculum gave up cultivating the attitudes that are so important for contemporary society, such as involvement in civic activities, social sensitivity, tolerance for different opinions, behaviours, customs and beliefs, opposition to discrimination, maintaining ties with the local, national, but also European and global communities. They are not only missing in the education objectives of history teaching, but also in teaching civics" - historians wrote in the resolution. The way in which the lives of important Poles are described is criticized as being infantile and is comparable to religious texts describing the lives of saints. The lives of soldiers are particularly glorified, which is deemed by some teachers as uneducational and contrary to the principle of upbringing in the spirit of peace. Soldiers are represented as heroes, and their biographies - as models to follow for fourth-graders. One of the textbooks even contains a picture of children dressed as soldiers with arms in hand, which is at least controversial in a pedagogical sense. In addition, the photo has an incorrect description. The information states that the children are "banished soldiers", although the children are holding a "Czata 49" coat of arms. This unit fought in the Warsaw Uprising" (Zubik, 2017).

The expression "banished soldiers" shows up in the new core curriculum for teaching history in grade schools as an effect of education in grade 8: "The student describes the attitudes of Poles towards the new authorities with particular emphasis on armed resistance (the unbroken [banished] soldiers)" (MEN, 2017a, p. 21). Moreover, among the figures of major importance to the formation of Polish cultural identity to be learned by grade four students,



are the “banished soldiers”: Witold Pilecki and Danuta Siedzikówna “Inka” (ibid., p. 12) The curriculum does not suggest a discussion on who is to be a part of the banished soldiers group, or how these figures should be placed in the complex historical and social circumstances of post-war times. The banished soldiers are presented as crystal clear, gaining the status of national heroes, with no additional reflection on who they really were.

Introducing the banished soldiers theme into the core curriculum in such an indiscriminate way is the consequence of the adopted paradigm. The objective of teaching history is not to reflect on the past, pondering the ups and downs of the Polish old times, but shaping national pride and love for the Polish homeland. Although the general teaching objectives state that students are to develop cognitive criticism, in practice many sections of the curriculum present a simplified vision of Polish history. Difficult subjects such as anti-Semitism in Poland were excluded from the core curriculum. For example, in the context of the attitudes adapted by Polish society towards the Holocaust, only heroic attitudes are referenced. At the same time, negative attitudes of Polish society toward the Jewish population, that even supported the extermination of Jews, are expressly ignored. In February 2018 Andrzej Duda signed legislation penalizing suggestions of complicity by Poland in the Nazi Holocaust on its soil during World War Two.

By minimizing the idea of social and community work and, at the same time, glorifying the lives of soldiers, the curriculum clearly interprets the concept of patriotism. Patriots are the people who fight for their country and are ready to sacrifice their lives for it. As an example, the fight of civilians in the Warsaw Uprising is presented and attributed an uncontested opinion. This armed struggle began in August 1, 1944 killed approx 150,000 civilians, including the most politically and socially active youth of the Polish capital, the forefront of the Polish resistance movement (Davies, 2004). Children also fought and died in the uprising. After 63 days of fighting, Warsaw surrendered and was defeated in the political, military and material dimension. Polish tradition treats the memory of the Warsaw Uprising as an evidence of national heroism and patriotism. In an educational dimension, it is an example of a tragic historical event, which can be used as a basis for discussing different aspects of an armed conflict and the fatal decisions that were made by the young generation. What did the word courage mean in those days? What social costs did the Poles bear in the Uprising? Was the decision to start the armed conflict the right one?

These are the questions that could have been discussed with the young people during history lessons, but the new curriculum and textbooks based on it do not encourage discussion. Everything is clear, simple and indisputable. War patriotism and not the patriotism of peace is presented as a valuable action. Polish heroism is being promoted without, however, showing the complexity of the war and the dramatic choices it requires. There is no incentive to reflect on the historical choices of Poles. For example, with reference to the Warsaw Uprising, students are to assess the attitudes of the Allies and the Soviet Union towards Poles without considering the sensibility of the Uprising in itself (MEN, 2017a, p. 20). Therefore, only the “others” are subjected to critical assessment, and not “us”.

Another example of the current approach to war issues is the dispute over the Museum of the Second World War opened in 2017. The museum has been criticized by historians and journalists who support the current government’s politics of memory as “not Polish enough”,

because the Polish experience of war has been presented in terms of universal and personalistic categories. The reviews commissioned by the Minister of Culture present allegations that no positive aspects of the war are presented, such as “tempering a man”. “We do admit to have been showing the Second World War in terms of great evil and enormous suffering. We focused on the millions of murdered, persecuted and suffering civilians. We regard this as our moral duty and are convinced that a museum rejecting such a perspective would deform the real image of war and betray its purpose (...)” (Newsweek, 2016a), the members of the museum council replied.

In a similar, simplistic manner, the new curriculum and textbooks prepared on its basis present the history of the years after the war. The times after the war are vastly complex, with the people who are trying to find a new place in life after the German occupation, and in the textbooks they did not even make the background for the struggle between the communists and the *banished soldiers*” (Zubik, 2017). The new core curriculum consolidates the myth of the heroic banished soldiers, introducing a simplistic historical narrative permeating into other spheres of the social and cultural life of contemporary Poland.

### 3 Banished soldiers in the social consciousness of contemporary Poland

For many years people in Poland have been creating a myth of the Warsaw Uprising as an admirable and heroic action. In the recent years yet another myth was born and raised - the myth of the banished soldiers. It is difficult to point to the exact origins of this myth - whether it occurred in the circle of the Law and Justice Party or historians from the Institute of National Remembrance, or it was perhaps triggered by the journalists of the right-wing media. The members of these three groups have been eager to discuss the banished soldiers theme in recent years, it was debated on many occasions, often with a load of emotions, accompanied by patriotic or heroic slogans, sacrifice for the homeland and national martyrdom. This approach reproduces the 19th century vision of the Polish history with martyrdom at its centre (Topolski, Molik, & Makowski, 1991). This myth promotes emphasising the periods of oppression by hostile nations, the martyrdom of Polish patriots, ready to give up their life for the independence of their homeland. The new core curriculum for history teaching returns to this paradigm, emphasising the military and insurgent themes in the history of Poland.

"After more than 70 years of no war experiences in our part of Europe, war becomes a romantic image, the prototype of which is of course the Warsaw Uprising. And on the other hand, the banished soldiers are also becoming part of a myth. We see the comeback of the romantic nineteenth-century image of the conflict, where war is something noble, something that integrates the nation, a reason for its participants to be proud and glorious and eternally famous, which has nothing to do with reality. We are not able to get rid of this unfortunate Polish romanticism” (Średziński, 2016), Prof. Wojciech Burszta, the Polish anthropologist of culture concludes about the changes in the paradigm.

It is not only the core curriculum that presents Polish history in this manner. Many circles in Poland cultivate and popularize the vision of history solely embracing political conflict and military themes. Later on in this chapter I will present examples of circumstances, events and situations based on a vision of history supporting the myth of the banished soldiers.



For the purposes of this article it was impossible to carry out studies on how the teaching on the banished soldiers has been delivered on the basis of the new core curriculum. The article was being written in autumn of 2017, the first months after the Polish education reform. However, even before the reform was introduced, educational campaigns concerning the banished soldiers had been performed or planned in many schools.

Many educational events are hosted as part of the National Day of Remembrance of the Banished Soldiers. Schools or museums often hold special classes devoted to the topic of the “banished” (an example of a museum lesson: <http://dulag121.pl/2017/02/lekcje-dotyczace-zolnierzy-wykletych/>).

The subject of the banished soldiers is introduced to the young people via various means of communication. The Passionart Association in cooperation with the Krakow branch of the Institute of National Remembrance prepared a Historical Educational Program. “The program is aimed at promoting history of Poland among middle and high school students by combining classical music with modern artistic means of expression (...)” (<http://passionart.org.pl/historyczny-program-edukacyjny-2/>). One of the three topics of the program were the banished soldiers. Classical music was accompanied by patriotic rap music. “Thus, the classical music meets history and the forms of expression preferred by the young to speak, sing and play about the heroism and perseverance of the Unbreakable” (ibid.).

A secondary school in Milanówek near Warsaw decided to open a class with a national-mathematical profile. The program includes shooting, field trips and tours in the footsteps of the banished soldiers. “Opening a class with the national and mathematical profile is a response to the current situation in Poland and abroad - and I mean first of all the situation in Ukraine, and the matters related to refugees, which remain a concern to the young people - The headmaster of the school explained” (Newsweek, 2016b). History at the school in Milanówek will be taught with emphasis on the most recent times and the theme of the banished soldiers.

The primary school in Skawina near Kraków showed a performance in tribute of the “banished”. In spring 2017 the Polish internet was in for a shock - a photo of an eleven year old shooting children in the back of their heads taken during the performance was everywhere.



Source: [krakow.wyborcza.pl](http://krakow.wyborcza.pl)

Journalists who published the photos reported the course of the school play and the interrogation scene. "The scene was performed in absolute silence. Four boys playing secret police agents entered the stage one by one. They simulated a blow to the face, a silent scream. Finally the boy who performed the execution approached the rest. The execution itself lasted 30 seconds" (Kopeć, 2017).

The photos of the execution published on the internet caused some internet users to feel indignation. It was pointed out that playing scenes of cruelty and murder can be dangerous to the emotional development of children. Other internet users had different opinions, claiming that children play war anyway, and so are used to shooting each other.

Teachers from the school in Skawina expressed a similar approach. They did not see anything wrong in the performance, and did not expect it to be controversial. "It is indeed a difficult subject, but we prepared students for it during history classes. Only the fifth and sixth grade students took part in the performance as they already have the ability to think in an abstract manner and understand the meaning of staged events" (ibid.), the headmistress of the school explained to the journalists. According to the information obtained from the headmistress, the parents had been informed about the content of the performance and did not raise any objections.

There were numerous comments online pointing out the harmful effect of the black and white vision of history describing the lives of the banished soldiers. "Did the children playing the role of the 'banished' also murder militia officers and civilians?" (ibid.) said one of the online comments. The authors of the performance, teachers from Skawina, did not respond to these accusations. The statement issued by the headmistress proves that in her opinion the banished soldiers are unambiguously positive figures. Asked to comments on the scene of the execution, she said: "This is only one scene that did not even last three minutes, while the entire show was 40 minutes long, during which we concentrated on the good, that is the presentation of the 'banished soldiers'" (ibid.).

Perhaps the parents did not raise any objections to the content of the show because they were convinced that the banished soldiers theme was a valuable topic to present to the children. Skawina lies in the Małopolska province, the region of Poland predominantly inhabited by people with conservative views. Many of them support the politics of memory promoted by the PiS party.

People across Poland make incessant attempts to spread the story of the banished soldiers in Polish schools. Fundacja Dobrych Mediów [the Good Media Foundation], whose mission is to build a significant Catholic media network in Poland (FDM, 2017), inaugurated the project "Banished to the schools" in 2016. A part of the campaign included creating mobile exhibitions of twelve figures of the banished soldiers. Exhibits are sent to the schools who are interested in popularizing the banished and prepare special lessons on the subject. Another idea to revive the theme of the soldiers was producing a catalogue with their profiles. The media partner explained the rationale for this project in the following way: "At present young people are increasingly interested in the fate of the Banished Soldiers. They however do not have an opportunity to learn more about the inspiring lives of the Polish heroes during their history lessons at school" (Pasim, 2016). This rationale is followed by a call to financially support the

campaign: "We believe that with your support we will help the young Polish generation on the brink of adulthood learn more about this important period of Polish history! Let us save our Heroes from oblivion. It is to them that we owe our independence! " (ibid.). Donations may be transferred into the Foundations account. The organizers informed they need PLN 75,000 PLN to carry out the project and 70% of the amount is still missing.

"Red is Bad", the partner of the campaign, and provider of promotional materials such as campaign logo lanyards, is a company selling patriotic clothing and gadgets. The products offered by the company are dominated by military themes and the Red is Bad print



Source: <http://pewex.pl/pictures>

manifesting hostility towards communism. The clothing is also available in baby and child sizes. "Red Is Bad offers a line of patriotic rompers for babies. Each of them has been made in Poland. Designed in a moderate manner, they reflect the views of the parents, and accentuate Polish background. Subtle toned clothing with an embroidered Polish flag make an ideal combination to welcome baby Poles. Patriotic clothing for babies available in size 56 and larger!" (<https://redisbad.pl/odziez-dziecieca/pajacyki>) - this is the way the store promotes its products. You can also get clothes with banished soldiers themes.

"Red Is Bad" is not only a brand of patriotic clothing, but also a foundation financially supporting the living

banished soldiers and combatants of World War II (<http://fundacja.redisbad.pl/foundation>). The foundation collects money mainly via the social media and gets numerous donations, which proves how important this issue has become to many Poles. The "Red is Bad" brand organizes many social and educational campaigns (<https://www.redisbad.pl/nasze-akcje>). Their products are donated to children in orphanages. "Red is Bad" supports and co-hosts events intended to pay tribute to the banished soldiers. The foundation is lobbying for calling streets and city buildings by the names of the "banished" and have monuments put up for them. Football games, runs and other sports events are hosted under the names of the banished soldiers. The foundation also sponsors awards in the contest on the knowledge about banished soldiers organized among schools. Many schools organize the "Banished" weeks on regular basis and the foundation provides patriotic clothing and gadgets for the students. The "Red Is Bad" campaigns are regularly updated on their website and their number is impressive.

"The Week of the Banished Soldiers" events are not only hosted by schools, but also by municipalities and towns. These events often include holy masses commemorating the "banished", concerts of patriotic music, marches through the streets of towns and cities, laying of wreaths at commemorative plaques and gravestones of the heroes, meeting members of the banished soldiers' families, art shows, talks and prayer meetings. Schoolchildren always participate in these events either by singing the national anthem, handing out flags or laying wreaths (see the example of the Banished Soldiers Week in Koło on the town's website: <http://kolo.naszemiasto.pl/artykul/iii-kolski-tydzien-zolnierzy-wykletych-program,3652014,artgal,t,id,tm.html>). The events do not mention any negative aspects the history of those times. All events have a commemorative character, emphasizing the heroism

of the “banished”. Their purpose is to arouse patriotic feelings, and a sense of belonging to the national community.

The number of this type of celebrations grows every year, and they are funded by both public and community organizations, such as the many foundations and associations supporting and promoting patriotic values and attitudes. For example the Polish Values Foundation (<http://www.polskiewartosci.pl/misja/>), which uses the “out of love for the homeland” slogan. The foundation, in cooperation with the Freedom and Democracy Foundation (<http://wid.org.pl/kim-jestesmy/>), has been since 2013 organizing a run dedicated to the memory of the banished soldiers - “Tropem Wilczym. Bieg Pamięci Żołnierzy Wyklętych”. Year by year the event gains more momentum as the event’s website states. “In 2017, approximately 60,000 participants from 281 cities took part in the Run: 229 partner cities, 6 foreign cities (Vilnius, London, New York, Chicago, Herdorf-Dermbach, Ingleburn), 41 cities (as part of garrison runs) and 5 military missions abroad (Kosovo, Afghanistan, Iraq, Kuwait, Bosnia and Herzegovina), where not only the Polish soldiers, but also by soldiers from the USA, Hungary, Denmark, Ukraine, etc. paid tribute to the banished. For the upcoming 6th edition of the Tropem Wilczym Run, which will take place on 4 March 2018, the organizers wish to involve over 280 cities, with around 70,000 runners. The project will include a traditional run for 1963 metres (reference to the year the last of the banished soldiers, Józef Franczak, aka Lalek, died)” (<http://www.polskiewartosci.pl/tropem-wilczym/>).

The cult of the “banished” is fostered on the Polish public television. Documentary programs, films and theatre shows focus on the banished theme. The message is clearly positive, and anybody who raises doubts about the moral purity of the “banished” is criticized. “After years of the communist propaganda calling the banished soldiers criminals and bandits, the struggle to restore their reputation continues. To this day, some still accuse them of crimes and criticize these who want to make them glorious - said a TVP anchor announcing the ‘Who is disturbed by the memory of the heroes’ show” (Jurszo, 2017b).

A journalist analysing television footage harshly criticizes the politics of memory pursued by the public media, which are subordinated to the PiS authorities. “TVP does not only ignore the facts, but also falsifies the inconvenient truth about the banished soldiers. It is ready to slander those who do not accept the manipulation of the past presenting the heroism of desperate struggles and erasing its pathologies. Those who do not wish to participate in the “religion of the banished” a new national cult” (ibid.).

The national and patriotic vision of history is surely an ideal image for the majority of the Independence March participants, who walked the streets of Warsaw on 11 November, 2017, on the 99th anniversary of Poland regaining its independence. This year, the March was dominated by the extreme right, and its organizers introduced the military style grouping. One of the journalists describes his experiences: “Men in orange vests, or the march protection guards, were loitering around the church. (...) They looked like civic militia. The situation looked like some kind of briefing. The “Officers” provided the “privates” with the guidelines. (...) Sheepskin coats worn over the uniform and fastened with a wide belt were popular. The banished... style” (Szczerek, 2017). Many participants of the March had the banished soldiers emblems attached to their jackets.



The photograph shows a boy, participant of the March, dressed up as a small insurgent. The boy holds a Polish flag in his hand and smiles for the picture. This is an example of how the national-patriotic politics of memory permeates the popular culture in Poland. Military, insurgent and soldier themes became trendy and popular, also among children, but missing the reflection on the drama of war and tragic choices of these times. War and struggle become a game with patriotic slogans. This seems to be particularly dangerous for children who quickly assimilate this kind of emotionally charged educational content.



Source: <http://thenowypolskishow.co.uk>

The banished soldiers theme seems to have been placed within the context of the march at a random, misguided attempt. There was a bizarre mixing of themes, contents and values, among which the xenophobic and racist content played a major role. "For example, you could see a dark-skinned man in a wheelchair, with emblems of banished soldiers attached to his jacket and people roaring behind his back: "refugees get the fuck out" (ibid.). The banished became a part of a mosaic of randomly matched elements, the ultimate result of which was, a combination of a national and patriotic, as well as racist and xenophobic content. The photograph below, showing participants of the March carrying a banner saying "Europe will be white or uninhabited" is an example of racist slurs present on the March.



Source: [m.newsweek.pl](http://m.newsweek.pl)

For many years, the extreme right-wing national movement has been participating in the marches, raising racist and xenophobic slurs and showing aggressive behaviour. So far, the authorities distanced themselves from these circles and condemned their behaviour. In 2017, the Independence March was praised by the ruling authorities as an expression of true patriotism of Poles. Thus patriotism was deemed to be simultaneously identified with banished soldiers and racist slurs.

## Conclusions

The manner of presenting the issue of banished soldiers in the core curriculum for teaching history in Polish schools is an example of the politics of memory implemented by the Law and Justice Party. The paradigm promoted by the Law and Justice authorities is based on the simplified vision of history. The objective of learning history is not intended to be a comprehensive analysis of events and figures significant for the history of the country so that the students can understand the complexity of political or social circumstances in historical context. The new, express objective is to arouse patriotic emotions, cultivate love for homeland and strengthen bonds with the national community. This goal is to be reached by commemorating the distinguished figures in the country. The majority of the past heroes are soldiers, i.e. the people who are ready to shed blood and forsake lives for their homeland. The war and military rhetoric leads to associating patriotism with the times of war and not peace.

The banished soldiers are depicted as morally pure. The new curriculum ignores historians' controversies over the figures of the "banished," as well as evidenced crimes against civilians and other nations committed by the members of the banished group. Recalling these facts is treated as an anti-Polish and un-patriotic attitude by the supporters of the new paradigm. Patriotism is then identified with a black and white vision of history which emphasizes the good "our" heroes deserve and the cruelty the "others" i.e. other hostile nations commit. Any elements disrupting this image are unwelcome.

Simplified history, ignoring controversies and reluctant to discuss dilemmas has become the basis for teaching history in the new core curriculum. This is a real threat to Polish democracy for several reasons.

First of all, young people are delivered a historical vision based on incomplete information. Uncomfortable information, inconsistent with the political goals of the current government is not mentioned in the new core curriculum for teaching history. In a democratic state, citizens should have access to complete information to form an opinion on various topics. The new core curriculum for history teaching is not intended to support young people in independent thinking and drawing conclusions based on the access to complete information. The way facts are selected and presented leaves no room for conclusions and interpretations. The main goal is to arouse emotions, and not promote independent and critical thinking.

Secondly, democracy expects the citizens to be able to discuss matters, an ability nurtured at democratic schools. The new paradigm of civic education at the Polish school does not nurture the art of discussion and rational argumentation as it does not appeal to analytical thinking, but emotions.



Thirdly, the new paradigm for teaching history introduces a division into “us” and “others”, the former of whom are supposed to be good while the latter should at least have doubtful intentions. This manner of teaching history may impact the way young people think about other groups, nations or religions, even today. This paradigm of the politics of memory does not serve peaceful and democratic coexistence in a culturally diverse world.

The effects of the politics of memory introduced to schools are also seen in other areas of public life, such as the media, public space or popular culture. Political actions implemented in these areas have more to do with nationalism than democracy. Polish heroism is glorified. War is presented as a black and white phenomenon, missing any complexity. The simplified narrative seeks to minimize discussions. Emphasizing heroism and moral purity of figures, who fought with the “others”, the enemies of Poland, creates a sense of divisions extending to present times. Other nationalities, especially the ones with a history of war against Poland, are treated with distrust or even hostility. It is thus no surprise that during the Independence March glorification of the banished soldiers is heard against the background of racist slurs, expressing hostility towards refugees and worshippers of other faiths. Trivialisation of history in combination with consumer culture creates a socially dangerous element and a real threat to democracy.

The politics of memory has many functions for the governing party. Firstly, it is a means of political mobilization, in particular of right-wing political scene. Secondly, it is used as a method of reinforcing political cleavages and strengthening political legitimization of PiS. Thus, it is a way to acquire some moral superiority by the party. Political actions of PiS regarding the Constitutional Court are an example of the new interpretation of political morality, presented by the government. “The good of the nation is above the law. If the law conflicts with that good, then we’re not allowed to treat it as something that we can’t break,” said Kornel Morawiecki from the populist Kukiz movement, which votes together with Law and Justice on many issues. Jarosław Kaczyński as the leader of PiS said in many interviews that his party had a moral mandate to reshape the country. In 2015 Kaczyński called the Constitutional Court “the bastion of everything in Poland that is bad” (Cienski, 2015). From this moment on the process of dismantling of the Court has started. The politics of memory should help to legitimize current political actions. The banished soldiers are presented as moral heroes, although some of their actions were not legal. Law and Justice presents itself as an actor inheriting after “good anti-communist heroes”. Giving the Constitutional Court the label of a post-communist institution should legitimate handling against the rule of law. The governing party wants to be seen as the one with the moral right to take political actions for the fatherland, even against the law.

The phenomenon of banishes soldiers is a Polish case which could be also analysed as one example of a broader tendency of fostering nationalistic historic and citizenship education through the politics of memory. This tendency is currently existing in many countries, for instance Russia, Hungary or Turkey. Many states have nowadays their own traitors and heroes and build historical myths aiming at shaping specific attitudes towards both history and present day. As long as interpreting history is used to achieve current goals, it should be analyzed as the politics of memory: political action that can have a significant impact on societies and the future of democracy.



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## Patriotic Celebrations in Educational Commemoration Practices in Ukraine

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- School commemoration is an organized process influenced by social memory discourse
- Holiday celebrations reflect the transformation of the official holidays calendar
- Complex relations exist between school patriotic rituals, official aims and civic identity
- Military conflict influences the strengthening of patriotic character in school celebrations
- Patriotic rituals display elements of contradiction between citizenship and patriotic education discourses

**Purpose:** This study aims to provide information on the main tendencies across the transformation of the official holidays calendar in Ukraine over the last decades and to demonstrate its influence on school celebrations. Also discussed here is the role of these factors in the parallel but sometimes contradictory processes of the students' civic identity formation.

**Design/Methodology/Approach:** The article is based on documentary analysis, an interdisciplinary literature review and an examination of current practices with regard to national holidays in Ukraine. Patriotic rituals are analyzed through examples and evidence of school celebrations of the main calendar dates, including audiovisual materials in different school settings. The authors' observations have been corroborated with evidence from Ukrainian students and teachers as seen in the results of the questionnaire. These reflect their perception and experience of school celebrations.

**Findings:** The results demonstrate that the transformation of the official holidays calendar in Ukraine has had an impact on school commemoration practices. This in turn has become a factor in the formation of students' civic identity. School patriotic rituals reflect a contradiction between the discourses of citizenship, patriotism and national upbringing in an emergent democracy in the continuing context of military conflict.

**Key words:** Ukrainian holidays celebrations, commemoration, patriotic rituals in school, civic identity, patriotism, citizenship education, democratic values.

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## 1 Introduction

During the 20th century Ukraine experienced many political changes which influenced celebrations in both the political and educational context<sup>1</sup>. The political transitions since the proclamation of independence 1991 in Ukraine and its border areas respectively affected the practice (and application) of historical memory, introducing different and controversial historical narratives in the public sphere. It has also been reflected in the formation of a new system of holidays, and a new structuring of the past.

The work of Paul Connerton (1989) on the construction of social memory in a sense provides both an underpinning and a working hypothesis for our research. He concludes that social memory construction is impossible without the respective ceremonies. Connerton interprets political rituals as operating within political contexts in which power is distributed in a systematically unequal way, so that rituals may be understood as exercising cognitive control by providing the official version of the political structure with symbolic representations. In the modern period national elites have invented rituals that claim continuity with an appropriate historic past, organizing ceremonies, parades and mass gatherings, and constructing new ritual spaces. Ritual actions should be interpreted as exemplifying the kinds of cultural values that are regarded as currently politically acceptable, perhaps by a majority. Commemorative ceremonies play a significant role in the shaping of communal memory.

Steven Lukes (1975) suggests using the term “ritual” concerning activities and deeds where people are guided by the rules of the symbolic character in such a way that the attention of participants is attracted to certain ideas and feelings which are assigned a special meaning. Pierre Nora (2005) fine-tunes this by drawing on the paradigm of decolonization, specifying the type of decolonization intrinsic to the peoples who were under the reign of totalitarian regimes. The process of freeing their historical memory from ideological frameworks of a totalitarian kind is seen as a necessary condition of socio-economic and political freedom, as well as offering the possibility of forming new frameworks.

The holidays topic represents various issues, significant for understanding the transformation of Ukrainian society in the independence period after 1991. The cardinal political and socio-cultural changes in Ukraine of the last decade have caused the formation of the new festive calendar. The controversies and contradictions of post-Soviet, post-colonial and Ukrainian national historical narratives became the distinctive features of memory policy in Ukraine across the years of independence and these features were reflected in the emergent patriotic commemoration practices in schools.

In the latest Ukrainian research into the dynamic political and socio-cultural changes there is an increasing interest in the festive culture, and consequently attempts have been made to reinterpret the holidays discourse critically (Tarapon, 2016; Hayevska, 2012; Lymanska, 2003; Malooka, 2017; Liubarets, 2016; Kyrydon, 2017). Researchers consider the most characteristic definitive feature of the ritual and festive canon to be its symbolism, because every ritual consists of a system of actions which appear as symbols (signs) of certain social ideas, values and norms. Through rituals and ceremonies stereotypical forms of mass behavior are developed, and this takes place to normalize automatic involvement in the dominating system of regulations. Ceremonies affect not only the intellect, but also the feelings of their participants (Tarapon, 2016). Rituals, holidays, customs and traditions always act as a special





form of communication among people, performing cognitive, educational, emotional-psychological and aesthetic functions. "Holiday" as a social phenomenon carries a special functional load in the transitional periods of the society development (Kyrydon, 2017).

In the post-Soviet countries some dates are of great significance in the collective memory, the traditions of celebrating which originated in the Soviet Union and which still have or have had a partial ideological basis:

*Defender of the Fatherland Day* (February, 23) (originally known as Red Army Day) was celebrated in Soviet Union on February 23<sup>rd</sup> since 1918. It was initially dedicated to veterans and members in the Armed Forces, though it is known as Men's Day and commonly treated as a celebration of all men.

*International Workers' Day* (May, 1-2) was a public holiday and was celebrated with huge parades in cities in former Soviet Union.

*The Victory Day* (May, 9) commemorates (and indeed celebrates) the end of what was known in the Soviet era as "The Great Patriotic War".

Wagner, Davis and Osborn (2011) pointed out that celebrations are important organizers of the school calendar and all its activities, in the sense of serving as an axis of collective memory and of time in general, because a number of school activities are scheduled according to these dates and commemorations.

In our research, special attention is paid to the commemoration of the most politically instrumentalized holidays – the Defender of the Fatherland Day and the Victory Day. In some countries, like Russia, the Soviet versions of these dates – Defender of the Fatherland Day (February 23) and the Victory Day (May 9) are still alive. In Ukraine, these calendar dates have been undergoing an intense revision in the last years reflecting commemoration practices in schools. The new practices of celebration of these holidays in schools (8 May – the Day of Memory and Reconciliation, 9 May – the Day of Victory over Nazism in Europe, the Victory Day; 14 October – the Defender of Ukraine Day), and additionally the development of the new traditions of celebration in Ukraine – of the Day of Dignity and Freedom (November 21) will also be examined.

## **2 Contradictions in World War II commemoration practices in national identity construction.**

The remembrance of World War II is characterized by controversy and contentedness in the collective memory of the Ukrainian people and its neighbors. As Wilfried Jilge (2006) noticed, the heroic narrative of the "Great Patriotic War" was one of the Soviet Union's legitimizing myths. The maintenance, modification, or re-evaluation of this myth since the end of perestroika (Ukrainian: *perebudova*) remains among the most controversial key issues in the Ukrainian debate over the past.

"Battles of memory" are an important element of the commemorations of 8/9<sup>th</sup> of May [*Victory Day, Ukr. - Den' Peremohy*] in Ukraine and their commemorative practices are connected with political interests and identity issues. The core theme in such conflicts is the attitude to the Soviet past and its heritage. On the other hand, such struggle for establishing a certain version of memory in the public space testifies to not only to the development of civil



society, but also to the implementation of the democratic principles of pluralism and freedom in Ukraine's socio-political sphere, in contrast to those of Russia and some other post-Soviet countries where heroic memory about the Great Patriotic War became a sacred part of the authoritarian policy of the state apparatus and accordingly, raised the memory of World War II above the possibility of any component which favored critical scrutiny.

It is worth pointing out that there is an ambivalence in the practice of commemorating memorable dates of the World War II in Ukraine which is manifest in the co-existence of different models of memory – post-Soviet, national and European ones. In particular, the post-Soviet tradition of the analysis of World War II events in the light of the Soviet ideology considers it as the Great Patriotic War which started on June 22, 1941 with the attack of Germany on the Soviet Union, but the European model broadens and back-dates the chronology of war to an event which started in 1939. In addition to the present post-Soviet model of memory of the World War II elements of Soviet identity (the Soviet myth of “Great Patriotic War” as a symbolic resource for ‘consolidation the entire people of Ukraine’) (Jilge, 2005), in the years of independence in Ukraine, the Ukrainian national perspective of memory of the World War II has grown in significance.

After the Revolution of Dignity<sup>2</sup> of 2014 [Ukrainian: *Revoluciya hidnosti*] the memory policy and public perception of the Soviet heritage in Ukraine underwent radical changes. The reinterpretation of the Victory Day celebration took place in 2014. It was connected with the hybrid war in the East of Ukraine and active appeals of the pro-Russian separatists for the revival of Soviet models of memory about the World War II (Liubarets, 2016). Ukraine together with Europe and the world began honoring the memory of all the victims of the World War II of 1939-1945 on May 8, which was officially proclaimed the Day of Memory and Reconciliation according to the Law of Ukraine “On memorialization of the victory over Nazism in the World War II of 1939–1945”. On May 9, the state holiday is marked as the Day of Victory over Nazism in Europe, the Victory Day. It should be mentioned that this addition of May 8 marked a move away from the narrow Soviet tradition of victory celebrations to a recognition that there can be an international or transnational dimension to patriotic commemorations.

### **3 How do patriotic and citizenship education discourses influence the schools' patriotic celebrations?**

Traditionally school is one of the main places where processes of socialization take place, which results in forming the sense of social belonging and the ability to perform one's social role successfully. Schools themselves can be part of the transition away from authoritarianism. Schools can affect the community to some extent and be affected by it; any policy of education, and particularly the one under consideration, both reflects and conditions the political culture that generated it (Gregg, 2015).

New states are an interesting arena in which citizenship education can be examined, as these states tend to give priority to the nation-building policies in the first decades of their existence—i.e. to policies promoting cultural unity and unconditional loyalty to the state (Coulby, 1997; Green, 1997). A key question that providers of citizenship education must face is the extent to which they should be involved in accepting the polarities which would result from a difficult choice between promoting either critical attitudes or allegiance to the state, or



whether there should be a different approach consisting of a more creative construct which combines criticality with loyal citizenship (McCowan, 2004).

Discussion about the dimension of patriotism in Ukraine, its connection with national, state and civic identity is reflected in many publications over the years of independence. The researcher considers patriotism as a spiritual and moral principle of a person's life activities which is characterized by the responsible attitude of a person to the native land, to Motherland, to people (Chorna, 1997; Ihnatenko, Popluzhnyj, Kosareva, & Krytska, 1997; Vyshnevskyi, 2003; Korkishko, 2007).

In pedagogical literature considerable attention is paid to the importance of calendar holidays and anniversaries as a means of national and patriotic upbringing of youth. In particular, Korkishko (2007) notes that a great cycle of folk, religious, family traditions and holidays contribute to enriching students with patriotic feelings which reveal the emotional attitude of a child to himself/herself, to the world around them, to people, to Motherland, to national values. Silenko (2015) does not stress the importance of criticality, but emphasizes that enriching students with patriotic feelings takes place in the process of familiarizing themselves with the history of the heroic past of the Ukrainian nation. Kovalchuk (2013) emphasizes that the main objective of celebrating in schools is the consolidation of society and its cohesion around the national idea, education of students' patriotic feelings.

The above-mentioned approach to patriotic education by means of school celebrations reflects the tension between the discourses of active citizenship, patriotism and national upbringing in educational practice in schools in the context of the dichotomy of "constructive versus blind patriotism" (Schatz, Staub and Lavine, 1999). Blind patriotism is described as a stiff and uncompromising belonging to the country characterized by indisputable positive evaluation, convinced loyalty and intolerance to criticism, and constructive patriotism is a kind of belonging to the country characterized by an attitude of "critical loyalty" (Schatz et al., 1999).

This notion of constructive patriotism as contrasted to blind patriotism, can influence the formation and successful functioning of civil society. Russian researcher Anna Sanina (2016) points out that the militarized character of contemporary Russian state policy in the patriotic upbringing sphere shows the dominance of blind patriotism in society, with an obvious accent on militarism. In the framework of patriotic upbringing Russian citizens have no possibility to develop critical thinking or the "critical loyalty" that is characteristic for constructive patriotism, and also the related decision-making skills, based on a clear understanding and realization of one's actions. The lack of any opportunity to question a mythic master narrative, or even suggest that the national story might be more complex, is part of the problem.

A particular challenge in Ukraine is seeking to reconcile a revised post-Soviet national narrative with the survival in parts of Eastern Ukraine of elements of the older allegiances and interpretations, and in a way these form two parallel heroic narratives, an old and a new. In the West and Centre of Ukraine the old heroic version is contested, but this discussion is permissible in the new democratic state. However, a new attitude to what it means to be 'heroic' in the present is needed, more of a civic definition and one that goes beyond ethnicities.

It should be mentioned that the critical reinterpretation of patriotic education in modern socio-cultural conditions is insufficiently represented in Ukrainian pedagogy, with the



exception of several works by Sukhomlynska (2010), Mudryi (2009), and Kendzor (2016). Mudryi conflates patriotism with gaining personal ownership of a tailor-made kind of citizenship. Patriotism today is not only a moral category, not only a type of experience, but to a greater extent it is an ability and competence to act in the contradictory world, preserving at the same time one's identity and dignity. Mudryi (2009) writes that it is not heroic or tragic rhetoric, neither endless conversations about "struggle" which will have a positive effect on the youth, and historical knowledge itself will not have any educational importance until its significance has become understandable for a specific person.

Patriotic education of school students in a modern (democratic) society, in the opinion of Sukhomlynska (2010), should not be driven solely by the academic ideas of patriotism in corresponding sets of abstract knowledge constructions, but should offer alternative plans to allow students to get involved in active volunteer exercises free from evaluation, where shared democratic values can be expressed not just intellectually but emotionally and for the benefit of society.

Similarly, Kendzor (2016) flags up doubts about whether interest in one's own history, folk traditions, coloring in state symbols or other state infrastructure objects, using the elements of national clothes in everyday practice, etc., are sufficient properties of a modern Ukrainian patriot. Therefore, there is a recommendation that the ethnic nature of Ukrainian patriotism should be transformed into a different sense of citizenship which can be defined principally through the development of civic identity in an individual personality to reflect the conditions of a democratic political system.

It worth pointing out that apart from the work of these critics, there was not a widespread reinterpretation of the cultural-historical dynamics of the holiday phenomenon in the context of pedagogy, neither in the patriotic nor the civic education of students. The changes and influence of the state memory policy on commemoration practices in schools have been overlooked by the researchers.

The Crimea's annexation<sup>4</sup> (February-March 2014), and the military events in the East of Ukraine since 2014 have emphasized or certainly contextualized the actualization of patriotic upbringing of youth at the levels of both state policy level and of commemorative practice in schools. It has had an impact on how the concept of national and patriotic education for children and youth should be defined and developed. In Order No. 641 which followed there is a distinct move away from a heroic to a civic definition of patriotic citizenship.

The Government's Order No. 641 which defines the concept, was adopted on 16 June 2015 by the Ministry of Education and Science of Ukraine. The Concept stipulates that the aims and objectives of the patriotic and civic education elements in the education (and upbringing) of children and youth, should be the following:

- to strengthen patriotic values and beliefs in the consciousness and feelings of an individual;
- to realize the interconnection between individual freedom, human rights and an individual's responsibility;
- to promote the ability to determine the forms and ways of their own participation in the life of civil society;



- to cooperate with governmental and social institutions;
- to abide with the laws of the state and protect human rights;
- to be willing to take responsibility upon oneself;
- to develop the capacity for solving conflicts according to democratic principles; to adopt a tolerant attitude towards other nations, cultures and traditions;
- to recognize a sense of humanistic morality as the basis of civil society (Concept of National Patriotic Education).

There are clearly messages here for understanding other states with empathy, recognizing why change has not happened, and that under authoritarian regimes, such as the neighboring Russian Federation, heroic narratives persist, and freedom of speech and multiple interpretations are not possible. There are messages here too for Ukraine, to celebrate the opportunities which belonging to a democratic state can offer, and not least, while embracing the new democratic freedoms and the changes to the nature of holidays, the necessity of adopting a critical, self-aware and open stance towards its own history. This assumes that being democratic in everyday life is an alternative to being heroic in a military sense, or perhaps at least recognizes that it should remain as a strong supplementary imperative in a society where military activity is a continuing necessity for national defense.

At the same time it should be mentioned that the ideas of directing the prospects of patriotic education development in Ukraine towards a constructive and critical approach are indeed being implemented in practice by the academic and pedagogical community (in effect universities, colleges and schools and their corresponding local communities) in developing education for democratic citizenship, and this has gained in importance in Ukraine since independence and especially following the Dignity revolution (2013-2014).

Regulatory and legislative bases of citizenship education in Ukraine are stated in the new Law of Ukraine "On Education", and in the directions of citizenship education. These are described in the National Strategy of Promoting the Development of Civil Society in Ukraine for 2016-2020 and the National Strategy in the Sphere of Human Rights. Article 12 of the Law of Ukraine "On Education" defines 12 key competences, in particular, "civic and social competences related to the ideas of democracy, justice, equality, human rights, welfare and healthy lifestyle with realization of equal rights and possibilities", as well as critical thinking as a cross-curricular competence (Law of Ukraine Nr. 2145-VIII "On Education", 2017).

Taking into account all the above-mentioned, we consider that the prospects of patriotic education development in Ukraine should be directed at building up a civic nation based on interpersonal trust among citizens, cooperation and joint actions for the benefit of the society. Ukrainian patriotism should be the result of practical implementation of the responsible sense of citizenship based on democratic values. In order to fulfill this task, teachers should seek to draw on their skills to develop the competences of a democratic culture which will enable students effectively to meet the demands of the associated social challenges. Democratic values should be at the core of the process of student identity-building in these commemorative practices. As a result, patriotic feelings should become for the Ukrainian youth not only a firm and conscious association of identity with the native country, but also the readiness for responsible active democratic participation.



## 4 Commemoration practices in schools in Ukraine

### 4.1 The Day of Memory and Reconciliation and Victory Day commemoration

As a rule, commemorative practices in schools have been preserved since the Soviet Union period, although there have been considerable changes in their content and in their outward forms in the post-Soviet countries since the times of independence. In particular, much of the systematic character of commemoration in schools still reflects the shape of the Soviet tradition.

The procedure of public holiday commemorations in Ukraine is regulated by official documents such as the Presidential Decree № 84/2017, “On commemorating the Day of Memory and Reconciliation” and, according to the order given to the administrative heads of regions, at the levels of region and city there are details about the nature of the plan of events devoted to the Day of Memory and Reconciliation and Victory over the Nazism in the World War II. The Ukrainian National Memory Institute, in the framework of commemoration of memorable dates in secondary schools, has developed information materials on marking the Day of Memory and Reconciliation.

The main commemorative practices on marking the Day of Memory and Reconciliation on May 8 and the Day of Victory over the Nazism in the World War II on May 9 are a meeting with veterans, laying flowers at the Unknown Soldier’s grave, a whole school assembly-requiem and a festive concert. School students visit surviving war veterans and victims of Nazi persecutions, and ensure that monuments, memorials and war burial sites of the victims of World War II are preserved in good order.

Here are several examples of how the Day of Memory and Reconciliation is commemorated in the schools of Ukraine. This video of May 4, 2018 demonstrates a concert requiem devoted to the Day of Memory and Reconciliation and the Victory Day in school № 16 Kremenchuk (Poltava region in Center of Ukraine).

In Bakhmut school № 5 in the Donetsk region (close to the military conflict zone in the East of Ukraine) besides the memorial solemn event, visiting the Unknown soldier’s grave and laying flowers at the burial place of the innocent citizens who perished in the years of the World War II, the school students participated in the whole-school action, “Good morning, veteran!”, during which they made greeting postcards for the veterans and the children of war and greeted them personally. Besides that, students participated in the “memorable race” and in the city streetball competition.

Commemoration of the Holocaust victims is an important component of the Ukrainian nation’s memory. In remembrance of the Holocaust in Ukrainian schools the International Day of Holocaust victims’ memory is marked on 27 January. Thus on January 26, 2018, on the day preceding the the Day of Holocaust victims’ memory, in the 10<sup>th</sup> grade of school № 19 of Mykolayiv a demonstration lesson was held, where the students talked about the Righteous people of the nations of the world. The students lay the flowers on the place of tragedy in Mykolayiv. “This event made me realize better the tragedy of the Jewish nation and understand more what a cruel fate this nation endured. We learnt plenty of interesting things and made useful conclusions for us”, pointed out the 10<sup>th</sup> grade student (Kostjuk, 2018).



Picture 1. Concert devoted to the day of memory, reconciliation and the day of victory regarding 9<sup>th</sup> of May (11<sup>th</sup> May 2017 - Bakhmut) [city near conflict zone at the East Ukraine].

Where a situation of military conflict exists, the process of school celebrations is clearly influenced by children's relationship to war and the place of war in children's lives. These are difficult topics to broach as they raise complicated questions about agency, responsibility, rights, ethics and care, and this has been examined by Woodward (2004) and Horschelmann (2016).



Picture 2. The 10<sup>th</sup> grade students of school № 19 commemorate the Day of Holocaust victims' memory (26<sup>th</sup> January, 2018 - Mykolayiv) [a city at the South of Ukraine].

Where a situation of military conflict exists, the process of school celebrations is clearly influenced by children's relationship to war and the place of war in children's lives. These are difficult topics to broach as they raise complicated questions about agency, responsibility, rights, ethics and care, and this has been examined by Woodward (2004) and Horschelmann (2016).

The specific characteristic of commemorative practices in Ukraine in the last years is the relationship between these commemorations and war, and the participation of children in such ceremonies. Thus, non-governmental organizations initiate commemorative practices in schools, in particular those which have elements of a military character. The Day of Memory and Reconciliation commemoration activity for the students of the 9<sup>th</sup> grade in Chernihiv secondary school № 7 (North of Ukraine) was conducted by NGO volunteers in the format of a practical training session aimed at acquiring basic skills in first aid treatment, in tactical medicine and in the initial level of using the protecting weapon. Victory Day is a set of volunteer activities for students of the secondary school № 15 in Pokrovsk (Donetsk region in East of Ukraine), again close to the ongoing military conflict in East of Ukraine. Clearly, in an area still affected by military conflict elements of the past still affect the present, and NGOs consider that commemoration should take practical forms.

#### 4.2 Commemoration of the Defender of Ukraine Day

The Defender of Fatherland Day is one of the most popular holidays, the traditions of celebration of which originated in the Soviet Union and which had an ideological background. The tradition of celebrating the day of February 23 as an anniversary of setting up the Red Army comes from 1919. However, the continuous celebration of this holiday starts from 1922 under the name of "The Day of the Red Army and Fleet". In 1991 this holiday was not included in the list of public holidays in Ukraine. The day of February 23 became a public holiday in 1999. Four years before this (in 1995) the day of February 23 was nominated as the Defender of Fatherland Day in Russia, which can testify to the imitation and re-appropriation by the Ukrainian government at that time of some elements of the Russian Federation's memory policy. At the level of everyday life the holiday gradually started being celebrated as "the Men's Day" and a kind of an analogue of March 8 (International Women's Day in Ukraine), quickly having lost its ideological meaning as a celebration of the Soviet armed forces (Liubarets, 2016).

In 2014 in Ukraine by the decree of the President P. Poroshenko, celebrating the Defender of the Fatherland Day on 23 February was cancelled and a new holiday was established – the Day of Defender of Ukraine (October 14). The date of 14 October was chosen not incidentally, but precisely because on this day an Orthodox holiday is celebrated – The Intercession of the Holy Virgin [Ukrainian: *Svjato Pokrovu*]. Also, since 1999 this important date in the calendar of holidays was given extra significance, being named the Day of Ukrainian Cossacks<sup>5</sup>. In addition, on this date the creation of the Ukrainian Insurgent Army<sup>6</sup> is also celebrated. The holiday appeared on Ukraine's calendar for the first time in 2015.

Here are some examples of a school commemoration of the Day of Defender of Ukraine. Among the festive events in Brovary school № 10 (Kyiv region in Center of Ukraine) there were held: a book exhibition, competition between the 10<sup>th</sup> grades in shooting an air rifle, a festive concert.





All the people who were killed during the Revolution of Dignity (2013-14) and in military actions in East of Ukraine were honored by a period of silence. In the [video](#), it shows the members of the local center of the National scout organization “Plast” (Scout) in Irpin (Kyiv region) playing a game, celebrating the Pokrova holiday and the Defender of Ukraine Day. A “flash-mob” activity and games took place on 14 October in the school of settlement in the Krakivets, Lviv region (West of Ukraine).



Picture 3. Games for the Day of Defender in Ukraine (13<sup>th</sup> October, 2017 - Krakivets) [a city at the West of Ukraine].

The events devoted to the Defender of Ukraine Day in educational establishments in Bakhmut (formerly named Artemivsk on the border with conflict zone in the East of Ukraine) reflect the military situation in the East of Ukraine. For example the students of Bakhmut boarding school №1 [visited the military border guards](#). Also on the Defender of Ukraine Day the students of Bakhmut educational (“upbringing”) complex № 11, celebrated on the delimitation line – in frontline Myronivsk. In Bakhmut school №7 lessons on first aid treatment were given by a military doctor from the military hospital.



Picture 4: Lessons on first aid treatment are given at Bakhmut school №7 (9<sup>th</sup> October, 2017 - Bakhmut) [a city near conflict zone at the East Ukraine].

The students of Bakhmut school № 18 met with the Organisation for Security and Co-operation in Europe (OSCE) representatives. The members of the “League of future policemen” played a friendly football match within the framework of the project “East and West Together”.



Picture 5. Meeting with the OSCE representatives (7<sup>th</sup> October, 2017 – Bakhmut).

This [Video greetings](#) was prepared by students of school № 4 in Pokrovsk of Donetsk region in East of Ukraine for the defenders of Ukraine in the ongoing military conflict. Students expressed their hope for peace and solving the conflict.

### 4.3 New commemoration tradition in Ukraine. The Dignity and Freedom Day

According to American sociologist Jeffrey Alexander (1990) the key notion in the thesaurus of patriotism is the factor of solidarity which includes the subjective feelings of being integrated inherent in individuals as members of social groups. And it is worth mentioning that the commemoration of Dignity Revolution in the situation of ongoing military conflict in the East of Ukraine is an example of such solidarity and mutual respect among Ukrainians, bringing them around a common goal to defend their choice of European orientation based on democratic values.

Dignity and Freedom Day is a new national holiday introduced after the Revolution of Dignity (February 2014), and this reflects new approaches towards celebrations significantly moving towards symbolizing the protection of human and civil rights and freedoms, based on Ukraine's choice of European democratic values. The holiday is marked annually on November 21 pursuant to the Decree of the President of Ukraine №. 872/2014. It is established in honor of the commencement on this day of two significant and fateful events in the contemporary Ukrainian history: the 2004 Orange Revolution and the 2013-2014 Revolution of Dignity. The Day of Dignity and Freedom became a kind of successor to the Freedom Day holiday, which was celebrated in honor of the Orange Revolution on November 22 from 2005 to 2011 but was later cancelled and replaced (Degree of Ukrainian President № 872 "On Day of Dignity and Freedom", 2014)

On this day citizens and students commemorate both the participants of the Revolution of Dignity and those who have been involved in the military conflict in the East of Ukraine, who currently defend Ukrainian sovereignty and independence. In the framework of commemoration activities of Dignity and Freedom Day, the students of Cherkasy school №3 (Center of Ukraine) on 21 November 2017 prepared a composition honoring the heroes' memory, conducted an action "Peace Tree" and organized a patriotic "flash mob" which symbolizes the unity of all corners of the country. During the so-called "information hours" of the teaching day, teachers focused their attention on the values which are worthy objects of this struggle. The day before the Dignity and Freedom Day this school was visited by the



volunteers who told about their work in the conflict zone. The students honored the memory of the Heavenly Hundred Heroes [Heroyi Nebesnoyi Sotni] (people who were killed in Kyiv during the Revolution of Dignity on 20-21 February 2014), by laying flowers to the monument to the Fighters for Freedom of Ukraine. The high school students participated in the “brain-ring” for “World Figures who Fought for Freedom” (Den Hidnosti ta Svobody [Day of Dignity and Freedom], 21.11.2017).



Picture 6. Celebration of Dignity and Freedom Day in the school (21<sup>th</sup> November, 2017 - Cherkasy) [a city in the Center Ukraine].

It should be noted that some examples of commemorating this date in Ukrainian schools reflect a contradiction between the democratic ideas and values of the society that has chosen both a democracy for its further development and a military character for its patriotic celebration given the situation of ongoing military conflict in the east of Ukraine.

In Mariupol secondary school № 30 (on the border with the military conflict in East of Ukraine) on 21 November 2016 there was a festive event for the Dignity and Freedom Day with the motto “Ukraine is the territory of dignity and freedom!”. After the festive event the officers of civil-military cooperation conducted for the students some practical training in learning the technical characteristics of light weapons and the safety precautions for conduct with potentially lethal explosive containers (Civil-Military Cooperation of Armed Forces of Ukraine, 2016). On the portal “school life” there are scenarios of festive events which were held in different educational establishments devoted to the Dignity and Freedom Day.

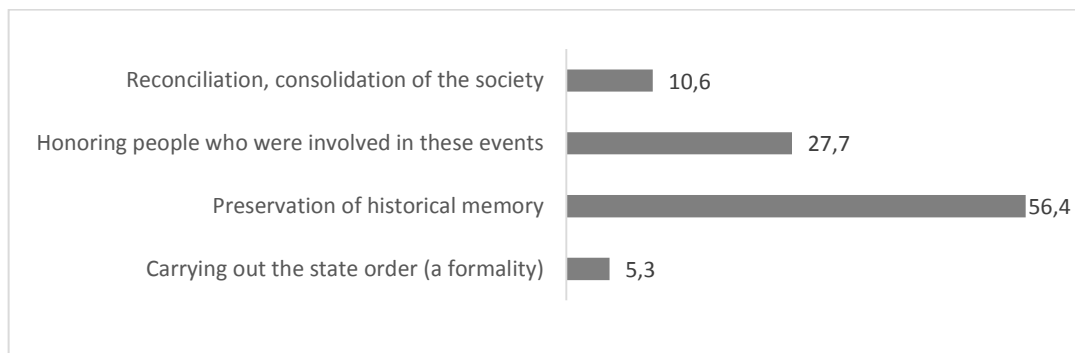
## 5 Patriotic celebrations in schools: personal dimension

With the aim of finding out the attitude and perception of public holiday celebrations and patriotic rituals an online questionnaire of students aged 14-17 and teachers was conducted in April-May 2018. The participants were 287 school students and 62 teachers from different regions of Ukraine. The following regions of Ukraine were questioned: the city of Kyiv, and the regions of Dnipropetrovsk, Donetsk, Luhansk, Lviv, Mykolayiv, Rivne, Ternopil, and Kherson. It should be mentioned that Donetsk and Luhansk regions are bordering the conflict zone in the East of Ukraine.

In the respondents' opinion the aim of celebrating the memorable dates in school is preservation of historical memory (56,4%); honoring people who were involved in these events (27.7%); reconciliation, consolidation of the society (10,6%); carrying out the state order (a formality) – 5,3%; reinforcement of the role of state – 0%.

**Figure 1. Attitudes of respondents at celebration of the memorable dates in school**

What is the aim of celebrating the memorable dates in school (%)



The students' answers to the question about the sources from which they obtain information on memorable dates of the festive calendar that are marked in school turned out to be quite interesting. They claimed to choose from among the following information sources: mass media, accounts of friends and acquaintances, reading fiction, school celebrations, and history lessons. Surprisingly, school celebrations themselves as the source of information about the commemorative event were mentioned by the smallest number of students (1,1%).

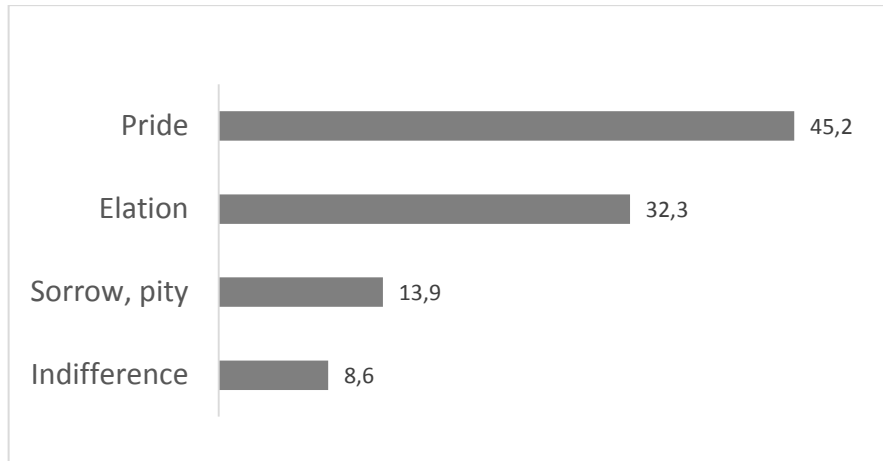
However, the students prefer and trust more the stories told by their relatives (69,9%), history lessons in school (66,7%) and the information from the Internet (53,8%), to a smaller extent the mass media (40,9%). These results from one side prove the importance of history teaching in the context of patriotic education of students, and from another – the low effectiveness of traditional forms of patriotic rituals in schools.

The answers to the question "Which feelings arise during the celebration of memorable dates in schools?" were divided in the following way: pride – 45,2%; elation – 32,3%; sorrow, pity – 13,9%; indifference – 8,6%.

Observations about the role of effective and emotional components in patriotic discourse can be found in scientific researches (Mackie, 2009; Rosa & Bresco, 2017; Zadora, 2017). The discourse is reliant on the distribution of a unified version of the national past, typically presented through a series of stories with a strong emotional and moral content, aiming at encouraging national feelings (patriotism, sacrifice, honor to heroes, etc.) and, above anything else, a social representation of a more or less unified way in which we are separated from other different groups – if not enemies – of our nation (Rosa & Bresco, 2017). Emotions engendered by belonging to a group play a structural role in identification and are a part of human behavior for individuals to aspire to a valorizing collective identity within a group (Mackie, 2009).

**Figure 2. Feelings that arises during the celebration of memorable dates in school**

Which feelings arises during the celebration of memorable dates in schools? (%)



In the context of current conditions of military conflict in the East of Ukraine another factor worth considering is what Clark (2008) has described in an Australian context as a kind of national spiritualism associated with students' emotional interest in military matters, resulting in a strong motivation to visit the sites linked to war, particularly the sites of engagements in the Gallipoli campaign (1915) in which ANZAC (Australian and New Zealand Army Corps) losses had been so high (Clark, 2008; Sheehan and Taylor, 2016). This had not been a military success for Australia but had represented a national coming of age and the birth of national self-awareness on a far shore.

We consider that the students' patriotic feelings connected to a sense of belonging to their native country should be formed not only at the level of sensation and emotional experience but also on the basis of respect for dignity and rights of others, critical understanding as well as readiness for a responsible civic action. In this respect, the commemoration practices in school should be implemented in innovative forms aimed at developing a student's motivation and the competences needed for active democratic participation. There can however be no underestimation of the difficulties associated with reaching out to the wider community or engaging in psychological "border-crossing" when the community beyond the border or even in some instances within the border is seen as hostile. The most positive attitude however is seen in the activity of "honoring" the memory of veterans of previous conflicts, although as can be seen below even the teaching methods are not without problems in some cases.

This statement is partly confirmed by the students' answers. Thus the most interesting forms of commemoration of memorable dates in the calendar, in the respondents' opinion, to a certain extent differ from the traditional practice of holding them in school. While in Ukrainian school practice the most widespread forms of commemoration are school assemblies, visiting of memorial complexes, meetings with veterans, for the respondents – students are interested in: concerts – 66%; sports activities – 47,9%; project work – 37,2%; outings – 35,2%; visiting we museums – 34,0%; collecting evidence of event witnesses – 23,4%, research in the local community – 17,0%.

### Figure 3. Most effective forms of memorable dates commemoration in schools from the student's perspective

What are in your opinion the most effective forms of commemoration of memorable dates in schools? (%)



Teachers of these students who participated in the questionnaire confirm a similar picture although they give priority to educational goals through such celebrations. Particularly, the teachers from their experience defined the following most effective forms of memorable dates commemoration in school: project work, concerts, meetings with the events witnesses, sports activities, visits to museums, excursions, outings, conducting researches in local community, and participation in city programs. The teachers unanimously expressed their opinion concerning the form of event commemoration in school: it should be the principle of honoring, not a celebration.

Informative were the answers to the open questions to teachers concerning the basis of commemorating of the mentioned dates. Here we quote some answers, taking into consideration the anonymity of the respondents: "... the basis of development of citizens of Ukraine should be only respect, honoring and defining common values" (Respondent A); "... it is necessary to search for common values" (Respondent B); "... unfortunately, in our history mainly problems, enemies and negative things are elucidated and one can seldom discuss with students achievements, find the events around which all people can be united. Teachers do not pay attention to this fact, don't encourage children to hold a reasonable discussion, but impose their own position on children" (Respondent C); "... in our society such a trait as implacability dominates not only concerning the enemies, but also concerning each other. That is why the commemoration of these dates is turned not into honoring, but into the confrontation of values. Here we need a more tolerant policy concerning the memorable dates" (Respondent D); history must not be rewritten and edited! There should be only honoring and common values (Respondent E).

The teachers' answers concerning the influence of the commemoration of memorable dates in school on forming students' values were critical. The majority of teachers mentioned dignity, independence, pride and respect for the country, honor, hope, belief in future; attitude with respect to the family, the elders, patriots, defenders; forming of historical memory, raising civic qualities, defining one's national identity.

This can be set against an awareness that parents have their views too. For example, parents' committees in 2014 in Lviv demanded an end to the marking of Soviet holidays in schools. Parents' committees of Lviv schools sent official appeals to the local Educational Board with the demand of prohibiting school celebrations of the International Women's Day (March 8) and the Defender of Fatherland Day (February 23). Parents say that such remnants of the past do not contribute to raising patriotic values in their children. This was included in the news in the first West-Ukrainian news "Daily overview" on the TV Channel ZIK.

### **Reflections on the questionnaire results**

Changes for the younger generation need appropriate methodology. In spite of the dynamic process of socio-cultural and political transformation in Ukraine and changes in the content of celebrations, the associated methodology and pedagogy of school celebrations has mainly remained in its old forms. Organization of the celebration of holidays in school within the framework and timetable of out-of-class activities is extra work for teachers. Clearly, the overloading of teachers is an obstacle for quality in this process.

Values and attitudes should be learned, experienced and practiced. Not limiting patriotic celebrations to patriotic feelings or emotional competence, we consider that youth in democratic society needs practice in skills, experience in expressing attitudes and in critical thinking development in order to take responsibility and participate in decision-making process during schools' commemoration activities. Students should define for themselves the goals and motives of their participation in these activities, in particular, what, why, and how they commemorate memorable dates in their schools.

It is very important to develop skills enabling students to be involved actively in improving their life, participating actively in the life of society at a local level by means of active pedagogy. Teachers should provide opportunities for discussing controversial and sensitive issues of the past (related to holiday content) with students on the basis of multiperspectivity, taking into account different points of view, respecting different opinions and valuing diversity and dialogue.

Taking into account all the above-mentioned, we consider that patriotic and citizenship education in the democratic society should be oriented at developing a constructive, critical and competency-oriented approach to commemoration practices in schools, and this should be aimed at students' civic identity building, based on democratic values

### **Conclusions**

The results of the conducted research allow us making the following conclusions. On the basis of the analysis of school commemorative practice in Ukraine one can see that the organization and commemoration of such holidays is a systematic and organized process connected with the practice of historical memory and the political discourse.

The holidays topic unites a wide range of problems that are important for understanding the transformation of the Ukrainian society in last decades. The controversies of post-Soviet, post-colonial and Ukrainian national historical narratives became the distinctive features of memory



policy in Ukraine across the years of independence and these features were reflected in the patriotic commemoration practices in schools. These socio-cultural transformations which involve both old and new landmarks have been outlined and the nature of their value markers has been examined. The shift from celebrations to commemorations is a remarkable feature of this treatment of holidays both at the state and school level.

Two sets of these rituals: 1. 8-9 May (a) 8 May - the Day of Memory and Reconciliation, (b) 9 May – the Day of Victory over Nazism in Europe, the Victory Day; and 2. 14 October - the Defender of Ukraine Day, display a certain conceptual and thematic continuity: they refer to events dealing with Soviet heritage and the building of national identity in the period of independence.

The third calendar date analyzed in the paper, the Day of Dignity and Freedom (21 November) which was introduced in Ukraine after the Dignity Revolution of (21 November 2013 - 24 February 2014), demonstrates another direction which cultural memory and official discourse has taken with regard to the dates of the official and school celebrations. It reflects the democratic ideas and values of the society that has chosen a democratic direction for further development: the defense of democratic values, rights and individual freedoms of citizenship, as well as the national interests of our state and its choice to be European.

Patriotic rituals analyzed in the paper through a diverse manifestation in the given examples of school celebrations of the main calendar dates integrates an emotional indeed almost spiritual attitude of a citizen to the country associated with state, civic and national identity. Contradiction between the discourses of citizenship education, patriotism and national upbringing have an influence on the educational practice of the state calendar commemoration. Thus, critical discussion of patriotic rituals is crucial for educational and political discourse in Ukraine.

School plays an important role in the process of integration across society under conditions of developing respect for different identities on the basis of democratic human values, giving the young personality the freedom of critical thinking and choice. Voices of Ukrainian students and teachers, as the results of questionnaire demonstrate the low effectiveness of traditional forms of commemorations and the influence of collective memory and history teaching on students' perception and attitudes with respect to historic events that are celebrated.

Commemoration activities in schools reflect contested differences in perception and draw on a range of controversial memories of representatives from different ethnic, religious, and regional backgrounds, as well as different cultural traditions at the level of both family and wider society. These activities also have potential in the process of declaring and sharing common values and responsibility for society, setting up relationships based on trust for all students, and consequently having a wider impact for parents and civil society.

Citizenship education is the main means of society's development in an emergent democracy, but it has become a crucial factor in young democracies seeking to survive in conditions of military conflict. The military conflict in the East of Ukraine has undoubtedly influenced the strengthening of patriotism behind commemoration practices. In this situation the issues of consolidation and integration are a challenge for modern Ukrainian society. In 'normal' peaceful circumstances – but these are not in that category – formulating the crucial tasks for citizenship education concerns the selection of adequate and effective pedagogical tools which





provide a general social synergy as a basis for forming in young people a responsible civic position and constructive patriotism.

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Pictures:

Picture 1: Baxmutska Miska Rada [Bakhmut town hall], 11.05.2017  
<http://artemrada.gov.ua/news/16596>

Picture 2: Mykolaiv School №. 19 [Mykolaiv school №.19], 28.01.2018 <http://mzzso19.osvita-mk.site/?p=14918>

Picture 3: Yavir.net Informacijnyj Portal [Information Portal], 13.10.2017  
<http://www.yavir.net/novunu/suspilstvo/item/1004-do-dnia-zakhysnyka-ukrainy-v-krakovetskii-shkoli-vidbulys-kozatski-zabavy>

Picture 4: Upravlinnya Osvity Baxmutskoj Miskoyi Rady [Administration of the educational department of Bakhmut], 07.10.2017 <http://artemosvita.klasna.com/uk/news-4319-3881/>

Picture 5: Upravlinnya Osvity Baxmutskoj Miskoyi Rady [Administration of the educational department of Bakhmut], 07.10.2017 <http://artemosvita.klasna.com/uk/news-4316-3881/>

Picture 6: Cherkaska shkola №3. [Cherkasy School №3 ], 21.11.2017 <http://school3.ck.ua/den-gidnosti-ta-svobodi/>

**Endnotes:**

- <sup>1</sup> The process of Ukrainian state formation had lasted for centuries. Ukraine has complicated history partially conditioned by the absence of its own state and the different character of its regions which in the past were separated by the borders of different countries. The Eastern and Western parts of Ukraine have been ruled by different states for centuries, so the regional differences in Ukraine have been very significant. Ukraine became independent in 1918. After the First World War and the defeat of the Ukrainian revolution as the result of Bolshevik invasion Ukraine became the part of Soviet Union., which was deemed completed only around 1954, when Crimea was transferred to the Ukrainian SSR. In 1991 Ukraine proclaimed itself an independent state and the decolonization period of its history started, which had contradictory strands in the search for meaning in its political structure and its identity. Despite its newly earned independence, Ukraine has remained as an inefficient hybrid of the old Soviet and new oligarchic structures in its management and leadership. In addition, rampant corruption among the elites accelerated the state's social and economic deterioration. Central and Western Ukraine were influenced by Europe, whereas Southern and Eastern Ukraine by Russia. Even after its independence, the regionalism of Ukraine lingered on as the critical agenda, and this continued to have the potential to splinter the unity of the nation (Shveda & Park, 2016).
- <sup>2</sup> The largest civil protests in Ukraine since the Orange Revolution of 2004 (also known as Euromaidan), in Kyiv of the winter 2013–2014, the focus and motivation of those who were assembled was firstly the fate of the European Union Association Agreement, the abrupt policy shift from pro-European to pro-Russian, and in addition, corruption. The rapid and dramatic expansion of the civil resistance was due to the extremely critical attitude of the people about the policies that were being implemented by those in power, as well as the authoritarian use of power (Shveda & Park, 2016). A total of 106 protesters were killed and more than 2,000 were wounded as the criminal authority led by Viktor Yanukovich resorted to a crackdown on the Ukrainians using security and police officers
- <sup>3</sup> Decree of the president of Ukraine № 169/2015 “About the measures of commemoration in 2015 of the 70th anniversary of Victory over the Nazism in Europe and the 70th anniversary of the end of World War II” of March 24, 2015.
- <sup>4</sup> The Euromaidan events were followed by Russia's annexation of Crimea (March 2014) and military hostilities in East of Ukraine resulting in thousands of killed, wounded and displaced persons. Pro-Russian separatists took control of the cities of Donetsk and Luhansk in eastern Ukraine (April 2014 – to present). Russia moved in and backed the separatists fighting Ukrainian forces for several months (Ellis, 2018). The situation in Ukraine escalated into an international crisis, putting the United States and the European Union (EU) at odds with Russia. In July 2014, when a civilian Malaysian Airlines flight was shot down over Ukrainian airspace, killing all 298 onboard, by what Dutch air accident investigators concluded in October 2015 was a Russian-built surface-to-air missile. Since February 2015, Ukraine, Russia, France, and Germany have attempted to broker a cessation in violence through the Minsk Accords, which include provisions for a cease-fire, withdrawal of heavy weapon, and full Ukrainian government control throughout the conflict zone. However, efforts to reach a diplomatic settlement and satisfactory resolution have been unsuccessful (Global Conflict Tracker, n.d.). The military conflict in the East of Ukraine also has taken the form of the hybrid war supported by a propaganda and information war.
- <sup>5</sup> Ukrainian Cossacks used to be a predominant driving force in Ukrainian history for more than three centuries, particularly from 1489 till complete liquidation in 1775. They united into self-



organized military units in the lower basins of Dnieper and Don rivers. Thoses were free territories between Polish-Lithuanian Commonwealth, the Crimean Khanate and the Moscow Kingdom. Cossacks defended Ukrainian lands from the Tatar and Turk forays; excited national rebellions against socio-economic and religious oppression of Ukrainian people under the Polish rule; controlled commercial roots; participated in military campaigns and defended borders of the neighboring countries. Their main historical merit is an attempt to construct an independent Ukrainian state. In 1775 Zaporizhya Sich were abolished by Catherine II, Russian Empress, and all Cossacks' leaders were either killed or expelled. The rest of cossacks spread along the cost of Black and Azov seas. Some of them were later sent to Kuban in modern Russia (Lambert, 2018).

- <sup>6</sup> Ukrainian Insurgent Army was an Ukrainian nationalist military and later partisan army that during World War II fought against Nazi Germany and the Soviet Union. The army originally formed in Volyn region (northwestern Ukraine) in the spring and summer of 1943. But officially the day of creation is the Day of the Intercession of the Holy Virgin that is celebrated in Ukraine on 14th of October (The 69<sup>th</sup> anniversary of the Ukrainian Insurgent Army, 2011).

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## "With tears upon our eyes?": Commemorations of Victory Day in the Great Patriotic War in the school practice in the Soviet Union and Russia

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- The article describes the history of the appearance and origin of Victory Day in the Soviet era and the transformation of its ritual content in the conditions of the new Russia.
- The results of a comparative analysis of the main practices and rituals of Victory Day commemoration in the Soviet and Russian schools are described.
- It is shown that the commemorations of Victory Day in the modern Russian school are characterized by performativity, temporal inversion, repressive nature of some events.

**Purpose:** This article is devoted to the description and comparative analysis of the commemorations of Victory Day in the Great Patriotic War in the practice of Soviet and Russian school education, based on the example of the two regions of Central Russia (Tambov and Lipetsk region). The purpose of the article is to study the features of the transformation of the content and forms of organization of festive events and rituals of the holiday at the level of the school system.

**Design/Methodology/Approach:** The article was prepared on the basis of a wide range of the sources: educational and methodological materials, materials of social networks and school websites, legislative acts and normative documents of school institutions connected with patriotic education, and also qualitative observations of the authors with the support of several visual materials.

**Findings:** The analysis has shown that the activation of the patriotic rhetoric in modern Russia has transformed Victory Day into a central element of the official politics of memory, one of the most important resources of which is the system of school education and upbringing. At the same time, while preserving most of the external attributes and Soviet symbols of the holiday, the commemorative practices and rituals of celebrating Victory Day in the Russian school differ significantly from the Soviet era. This is due both to demographic and political causes, and to the growing influence of local practices of family memory. The performativity, temporal inversion, repressive nature of some events are typical of some commemorations of Victory Day in modern Russian school.

### **Keywords:**

National holidays, Victory Day, school rituals

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## 1 Introduction

National holidays are not just "national commemorative practices" (Gillis, 1994). National holidays outline the chronologically significant moment of the formation of a certain community - not so much as real as it seems for later generations. In this sense, the holiday is an important attribute of cultural memory, as it becomes a reason for the actualization of social ties and the maintenance of the existence of the community itself. In modern Russia there are several holidays that claim to be "national": Day of Russia (June 12), National Unity Day (November 4), Victory Day (May 9). However, only the last of them successfully carries out the tasks of transferring the necessary images of the state identity for the formation and is the most popular among the population.

Huge human sacrifices, decades of Soviet commemoration, and mass nostalgia for the Soviet times are the most important reasons for the enormous popularity of Victory Day in the Great Patriotic War of 1941-1945 in modern Russia. However, the transformation of Victory Day into the main national holiday started back in the Soviet times. The Victory Parade, which traditionally takes place on Red Square on May 9, is approaching the New Year's Eve celebrations according to television popularity ratings. In one of the most popular Soviet songs, which is a national anthem of Victory Day, there are the lines that Victory Day is a "holiday with tears upon our eyes". This phrase has always meant that the joy of the end of the war is accompanied by the sorrow for millions of the dead. However, does it remain so in the new Russia? Despite the great similarity of the official ceremonies and commemorative practices with the Soviet era, the semantic content and the set of ideas embedded in them have changed significantly. We will try to specify this thesis, using the comparative analysis of the commemorative practices of celebrating Victory Day in the system of school education in the Soviet era and in modern Russia. We illustrate the identified trends on the example of schools in the Tambov and Lipetsk regions.

The regions were chosen due to a number of factors. Tambov and Lipetsk regions are two bordering regions, which are located in Central Russia, about 500 km from Moscow. However, despite the same geographical location and natural conditions, they differ sharply in economic development and living standards (54 and 19 place, respectively, among 85 regions according to 2018), have a different history (Tambov is an old provincial city, Lipetsk is a relatively new city, which became the regional center only 64 years ago), the demographic and social situation. Based on these data, one would suggest serious differences in educational practices. However, the strategy of patriotic education in general is determined in Russia by the federal center. Thus, a comparison of the practices of celebrating national holidays in the two specified regions allowed us to identify general trends of change.

The article was prepared on the basis of a wide range of the sources: 1) educational and methodological materials: methodological recommendations, scenarios of different activities to celebrate Victory Day, published both in specialized methodological literature (pedagogical journals for teachers) and in forums and communities for teachers in social networks. In order to analyze Victory Day in the Soviet school the journals issued during that period were used; 2) the programs of State Patriotic Education (2000-2020), as well as local acts issued by the regional and school administration in accordance with the provisions of the Programs; 3)





special attention was paid to 4 schools of the Tambov region and 2 schools of the Lipetsk region. We chose schools that aren't similar to each other: two schools in the regional center, one of which is located in a new district and is currently the largest school in the city of Tambov (school №36), the second one is a classical gymnasium located in the historic center of the city, whose students are selected for admission (gymnasium №12). Among the rural schools of the Tambov region, we chose the school in the village of Dmitrievschina of the Rasskazovsky district (a small junior high school that meets the needs of only this village) and a school in the village of Degtyanka of the Sosnovsky district (the central school for several villages, one of the largest regional rural schools). In Lipetsk, Lyceum №44 and Secondary School №4 were chosen. Lyceum №44 is the best school in the city and it appeared two decades ago. School 4 is one of the oldest schools in the city, but at the same time it is a typical secondary school. Choosing the most dissimilar schools, we sought to identify the common and different in the celebration of Victory Day in these educational institutions and to analyze the possible causes of differences. Throughout 2016 - 2018 the authors of the article attended various patriotic events in these schools, communicated with the teachers and parents.

## 2 National Days in School: the case of Russia

National holidays continue to be one of the most important factors in the construction of social solidarity of communities and the national identity of states (McCrone, D., & McPherson, G. 2009). Despite the presence of a number of global trends, talking about post-national identity requires caution. Post-national identity is not opposed to national one, but they are interdependent. We are dealing with some elements of post-national identity, arising in addition to and within our usual forms of national identification. Moreover, the postnational elements penetrate the very practices of national identification, complementing, combining or transforming them. These trends contribute to the transformation of national holidays. At the same time, as many studies show, while maintaining external forms the very content of national holidays changes (Schall, 2014; Buxrud & Fangen, 2017; McCrone & McPherson, 2009). The controversial situation is observed in the framework of the national holidays' celebration at schools. However, while maintaining the external forms of the national holiday at school the content transformation can be associated not only with post-national trends, but also with the influence of the political context (Acikalin & Kilic, 2017). A similar situation is observed in Russia where the activation of patriotic rhetoric after 2014 has become a powerful factor of social consolidation in the conditions of the people's deteriorating economic situation in the country. Politics has always interfered in staging and carrying Victory Day. The first practices of Victory Day celebration completely repeated the scenarios of the Soviet pre-war holidays and included folk festivities on the streets, the sale of food, drinks and holiday symbols. They also included the decoration of public buildings and houses with portraits of party leaders and relevant thematic posters. Thus, the rituals that had been approved by the celebration of the October Revolution and were a specific form of "social choreography" (Hewitt, 2005) were used.

The holiday was supposed to broadcast live experience of the participants of the events, solidarity of pupils, teachers, members of their families. That is, the festive rituals of



celebrating Victory Day derived from the celebration of the revolution with the preservation of their symbolic value. An exception was the festive firework, which would later become an obligatory element of the main holidays in the post-Soviet period. After 1965, a ritual of "minute of silence" appeared in all cities of the Soviet Union, as well as a ritual of laying floral tribute at the Tomb of the Unknown Soldier. The Tomb of the Unknown Soldier was a memorial complex in the center of a Soviet city, with the names of its residents who died in the war and the flame of "Eternal fire" (Photo 1).



Photo 1. Soviet and English schoolchildren laid floral tribute at the memorial "Eternal fire" in Sochi, 9 May 1990

The Parade on Red Square, which included the passage of columns of military and armored vehicles of those military units that had taken part in the war played symbolic significant role. Some changes appeared only in the era of Gorbachev on the Victory Day parade on May 9, 1985. Not only representatives of military schools and combat arms, but also the veterans of the war (Photo 2).



Photo 2. The Parade on Red Square, 9 May 1985

After the collapse of the Soviet Union, Victory Day was one of the few public holidays in Russia, preserved from the Soviet era. In modern Russia, Victory is the transferring and reproduction of the corresponding ontological status, the people-winner. The public manifestation of the status acts as a certain symbolic defense and the desire to recall the military might of Russia. The participation in the events is devoid of reflection, any reflection, especially doubt, is perceived as a desecration of memory of Victory (Торговцам одеждой, 2015; Серенко, 2012; Романова, 2012). The adoption of Victory Day as the main national holiday is considered by the political power in Russia as the basis for the formation of civil identity and patriotism.

In general, the place of the Victory cult in modern Russia fully corresponds to the ideas of the civil religion in the interpretation of E. Durkheim (Durkheim, 1965). He stressed that contract relations are not enough to preserve social cohesion, rituals that transfer values recognized as sacred by communities are also needed. Citizens need to feel connected with something "sacral", regardless of whether secular or religious is an event. For our research, three themes will be of fundamental importance. They are connected with the substantiation of rituals in E. Durkheim's works: ritual has something to do with sacred; ritual contributes to feelings of social solidarity; ritual works to maintain the social order. These three aspects will be used by us as criteria for comparing the Victory Day commemoration practices in the Soviet and Russian schools. Following Richard A. Quantz, we will interpret the rituals as "formalized, symbolic performance" (Quantz, 1999, 506). This definition, according to the author, allows us to consider a ritual not only as a static object, having a structure (extremes of E. Durkheim's approach), but also as a dynamic, multivocal, symbolic process (V. Turner approach). It is important to note that this approach to the definition of a ritual, as well as the E. Durkheim criteria outlined above have already been applied to the analysis of the rituals in the modern school (Quantz, 1999).

### **3 Rituals of Victory in School Commemoration**

Like the Soviet schools, Russian schools have always fulfilled not only the function of education, but also the function of upbringing. The main rituals and commemorative actions of Victory Day, which passed from the Soviet school to the Russian one, did not undergo significant changes. At the same time, despite the preservation of most of the external attributes and symbols of the holiday, the semantic component and narratives of the commemorative practices in the Russian school are significantly different. We identified the most important commemorative practices of Victory Day in the Soviet and Russian schools and compared them in the light of three aspects of the understanding ritual in the theory of E. Durkheim. Such a comparison will allow us to fix the transformation of the essence and basic meanings of the commemorative actions.

#### **The sacred in the rituals of Victory Day**

According to E. Durkheim, the separation of reality into the "sacred" and the "profane" plays a key role in both civil and religious rituals. This division is, for Durkheim, one of attitude. Those objects toward which we maintain an attitude of "respect" belong to the sacred realm. Those



objects toward which we feel no such sentiments belong to the profane realm: "We get the impression that we are in relations with two distinct sorts of reality and that a sharply drawn line of demarcation separates them from each other: on the one hand is the world of profane things, on the other, that of sacred things" (Durkheim, 1965: 243). The image of Victory is central to the understanding of the sacred in the commemorative rituals of the Soviet and Russian times. The most striking manifestation of Russian schoolchildren's participation in sacral rituals is the practice of the guard of honor at the "Eternal fire".

In every big city of Russia since the Soviet times there is a special place, which is consisted of a memorial to soldiers and victims of war, marble sculptures and the "Eternal fire". Every year on May 9 flowers are laid and solemn and memorable speeches are pronounced around this memorial. Moreover, even now in Lipetsk, graduates of schools on the school prom day in late June, that is not related to Victory in the war at all, bring bunches of flowers to this particular memorial. That's why the honor guard duty near the "Eternal fire" has always been considered an extremely responsible and important act of memory of the war. In 1977, in Lipetsk and Tambov, "Watch of Memory of the Guard of Honor" (Пост № 1 у монумента «Вечная слава»; Пост № 1 на Площади Героев) was officially created, and the place for carrying the guard of honor was called Post No. 1 (Photo 3). The emergence of the commemorative practice was characteristic of the late 70's.



Photo 3. The Guard of Honor in Lipetsk at Heroes Square (1978)

The practice included the presence of three schoolchildren, dressed in the military uniform of the armed forces of the USSR and holding fake small arms. Every hour the guard changed, which fully corresponded to the practice of the guard of honor at the "Eternal Fire" in Moscow. The commemorative practice involving schoolchildren was obligatory for the whole territory of the Soviet Union. It presupposed the same ritual and has remained unchanged until today. The only difference between the regions of Russia is the architecture of the memorial itself the new uniform. Schoolchildren make the same oath. The order of guarding has the same time

intervals and strictly corresponds to the samples approved in the Soviet era. At the same time, the transformation of the semantic contents of the ritual is important. During the Soviet times, only the best pupils of the school who had excellent academic achievements and who were active members of the pioneer organization had the right to take part in carrying the Guard of Honor. In modern Russia, the honor guard duty is the responsibility of all high school students and is formalized by the order of the Head teacher of a school (photo 4).



Photo 4. Common soldier Igor Pecherikin at the Post No. 1, Heroes Square, Lipetsk (2018)

Schools receive a formal request from the authorities and allocate a certain number of students in accordance with the plan. Moreover, in the Soviet era flowers were laid at the "Eternal Fire" only on May 9, but today flowers are also laid on the memorable dates related to other conflicts, the Afghan war and the two Chechen wars. It shows that the significance of the Great Patriotic War is used as a common symbolic platform for the theme of continuity of the heroic experience in Russia. However, this diminishes the experience of participating in various wars of different historical significance. Post No. 1 turns out to be the guard of honor in the name of the heroism of all Soviet and Russian soldiers of all wars that Russia led. It should also be noted that the laying of flowers to the memorial is also preserved in small towns (Photo 5), and the care for the monuments by the schoolchildren is either absent or includes formal things, as they are regularly painted. Restoration no longer corresponds to the norms of school labor education.



Photo 5. Laying the floral tribute at the memorial of the victims, v. Dmitrievschina, Tambov region, 9 May 2018

### Social Solidarity in Victory Day Rituals

Social solidarity is the reverse side of the sacred in the theory of E. Durkheim. The feelings of solidarity are created in the process of joint actions of individuals, which are integrated by special symbols of group identity. Moreover, "what is frequently lost in these studies is Durkheim's recognition that the key to understanding ritual lies in the noncognitive effects of participation rather than in the cognitive meanings per se of the symbols around which rituals are performed" (Quantz, 1999: 497). It is the values of solidarity that are consonant with the principles of communism that were the reverse side of the sacred status of Victory Day in the Soviet school. Solidarity is an essential element of commemorative rituals in the Russian school. At the same time, the transformation of the sociopolitical system, as well as the dynamics of generations in the modern one, led to a change of some elements of the solidarity rituals' content. We'll consider this on the example of such practices as a meeting with veterans, participation in a demonstration on May 9 and the action "St. George's Ribbon".

Historically, the first commemorative event that was held at schools in the 60s - 70s and directly related to the Victory is the practice of meetings with veterans. This practice has always been of particular importance, despite the contradictory attitude towards the veterans throughout the Soviet history (Edele, 2008). Since Victory Day is a day off, meetings with the veterans during the Soviet era were held at schools a few days before the holiday or directly on the squares on May 9. The veterans came to the lessons, which were named "lessons of courage" (Сохраняя память, 2018) in the Soviet school. The lesson was not included in the number of educational subjects and acted solely as a patriotic event. During the lesson the veterans talked about the events, hardships and personal experiences during the war. Despite the fact that there are fewer and fewer war participants every year, the veterans in modern

Russia continue to remain, as in the Soviet school, a central element of commemorative practices (Photo 6).



Photo 6. «The lesson of courage» at primary school, Tambov, 7 May 2018

However, the practice of working with them has changed not only because of the age of the veterans, but also because of the transformation of some commemorative strategies. First, the place of the passing veterans of the Great Patriotic War is occupied by the participants of other military operations, who perform the same functions. They talk about the need to defend the Motherland and provide examples of heroism. Moreover, in the modern Russian school, the veterans of other wars, servicemen and even veterans of the Ministry of Emergency Situations come to meet with the veterans of the Great Patriotic War on May 9 (Photo 7).



Photo 7. The veterans of the Ministry of Emergency Situations together with the veterans of the Great Patriotic War on the Victory Day celebration in one of Tambov schools, 2017

The veterans of the local conflicts (in Afghanistan, Chechnya) talk about their victories, promoting courage and readiness for heroism. It is interesting that the narrative of this discourse is in many respects similar to the narrative of the veterans of the Great Patriotic War. It shows that the very structure of the stories about the Victory in the war of 1941-1945 serves as a delineating, semantic framework for any other stories about the wars of Russia and the courage of its soldiers. The veterans have no other language of description than the one formed by the Soviet discourse on Victory. Thus, even if there are no survivors of the living memory of the war, the broadcast of the discourse, characteristic of "meetings with the veterans" as an indispensable attribute of the celebration of Victory Day, will be preserved. If possible, the participation of the veterans is even intensified. It is not limited to meetings, concert visits, but includes their presence at other events that have appeared only in modern Russia. For example, in the Tambov region the annual sports contest "Marathon of Victory" has been held for several years already, where the veterans act as a jury (Photo 8).



Photo 8. The annual sports contest of schoolchildren "Marathon of Victory" in Tambov in the presence of the war veterans

Secondly, personal communication with the veterans gradually gives way to indirect methods of communication. Instead of the veterans, meetings with schoolchildren are attended not only by the participants in other later wars, but also by the "children of war", witnesses of military operations. The proposed scenarios for the celebration of Victory Day at school continue to insist on the need to appeal to the living memory if not of the war participants, then at least of the remaining witnesses of that time in order to avoid "distorting the image of the war of 1941-1945 and leveling the heroic deed of our people" (Картушина, 2005: 4). Because of the shortage of real witnesses (especially in small towns), there is a change in commemorative strategies. For example, students are encouraged to record the memories that they have heard from their relatives previously. The indirect ways of communication with the veterans include common cases when schoolchildren give flowers to the people who carry portraits of the veterans during the "Immortal Regiment". The tradition of giving flowers to the



veterans (mostly red carnations) has derived from the Soviet times as a tribute to their feat. Now, the person who carries the portrait of the veteran acts as a mediator between him and the giver. The flowers are not offered to him, but to the veteran.

The action "Immortal Regiment" became the most widespread event of recent years. Since less and less veterans can take part in the parade, the organizers, relying on the tradition to come with the porters of the relatives who took part in the war to the Victory memorials, decided to arrange a procession with photos of the war veterans, rear workers, blockade workers, children of war (Charter of the organization "Immortal Regiment", 2017). In 2012, 15 cities took part in the action, in 2013 - 120 cities, in 2014 the number was more than 500. As for 2018, the action is supported by "Ruspatriotcentre" and the Federal Agency for Youth Affairs ("Rusyouth"), is financed from the federal center.

The appearance of the action "Immortal regiment" had not only political significance, but also a demographic meaning. It is associated with the death of most veterans of the Great Patriotic War. Such a transformation of the memory of the war from a communicative to a cultural one puts not the veterans but their descendants in the center of attention within the framework of the all-Russian commemorative action "Immortal Regiment" (Бессмертный полк России, 2018). On the morning of May 9, in every Russian city, central roads are closed and thousands of Russians marched on them. They carry portraits of their deceased relatives, symbolizing the continuity of the Victory in the war and the memory of the victims of the Soviet people (Photo 9).



Photo 9. "The Immortal Regiment" in St. Petersburg on May 9, 2018

The appearance of this event allowed to build a certain relationship between the communicative and cultural memory of the war in Russia. It also contributed to the greater influence of the official politics of memory on local memories of the family memory of Russians, which were often in opposition to the images of the past broadcast by the state. It is the family memory that provided for decades the spiritual space, where the theme of war was presented from the point of view of the enormous sacrifices of the people and personal losses.

Despite the fact that the "Immortal Regiment" is not officially connected with school education, the resource of educational institutions is usually involved in the event. If in large cities (Tambov, Lipetsk) the participation of schoolchildren in it is encouraged (free production of a banner with a photo of a veteran, the organization of thematic columns), it is not obligatory, but at rural schools the participation of all pupils and their families is strictly obligatory. The refusal leads not only to reprimanding the student, but also to public censure, the consequence of which is further problems in learning and communication. Children and their parents are the central participants of the rural processions of the "Immortal Regiment" (Photo 10).



Photo 10. Schoolchildren with the portraits of their relatives in the "Immortal Regiment", 9 May 2018 (v. Dmitrievschina, Tambov region)

As a rule, the school administration does not explain the need for participation, considering it is unnecessary. At the heart of this position is the idea of the sacred Victory. However, if comments are necessary, they speak about the correct upbringing of children and the fact that only teachers and parents can protect the memory of ancestors from distorting and rewriting history by "our enemies". Speaking about enemies, they mean the entire Western world. The processions of the "Immortal Regiment" themselves often resemble religious processions, in which the photos of the veterans are sometimes mixed with icons of saints (Обухов, 2016). Thus, the participation of schoolchildren in the procession is not only a tribute to memory, but also a ritual of the civil religion in the treatment of Durkheim, the consequence of which should be the strengthening of solidarity. If traditional meetings with the veterans are designed to transfer the image of the winning nation from the past (veteran) through the present to the future (the children), then the "Immortal Regiment" is an inversion of time in which the past is in the present, and the future is beyond the continuing moment. It is curious that the obligatory nature of participation in the action "Immortal Regiment" has already

caused several conflict situations. So, on April 22, 2018 schoolchildren from the city of Korolev (Moscow region) wrote a complaint about coercion to take part in the "Immortal Regiment" on May 9. The complaints led to numerous conversations of the school administration with the students of the class and their parents. At first, the school administration refused to organize its own column in the "Immortal Regiment". But then it was decided that the school column would still be there but without the "complainers" (Литой, 2018).

The concept of conformity is very important in order to participate in all events. People should wear parade dress, the St. George ribbon is pinned to the left of the chest, any conversations during the festive concert or procession "Immortal Regiment" are perceived as a display of disrespect for the heroic deed of veterans, disregard for Victory. The participation in the action "Immortal Regiment" is not strictly regulated, however, more claims are made to schoolchildren than to ordinary participants (clothing, organization, etc.). The appeal "to be worthy of memory" is the main theme of the scenarios dedicated to Victory Day in schools, which are included in thematic books for schoolchildren (Казиков & Шорыгина, 2011: 44).

Another key Soviet commemorative practice that exists in Russian schools from the Soviet times is the participation of schoolchildren in the Victory Parades, which are held on May 9 in every major Russian city. If there are military personnel in the city, then the servicemen of local garrisons and troops must take part in the parade. For example, in Lipetsk, the military pilots take a key part in the parade, while in Tambov the parade participants are traditionally the soldiers of the local garrison and servicemen of internal troops and police. Usually the parade is held on the morning of May 9 in the central square of the cities near the Victory Memorials. The officials read speeches, after which the columns of soldiers, police officers and other security services march on the square. The schoolchildren dressed in the uniform of the Great Patriotic War finish the festive parade (photo 11).



Photo 11. Pupils of primary school take part in the Victory Parade Lipetsk, 9 May 2018

After the main official events, there are open field kitchens in the city's parks where everyone can try the food of the war years and where the music of the war time plays. In general, the participation of primary school pupils, dressed in the uniform of the war of 1941-1945 is an important element in the conduct of patriotic actions that are not related to the celebration of the victory over Germany. So, on April 17, 2018 in the 4th school of the city of Lipetsk within the framework of the project "The Living Memory of Generations" memorial plaques were erected for the Lipetsk citizens who died in the Afghan war (Торжественное открытие, 2018). The children, dressed in the uniform of the Great Patriotic War, opened the event (photo 12).



Photo 12. The participants of the event on April 17, 2018. School 4, Lipetsk

However, since 2017 the participation of schoolchildren in the general columns of the festive procession has been supplemented by the participation of the representatives of the "Unarmy" (Young Army) in the parades. This children's non-governmental organization was established on the basis of the Ministry of Defense and actively uses the resources of schools in every region of Russia. The organization's goal is to prepare young people for military service and to promote patriotic traditions. On May 9, 2017 in Red Square in Moscow the students of the Unarmy marched in the parade like other servicemen (Парад Великой Победы!, 2018). After that, in all Russian cities they also became a part of the festive parade (photo 13). The Unarmy is an attempt to rehabilitate the Soviet organization RAAFNVS (Russian Army, Air Force and Navy Volunteer Society), which was also engaged in the active development of young people's military skills and was one of the elements of patriotic education in the USSR. The key difference between the Unarmy and the RAAFNVS is that the Russian analogue does not have a significant ideological platform, and patriotic education generally consists of military training, learning military history and the development of a sense of collectivism among pupils.



Photo 13. The "Unarmy" students as the participants at the rehearsal of the Victory parade in Tambov, April, 2018

The most noticeable commemorative practice that has affected all spheres of Russian society and caused a wide response in the world is the action "St. George's ribbon". This action has taken place in Russia since 2005 in all educational institutions. Despite the fact that the ad itself is a recommendation, most teachers and people who work in education insist that the ribbons must be worn by all schoolchildren. As a symbol of memory of the feat of the Russian people in the Great Patriotic War, the action is positioned as a non-profit and non-political one (Опубликован Кодекс "Георгиевской ленточки", 2006). However, the use of St. George's ribbon as one of the main symbols denoting the supporters of the pro-Russian side in the conflict between Russia and the Ukraine and the general patriotic rise in Russia led to the fact that the St. George's ribbon became an identification indicator and lost its symbolic significance of memory. Teachers say in an interview that until 2014 its wearing was welcomed (and among teachers, not schoolchildren), but there were no attempts to make schoolchildren wear the ribbons. At some schools in the Tambov region, according to the parents, the child was threatened with dismissal if he came to school without a ribbon, although there were no such real cases in our research. The refusal to wear a ribbon is perceived by the teachers and the school administration as a refusal to be a citizen. You can pay attention that on most of the photos used in the research, students wear St. George's ribbon during all the commemorative events on May 9 (photo 14).



Photo 14. Students with St/George's ribbons give flowers to the veterans  
9 May 2018 (Tambov)

It is interesting that the space of the war commemorations is not limited only to May 9 in school life. The action "Candle of Memory" has become equally important in recent years. It is held late in the evening on June 21 and has already become official in Lipetsk. The pupils of the senior classes of all schools and universities are obliged to come to Sobornaya Square by 22.00 and follow the Parade to the Victory Memorial in Heroes Square with lighted candles (21 июня в Липецке, 2018). The participation in the action is obligatory for all schools in the city of Lipetsk, it is formalized by the relevant orders of educational authorities (Участие в акции «Свеча памяти», 2018). The action gathered more than 2,5 thousand people. In addition to schoolchildren, citizens, students, 200 employees of law enforcement agencies, representatives of patriotic public associations and government bodies took part in it and carried candles (photo 15).



Photo 15. Lipetsk citizens and schoolchildren take part  
in the "Candle of Memory" 21 June 2018

### Social order and the rituals of Victory Day

To understand the transformation of the Victory Day rituals, the theme of maintaining social order is no less important. Applying the ideas of E. Durkheim to the educational practice of Basil Bernstein pointed to ritual as a structure that serves the status quo: "Here [in education], the symbolic function of ritual is to relate the individual through ritualistic acts to a social order, to heighten respect for that order, to revivify that order within the individual and, in particular, to deepen acceptance of the procedures which are used to maintain continuity, order and boundary and that control ambivalence towards the social order" (Bernstein, 1977: 54). Commemoration of Victory in the Soviet and Russian schools also involves practices that develop activity and patriotism among schoolchildren. In this regard, we turn to holiday concerts, sports and military events.

Comparing the repertoire of festive concerts in the Soviet era and in the modern Russian school, it is difficult to talk about any significant changes. A festive concert is held at a school and includes songs by the choir and various theatrical performances, dances. But earlier the main spectators at such concerts were the veterans, now at most schools the concert is an amateur performance for other teachers and the school administration. In the primary classes of major schools, a cultural program is usually limited to attending a performance or a concert organized by professional performers. In the villages, parents and representatives of the rural administration are often invited to the concert. If there are veterans, then they are given flowers and postcards. We can provide an example of a concert in one of the best lyceums in Lipetsk, Lyceum No. 44, which took place on May 7, 2018 (Состоялся праздничный концерт, 2018). The honorary guests of the event were the veterans of pedagogical work, former teachers, deputy directors of the school. Lyceum students, a choir of high school students performed vocal and dance numbers. (photo 16). It is important to note that most of the concert programme items were not directly related to the theme of the war. These were traditional Russian songs, choreography, theatrical performances of the past years, which had been highly appreciated at other competitions. Thus, in this case too, the theme of Victory Day turned out to be a kind of worldview framework that includes various events of different meaning and character.



Photo 16. The choir of senior pupils of the lyceum No. 44 in Lipetsk at a festive concert on May 7, 2018.

However, the traditional events of the celebration of Victory Day at Russian schools don't include only a concert. The Russian school inherited the practice of organizing various sports competitions devoted to May 9. As in the case of concerts, these sporting events can be held at any other time of the year and are only a part of the general activity program of the school. It needs to organize intensive activities within the general sense framework Victory Day. So, for example, in the Tambov region the annual sports contest "Marathon of Victory" has been held for several years. This event is a sporting event in a short distance race for primary school students (photo 17). Accordingly, a fairly simple sports event receives a special status, since it is held on May 9 or on the eve of the holiday.



Photo 17. Primary school students at the annual sports contest "Marathon of Victory" (9 May 2018, Tambov)

The surviving Soviet attribute of the Victory Day celebrations is the military game "Zarnitsa". The game was invented in 1964 by a rural teacher, and we returned to it in 2001 in accordance with the ideas, written in the first Program of patriotic education. "Zarnitsa" is a military sports game in which students should show the ability to march in ceremonial step, reach qualifying sports standards (running, jumping, obstacle course, strength exercises) and dismantle the Kalashnikov assault rifle (Photo 18).





Photo 18. A school student dismantles the Kalashnikov assault rifle, 9 May 2018

However, modern schoolchildren in the Tambov region are more likely to answer questions about the history, which, as a rule, test the knowledge of the most striking facts of the Great Patriotic War of 1941-1945, then to demonstrate the ability to defend the Motherland. Moreover, as in the case of other commemorations there is no ideology behind the game "Zarnitsa" in the Russian version like the one in the USSR. This is a set of practices demonstrating military skills, the ability to obey orders and know the generally accepted set of facts about the history of the Great Patriotic War.

The social order, transmitted through the Victory Day rituals in the Russian school like in the Soviet era, does not tolerate ideological dissension. Everything connected with a different interpretation of the war or Victory is subjected to harsh criticism and public censure. An example of the recent years was the story of the public harassment of a schoolchild, Nikolai Desyatychenko. On November 19, 2017, he gave a speech in the Bundestag and spoke about visiting the graves of Wehrmacht soldiers in Russia. In his speech there was sympathy for those Wehrmacht soldiers who did not want to fight and died in Russia (Мерзликин, 2017). It was perceived in Russian social networks as "betrayal". A number of officials and bloggers came out with a demand to "check the validity of the statements of the Russian schoolchild." The schoolboy had to delete all the accounts in social networks because of the huge number of negative comments and threats. Despite the positive comments which were made by Dmitry Peskov, Vladimir Putin's spokesman, the school of Nikolai Desyatychenko was checked.

#### 4 Memory of Victory in the Modern Russian School: Toward a Predictable Past?

Patriotic education in the modern Russian school is regulated by the programs of patriotic education, which have been adopted in Russia since 2000. The actions of each program are extended for 5 years. It is interesting that the anniversary of Victory becomes a kind of indicator of the fulfillment of the program. The First Program declared the goal of creating a system of patriotic education (special centers, movements, organization of extracurricular

activities, etc.), while the whole Russian society was the target of the impact. Then the authors' ambitions decreased, and the second Program (2005-2010) focused on young people (the main funding was received by the education authorities). The goal was the need to create tolerance and actualize the Soviet idea of friendship among nations. The Third Program (2011-2015) stated "the formation of a patriotic education system". Since 2011 the growth of the conservative trend has been observed, within which the Program promotes continuity of the Soviet system of patriotic upbringing. The Fourth Program (2016-2020) speaks about the need for a modern and scientific approach. However, some conservative trends remain (Decree of the Government of the Russian Federation, 2015). The regional and municipal programs that determine the plan of activities in educational institutions, as well as the procedure for financing are adopted, relying on the federal programs. Until 2015 the main activity on May 9 was a festive concert and military sports game "Zarnitsa", which did not directly link to Victory Day. But while implementing the third Program of patriotic education, and especially after the patriotic turn of 2014, the inclusion of schoolchildren in the celebration was intensified.

It should be noted that while some Soviet practices have become a part of the Russian celebration of Victory Day in schools, there is one important difference between them. The Soviet commemorative strategy was not aimed at fostering patriotism through the memory of Victory Day. The veterans talked about their deeds, "Zarnitsa" prepared "for work and defense." However, these rituals were based on the desire to emphasize the difference between the present day and the military one. The Soviet school broadcast the need for peace and showed a desire for it. The veterans were thanked for "a peaceful sky over our heads", and Victory Day was presented as a holiday of the end of the war. With the help of this distinction, the successes of the socialist system were emphasized. According to the official propaganda, it was possible to defeat fascism, to restore the country after the war and "to convince half of Europe of the correctness of the socialist path".

In today's Russian school there is an identification of present time with a stereotyped image of the military period. The formation of patriotism turned into militaristic tendencies. It is difficult to imagine an answer "We can do it again!" (a refrain of modern commemorative practices) to a veteran in the Soviet era after he had told his story. The readiness to "do it again" is a consequence of the formed notion of war as a place of heroism and deeds, but not pain and suffering. The basic constructed emotions in the modern Russian school are not gratitude, but pride. The further the Great Patriotic War is, the more actively the fact that schoolchildren have the right to pride is inculcated in their minds. The reason for it is that the events of 1945 are presented as a common Victory of the Soviet (Russian) people and they belong to the state-winner. That is, pride turns out to be a duty, like wearing a St. George's ribbon (its motto is "I remember, I'm proud") or participation in the "Immortal Regiment". Some modern methodological books advise, "Even before going to school, it is necessary to form the children's initial ideas about the heroism of our people in the Great Patriotic War, to awaken pride of belonging to Russia" (Картушина, 2005: 2) It is interesting that not only the majority of the Soviet practices are preserved, but the discourse itself, which accompanies the narrative of the celebrations in modern schools. The children are invited to tell about "the price of Victory, fearless heroes of the war" (Казаков & Шорыгина, 2011: 3). The children are told that



"at the cost of huge losses, our people and the Red Army managed to save not only Europe but the whole world from the fascism" (Казаков & Шорыгина, 2011: 3).

Modern commemorative practices are directed to the maximum possible identification. Their main feature is the increased performativity, which is characteristic of modern commemoration in general, and is required from schoolchildren. Now it is not enough just to remember, it is necessary to show and prove that "I really remember". It is achieved by the participation of school students in various rituals. And such performativity and fusion of rituals are represented by teachers as one of the ways to avoid the distortion of history.

The performativity of modern practices increases the relevance of the ideas of biopolitics. A memorial in modern practices becomes the body of a descendant, which is used to wear a St. George's ribbon or a portrait of a veteran. These practices, declared as a tribute to memory, in fact ensure transferring the sacred concept of the accomplished feat, to which now every Russian citizen has relation through this collective body, that includes the veterans and their descendants. Taking into account the dominant place of Victory in the symbolic pantheon, the inclusion of schoolchildren in the Victory celebration practices can be considered as the introduction of young citizens to the collective body of Leviathan.

## 5 Conclusions

Thus, the activation of patriotic rhetoric in modern Russia has transformed Victory Day into a central element of the official politics of memory, one of the most important resources of which is the system of school education and upbringing. The place of the cult of Victory in modern Russia fully corresponds to the ideas of the civil religion in the interpretation of E. Durkheim. Participation of schoolchildren in the commemorations of Victory Day acts in modern Russia not only as a tribute to memory, but appears as rituals of the civil religion, the consequence of which should be the strengthening of solidarity, the sacred and social order. At the same time, while preserving most of the external attributes and symbols of the holiday, the commemorative practices of celebrating Victory Day in the Russian school are significantly different from the Soviet era. It is due both to demographic and political causes, and to the growing influence of local practices of family memory. Performativity, temporal inversion, repressive nature of some events are typical of the commemorations of Victory Day in modern Russian school.

## 6 Acknowledgements

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## Pictures

Picture 1: Семейный фотоархив семьи Экштут [Retro View of Mankinds Habilitat], 8 Августа [August] 2017 [www.pastvu.com/p/641682](http://www.pastvu.com/p/641682)

Photo credit: Semen Ekhtout

Picture 2: Мир тесен [The world is small], 10 Мая [May] 2015  
<https://zagopod.com/blog/43870538319/Parad-na-Krasnoy-ploschadi-9-maya-1985-goda?domain=mirtesen.ru&mid=588755197EB1BB52771C88F0880A0467&pad=1&paid=1>

Photo credit: Ivan Petrov

Picture 3: Липецк. Каким он был в 70-80 годы XX века. Найдете знакомые улицы и районы? [Lipetsk. What it was in the 70-80 years of the twentieth century. Can you find familiar streets and districts?], 1 Июня [June] 2015 <https://www.colors.life/post/25686/>

Photo credit: Snezhana Denisovna

Picture 4: Пост № 1 на Площади Героев в г. Липецке [Post number 1 on the Heroes' Square in Lipetsk], 15 Мая [May] 2018 <https://vk.com/club9079476>

Photo credit: Igor Pecherikin

Picture 5: Фотография из личного архива Оксаны Головашиной [Photo from Oksana Golovashina's personal archive], 9 Мая [May] 2018

Photo credit: Oksana Golovashina

Picture 6: Фотография из личного архива Оксаны Головашиной [Photo from Oksana Golovashina's personal archive], 7 Мая [May] 2018

Photo credit: Oksana Golovashina

Picture 7: Фотография из личного архива Оксаны Головашиной [Photo from Oksana Golovashina's personal archive], 7 Мая [May] 2018

Photo credit: Oksana Golovashina

Picture 8: Фотография из личного архива Оксаны Головашиной [Photo from Oksana Golovashina's personal archive], 8 Мая [May] 2018

Photo credit: Oksana Golovashina

Picture 9: Шар. Журнал для ума и сердца [Ball. Journal for the mind and heart], 10 Мая [May] 2016  
<http://svo.spb.ru/kartinki/den-pobedy-v-sankt-peterburge-foto.html>

Picture 10: Фотография из личного архива Оксаны Головашиной [Photo from Oksana Golovashina's personal archive], 9 Мая [May] 2018

Photo credit: Oksana Golovashina

Picture 11: Фотография из личного архива Андрея Линченко [Photo from Andrei Linchenko's personal archive], 9 Мая [May] 2018

Photo credit: Andrei Linchenko

Picture 12: Торжественное открытие мемориальной доски [Official site of the school No. 4 in Lipetsk named after L.A. Smyk], 17 Апреля [April] 2018 <http://lipetsk-school4.ucoz.ru>



Picture 13: Фотография из личного архива Оксаны Головашиной [Photo from Oksana Golovashina's personal archive], 20 Апреля [April] 2018

Photo credit: Oksana Golovashina

Picture 14: Фотография из личного архива Оксаны Головашиной [Photo from Oksana Golovashina's personal archive], 9 Мая [May] 2018

Photo credit: Oksana Golovashina

Picture 15: Без формата.RU [Without formalities], 22 июня [June] 2018

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Picture 16: Состоялся праздничный концерт, посвящённый Дню Победы [Official site of the lyceum 44], 7 Мая [May] 2018 <http://www.lyceum44.ru/news/12433/>

Picture 17: Фотография из личного архива Оксаны Головашиной [Photo from Oksana Golovashina's personal archive], 9 Мая [May] 2018

Photo credit: Oksana Golovashina

Picture 18: Фотография из личного архива Оксаны Головашиной [Photo from Oksana Golovashina's personal archive], 9 Мая [May] 2018

Photo credit: Oksana Golovashina

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## An Evaluation on the Changing Educational Policies and Socio-political Rituals in Turkey

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- Socio-political rituals appear more densely within the educational process of primary schools, rather than at later stages of education.
- The first fifteen years after the establishment of the Republic of Turkey (1923-1938) was very productive in terms of inventing educational rituals.
- The effect of policies on the daily lives of primary schools can be followed most distinctively through the Student Pledge.
- In Turkey in 2012, essential changes in the form of festival celebrations were made.
- In order for rituals to be effective, they first need to be legitimate in the eyes of the teacher.

**Purpose:** The purpose of this paper is to demonstrate how the socio-political rituals such as national festivals and student pledges have changed in the Turkish Republic primary schools over the last twenty years.

**Method:** The data used to achieve this purpose was collected from four different sources; the applicable legislation, statements of policymakers, teacher organizations and an interview with primary school class teachers.

**Findings:** Developments in politics have affected both the daily life and the celebration of special occasions in primary schools considerably. Abolishing the Student Pledge which took place in 2013 can be regarded as the most important alteration in the everyday life of the school since the foundation of the Turkish Republic. The most significant change in the celebration of special occasions in primary schools was made in 2012, and was ostensibly to free the marking of these festivals from their militaristic framework. However, a knock-on effect of this change appeared to be a waning of enthusiasm for such festivals in general. After the failed coup attempt on 15th July 2016, Turkey announced the 15th July Democracy and National Unity Day. During the first week of the school year, activities are carried out for this day.

**Keywords:**

School rituals, socio-political rituals, national festivals, student pledge





## 1 Introduction

School is often understood primarily as the place where young people learn the skills and knowledge needed for them to go into the job market and provide for themselves in adulthood. However, since the birth of modernity, public schools have also played a primary role in socialising the future citizens of the nation. This duty, which in the past was performed primarily by familial and religious institutions, has passed on to state schools and education institutions in today's modern society and this shift in responsibility has gifted the governing classes a highly effective and important tool for maintaining their existence. According to Bernstein, Elvin, Peters, & Huxley (1966, p.429), the education a school provides transmits two cultures: instrumental and expressive. The primary purpose is to divide the society into professions and thus make it heterogeneous by transmitting the *instrumental culture*, which includes specific academic and professional skills to provide the necessary workforce. The second purpose is to unify the society and thus make it homogeneous by transmitting the *expressive culture*, which includes the norms and values which legitimize the dominant system, protect the governing order and provide social solidarity.

In transmitting the expressive culture, the norms and values that are cast as part of the wider national character are frequently defined by the ideology of the current government among states who exert great control over their state education systems. Additionally, textbooks, curriculums, national-official festivals and pledges come to have great socio-political importance. The official discourse that influences both the overt and the more covert curriculum transmitted in public schools helps form individual students' understanding of their role and position within society. Through the official/open curriculum, a student learns the history of the nation, and the superiority and uniqueness of this history, how to understand it and the rights and duties s/he has as a citizen.

National festivals have a special importance in transmitting the expressive culture. Jean Jacques Rousseau, who set the philosophical foundations for the concept of the modern nation-state, recommended creating civil festivals to strengthen the national character and to provide a channel to concentrate society's emotions into a new, national, energy (Kertzer, 1988, p.153). His words were later supported by Emile Durkheim (2005), who stated that participating in national festivals reduced the social barriers that separate people from each other in everyday life and help to provide social solidarity among citizens (p.413). Thus, national festivals mark events important to the nation and celebrate special days when all citizens feel themselves as part of the nation, regardless of which religious group, ethnicity or social class they come from. In addition to such events, more regular rituals embedded into the routine of the school, such as pledges of national allegiance which are recited everyday, are the symbolic performances that help provide a child with an emotional bond to abstract concepts, such as government and nation. Such acts are performed in an environment which reinforces the naturalness of such rituals so that students come to enact them almost unconsciously, and the capacity for any questioning or resistance is greatly limited. In creating a consent-based national unity and order of loyalty, the government benefits considerably from such socio-political rituals such as festivals and pledges.



The period of 1875-1914 is defined as the age which saw primary schools become sites of ideological power in terms of nation-building in many European countries (Hobsbawm, 1987, p.149). In this age, primary school education became compulsory in many countries, and states began to marshal various ideological strategies in order to teach children how to become good citizens (Alexander, 2001, p.16). The foundations for this were established after the dissolution of absolute monarchy in France in 1789, when the socio-political power of national events, particularly those celebrating military victories such as France's July 14 Bastille Day, came to be realised (Kertzer, 1988, p.157). At the same time, years of war, internal conflicts and the idea of the citizen-soldier also helped to integrate a military aspect into the developing symbol of the national citizen. This military turn was also evident in school life, as semi-military conditions were imposed on the school and military thought began to become part of school life. Thus the space left by religious colleges of the *ancient regimes* was filled with a military understanding (Ariès, 1962, p.255–256).

Military developments had a tremendous effect on the spread of uniformity, order and uniforms in schools, with the notion of a citizen soldier gaining sway across the whole of Europe. Days of national celebration ballooned, with military victories and royal birthdays celebrated, and portraits and symbols began to be hung in schools (Hobsbawm, 1983, p.271–277). According to Eric Hobsbawm, by the early twentieth century, the imperial role of the British public schoolboy was fundamentally a sacrificial one with the primary purpose of a public school education to produce the 'neo-imperial warrior'. In 1904, Empire Day Festival was invented. This festival was equivalent to Bastille Day in France and Sedan Day in Germany (English, 2006; Mangan, 2010). However, perhaps the most developed rituals of an imperial education were not European but Japanese. In 1888, Japan's Ministry of Education instructed schools to conduct celebratory ceremonies on 'three great holidays', New Year (1 January), National Foundation Day (11 February), and the Emperor's Birthday (3 November) (Cave, 2016, p.13). Two years later the *Imperial Rescript on Education* was published, a pledge intended for recitation which emphasized dedication to the continuity of the Empire and the loyalty of the Japanese people. Copies of this Rescript were distributed to every school in Japan, and were hung near the Emperor's portrait (Tsunoda, De Bary, & Keene, 1964, p.139). Reciting the Imperial Rescript, raising the national flag (Hinomaru) and performing a march (Kimigayo) were incorporated into regular school ceremonies, the emphasis of which was on celebrating the infinity of the empire (Passin, 1965, p.308; Takato, 2004, p. 207–208).

Like all other empires, the Ottoman Empire was affected by the fact of nationalism and militarism brought by the wars of the nineteenth century. Militarist and nationalist elements entered the Ottoman education system at the beginning of the twentieth century, with the impending dissolution of the empire threatened on its many fronts intensifying the development of the citizen soldier [millet-i müselleha] mentality. Especially during the First World War, military drills, physical education, war games and scouting activities became an integral part of education at every school level with paramilitary youth organisations also becoming popular during this period (Yamak Ateş, 2012, p. 99-101). Militarist and nationalist features were also strengthened through changes to the curriculum and, as of 1909, *July 10*, the day when the Ottoman Constitution was enacted was made a national festival. This was

the first official holiday adopted by the Turkish parliament in the empire's history (Taş, 2002, p.352).

On April 23, 1920 the Grand National Assembly of Turkey [Türkiye Büyük Millet Meclisi (TBMM)] was founded. With the proclamation of the Republic on October 29, 1923, the Ottoman State of six hundred years was replaced with the Turkish Republic. Mustafa Kemal (Ataturk) (1881-1938) became the first President of the Republic of Turkey. Ataturk had a pioneering role in making several revolutions to raise Turkey to the level of contemporary civilizations. Ataturk introduced a broad range of reforms in the political, social, legal, economic, and cultural spheres. Abolition of the Sultanate; proclamation of the Turkish Republic; abolition of the Caliphate; unification of education; adoption of the new Turkish alphabet are some of these reforms. The basis on which today's Republic of Turkey is built was largely structured in the time of Ataturk.

The first fifteen years after the establishment of the Republic of Turkey (1923-1938) was more productive in terms of inventing educational rituals and while some educational rituals that were invented during this period have undergone various changes, they have survived to the present day. In the intervening period between the founding of the Republic and now, text books and curriculums have been revised, but the national festivals are regarded as having a static structure, as they have become integral symbols of the nation's existence. Nevertheless, because such festivals are ideologically structured, they have undergone changes in terms of their practice and discourse, as the governments of Turkey have changed.

In the last twenty years, the Republic of Turkey has experienced important social, economic and political changes. Therefore this paper intends to chart the changes in the Turkish Republic's primary schools by focusing on the evolution of the socio-political rituals such as national festival celebrations and the Student Pledge.

Socio-political rituals appear more densely within the educational process of primary schools, rather than at later stages of education. Easton and Hess (1962, p. 103, 238) compare early political orientations to religious feelings and emphasize that they are stronger than the academic structure of the school. This shows that, although not on a cognitive level, rituals wield a potent emotional power over primary school-age students. The main socio-political rituals mentioned in this paper are; the Student Pledge [Andımız], the 23<sup>rd</sup> of April, the 15<sup>th</sup> of July, and the Week of the Holy Birth [Kutlu Doğum Haftası]. The Student Pledge was an important socio-political ritual which was continuously carried out as part of the ordinary primary school day between 1933-2013. The 23<sup>rd</sup> of April is an official festival for the foundation of Turkey's Grand National Assembly, celebrated since from the earliest years of the Republic as Ataturk's gift for the children. On the 15<sup>th</sup> of July, the failure of the coup attempt is celebrated. The Week of the Holy Birth celebrates the birth of the Prophet Mohammed, which the Justice and Development Party [Adalet ve Kalkınma Partisi (AKP)] brought to schools as part of its policy to raise a religious generation.

The information about the changes in the socio-political rituals in primary schools is gathered from different sources. Firstly, the relevant legislation was reviewed and developments in practice were determined. Then, in order to understand the source of motivation for such



changes, and the reactions of the opposition, the statements of relevant policy makers were examined. In assessing present day attitudes to these rituals, and to learn what teachers think and what is being discussed regarding this topic in the staff room, five primary school class teachers were interviewed. The teachers interviewed were selected from those who have over twenty years of experience in public schools. In addition, the statements of teacher organizations on the subject, the announcements they made from their websites and the reports they wrote have been examined.

## **2 Effects of the changing education policies on ordinary school days**

The socio-political rituals of a state school are mainly shaped according to governmental and educational policies. In the early years of the Turkish Republic, founded on the 29<sup>th</sup> of November 1923, the air of democracy was dominant. The main purpose was to build a national, modern, democratic, Western and secular educational system. However, because the founding members thought a new war was imminent, military lessons taught by officers alongside basic military training camps were brought into schools as of 1926. Until the end of the Second World War, the aim of raising a military spirit in schools, which had provided civil education earlier, gradually became more and more integral to Turkish education.

Turkey moved on to a multi-party system in 1945. However, before democracy was fully established, the regime was interrupted 1960 by a military coup in 1960, followed by a succession on military interventions in 1971, 1980 and 1997. Education was greatly impacted by this process. In the 1990s, Turkey was ruled by a series of coalition governments and went through political and economic difficulties, but nevertheless, at the European Summit held in Helsinki in December 1999, the European Union acknowledged Turkey as a candidate country for accession to the block and the political negotiations started. Potential EU accession engendered a wave of thorough political reforms between 1999-2005, in order to comply with the harmonization packages, but the direct effects on educations were marginal, as the process focused more on democratization and human rights issues. After 2005, Turkey shifted its EU policy and began to move away from the accession process.

2002 saw significant changes to the educational system with the coming to power of the AKP government. Throughout the tenure of the AKP, which defines its political position as democratic conservatism, education has continued to be a target area where many of the cornerstone policies of the government have been produced. Concepts of democratisation alongside conservatism, the lenses through which the party defines itself, have become the most debated concepts in the country. All the changes made in the pursuit of the democratisation of the education system have been carried out within the frame of conservatism. This drive is open and conscious, as expressed by then Prime Minister, now President Recep Tayyip Erdoğan, in a meeting with a provincial chairman, who explained clearly “[w]e want to raise a religious generation”, summarising the education policy of the AKP (Dindar bir gençlik yetiştirmek istiyoruz [We want to raise a religious youth], 1 February [Şubat], 2012).



As of 2004, Values Education is included in the school curriculum in this pursuit to foster a religious generation. The Ministry of Education [Milli Eğitim Bakanlığı (MEB)] demanded that Values Education activities to be carried out in the first week of the school year as of 2010-2011 academic year and religious values and figures were chosen to forefront the move. At the same time, the number of Islamic schools [İmam Hatip] increased. Together with the already compulsory Religion and Ethics Education for high school students, options such as Koranic study, classes on the life of the Prophet Mohammed and Basic Religious Knowledge were added to the curriculum under the name of Religion, Ethics and Values. The demand for Religion and Ethics classes to teach Religion, Ethics and Values teachers increased substantially and a substantial expansion in the number of Religious Education teachers took place (Meşeci Giorgetti, 2016).

The policy to raise a religious generation also took effect in the daily life of schools. In 2013, MEB made new arrangements on the regulation of secondary schools and stated that a suitable place could be provided upon request to meet the needs of religious service at schools (MEB ortaöğretim kurumları yönetmeliği [MEB secondary schools regulation] (07 Eylül [September], 2013). With this arrangement, opening place of worship at schools became optional and religious rituals were brought into schools. In the meantime, uniform in schools was abolished in the name of democratisation. However, the most radical change was made in 2014, when the regulation on the restriction of female students in secondary schools and high schools wearing head-scarves was abolished (Meşeci Giorgetti, 2016). Thus, another step on the road to conservative democratisation was taken.

This overview of the changing education policies of Turkey since the founding of the republic charts the shifting priorities of the national government, beginning with the concept of producing national soldier-citizens to the raising of a religious generation. Since 2009, the concept of the solution process, with a view to solving tensions in the Eastern regions of the country, has also entered Turkish politics, and this has also had an impact on the Turkish education system. This solution process involves the disarmament of Kurdish Workers Party (Partiye Karkerên Kurdistanê [PKK]), which undertook its first terrorist attack in 1984 and has since caused the deaths of 40.000 people. It has also focused on strengthening social integration and an acknowledgement of the Kurdish problem by the Turkish Republic (Terörün sona erdirilmesi [Law on the elimination of terror], 10 Temmuz [July], 2014). The solution process remains complex and the PKK have continued with terrorist attacks. However, concepts such as multiculturalism, pluralism and identity politics have begun to make themselves felt in terms of education policy. In 2013, Prime Minister Tayyip Erdoğan, announced a Democratization Package for speedy implementation in schools. The package included steps to erase the legacy of the military coups from the Turkish education system and pave the way for education in different languages and dialects; the removal of the ban on headscarves in public; and abolishing the student pledge from primary schools (Demokratikleşme Paketi'nin içeriği [The contents of the democratization package], 30 Eylül [September], 2013). The effect of these policies on the daily lives of primary schools can be followed most distinctively through the Student Pledge.



Since its implementation, the Student Pledge had been an untouchable socio-political ritual due to its militarist statements and essentialist expressions about being a Turk. It was brought into Turkish primary schools in 1933 and had been an established part of the school day ever since. Reşit Galip, the Minister of Education of the time, wrote the Pledge and put it into practice on the 23<sup>rd</sup> of April 1933.



Picture 1: Reşit Galip for the first time reciting the Student Pledge (24 Nisan [April], 1933).

The Pledge is as follows: "I am a Turk, I am honest, I am hardworking. My law is to protect my minors and respect my elders and to love my country and nation more than I love myself. My ideal is to rise and progress. I offer my existence to the Turkish existence as a gift!" (Meşeci Giorgetti, 2015). The first alteration of the Pledge was made in the period when Turkey was being ruled by supra-party governments, during the period intervening the military coup on the 12<sup>th</sup> of March 1971 and the elections held on the 14<sup>th</sup> of October 1973. In this period, the emphasis of Atatürk was added to the pledge and it followed: "Oh the provider of our days, Great Atatürk; I vow to walk forever and ever on the path you opened and follow the ideals you established, missions you indicated. Happy is the one who says I am a Turk." (İlkokul yönetmeliği [Primary school regulation], 29 Ağustos [August], 1972).

In 2003, the obligation for foreign students to recite the Student Pledge was abolished. Nobody laid too much emphasis on this change. However, by 2010, as the government began to look for ways to resolve the Kurdish situation, the content and obligatory nature of the Pledge was beginning to be questioned. The Minister of Education at the time, Nimet Çubukçu

criticised the content of the Pledge due to its essentialist expressions (Bakan Nimet Çubukçu'ya “ant” sorusu [“Pledge” question to Minister Nimet Çubukçu], 15 Şubat [February], 2010). The obligation to recite the Pledge every morning in schools was abolished in 2013 under new regulations. (MEB ilköğretim kurumları [MEB primary schools], 8 Ekim [October], 2013). Nevertheless, this change brought protest from opposition political party organizations and nationalist unions (Eylemler başladı [Protest actions started], 2 Ekim [October], 2013). Erdoğan responded to these protests, by saying “[i]n no developed countries in the world can you see texts with racist slogans read by children lined up like soldiers,” and reaffirmed his support for the abolition (Erdoğan 'andımız' [Erdogan 'pledge'], 8 Ekim [October], 2013). However, a widespread backlashes ensued, with various organizations gathering in protest in town squares to recite the Student Pledge (Dünkü çocuklar [Born yesterday], 11 Kasım [November], 2015).



Picture 2: Ünye's Born Yesterday group recited the Student Pledge at the Dolmabahçe Palace (11 Kasım [November], 2015).

In this [video](#), you can watch one of these protest which organized by Nilüfer Municipality in Bursa. Some schools formed their own pledge, including the private school Taş Mekteb (Taş School), whose school board asked to Ataol Behramoğlu, a well-known Turkish poet to write a student pledge. Behramoğlu wrote a pledge which gives an emphasis on the concepts of equality, justice, liberty, and the legacy of Atatürk, and the pledge was adopted by the students in the school (Dündar, 2018).

Five years after the abolition of the Pledge, there was a significant development. Türk Eğitim-Sen, a well-known educational union with nationalist tendencies, filed a lawsuit with the Council of State requesting cancellation of the Student Pledge repeal. In response, the Council of State annulled the provision that had previously abolished the Student Pledge, justifying their decision by stating that the concepts and principles contained in the Student Pledge and that had been recited in primary schools for generations were the concepts and principles on which Turkey's Constitution is based, and that within the Pledge was contained the primary

purpose of the Turkish Educational System. The Council of State emphasized that this pledge strengthened the notion of national belonging within young generations on the basis of constitutional citizenship and that it contributed to the formation of moral and ethical values in students. The Council of State also stated that the abolition of the Student Pledge would only be possible if it was based on a lawful scientific justification (Danıştay [The Council of State], 19 Ekim [October], 2018).

Upon this decision, the media started to publish news that the Student Pledge had returned to schools. MEB stated that the decision was not finalized; the legal process continued and then MEB gave an 11-page appeal petition to the Council of State to overturn the decision. The petition argued that Turkish national identity was formed too late when compared to other national identities and the Student Pledge was necessary in 1933 in order to build the Turkish national identity. But today Turkey does not need the Pledge. The appeal also argued that the Pledge was anachronistic, and that such rituals were most commonly seen in fascist or communist regimes, that students parroted the Pledge rather than speaking it meaningfully and that the dictation of monolithic ideas was not appropriate for the education of the 2000s (İşte Milli Eğitim [Here National Education], 12 Kasım [November], 2018).

This petition was debated in the Turkish public sphere for a substantial amount of time, but more significantly, caused conflict between the AKP and the Nationalist Movement Party [Milliyetçi Hareket Partisinin (MHP)] which had been cooperating in national elections under the name of the Republican Alliance [Cumhur İttifakı]. The leader of the MHP, Devlet Bahçeli, in particular was vociferous in his reaction to the petition, asking “[w]hat is the problem of the pledge? Which part of pledge offends your sensibilities? Is it a crime to say I am a Turk? Is it wrong to say I am honest? Is it heedlessness to be hardworking? [...] This country is called the Republic of Turkey; the people lives in it are called Turk. The Student Pledge is one of the distinctive features of our national identity. If you dislike it, quiet down.” (Bahçeli’den ‘öğrenci andı’ çıkışı [Pledge indignation from Bahçeli], 20 Ekim [October], 2018). Other opposition leaders made similar criticisms. The most severe response to the petition given by MEB came again from MHP leader Devlet Bahçeli. He said that, “to consider Turks as a people who reached national consciousness the latest is a denial of history, the neglect of history, the betrayal of history.” Bahçeli, however, did temper his message somewhat by opening up a path for reconciliation with the AKP, remarking that “we want to believe that our Minister of Education has not seen the petition of appeal or that he did not examine it carefully because of his intensity”. In a further twist then, AKP spokesman Ömer Çelik released a statement arguing that the petition did not reflect the opinion of the AKP and MEB, and that the petition is both historically and morally incorrect.

In the days following this press release, the General Director of MEB’s Legal Services Department and the two lawyers who filed the petition were dismissed (Kemalistler ve Bahçeli istedi [Kemalists and Bahçeli wanted], 14 Kasım [November], 2018). The Ministry re-submitted the petition to the Council of State, with previous references such as “parroting”, “anachronistic”, and the comments made on the national identity of Turks removed. However the controversy continues, with Türk Eğitim-Sen, the union that opened the case to the Ministry of National Education, wanting the ministry to withdraw the appeal application





completely, rather than merely amending its petition, and for the Student Pledge to be reinstated once again in schools (Türk Eğitim-Sen, 2018). Not every education union agrees with this position, with Eğitim Bir-Sen, the education union known for its closeness to the conservative policies of the AKP government defining the Pledge as the product of a reactionary, repressive, militarist, totalitarian mentality and supporting its abolition as an important achievement in the name of civil peace and reconciliation (Eğitim Bir-Sen, 2018). Eğitim-Sen, another education union with democratic and left-wing affiliations, approaches the situation differently as a crisis deliberately engineered by the AKP in order to create the perception that "Turkey has an independent judiciary". According to this union, any discussions on the Pledge in absence of an appropriate democratic environment in which to have them will necessarily remain superficial (Eğitim Sen, 2018).

While all these discussions were taking place, it was claimed that MEB sent a circular to all schools. Allegedly, MEB requested that the Student Pledge not be recited and that teachers should not be talk about this subject in schools (Andımız'la ilgili [about the Pledge], 6 Aralık [December], 2018). However, MEB denounced these allegations as untrue (MEB öğrenci andıyla ilgili [MEB about student pledge], 8 Aralık [December], 2018).

One way of understanding the effect of the abolition of the Student Pledge on the ordinary school day and the teaching process is to listen to teachers. In this regard, it is instructive to know what is being discussed in the teachers' room and what the teachers think about the Pledge. To this end, five class teachers were interviewed individually in a primary school in Istanbul. All teachers interviewed have more than twenty years of professional experience. Admittedly five teacher's thoughts cannot be taken as representative of all the teachers in Turkey. However, access to the perspective of experienced teachers is important in terms of expanding our knowledge pool regarding the controversy over the Pledge.

All five class teachers who were interviewed for this paper were in agreement with the policymakers and had parallel views about the content of the Pledge having problems. They all expressed concerns over the Pledge being perceived as "imposing being a Turk" and as not having "an inclusive content". Further, all teachers agreed that there was value in morning ceremonies in schools and felt that some kind of student pledge should be recited. They emphasised that when there was trouble either within the school or in the wider society, the Pledge played an important role in unifying students in their emotional attachment to the notion of the country and what it represents, and helped increase the awareness of students to wider issues of solidarity and a sense of united purpose. Interestingly, while the literature regarding school pledges focuses on their socio-political function and significance, the teachers expressed that it had many different functions within the daily routine of the school. We can categorise the statements of the teachers regarding the functions of the Pledge in the following ways: rewarding; supporting self-confidence and instilling student discipline.

In terms of the structure, recitation of the Pledge tended to be according to students' school identity numbers. Everyday a student recited the Pledge on the stand and other students repeated after him/her. However, in some cases, teachers would interrupt the routine in order to recognise student success by giving them the honour of leading other students in the reciting of the Pledge that day. Additionally, if a student struggled with speaking in public, that



student was given more opportunities to recite the Pledge as one method to help standing to help them overcome their shyness. In this way, the Pledge offers a tool for teachers to both reward and develop confidence in their students.

However, all five teachers expressed that the most important function of the Pledge according to the teachers was its effect on school discipline. According to the teachers, starting a school day with a pledge gives the school a sense of formality, encourages and accelerates the process of students putting on their student identity cards and helps prepare them for the day. Teachers regard morning ceremonies and the Pledge as important elements to ensure students came to school on time. Here a teacher puts emphasis especially on the Turkish culture and argues that “people should be kept within certain limits in Turkish culture”. The loss of these more practical functions of the Pledge maybe the most significant major consequence of its abolition, and is one that policymakers are unlikely to have foreseen. Teachers state that the abolition of the Pledge and, consequently, the morning ceremonies as a whole, have weakened school discipline and caused students to be late for lessons. Therefore, we can say that alterations made for political purposes have engendered potentially problematic changes in the daily routine of the school.

### 3 Effects of changing education policies on special school days

One can follow the changes made in governmental and educational policies by looking at the marking of the special celebration days and the activities carried out on those days. As mentioned above, the democratisation of Turkey aimed at scaling down the militarist elements in education. The National Security course, which was the most prominent example of militarist education, was abolished in the academic year 2012-2013. Another important step taken to scale down the elements of the militarist education was the changes to be made for special days like national festivals.

Turkish Republic primary schools put excessive emphasis on the 23<sup>rd</sup> April festival. The day the Grand National Assembly of Turkey was founded, the 23<sup>rd</sup> April was legally designated a national festival in 1921. Dedicated to the children of the nation by Atatürk, this festival was named the *Children’s Festival* in 1929, the *National Sovereignty Festival* in 1935 and *National Sovereignty and Children’s Festival* in 1981. The first 15 years of the Republic was key in establishing Turkey’s national festivals. However, military coups in 1960 and 1980 meant that these festivals progressively began adopting a militarist framework. As militaristic discourse entered the curriculum and the wording of the Student Pledge, it also began influence the ways in which special days came to be celebrated. A moment of silence practiced in official ceremonies during national festivals, national songs and parades with marching bands, long speeches, soldiers and military schools are at the forefront. Marching parades, marching bands, the content of the poems recited, alongside the solemnity and discipline with which events take place are all intended to invoke the notion of the citizen soldier. In addition to these official ceremonies, each school has its own activity and individual ceremony. During the week of the 23<sup>rd</sup> of April, classrooms in primary schools are decorated with visuals about the festival, students write compositions and memorise poems, and the ceremonies held on these



special celebration days and the process of preparation are regarded as important opportunities to cultivate and strengthen national feelings in students. The symbolism of the citizen soldier is especially dominant. The dominant military structure of national holidays in Turkey can be viewed from this [video](#) from 23 April 1967.

With a regulation published in Turkey in 2012, essential changes in the form of these festival celebrations were made and official state ceremonies held in festivals were changed entirely. Local authorities were given the right to organize both the national and official ceremonies, and official ceremonies, parades and stadium shows were abolished. The presence of soldiers was withdrawn from festival celebrations (Ulusal ve Resmi Bayramlar [National and Official Holidays], 5 Mayıs [May], 2012). This impetus behind this regulation was stated to have been the distancing of official festival activities from a standardised frame and to encourage diversification in their celebration, free them from their legacy of militaristic influence and make them more participatory enabling large numbers of people to participate in them. Thus, the school principal was given the initiative to organize the way in which the celebration of national festivals was performed at each individual school.

These changes in the regulation were expressed differently within different schools. Data collected during the interviews highlighted that the province of the school, parents, the personal wishes of the school principal and the teaching body became important parameters in governing each individual school's celebration. The results were mixed. Some schools enjoyed the chance to influence celebrations and started preparing enthusiastically and in a more participatory manner, involving local authorities, the school, teachers and parents in the process. However, for other schools, according to our interviewees, the aura and prestige surrounding their celebration began to diminish with some insensitive and reluctant principals started not attending celebrations unless their staff put pressure on them. Thus while some schools compelled the school administration to have elaborate celebrations, in others some teachers began to pass over them.

Teachers stated that the most important reason the 23<sup>rd</sup> of April celebrations lacked enthusiasm was that the 23<sup>rd</sup> of April Children's Day coincided with the Week of the Holy Birth celebrations which overshadowed the 23<sup>rd</sup> of April celebrations. The Week of the Holy Birth, which celebrates the birth of Prophet Mohammed, became a special event in 1989 but came to be celebrated in schools as of 2010 within the framework of AKP's policy to raise a religious generation. It was included in the work calendar of schools as of 2015. All schools started holding religious composition and poem-writing competitions, quiz shows, competitions reciting the Koran and the call to prayer (azan) and memorising the words of Mohammed.

Religious books were also distributed. While the 1989 celebration had conformed the Islamic calendar, the week began to be celebrated according to the Gregorian calendar as of 1994 with the date determined to lie between 20-26 April. In 2008, the date was adjusted Presidency of Religious Affairs [Diyanet İşleri Başkanlığı] to fall between the 14-20 April. While the Islamic calendar typically loses 11 days each year, bringing the religious celebrations such as Ramadan and Eid progressively earlier in the year, it is not usual in the Islamic world to celebrate specific religious days according to the Gregorian calendar. Nevertheless, stabilising celebrations of the Week of the Holy Birth to coincide with Children's Day, again, which marks



the foundation of the secular Grand National Assembly of Turkey by Atatürk, has been perceived as a reaction against Atatürk and the Republic by the ruling AKP.



Picture 3: Holy Birth program in a Primary School (25 Nisan [April], 2015).

When we look at how this coincidence played out in schools, unsurprisingly this situation caused a war of rituals amongst the teachers and created conflict. Teachers stated that the Week of the Holy Birth celebrations have over the past eight years come to overshadow, the 23<sup>rd</sup> of April Children's Day celebrations with the more established festival neglected and old traditions, such as the widespread visual presence of Atatürk, eschewed in favour over the religious celebration. Some of the teachers reported their discomfort with the new arrangements, and emphasized that even though they mentioned the Week of the Holy Birth in their lessons, they never let it overshadow the 23<sup>rd</sup> of April. The contrary was also true, with some teachers giving weight to the 23<sup>rd</sup> of April Children's Day celebrations. Thus this development in student celebrations seems to have caused conflict among teachers at schools, dividing them in terms of personal compulsions.

Based on the teachers' interviews, this conflict has to a large extent been resolved, largely in due to the sense of solidarity that came in the wake of the events of 15<sup>th</sup> July 2016. A coup was attempted by members of a religious cult, enemies of Atatürk, the Republic and of secularism, who had managed to establish themselves in key positions of both government and military, and were aiming to overthrow the existing government. In response, the public, the police and military forces not belonging to this group blocked this coup attempt, and 248 people who went out on the streets in defence lost their lives (Dakika dakika darbe girişimi [Minutes of the coup attempt], 16 Temmuz [July], 2016). Kemal Kılıçdaroğlu, leader of Republican People's Party, [Cumhuriyet Halk Partisi (CHP)] the main opposition party of Turkey, claimed that the government had previous knowledge about the plan but chose not to prevent the coup (Kılıçdaroğlu'ndan çarpıcı [Stunning from Kılıçdaroğlu], 5 Nisan [April], 2017). After the events of 15<sup>th</sup> July, this cult was announced a terrorist organization.

It emerged that the stabilisation of Holy Birth Week celebrations to the Gregorian calendar that coincided with the 23<sup>rd</sup> of April Children's Day week in schools was a project of this

terrorist organization. Therefore Holy Birth Week celebrations on April abolished. According to new regulation, the celebrations of Prophet Mohammed's birthday were named Mevlid-i Nebi and the celebrations started to be made according to the Muslim calendar (12<sup>th</sup> of Rebiulevvel) (Kutlu Doğum Haftası [Holy Birth Week], 29 Ekim [October], 2017).

Following the coup attempt, a new socio-political ritual in schools emerged. In the very first week of the 2016-2017 academic year, just a couple of months after the failed attempt a detailed activity programme similar to the other national and official festivals with the theme "15<sup>th</sup> July Victory of Democracy and Martyrs' Day" was released by the Ministry of Education, giving instructions to all education institutions, both formal and informal to mark the day appropriately, taking the levels of students into consideration but giving the final responsibility of how to arrange the in-class activities to the teachers themselves. The activity programme stated that bulletin boards should be formed in every classroom, letters should be written to the heroes of the 15<sup>th</sup> of July, poetry and arts competitions should be held in schools. In addition, another detailed programme was made by the Ministry of Education that determined the content of the speeches and poetry to be performed on these occasions and ceremonies (Açıkalın & Kılıç, 2017, p.79). Some schools got students to watch [videos](#) about the 15<sup>th</sup> of July, which likened the day to the victories won in 1915 and 1922 during the foundation process of the Turkish Republic (MEB'in öğrencilere izlettiği 15 Temmuz videosu [July 15 video of MEB for students], 19 Eylül [September], 2016). In October 2019, 15<sup>th</sup> July was inaugurated as the Democracy and National Unity Day holiday (Ankara ili Kazan ilçesinin [Ankara Kazan province], 29 Ekim [October], 2016). The following year in September 2017, all schools were sent a booklet about 15<sup>th</sup> July in the first week of the academic year. The booklet included words of Atatürk, the definitions of concepts such as democracy, nation, flag, motherland, republic, government, coup and junta, a text written for children by Recep Tayyip Erdoğan, paintings, poems and stories students prepared for this day (MEB, 2017).

Here, one of the main questions to be concerned about is how legitimate this new socio-political ritual, brought into schools by various regulations, became in the eyes of the partners of the school. Based on our interviews, observing this new national day is not important in the eyes of every teacher. Some teachers say that they have been compelled to mark this day against their will. It also emerged during the interviews that some teachers feel under pressure and "keep the booklet sent by the ministry in the classroom all the time, for fear that an inspector might come to check it" and that they "do not really study the subject in the class but showed that they did only on paper", "summaris[ing] the booklet with three or five sentences" and "hang[ing] the visuals on the doors of the classroom only for a short time [before] remov[ing] them".

When they were asked about their reasons for their behaviour, they had differing responses. The most frequently stated reason was that teachers found this day "rather political" and thus, they did not want to talk about it in the classroom. The other points the troubled the teachers were the graphic visuals about the attempted coup that were hung on the classroom walls and school bulletin boards. Some of these visuals included armed civilians on tanks. Some expressed that it was confusing to see armed civilians on pasted on school bulletin boards as

an expressed part of educational policy, the purpose of which was ostensibly to diminish the militaristic elements of Turkey's education system.



Picture 4: 15<sup>th</sup> July Victory of Democracy and Martyrs' Day program in Afşinbey Primary School (26.Eylül [September], 2018).

From this point of view, we can say that in order for the Victory of Democracy and Martyr's Day to be functioning effectively in schools, it needs to be legitimate in the eyes of all teachers and removed from its emphasis on militaristic discourse.

## 5 Conclusion

As we have seen, the social, economic and political changes in the last twenty years of the Turkish Republic are clearly reflected in the country's educational policies. This paper has used two aspects of education policy, the Student Pledge and the celebration of national festivals, to chart the changing emphasis on educational policy in Turkey. Today's educational policies have mainly been shaped according to the policy concerns of the AKP, who have been in power in Turkey for the last sixteen years. These policies can be clustered under two headings: democratisation and conservatism. Democratisation aimed at reducing the militaristic elements in education which arose mainly as results of wars and coups. To achieve this aim, the Student Pledge, which had been recited every morning during primary school assemblies and had an important place in the daily lives of primary schools, was abolished. However, this change made the Student Pledge one of the most debated topics in Turkey. While removing a pledge that forefronted militaristic and essentialist expressions was taken positively, many teachers highlighted the practical problems that came with the loss of the pledge, a major problem being the disruption of the timing of the primary school day. According to our

interviewees, an ordinary school day should start with a morning assembly where an inclusive pledge is recited. The teachers in our interview suggested that such a pledge would also help the political socialisation of the students and foster a sense of inclusivity while at the same time encouraging.

Another important step to scale down the militaristic elements of the Turkish education system was to make changes to the celebration of special days including national festivals. In 2012, the responsibility for organizing official festival celebrations was passed over to local authorities and individual school bodies and the presence of soldiers was withdrawn from these celebrations. Notably, although aimed at increasing the participation of people, enthusiasm for the celebrations diminished with these changes, and subdued celebrations caused reluctance, according to our interviewees. The Week of the Holy Birth was brought to schools as part of AKP's policy to raise a religious generation, but timing a religious day to coincide with 23<sup>rd</sup> April celebrations caused polarization in schools. After the failed coup attempt on 15<sup>th</sup> July 2016, however, it seemed that this polarization dissolved as concerns reoriented themselves around questions of how to acknowledge the newly inaugurated Victory and Martyrs Day.

Constituted after the failed coup attempt of 2016, Democracy and National Unity Day stands before our eyes as a unique example regarding the legitimisation process of socio-political rituals. No matter how compelling and insistent educational policies, policymakers, regulations are, it is the teachers who carry out those socio-political rituals in schools and are thus responsible for the way in which these policies are communicated to their students. We may conclude, then, that in order for such rituals to be effective, they first need to be legitimate in the eyes of the teacher. The power and influence of class teachers in primary schools is significant here. Thus, it seems that from the opinions expressed in the interviews undertaken as part of this research, the commemoration of the events of 15<sup>th</sup> July 2016 has not been fully legitimised. Therefore, the enforcements of central organizations or school principals have faced resistance.

National festivals and socio-political rituals are considerably important parameters in terms of the political and expressive function of education. Based upon this research, it can be said that festivals and socio-political rituals in Turkey have been constituted based on the objectives of the government at the time, and as such are subject to constant change. At the same time, one can see that these changes come to life depending on the attitudes of teachers and principals in schools. This paper also shows us how rapidly these rituals, which seem to be a very stable and established part of ordinary school life, have evolved into a dynamic structure in response to rapid political changes, as well as what important catalysts they are regarding the legitimisation of new policies.



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## Pictures

Picture 1: Reşit Galip (24 Nisan [April], 1933). Türk Çocuğu Yasası [Turkish Child Act]. *Hâkimiyeti Millîye* [Sovereignty of Nation], p.1.



Picture 2: Ünye'nin Dünkü Çocukları Dolmabahçe'de [Ünye's Born yesterday are in Dolmabahçe], 11 Kasım [November], 2015 <http://www.unyetv.net/gundem/unyenin-dunku-cocuklari-dolmabahcede/>

Picture 3: İstiklâl İlkokulu'ndan Kutlu Doğum programı [Holy Birth program in İstiklâl Primary School], 25 Nisan [April], 2015. Çorum Haber Gazetesi [Çorum Newspaper].

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Picture 4: Afşinbey İlkokulu 15 Temmuz Demokrasi Zaferi ve Şehitleri Anma Programı [15<sup>th</sup> July Victory of Democracy and Martyrs' Day Programme in Afşinbey Primary School], 26 Eylül [September], 2018).

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## “Our Silent Day”: One White Gay Teacher Explores Teacher Agency and Counter-Socialization during the National Day of Silence

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- Reflective use of teachers’ LGBTQ identities offer underexplored assets in civic and social education for counter-socialization, as models of critical consciousness
- Participating in the Day of Silence promoted greater teacher agency because all 150 students chose to participate, and nearly 100% expressed meaningful engagement
- In contrast to other studies, here DoS served to promote empathy, trust and communal concern when the teacher expanded its terms of participation, particularly for students of color
- LGBTQ teachers and students continue to face a “civic paradox” in schools, even in politically liberal contexts

**Purpose:** This study examines one “out” gay teacher’s participation in the Day of Silence (DoS), an international event highlighting the silencing of LGBTQ people in schools, to illustrate teacher agency in counter-narrative teaching, particularly for countering the typical civic exclusions of LGBTQ people.

**Design:** Civic education and queer theory inform this interpretive qualitative case study based on four semi-structured teacher interviews and document analysis.

**Findings:** When all 150 students chose to participate and nearly all found DoS meaningful, the ritual’s possibilities for counter-socialization and civic inclusion deepened, expanding teacher agency and suggesting increased trust and communal concern, particularly for students of color. Though being “out” may often be perceived as a constraint or liability for social educators, this teacher drew on his identity and queer theory as clear assets for crafting effective, experiential counter-socialization learning.

**Research limitations:** District concerns limited data to those collected from the teacher, limiting triangulation efforts.

**Practical implications:** “Out” LGBTQ teachers able to contextualize counter-socialization learning with their own experiences of civic exclusion may have particular assets for social education. DoS and queer theory may offer useful tools for non-LGBTQ educators, especially when multiple or intersectional meanings are validated.

**Keywords:** case study, civic education, social education, queer theory, qualitative research, LGBTQ

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## 1 Introduction

On a typical school day, talk permeates school spaces, facilitating and defining belonging, connection and meaning. Rarely do students – or teachers – choose to be silent; yet for one day every April, the Day of Silence expects just that.

Participants in the Day of Silence (DoS) enact a counter-narrative, unlike many school holidays promoting uncritical patriotism, or cultural unity through assimilation. This ritual, an annual, student-led event celebrated in schools across the U.S. and four other nations,<sup>1</sup> focuses on students and educators taking a vow of silence throughout the school day to “highlight the silencing and erasure of LGBTQ<sup>2</sup> people at school,” and demand more inclusive and responsive school experiences for LGBTQ students (GLSEN, 2018, para 1). Studies have found sustained evidence that U.S. students who identify or are perceived as LGBTQ experience hostile school climates, with higher rates of harassment and bullying, suicidal ideation, lowered GPA, lowered self-esteem, higher truancy and drop-out rates, and cognitive overloads (see, e.g. Kosciw et al, 2016; Pascoe, 2004).

Started in 1996 by students at the University of Virginia, DoS grew from 150 student participants to more than 650,000 in 10,000 schools today in the U.S., New Zealand, Singapore and Russia, with GLSEN as its organizing sponsor (GLSEN, 2018). Elementary, middle, high school and college students and staff take part, representing a cross-section of regions and settings in the U.S. (Becca Mui, personal communication, July 10, 2001; GLSEN, 2018). Participation may include passing out cards to teachers or peers sharing their reasons for not speaking, and using buttons, stickers, face paint, temporary tattoos, or other visual cues. Now over 16,000 student organizers and educators, often with student clubs such as GSAs (Gay-Straight or Gender and Sexuality Alliances), promote and organize participation, and may include a “breaking the silence” event at the end of the school day.

While current DoS accounts emphasize students’ participation and experiences (see Curwood, Schliesman & Horning, 2009; Woolley, 2012; Young, 2009), LGBTQ teachers face significant challenges in participating, including being “especially vulnerable to harassment and discrimination at work” (Connell, 2012, p. 168). Currently, workers in 28 states in the U.S. can be fired for being LGBTQ (Movement Advancement Project, 2018). Only 72 nations offer any legal protections for LGBTQ employees, and elsewhere their identities are subject to lengthy prison sentences, corporal punishment, or death (Carroll & Mendos, 2017). Moreover, being explicitly “out” throughout school and community spaces (see McKenna-Buchanan, Munz & Rudnick, 2015), is often presumed to be a constraint in social education because of frequent expectations of teacher neutrality on issues marked as controversial (see Hess, 2009; Ho et al, 2017; Zimmerman & Robertson, 2017). School cultures often punish those who challenge the narrow norms of gender expression and heterosexuality (Beck, 2013; Mayo, 2004; Pascoe, 2004). Teacher disclosure about LGBTQ identities, inclusion of queer content in curriculum, and participation in



events like DoS thus reflect potentially high personal and professional risks – and potential rewards (Rands, 2009).

Opposition movements demonstrate how DoS participation signals a critical and activist stance, resisting the exclusion of LGBTQ people found in schools and elsewhere. In 2005, the conservative Christian legal group Alliance Defending Freedom launched a counter-protest event named "Day of Truth," renamed "Day of Dialogue" when Focus on the Family became its sponsor (Day of Dialogue, 2018). Claiming DoS promotes a "homosexual agenda" inconsistent with free speech, these and other counter-protests, including "Anti-Gay Day" and "Day of Silence Walkout," have been promoted across the U.S., leading to legal challenges, disciplinary and sometimes violent consequences for DoS participants (Lambda Legal, 2018; Volokh, 2014; Woolley, 2012).

By investigating Talbot's<sup>3</sup> decision to participate in the National Day of Silence, this study aims to understand how one "out" gay teacher challenges civic exclusions in his context by teaching counter-socialization, and how his identities shape his agency in doing so, asking: *How does the process of planning and participating in the Day of Silence influence this teacher's views on agency for teaching counter-socialization?*

## 2 Theoretical Framework

Literature in queer theory and civic education illuminates how this teacher's context, identity and process (Torney-Purta, Amadeo & Andolina, 2010) of DoS participation influence his understanding of his own teaching agency. Queer theory illustrates how ideas of normality, marginalization, and exclusion are constructed and maintained in schools, how they impact people and institutions (Loutzenheiser, 2006; Schmidt, 2010) and definitions of citizenship (see Crocco, 2008 for a thorough historical overview). Reviews of social education literature show that educators, researchers and curriculum largely still ignore the possibilities of applying queer theory (Castro & Knowles, 2017; Maguth & Taylor, 2014; Mayo, 2017; Schmidt, 2010). Given these limits, this study also draws on recent empirical research from learning sciences and literacy exploring student and teacher LGBTQ identities.

### 2.1 Identifying as LGBTQ: A Civic Paradox in U.S. Schools

Since official curriculum rarely includes queer identities, histories and struggles for civil rights (Crocco, 2008; Mayo, 2017; Schmidt, 2010; Thornton, 2004), most students and educators lack a political or historical context for understanding queer people as civic subjects, or may actively resist their inclusion. While research affirms the academic, health and school climate benefits of LGBTQ-supportive practices and policies for *all* students (see Kosciw et al, 2016; Toomey et al, 2012), rarely do U.S. educators and schools make sustained efforts toward civic inclusion for



LGBTQ people (Beck, 2013; Hess, 2009; Thornton, 2004). In the public spaces of schools and classrooms (Parker, 2003; Schmidt, 2010), the naming of LGBTQ people (or those presumed to be so) occurs regularly and explicitly, leading to social and political marginalization (Loutzenheiser & MacIntosh, 2004; Pascoe, 2004).

I describe this phenomenon as a *civic paradox* because in the process of being publicly named and represented (even inaccurately) as LGBTQ, students or educators simultaneously experience civic marginalization. They must stay closeted, or avoid affiliations with LGBTQ identities or stereotypes, to experience reliable civic protection and legitimacy in curriculum and schools (Camicia, 2016). Even when represented in curriculum and teaching roles, LGBTQ people must often "cover" their gender and/or sexual identities to align with or approximate heteronormative values (see Yoshino, 2006) or accept charitable forms of inclusion taken for granted by heterosexuals granted full citizenship (Thornton, 2004). By framing LGBTQ exclusions as merely individual experiences of homophobia, schools socialize students and educators to ignore *heteronormativity*, the pervasive, systematic ways that the gender binary and heterosexuality are constructed and promoted as natural, normal, and superior human experiences (Blackburn & Smith, 2010; DePalma, 2013; Sumara & Davis, 1999). LGBTQ teachers of social education face a special paradox in that being "out" may imply progressive political views, making their visibility incompatible with expectations of teacher neutrality, or even professionalism.

## 2.2 Teacher Agency & Counter-Socialization

While many school-based holidays and rituals serve to memorialize the nation with uncritical patriotism, teachers participating in DoS offer their students a counter-socialization opportunity, in Engle and Ochoa's (1988) terms. Unlike celebratory narratives of "predictable progress" for holidays such as Thanksgiving or D-Day (VanSledright, 2008, p. 119), DoS centers an ongoing civic need in schools and a group often excluded from American democracy. By focusing on this marginalization, DoS offers the possibility for "a learning process designed to foster the independent thought and social criticism that is crucial to political freedom" (Engle & Ochoa, 1988, p. 31). Rather than a flat rejection of past learning, teaching for counter-socialization requires that students engage in reflective analysis of their beliefs and collective deliberation of significant social problems, necessitating an expansion of curriculum content and instructional methods (Hess, 2009; Ho et al, 2017; Parker, 2003).

Teacher participation in DoS clearly interrupts school as usual, especially holiday celebrations as usual, because teacher silence offers entirely different possibilities for learning and leadership. For LGBTQ-identified teachers, their decisions on if/how to be "out" with students and colleagues, and if/how to participate in DoS, also reflect significant turns of civic identity navigation, and possibilities for counter-socialization in showing LGBTQ identities as assets, not liabilities. With the authority embodied in the teacher's role, an "out" teacher's presence may function as a form of



official curriculum, challenging the presumed negativity of queerness. Since DoS highlights school-based and civic exclusion of LGBTQ people, participating teachers may role-model a form of social criticism consistent with counter-socialization.

To understand teacher agency as vested in the teaching role, its actions and interactions, Tina Gourd's (2018) concept of *teaching as agency* also offers insight. Rather than seeing teacher agency as functioning primarily through structures, institutions, rules and resources (from structuralist and structurationist theory) or exceptional teacher talent or contexts, Gourd employs post-structuralist theory to envision teacher agency as centering on actions and inactions inherent in *all* teaching roles and contexts, from the mundane to most activist. She argues that teaching entails agency as action/inaction in three forms: agency within – not despite – constraints; agency within contested and ambiguous spaces; and structures (such as rules, policies, and institutions) enabling agency through relationships, collective efforts, roles, etc.

### 2.3 Queer Theory and the Tensions of Inclusion

Though summarizing the wide scope of queer theory would be impossible here, several core principles illuminate this inquiry. First is the understanding of gender and sexuality as fluid, dynamic, multiple performances shaped through the demands of context, and varying over time, replacing the notion of a stable, coherent subject with a constellational identity framework (Loutzenheiser, 2006; McWilliams & Penuel, 2016). Second, queer theory helps us see the hidden curriculum (Eisner, 2003; Kumashiro, 2003) at work in schools, and the ways in which queer individuals and groups may be constructed as vulnerable, at-risk, or negated - but retain significant agency nonetheless (Meyer, 2010). Third, queer theory emphasizes two meanings of queer: defined in opposition to heterosexuality, or against normativity (Rands, 2009). While liberal democratic states typically value inclusion and representation, queer scholars insist such concepts are insufficient for achieving equity or justice. For example, Beck's (2013) study poignantly illustrates how inclusion of discussions on same-sex marriage only deepened LGBTQ students' experiences of exclusion and discomfort in the secondary classroom. Even with caring teachers and thoughtful planning, curricular inclusion and representation was insufficient for promoting LGBTQ student safety, or discourses about LGBTQ people beyond deficiency.

To provide an effective counter-narrative to civic exclusion, queer theory requires a critical and intersectional (Crenshaw, 1989) pedagogy to attend to multiple forms of marginalization (Mayo, 2017). Unfortunately, the limited lens of academic queer theory may overlook those at the center of queer histories and movements: people of color, working class people, and others with multiply-marginalized identities (Alexander, 2018; Bassichis, Lee & Spade, 2011; McWilliams & Penuel, 2016). Similarly, multicultural and culturally relevant approaches in the social studies tend to minimally engage with topics of gender and sexuality, or position such topics as disconnected from race and ethnicity (Crocco, 2008; Loutzenheiser & MacIntosh, 2004; Mayo, 2017). This





perceived separation strengthens the power structures that uphold both racism and heterosexism, with particularly harsh outcomes for LGBTQ youth of color (Burdge, Licona & Hyemingway, 2014; Diaz & Kosciw, 2009; Kahn et al, 2018). For the educator, highlighting multiple exclusions simultaneously may be a demanding endeavor, while negotiating dynamic identities and social limits in the classroom and beyond (Miller, 2015). With its challenges, queer theory offers important potential for civic education to move beyond standardized and relatively static procedural knowledge to rich possibilities of meaning and civic engagement (Mayo, 2017; Schmidt, 2010).

### 3 Methods

To understand complex, contextually-embedded phenomena such as a teacher's changing perceptions of agency during teacher participation in the Day of Silence in a detracked classroom, case knowledge is suitable and needed (Shulman, 1986; Yin, 2017). This interpretive qualitative case study relies on a purposeful teacher sample (Patton, 2002) based on several criteria: interest in participating in the Day of Silence, self-identification as LGBTQ+, at least 3 years of teaching experience to support navigating this complex topic with students, and curricula that relate to citizenship, global topics and identity. Talbot was 35 years old and a White, cisgender male English/Language Arts teacher from a middle-class background who identified as gay or queer. This was his third year teaching, all at Douglass High School, and he was "out" to everyone in the school community.

"Douglass High," an ethnically diverse public high school of about 1,700 students, stood in a liberal West Coast city, in a state with laws explicitly prohibiting discrimination based on sexual orientation and gender identity. This site provided a potential contrast (Merriam & Tisdell, 2016) to the general hostility in predominantly White schools reflected in school-based studies of queer students and teachers (see, e.g. Martino & Cumming-Potvin, 2017; Mayo, 2004; Pascoe, 2004; Woolley, 2012). The school's diversity in terms of race, socio-economic status, languages and immigration status, and its location in a historically African American neighborhood contributed to a reputation for social activism. Thus, it was not a likely location for a counter-protest like Day of Dialogue. The largest student populations were White (41.4%), Black (24.8%), Asian (17.2%), and Latinx (7.9%), with 30% on free/reduced lunch. Queer staff and students had access to LGBTQ-specific supports through a long-established Gay/Straight Alliance (GSA), several "out" teachers, a club for transgender students, and a Queer Arts Club.

Four semi-structured teacher interviews (70-100 minutes each) and document analysis of lessons and syllabi, collected over five months and concentrated on the Day of Silence (April 27, 2018), illustrated how this teacher understood his agency within contextual opportunities and constraints. A summary of data collection follows:



**Interviews:** Interview one in January 2018 focused on teacher identity, pedagogy and philosophy, curriculum and professional development resources, and his needs/goals for participating in the study. Interview two in April 2018 centered on planning for the Day of the Silence, his classroom and community context, and how they influence curriculum and instruction. Interview three was conducted immediately after school on the Day of Silence, focused on reporting and reflecting on patterns of his and students' experiences and engagement. Interview four in June 2018 returned to reflect on the impact of DoS participation on classroom community and teaching goals. All interviews were audio-recorded, transcribed and member-checked for accuracy.

**Document Collection:** Analyzing lesson and classroom materials, including syllabi, reflection questions and in-class assignments, proved essential to understanding the teacher's goals and practice for DoS.

**Approach to Analysis:** Constructivist grounded theory, which positions the researcher as a coproducer of the data through their interactions with it, "and therefore the meanings that the researcher observes and defines" (Charmaz, 1995, p. 35) aligns well with this study's theoretical framework, queer epistemology and my insider-outsider status (Fine, 2000). My personal lens, and my interactions with Talbot and the data, were certainly informed by my experiences as a White, queer, cisgender and middle class woman and secondary teacher. Interpretations also drew on almost a decade of contextual knowledge of Douglass High: first as a student, then volunteer and teaching intern, and recently teacher coach. While the school and community were very familiar, I met Talbot only once before this study, briefly during a partnership program for high school students and teacher candidates.

Triangulation of data sources and methods (interviews and document analysis) collected over multiple occasions aims to promote greater validity and reliability (Merriam & Tisdell, 2016) in this study. I employed member checks of the data and findings, and peer review with analysis and emerging findings. Data analysis included coding, analyzing, and reflecting on data within and across school settings. Starting with open coding, I generated 27 initial codes using in-vivo and open coding, using emic themes of repetition such as "empathy" and "protest" and codes of contrast like "performative" and "not performative." This enabled generalizations by testing representativeness and weighing the evidence (Miles, Huberman & Saldaña, 2014). The third coding process searched for evidence of agency within (not despite) constraints, agency within contested and ambiguous spaces, and structures enabling agency, while searching for supporting and disconfirming evidence before and after participating in the DoS.

**Limitations:** School district concerns for student vulnerability related to questions of sexuality (see Cahill, 2012; Irvine, 2012) limited the school-based data sources to those collected from the teacher, and prohibited any site observations, or student interviews. The district's LGBT program manager also opposed Talbot's participation in DoS and expected LGBTQ teachers to come "out" only if and when they could identify a specific student benefit. Viewing "out" LGBTQ identities as conditionally permissible, unprofessional or irrelevant may reflect a policy of containment



(Haywood & Mac an Ghaill, 2016), and a standard to which other teacher identities are not held. This restriction limited efforts to counteract potential social sources of invalidity such as reflexivity problems, researcher distortion or selectivity (Symonette, 2008), and reflects an ongoing challenge for understanding the experiences of LGBTQ teachers and students in schools.

#### 4 Key Findings: Teacher Agency and Teaching for Counter-Socialization

In this section, I first describe Talbot's planning and participation in the DoS as a counter-socializing ritual, aiming to clarify how this process influenced his views of teaching agency. With a constellational view of identity relevant to Talbot's agency in this context, relationships between and among marginalized and privileged identities emerged as central to understanding the dynamics of trust and communal concern for Talbot and his students. After synthesizing Talbot's process and decisions about DoS, findings are organized through Gourd's (2018) conception of teaching as agency: 1) within constraints, 2) within contested/ambiguous spaces, and 3) through structures as agency.

##### 4.1 Context: Planning and Goals

Informed by queer culture and theory, Talbot saw his DoS participation as both a performance – of silence as a metaphor – and as a counter-narrative that he wanted students to experience as impactful. Performance, as Muñoz (1999) argues, works as a means of disidentification for queer people of color: a means of action and subversion, a strategic and critical re/enactment of identity in relation or resistance to society in a publicly staged manner (p. 293). While Talbot is White, these attributes resonated in his use of DoS to critically engage with school and civic exclusion as usual, including countering assumptions of teacher neutrality and aims of "balanced" instruction on controversial or undecided issues.

Given his experiences of alienation in civic spaces and institutions as a gay youth and adult, Talbot believed DoS silence could promote student understanding and potential empathy across multiple identities in his highly diverse classroom. As he explained in interview two, some students arrived well-versed in silences based on their earlier experiences of academic tracking:<sup>4</sup>

Some of them will have been told their whole lives everything they have to say is valuable. They're just conditioned to believe that, and others are conditioned to believe that they should shut up and they're stupid, and no one wants to know what they have to say 'cause it's not valuable. Or somewhere in the middle...

For the folks who feel silenced, what I want *them* to take away from [DoS is] that other people are also thinking about this now, and getting this experience. And the silence is external to you, and isn't necessarily because you're deficient in some way. The other group... I would want them to be thinking about the same questions from the other end, like what is the cause of the silence? Is it me? Is it people like me? Is it people like my parents? What can I do about it?



Talbot shows how promoting student thinking about privilege ("Is it people like me?... like my parents?") and solidarity around marginalized identities ("other people are also thinking about this now") can stimulate action ("What can I do about it?"), an extension of his counter-socialization goals.

Though Talbot first planned on participating alone, he invited each class to consider being silent together as a collective protest. He exploited the dramatic when introducing the event. One week before DoS, he wheeled his chair into the middle of the classroom, expressed his nervousness, and spun in a circle to see each student, all very unusual behavior that provoked extra student attention.

I owned my fear, and I said, 'There's this Day of Silence.' And I talked to them about what it has meant historically, and why it came to be... And the fact that I've never participated in this before, but I wanted to this year, but I wanted it to be meaningful. I didn't want to just posture, so my thought was: we could all be silent. Would that be okay?

Talbot modeled vulnerability as an essential ingredient for an supportive detracked classroom community, and pointed to potential collective impacts: "If we did this, if this is a class where we took 55 minutes to not speak and this was something that we all experienced together and shared, then it [might do] something to this space." Students discussed his request, and again a few days later in weekly student-led discussions, in which Talbot did not intervene, as was typical. No groups expressed strong views, but generally mild support. Talbot assumed some students might not want to participate, but he had no pre-planned response; he did not want participation to feel punitive or forced.

Importantly, Talbot expanded the day's focus from the invisibility and silencing of queer people to multiple forms of marginalization. Talbot recounted in interview three that when introducing DoS, he invited students to consider participating based on "any time any part of your identity feels shut up to you" in schools. By highlighting multiple forms of marginalization, he hoped more students could forge personal connections to this protest and experience empathy for others. Unlike instances of individual or group-based DoS participation (Curwood, Schliesman & Horning, 2009; Woolley, 2012; Young, 2009), Talbot saw shared silence, and expansion of the event's scope, as an effective means of encouraging students to listen to and make broader meanings from this ritual. While he personally focused on queer identities, he emphasized voices not heard and absences in school spaces and elsewhere.

On the Day of Silence, Talbot set a cheerful tone, smiling and showing each class photos of his high school, himself as a ninth-grader, then shared a few sentences describing the invisibility he felt there. His next slide explained, "I still don't see schools, including this one, doing much for folks who are beginning to figure this stuff out. That's why I'm silent today." He shared two photos of himself with his partner and pets, a humanizing move since he had never shown his partner's face to the students. Then he showed this slide:



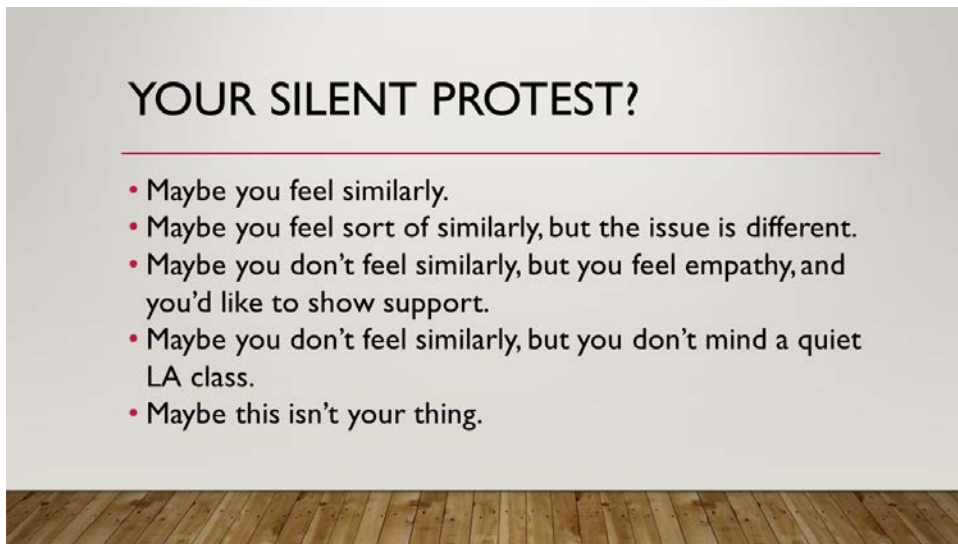


Figure 1. Talbot's slide framing potential students' personal motivations for participating in the Day of Silence.

The last slide read: "Today is about what you want it to be about. Give some thought to what you want it to be about."

In all classes, Talbot followed his lesson plan, using slides to lead various activities without talking. Ninth graders participated in a four corners activity, standing in different corners of the room to express identity group memberships along multiple prompts, then a seated individual writing exercise, and finally a gallery walk activity with identity objects students had brought. Tenth graders revised a partner's writing, then their own work. Each class closed with an exit ticket about their learning through the activities and what the silence felt like or meant.

#### **4.2 Collective Silence and Performance as Assets for Counter-socialization: Agency Within Constraints**

While an obvious constraint on instruction, for Talbot, silence became a counter-socialization tool because of the personal meaning, collective experience and larger activist context his performance and metaphor made available. Mobilizing DoS in this way clearly depended on trusting relationships with students, being willing and able to engage with this performance and ritual. As with studies of peer-based political socialization (e.g., Gordon & Taft, 2011), Talbot understood that many students were already engaged in multiple forms of activism and would create their own meanings for DoS participation, independent of adult-led efforts. He hoped that his personal connection to the event and the performance of silence could facilitate student meaning, not bound it.



Experiencing DoS as a performance and protest held clear promise for Talbot's goals of counter-socialization of heteronormativity – but such framing also represented a contextual constraint. In his initial request, Talbot asked students for feedback "to make this work well, because the last thing I want is for this to just seem like an empty exercise in phony activism." His references to "posturing" and "phony activism" held special salience at Douglass High, where student use of the word "performative" to mean "doing something for self-aggrandizement, without doing anything meaningful" became widespread, especially after teachers posed for a newspaper photographer wearing Black Lives Matter t-shirts during February's Black History Month. Talbot wanted to "put some skin in the game" while avoiding being "preachy" or "telling students what to think." By sharing his personal reasons for participating in DoS and then "do[ing] something about it" by promoting broader awareness, Talbot could engage civic action around heteronormativity and other exclusions. That no other student groups or teachers planned to participate may have heightened the contrast of his participation.

When every student chose to participate in silence, and when "almost 100%" described this performance of silence as personally meaningful on their exit slips, Talbot experienced "a paradigm-shifter" in teaching agency. Talbot cited three patterns of student responses that confirmed his DoS lesson as a counter-socialization endeavor. First, students voiced: "I'm not alone," whether LGBTQ-identified themselves, or silenced by other identities such as race or gender. On exit slips, two students came out: one as trans, one as gay. The second trend was surprise, particularly from highly privileged and high social status students: "I had no idea people felt this way all the time." The third was appreciation for the opportunity to show solidarity or empathy, to better understand what others regularly experience.

That Talbot's agency relied on student buy-in might represent a constraint, but students' meaning-making with DoS also deepened his pedagogy's transformative potential. This outcome clearly relied on the careful planning, relevant personal experience he shared, opportunities for choice that he embedded in student participation, and multiple avenues for students to discuss the event in advance. Prompted by students' exit slip feedback, Talbot shared new goals for queering his pedagogy and its impact across the school: making DoS participation an annual classroom ritual, encouraging colleagues to participate, adding curriculum on queer history and topics, and experiential learning on other identity-based topics. This was a marked shift from his first interview, when he described preference for queer pedagogy being "in the air" through brief comments and anecdotes, rather than part of explicit curriculum. While he first described the silence as "very isolating," and "lonely" that day after school, the silence did serve to deepen classroom community and relationships. Two months after, he reflected:

Now, the story that I'm telling myself about [DoS] as something that we all did together... I perceived it to have been a part of [students'] history of the class, too. They're like, "Oh, we did the Day of Silence" [in their unit summaries]. ... they firmly put [DoS] there and treated it like another learning activity, like right alongside other assessments.



Here, students claimed ritual ownership: *they* (not just the teacher) "did" the silence, and thus facilitated its meaning. Unlike school-based rituals that encourage but may not require students' ritual participation in significant depth, DoS here *required* every student's participation to function. Task "completion" necessitated a personal motivation beyond compliance because of the conscious demands of staying silent for 55 minutes, surrounded by peers. With that collectively chosen constraint, students enabled different meaning and learning than if some students had talked. The ritual became "our silent day," Talbot reported, adding that every class included DoS in their end-of-year reflections. These student actions may indicate lasting relevance of the ritual to their lives and learning, consistent with Talbot's aims.

Lastly, Talbot saw his outness and queerness as assets for his teaching agency, rather than emphasizing their constraints or liabilities. Because of his "out" identity, colleagues and students (including not his own) regularly sought him out as a resource on LGBTQ and other social justice issues. He drew on his experiences of marginalization to facilitate trusting rapport with students marginalized in other ways. Finally, queerness as an identity informed a social analysis consistent with counter-socialization, he explained:

To me, being queer means that I was rejected by society in such a formative way that I have become so critical of pretty much *every* institution, that I look back on it now with a lot of gratitude. Like getting kicked out of the world, means that you look back at the world, and you kind of pick and choose what you want and what you don't want... My queerness is so formative, I'm an outsider permanently. And I really like that....What that means for me, is that other outsider kids, I got them. I can relate to them.

As Talbot explains, his experiences as an "outsider" queer are consistent with counter-socialization: converting injustice into agency and new understandings. The ability to "pick and choose" may reflect his other privileged identities: as male, White, cisgender, etc. that he frequently references with his teaching in this context. Yet being queer fundamentally shaped Talbot's "critical" socio-political consciousness to "look back at the world," enabling closer connections with marginalized others.

### **4.3 Student-Centered Pedagogy and Tracking: Agency within Contested and Ambiguous Spaces**

While he navigated many ambiguous school spaces, Talbot saw his classroom as the most significant – and contested – space for counter-socialization that he could influence. This ambiguity reflected two contextual and political aims. First, Talbot's counter-socialization teaching goals required the centering of student discourse and leadership in multiple forms, from all students rather than those most frequently valued in schools. While his role as teacher positioned him as authority, student-centered methods and emphasis on multiple perspectives meant a contestation of that singular power or expertise because of how student relationships, engagement and action were prioritized in his decision-making and pedagogy. Talbot's detracked



classroom also represented a stark contrast to the larger school's marked segregation along racial, socioeconomic and academic tracking lines.

Building relationships across differences of gender, sexual identity, race and class were key classroom goals for Talbot, but segregated school structures consistently proved an obstacle. Douglass High's location in a rapidly gentrifying, historically Black neighborhood set the stage for tensions in school. "Black Balcony" and "White Hall" served as physical reminders of the prevalence of racial segregation, which tracking around honors and AP courses only deepened in the past three decades. These trends were exacerbated by feeder school tracking and socialization, which in Talbot's view, taught some students, especially the White and/or affluent, that they were "worthy" of responsive, student-centered instruction while others, especially students of color and/or low-income students, were not. For two years, Talbot worked with a detracking team, despite district-level opposition, to develop a detracked English/Language Arts and Social Studies in ninth grade. This experience directly informed his goals of interdependence and effective communication across differences, outcomes he related to necessary literacy and human skills.

Talbot's instructional choices – focusing on significant social issues using student-centered discussion (Engle & Ochoa, 1988) and cooperative learning – drew from those goals and offered regular student voice opportunities. Consistent with Cohen and colleagues' (1999) focus on interdependent, equitable relationships to minimize differences in student status, his methods typically included complex instruction and project-based learning, restructuring student interaction patterns. All too aware of the social re-segregation that can occur in detracked classrooms using cooperative learning strategies (see Rubin, 2003), Talbot sought methods to avoid reproducing the inequities so prevalent in his context. He understood that students who experience regular violations of rights in schools or society, as Rubin (2012) shows, may see a conflict between lived realities and democratic ideals – a sense of disjuncture – while those who experience congruence must move from complacency to an awareness that change is needed for equity and fairness.

Talbot worked to "engineer" relationships and trust across difference through seating and partner arrangements with chosen and assigned pairs, project-based learning that required outside-of-class communication, various in-class committees, weekly rotating discussion leaders and early, intensive community building activities. His *Romeo and Juliet* unit with performances that students planned and cast, illustrated how fundamental student-centered interactions across identities are for his pedagogy:

I'm thoughtful about really diverse groups. I couldn't do it if there wasn't a community. Standing and acting Shakespeare in front of [30+ people]... It's risky. There's lots of examples of people going through the motions. Like, 'I have to do this at school,' but not a single one of my students did that... The buy-in was really great. That's, I would argue, 'cause they love each other... the things I wanna do, I can't do unless the community is there.





By April, Talbot's students had experienced a classroom community that regularly expected they share their voices, lead and take risks, rather than "going through the motions." As Pace (2015) describes, Talbot's teaching goals depended on student relationships with him and with each other: moreover, students stay engaged in challenging learning "because they love each other." Centering student discourse – while developing rapport and skills – was essential for pursuing Talbot's counter-socialization aims.

#### 4.4 Unexpected Structures Enabling or Containing Teacher Agency

Talbot clearly felt that the Day of Silence as a movement and annual ritual offered a unique structure that supported his teacher agency and facilitated student meaning-making around the civic exclusion of LGBTQ people and others. In his recounting, participation functioned as a personal inquiry or experiment for him and many students, one requiring changes in social and academic behavior. Sustaining silence for 55 minutes in a close-knit class accustomed to plenty of interaction represented an impressive force of will for most teens. Unlike the middle school students in Murphy's (2016) account, no rule or authority figure enforced silence: students themselves set and maintained that expectation as a norm, and even developed their own spontaneous norms. The absence of talk, a shared ritual, and chosen experiential learning all became crucial for utilizing DoS for counter-socialization, Talbot explained:

[DoS] should be just one day a year and it should be focused on LGBT issues... It's so *valuable* but I also wouldn't want it to feel normal. So what I want to do is think of ways to empower students to have experiences like this but that aren't this.

Such experiences, Talbot noted, should extend to other experiences of identity-based exclusion relevant to schools and society.

Expanding the ritual's purpose facilitated deeper intersectional thinking and relationships of trust, particularly with students of color. Talbot emphasized that his biggest lesson post-DoS was on intersectionality: "it's crucial that I remember where I fall" in terms of power and privilege based on identities. When Talbot framed the ritual with his own experiences of civic exclusion and connected this to other forms of marginalization, other marginalized students – particularly by race – seemed to interpret his actions as consistent with empathy or communal concern for them, rather than "performative" social justice interests. He reported a sticky note conversation during DoS with one Native American<sup>5</sup> student, who he had struggled to consistently engage academically and socially, but on this day, chose to do the work and interact with Talbot with unusual warmth. Another student, a queer woman of color notorious at Douglass for publicly critiquing teachers' ignorance, stopped by after school to chat: Talbot saw this ritual as enabling a "breakthrough in [their] relationship." Broader impacts that Talbot reported in the final interview included trends of greater warmth in student relationships with each other, more unexpected student partner selections across identity groups, and more willingness to "call each other out" and share bravely in class.



Perhaps the most surprising structure supporting Talbot's agency during DoS was a school-wide sports assembly that morning. When Talbot chose to stand by the gymnasium's central doors instead of monitoring students at the sides, his highly visible position and silent contrast to chatting colleagues made his participation and commitment public. The assembly also included a collective moment of silence for DoS, led by a student government officer. While it lasted only one second, for Talbot's purposes, the attention was helpful for heightening the event's visibility and easing students' transitions into his classroom.

Even with the school's reputation for a "liberal hive mind," the absence of support for DoS or other initiatives countering heteronormativity at Douglass, and in the district, remained a limitation for Talbot's agency. The site did not offer a contrast to the homophobia of predominantly White and affluent schools studied (e.g., Mayo, 2004; Pascoe, 2004; Woolley, 2012). While at first Talbot described school administrators as "having his back hard" in the past, his last two interviews referenced "studious neutrality." The one-second recognition at the sports assembly, Talbot's expectation of hallway harassment, a lack of specific resources from the district's LGBT<sup>6</sup> office, and unreliable district and school administration support indicated that the context's assumed liberalism did not offer LGBTQ people dependable protection or legitimacy. Even Talbot's own expectations may have been normed around exclusion, like teachers in Mayo's (2004) study. Toomey and colleagues (2012) report that LGBTQ students "may experience this type of victimization [harassment or bullying] but feel that it is expected and thus do not consider it when rating the overall school climate" (p. 193). Nevertheless, Talbot recognized his agency to support other school-based structures for LGBTQ needs and agreed to advise a new after-school LGBTQ+ Arts Club. Students sought to create this group after disappointments with the school's GSA, and their student-led discussions of LGBTQ media and issues fostered a "third space" for queer critical pedagogy (Mayo, 2013) and challenging heteronormativity.

## 5 Discussion

Planning and participating in DoS enabled a "paradigm-shift[ing]" experience in counter-socialization and teaching agency for Talbot when all of his 150 students chose to participate. Although heteronormativity indeed relies on silences to prop up and reproduce its own privileges, as Woolley (2012) eloquently insists, the collective silence here represented a shared practice of dissent (Schmidt, 2013) that implicitly – and for some, explicitly – challenged heteronormativity in schools. Nearly all students identified personally meaningful or "transformative" value from DoS participation, and spontaneously included it as central to their learning and classroom community months later. For Talbot, this meant his counter-socialization goals were met, more effectively than if only he or a few students had been silent. These outcomes certainly relied on caring relationships built and maintained over time, and student-centered instructional practices. Also, Talbot's ability to contextualize the purpose of DoS through his own experiences of civic exclusion, his scaffolding to support students in discussing and deciding whether and how to participate independently, and his move to broaden the day's symbolism to any identity silenced in schools



reflected his courage and desire to forge deliberate meaning with students. In choosing to participate, students who were multiply-privileged could realize how infrequently they felt silenced, while many multiply-marginalized peers found greater trust and connection.

Participating in DoS thus supported civic relationships based on awareness of privilege, and a shared effort to deepen trust and communal concern, attributes that political philosopher Danielle Allen (2004) describes as crucial for democratic citizenship. Perhaps ironically, framing DoS as a potentially shared teacher-student experience, rather than an individual one, may have helped students feel ownership, while increasing teacher self-perceptions of agency. Unlike other school holidays, the shared decision on if/how to participate enabled both teacher and students to claim the ritual as "our silent day." In contrast to recent student-focused studies (e.g. Woolley, 2012; Young, 2009), these results indicate that Day of Silence participation can be a thought-provoking tool for counter-socialization teaching when it centers queer silences, questions heteronormativity, and engages intersectional meanings.

Importantly, this teacher's intentional, reflective use of his "out" queer identity offered a significant asset for democratic social education and counter-socialization. Though being "out" may often be perceived as a constraint or weakness for educators, Talbot leaned on its pedagogical possibilities with DoS and beyond. Queer pedagogy and counter-socialization teaching drew on his life experiences of civic exclusions, which cemented the goals of empathy, trust and communal concern in his classroom. While already "out," Talbot's courage to take action, and personally contextualize the event, demonstrated teacher vulnerability and explicit social critique: a practice of critical consciousness (Ladson-Billings, 1995; 2014). Instead of (simply) telling about himself, Talbot *showed* how to harness personal experiences of marginalization as fuel for deepening relationships and taking action (through teaching and DoS participation) for social change.

## 6 Implications

While educational research and social education literature generally emphasize constraints and risks for "out" LGBTQ teachers, this study reveals important affordances, particularly for critical social education pedagogy and teacher agency. This is not to suggest that all LGBTQ teachers should or must come "out," regardless of contextual consequences, rather that those doing so in thoughtful connection with civic curriculum may offer specific assets in social education. Talbot's results of transformational meaning-making from DoS represent valuable pedagogical tools that may only become available when "out" queer perspectives and civic experiences are validated and centered. Talbot's methods – participating in the Day of Silence as a performance and protest informed by queer theory and disclosure of civic exclusion – drew on his queer identity, community, and culture as assets for building students' socio-political or critical consciousness (Ladson-Billings, 1995; 2014).



Similarly, this study does *not* indicate that only LGBTQ people can enact meaningful counter-socialization teaching around the Day of Silence, rather that queer theory and pedagogy can support more meaningful civic education through this event, and throughout a curriculum. These findings echo many queer scholars' critique of inclusion and tolerance discourses as solutions to the violence experienced by those identified or perceived as LGBTQ (Blackburn & Smith, 2010; Meyer, 2010; Reddy, 2011), and their limited value in critical civic education. What did contribute to meaningful counter-socialization teaching and agency was prioritizing experiential learning designed to promote empathy, trust and communal concern. Drawing on queer theory to craft experiential learning activities was a key tool for Talbot's framing and experience of the DoS as a shared silent ritual performance. His instructional design aligned with Mayo's (2017) goals of asserting LGBTQ legitimacy and dignity through experiences that position LGBTQ people as "more familiar, viewed as fellow human beings instead of a 'category'... easily objectified and rejected" (p. 266). Practices of adopting and "hearing" the experience of often-silenced others may be a broadly powerful tool in counter-socialization teaching.

Knowledge of geopolitical local contexts (Camicia, 2016) and local practices (Nasir & Hand, 2006) are also crucial for navigating the opportunities and constraints of LGBTQ teacher self-disclosure choices, even more than regional or legal context, as Connell (2012) argues. Social education needs a much wider range of contextual research on LGBTQ education to understand when and how "out" identities serve as assets. To what extent did Talbot's "out" identity and counter-socialization curriculum function this way because of his liberal urban school, district and state? Importantly, his geopolitical context limited his agency and did not insulate him from harassment, despite the clear contrast intended with site selection. Additionally, queer students of color were among those most marginalized in Talbot's school - even in LGBTQ-led spaces - consistent with recent research (Burdge, Licona & Hyemingway, 2014; Diaz & Kosciw, 2009; Kahn et al, 2017; Singh, 2013).

Further studies of teacher participation in DoS and other LGBTQ education efforts from a range of contexts are necessary to build broader understanding of educational approaches that challenge the civic paradox and position LGBTQ identities as legitimately civic, not inherently controversial. This study joins Cahill (2012) and Irvine (2012) in calling for IRB reforms to access student thinking about and experiences of LGBTQ identities, as this study's district approval process illustrates. In particular, focusing on the strategies and resilience of queer educators of color and others who are multiply marginalized may offer insights for when and how being "out" works as a constraint on teacher agency (Brockenbrough, 2016) and/or as an asset. Such research may illuminate how "out" teachers' identities shape counter-socialization and socio-political consciousness approaches, and when that agency may depend on other aspects of identity, such as race or class, being privileged in their school context and in broader spheres.

Since student participation and meaning-making became crucial for both Talbot's goals for the DoS and for his sense of teaching agency, this study also points to the need for models of teaching agency that incorporate student relationships, engagement and action. As Talbot explained: "the



things I wanna do, I can't do unless the [classroom] community is there." Teacher dependence on students for meaningful, rigorous classroom outcomes and experiences may increase in socioculturally diverse classrooms, Pace (2015) argues, and the task of fostering classroom harmony without suppressing student discourse or diminishing expectations remains a perennial teaching challenge. Those students and teachers experiencing the most acute consequences of this civic paradox, in combination with other marginalized identities in classroom communities, may be best positioned to show how civic exclusions function and how they might be unlearned, in classrooms, schools and beyond.

Finally, this study joins Mayo's (2017) call for social education research that can give voice to queer people silenced over time, helping teachers, students and fellow scholars make sense of national and global narratives about LGBTQ identities and how such narratives impact people's lives. For LGBTQ students and teachers, when social education fails to address their lived realities – the civic paradoxes they face in schools and society – such curriculum and learning become irrelevant, alienating and even damaging (Beck, 2013; Camicia, 2016). Sidelining or dismissing queer studies as irrelevant and LGBTQ issues as "controversial," as Snapp and colleagues' (2015) recent curriculum findings demonstrate, may make our discipline complicit in the ongoing injustices LGBTQ individuals (and those perceived as such) face in schools and beyond. Counter-socialization instruction that promotes communal concern, in Allen's (2004) terms, remains an urgent tool for civic education - one necessary to counteract the civic paradox upheld in schools and society through heteronormativity.

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## Endnotes

<sup>1</sup> Countries including the Netherlands have created their own events (Day of Silence, 2018).

<sup>2</sup> LGBTQ stands for Lesbian, Gay, Bisexual, Transgender, Queer. While numerous identities related to gender and sexuality are often added to this acronym, and/or recognized through queer as an umbrella term, I generally use LGBTQ in this paper because those are the identities that the Day of Silence explicitly centers.

<sup>3</sup> Pseudonym.

<sup>4</sup> In the United States context, tracking is the separation of students into separate academic pathways and classes, for all or specific subjects. This article focuses on within-school tracking, though among-school tracking and post-secondary tracking are also significant phenomena in the U.S. See Leonardo and Grubb (2014) for a useful introduction.

<sup>5</sup> Native Americans are Indigenous peoples of North America, specifically in U.S. geography, "who have inhabited lands before colonization or annexation; have maintained distinct, nuanced cultural and social organizing principles; and claim a nationhood status" (Castagno & Brayboy, 2008, p. 983).

<sup>6</sup> The school district program office name relates to LGBT identities, but does not include the Q for queer.

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## Character Education for Social Action: A Conceptual Analysis of the #iwill Campaign

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- Applies Aristotelian character education to youth social action.
- Analyses the quality principles of #iwill, a cross-sector collective impact campaign in the UK.
- Suggests how Aristotelian insights can frame a habit of reflective and impactful social action.
- Reconceptualises the relationship between individual and community benefits of social action.
- Provides a conceptual framework that can be useful for other social action campaigns.

**Purpose:** This article integrates two distinct discourses to show how an Aristotelian account of character education can supply a valuable framework for developing a habit of social action.

**Approach:** We use a review of relevant secondary literature, a documentary analysis of #iwill materials, and an Aristotelian conceptual framework to analyse the quality principles of the #iwill campaign—a cross-sector, cross-party collective impact campaign that encourages youth social action in the UK.

**Findings:** We show how an Aristotelian account offers useful resources for conceptualising and applying #iwill's six quality principles and addresses four practical and theoretical challenges in #iwill's model. In particular, an Aristotelian account provides a more capacious conception of a habit and offers a revised model for understanding social action's benefits to individuals and communities.

**Practical Implications:** With over 800 partner organizations in the UK, #iwill has a significant impact on how social action is practised and supplies a valuable model for other campaigns to follow. By informing #iwill's quality framework, this Aristotelian account seeks to amplify efforts to cultivate social action as a virtuous habit for life.

**Keywords:** character education, social action, habit, #iwill, Aristotle

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## 1 Introduction: Youth Social Action in the UK

In recent decades, governments, schools, and non-profit organizations in the UK have actively encouraged youth to engage in social action—an umbrella term used interchangeably with ‘volunteering’ that refers broadly to activities that help or serve other individuals, the community, or the environment. While social action campaigns have increased youth involvement, these efforts occasionally lack a cohesive framework for conceptualising and cultivating social action as an enduring habit, even as they aspire to do so in practice. This article argues that an Aristotelian account of character education can supply a valuable conceptual framework for identifying and developing a habit of social action.

In making this case, this article seeks to overcome a divide in how character education and social action are typically promoted and practised. Often, practitioners of character education construe character individualistically without proper attention to the social sources and impacts of individual development (Kisby, 2017). Meanwhile, an Aristotelian account of virtue has not yet been explicitly applied to the quality principles of youth social action. We aim to bring these discourses into conversation and explore what an Aristotelian account can contribute to practical efforts to improve and increase social action. In this way, this article adds to extensive literature on youth volunteering in the UK (see Hill, Russell and Brewis, 2009) and contributes to the *Journal of Social Science Education’s* efforts to provide a ‘bridge’ between character education and citizenship education (see Davies, Grammes, and Kuno, 2017, p. 2, and the other articles in *JSSE*, 2017-3; see also Althof and Berkowitz, 2006).

To advance our analysis, we apply an Aristotelian approach to the quality principles of the #iwill campaign, a cross-sector collective impact campaign in the UK that seeks to improve the quality of social action opportunities, shrink the socioeconomic gap in participation, and increase participation in ‘meaningful’ social action by 2020.<sup>1</sup> Coordinated by the charity Step Up To Serve, the #iwill campaign aims to make social action a ‘habit for life’ (Step Up To Serve, 2014). Established in 2013 following a review commissioned by then Prime Minister David Cameron, the #iwill campaign enjoys cross-party support. It is backed by HRH The Prince of Wales and was referenced in the manifestos of both the Conservative and Labour parties before the 2015 election (#iwill, 2017).

#iwill offers a relevant object of analysis for three reasons. First, #iwill has developed a sophisticated conceptual framework for quality social action that promotes both individual and community benefits and seeks to make social action a habit of character, integrating discourses around social action and character education in ways that transcend typical divides. Since non-formal educational opportunities have been identified as promising areas for integrating character education and citizenship education among youth (Park, 2017, pp. 25–27), #iwill’s efforts to combine character and social action stand as a particularly relevant model for this work. Second, with over 800 partner organizations, #iwill has a significant impact on how social action is conceptualised and practised in the UK and potentially beyond. Third, #iwill enjoys widespread political support and has an ambitious goal of making social action the norm among 10–20-year-olds, which means it has the potential to make an impact across political and cultural divides. For these reasons, the #iwill campaign constitutes a valuable object of analysis and a potentially useful model for other campaigns to follow. Closer analysis of #iwill’s quality framework, however, reveals conceptual challenges in integrating



and applying the model that an Aristotelian account of character education can help to address.

Our argument proceeds as follows. Section 2 presents an overview of #iwill's 'six quality principles' as they relate to developing social action as a 'habit for life'. Section 3 identifies four aspects of #iwill's framework that would benefit from conceptual clarity. Sections 4 and 5 highlight how an Aristotelian account of virtue can clarify and expand #iwill's quality principles and address the four challenges of conceptualising and cultivating a habit of social action.

## 2 #iwill's Quality Principles

#iwill is informed by extensive research on how to ensure both the quality and impact of social action. In the campaign's early days, stakeholders from the voluntary, education, and business sectors undertook a literature review on social action, conducted interviews with stakeholders, and studied 50 existing quality assurance frameworks to develop a quality framework for youth social action. Their three-part framework includes 1) a definition of social action, 2) an outcomes framework for individuals and communities, and 3) six quality principles that 'define great youth social action' (The Campaign for Youth Social Action, 2013a, p. 6).

The #iwill campaign defines social action as 'young people taking practical action in the service of others in order to create positive social change that is of benefit to the wider community as well as to the young person themselves' (The Campaign for Youth Social Action, 2013a, p. 6). Social action encompasses activities such as fundraising, campaigning, tutoring, coaching, mentoring, supporting others (not friends or relatives), helping to improve the local area, and giving time to help a charity or cause (Cabinet Office and Ipsos MORI, 2016). Central to the #iwill campaign is the concept of a 'double benefit', whereby social action benefits both the person helping and the community, cause, or person being helped (The Campaign for Youth Social Action, 2013a, p. 7, 10–13; see also Snyder and Omoto, 2007, p. 955).

The double benefit model is represented in the outcomes framework in Figure 1. The outcomes for individual participants are grouped into three broad categories: 1) optimism, 2) determination, and 3) emotional intelligence.<sup>2</sup> The community outcomes are broader and include benefits ranging from increased voting and civic participation to better health, employability, and educational engagement (The Campaign for Youth Social Action, 2013a, p. 7, 10–13; 2013b, p. 14).<sup>3</sup>

Benefits for the individual		Benefits for the Community
Optimism	Communication	Can be wide-ranging, from civic participation, health, educational engagement to safer communities, sustainability, voting, resilience and employability.
	Creativity	
Determination	Confidence and Agency	
	Planning and Problem Solving	
	Resilience, Grit	
Emotional Intelligence	Leadership	
	Relationships	
	Managing feelings, Self control	

Figure 1: #iwill’s outcomes framework (The Campaign for Youth Social Action, 2013a, p. 7)

To achieve these benefits, #iwill developed six quality principles identified in Figure 2. Quality social action should be 1) reflective, 2) challenging, 3) youth-led, 4) socially impactful, 5) progressive, and 6) embedded.



Figure 2: #iwill’s six quality principles of youth social action (Step Up To Serve, 2014)



## 2.1 Progressive

The ‘progressive’ principle holds that social action ought to be developed and maintained over time. It entails that youth should be directed to multiple opportunities for ongoing social action so they are engaged in a journey rather than one-off experiences (Generation Change *et al.*, 2014, p. 16).<sup>4</sup>

In practice, social action providers have created an ‘engagement pathway’ to guide youth through projects requiring ‘increasing levels of responsibility’ (Ibid., p. 21). One provider—The Key—uses a four-stage approach where students must complete work at the lowest stage before progressing to increasingly challenging projects (Ibid.). Others have mentors and coaches that ‘support young people to take the next step’ upon completing a project, while some showcase alumni and highlight skills for future education and employment (Ibid., p. 16).

## 2.2 Youth-led

The ‘youth-led’ principle encourages social action to be ‘led, owned and shaped by young people’s needs, ideas and decision making’ (Ibid., p. 15). That social action is ‘youth-led’ encourages participants to exercise their agency, contribute their ideas and voice, and take ownership in choosing, participating in, and leading social action (Ibid.). In a content analysis of 23 providers’ external communications, ‘leadership’ was the second most common virtue they claimed to develop and one of the most important capacities that youth themselves said they develop (Arthur, Harrison, and Taylor, 2015, pp. 11–13).<sup>5</sup>

Providers have implemented the youth-led principle in various ways. Some emphasise the planning stages in which youth’s needs and opinions inform which causes to support and strategies to implement. Others focus on the execution stage, letting ‘young people make [their] own decisions’ to lead the project or training staff to guide younger participants through planning and execution (Generation Change *et al.*, 2014, p. 15).

## 2.3 Reflective

‘Reflective’ social action involves youth reflecting on what they learn through their social action and considering ways to improve (Ibid.). Compared to 30 other concepts studied by Arthur, Harrison, and Taylor (2015, pp. 11–12), reflection was the seventh most common practice mentioned in providers’ external communications, though, strikingly, it was not prioritised by any CEO of those providers when interviewed.

#iwill’s ‘reflective’ principle includes both into reflection and recognition. In terms of reflection, Envision uses a ‘Skills Passport’ whereby adult volunteers help students articulate and understand the ‘qualities they’ve developed during the programme’ (Generation Change *et al.*, 2014, p. 23). Other providers—such as London Youth—incorporate a reflective element for staff and use an impact questionnaire to assess how participants develop traits of confidence, resilience, and leadership (Ibid.).

Recognition is also a core part of many youth social action programmes. The Russell Commission even recommended a framework of accreditation and rewards that included a ‘personal development and progression plan’, a Youth Achievement Award, and ‘a direct link





between full-time volunteering and vocational qualifications' (2005, pp. 87–90). Thus, the Duke of Edinburgh's Award, vInspired, and Diana Award all reward exemplary youth social action, and #iwill recognises the social action work of 50 outstanding youth each year as #iwill Ambassadors (#iwill, 2016). Other providers recognise youth through ceremonies such as graduation or 'waymarkers' such as uniforms and badges (Generation Change *et al.*, 2014, p. 15).

## 2.4 Challenging

The 'challenging' principle holds that social action should be 'stretching and engaging, as well as exciting and enjoyable' (The Campaign for Youth Social Action, 2013a, p. 6). #iwill argues that challenging social action stretches participants in meaningful ways while helping them understand and address social and political challenges that affect particular communities.

The 'challenging' principle has been implemented in numerous ways. Some providers emphasise the amount and intensity of social action, tailoring the level and difficulty to participants' aptitudes to stretch their skills and experiences (Generation Change *et al.*, 2014, p. 16). City Year UK, for example, offers an intense year of service where 'challenge is crucial to the year's appeal' (*Ibid.*, p. 19). Others focus less on the intensity of the work than on the types of problems addressed. By 'meeting people from different backgrounds' or participating in experiences that participants would 'not typically have elsewhere at school or home', youth are challenged to think critically about their assumptions and expectations, try new things, and confront difficult problems (*Ibid.*, pp. 16, 19). Others engage participants by incorporating competitive elements into their programs (*Ibid.*, p. 16).

## 2.5 Embedded

The 'embedded' principle entails that social action should be 'accessible to all and well integrated into existing pathways to become a habit for life' (*Ibid.*, p. 14). This reflects the importance of integrating social action into familiar aspects of a young person's life—including families, social networks, and religious communities; schools, colleges, and universities; and apprenticeships, internships, and jobs. Embedding social action in existing communities and integrating it into aspects of everyday life minimises barriers to participation, makes social action more accessible and inclusive, and fosters genuine engagement within existing communities.

Although the progressive principle has theoretical links to developing the habit of social action, in practice providers connect habituation to the embedded principle. Some focus explicitly on developing a habit that will 'last into adulthood' by valuing habituation in the organization's operational strategy and mission statement (*Ibid.*). Some providers seek to involve youth in social action at critical transition moments, such as changing schools, leaving school, or starting a job (*Ibid.*). Others graft social action programmes onto existing youth groups, networks, and services to make 'the activity more accessible and visible' (*Ibid.*). Similarly, some providers encourage social action through 'positive peer pressure' and 'role models', which 'helps normalise the activity and make it aspirational' (*Ibid.*).



## 2.6 Socially Impactful

Finally, social action should be ‘socially impactful’, having ‘a clear intended benefit to a community, cause or social problem’ (Ibid., p. 17). At the core of this principle is the ‘double benefit model’, which ensures that social action benefits youth participants as well as the individual, community, or cause being helped.

Providers have taken varied approaches to ensuring social impact. Some use evidence-based assessments of local challenges to determine which issues to address, while others prioritise community partnerships and ‘beneficiary led interventions’ that rely upon ‘input and direction from the people they hope to benefit’ (Ibid.). Others emphasise measuring project outcomes through ‘before and after comparisons’ to assess whether efforts have achieved, and might continue to achieve, the desired social impact (Ibid.).

## 3 Toward Conceptual Clarity

#iwill’s commitment to promote a habit of social action that aligns with the six quality principles constitutes a significant achievement and valuable model for other campaigns to follow. Yet—as anticipated at the start of the campaign<sup>6</sup>—theoretical and practical challenges have arisen as the framework has been applied, tested, and evaluated. Building on work done by the Jubilee Centre, along with a review of relevant secondary literature, a documentary analysis of #iwill materials, and the application of an Aristotelian conceptual framework, we wish to highlight four aspects of #iwill’s framework that would benefit from additional conceptual clarity.

First, social action providers tend to operate with a limited view of a habit. For providers, ‘habit’ often refers to frequency of behaviour and intention to participate in the future.<sup>7</sup> While intentions are important for habit formation, intentions alone do not constitute stable and enduring dispositions, and evidence suggests they prove unsuitable as a single measure of habit when behaviour is tested (Marta *et al.*, 2014; Snyder and Omoto, 2007). Moreover, by emphasising behavioural outcomes (future participation in social action), this conception of a habit downplays the emotional, motivational, and dispositional aspects emphasised in #iwill’s mission and outcomes framework. While psychologists (Ajzen, 1991; Verplanken and Orbell, 2003) and philosophers (Miller, 1974; Ravaisson, 1838; Snow, 2010; Steutel and Spiecker, 2004) have sought to define and measure a habit in a range of areas, this work has only recently been applied to youth social action (Arthur *et al.*, 2017). It is too soon to tell whether or how this recent research will inform practitioners’ work, though it was conducted in partnership with the #iwill campaign and involved major providers including NCS, vInspired, Envision, and the Diana Award.

Second, many providers are unclear about how the two spheres of the double benefit model relate. While #iwill clearly outlines the intended individual benefits (optimism, determination, and emotional intelligence), community outcomes remain more ambiguous. This owes partly to the difficulty of using standardised quantitative instruments to measure the diversity of activity within #iwill’s broad definition of social action (Tyler-Rubinstein *et al.*, 2016, p. 12).<sup>8</sup> While this ambiguity is understandable, the lack of specification in community outcomes is



potentially problematic for two reasons: first it risks overemphasising individual outcomes at the expense of community outcomes, and second the separation of individual and community outcomes potentially neglects the fundamentally social sources and impacts of individual development.

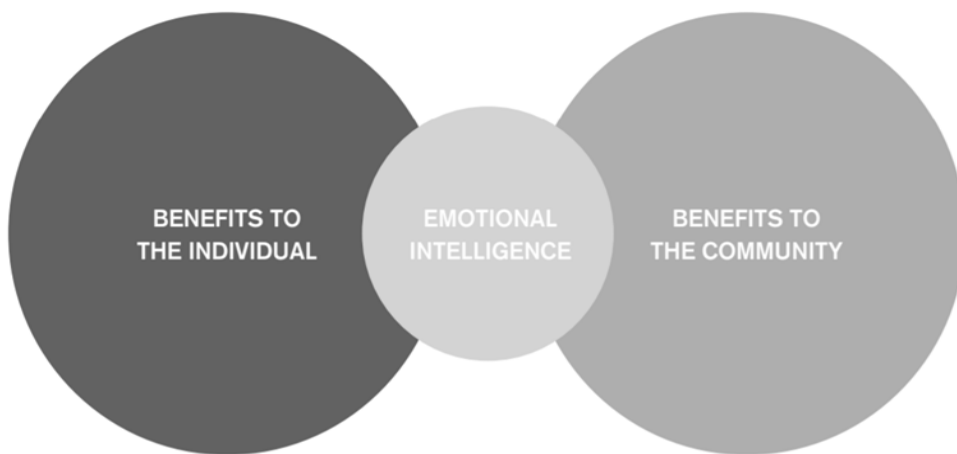


Figure 3: Original double benefit model (Arthur, Harrison, and Taylor, 2015, p. 16)

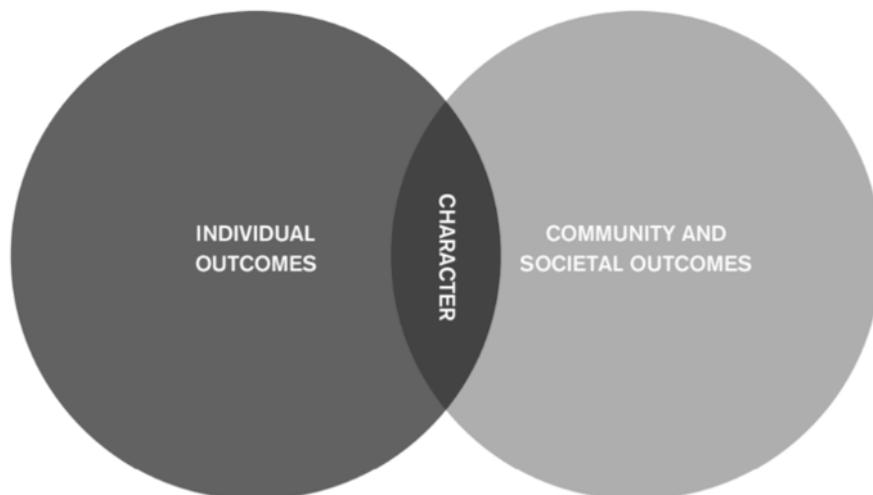


Figure 4: The Jubilee Centre's revised double benefit model (Arthur, Harrison, and Taylor, 2015, p. 23)

The original double benefit model (Figure 3) positioned individual outcomes as separate from community outcomes, with 'Emotional Intelligence'—defined as social awareness and empathy—linking the two (The Campaign for Youth Social Action, 2013a, p. 12). However, more recent studies by Generation Change *et al.* (2014, p. 12) and Arthur, Harrison, and Taylor

(2015, p. 23) attempt to reconfigure the double benefit model (Figure 4) by positioning character as the link between individual and community outcomes and recognising a more substantial overlap between the two.

This revised model (Figure 4) coheres with providers' views about their work. Of the CEOs of youth social action providers interviewed by Arthur, Harrison, and Taylor (2015, p. 4), 87% 'said that developing young people's character is fundamental to their organisation's work. Over half said it is their top priority'. Yet many CEOs had not 'necessarily thought about its meaning until prompted in the interview and gave personal rather than organisational definitions' (Ibid., p. 10). If 'character' is to link the double benefit model, #iwill's quality framework would benefit from more clarity about how character is conceptualised and developed.

Third, some providers overemphasise particular virtues. Recall #iwill's three categories of individual outcomes: 1) optimism (communication and creativity), 2) determination (confidence and agency, planning and problem solving, and resilience and grit), and 3) emotional intelligence (leadership, relationships, managing feelings, and self-control) (The Campaign for Youth Social Action, 2013a, p. 11). Noticeably, many of these outcomes are virtues—in particular, *performance* and *intellectual* virtues. Performance virtues are typically defined as 'behavioural skills and psychological capacities that enable us to put many other virtues into practice', while intellectual virtues are those 'required for the pursuit of knowledge, truth and understanding' (Arthur, Harrison, and Taylor, 2015, p. 6).<sup>9</sup> But *moral* virtues—virtues that direct us toward morally good ends, guide our actions, thoughts, and emotions in morally appropriate ways, and 'enable us to respond well to situations in any area of experience'—are largely absent in providers' external communications, though interviews suggest that moral virtues are central to their actual work (Arthur, Harrison, and Taylor, 2015, p. 21).<sup>10</sup> If 'developing young people's character is fundamental to their organisation's work' (Ibid., p. 4), then social action providers might carefully consider which virtues they seek to develop and how they communicate their efforts, and they might include moral virtues alongside performance and intellectual virtues among their intended outcomes.

Fourth, there are potential discrepancies in how #iwill's framework has been understood and applied. For example, there is a significant gap between virtues that participants and providers think they are developing. Arthur, Harrison, and Taylor (2015, p. 13) found that the 'top three virtues prioritised by providers and young people in the interviews and focus groups are, respectively, leadership, citizenship, and service, and confidence, respect, and communication'. This difference highlights the need for more clarity in how #iwill's outcomes framework is conceptualised and applied.

Moreover, the six quality principles have been understood and implemented in disparate ways (Generation Change *et al.*, 2014). Such diversity is expected and even encouraged for campaigns as large and multifaceted as #iwill, but if #iwill seeks both consistency and coherence in the use of its quality framework, additional conceptual clarity could be useful. An Aristotelian account of virtue, we believe, can help to unify the potentially disparate elements of #iwill's quality framework and provide valuable resources for other campaigns seeking to increase the quality of social action.



#### 4 An Aristotelian Framework for a Habit of Social Action

Following the helpful suggestion that ‘character’ is a better link between individual and community outcomes than ‘emotional intelligence’ (Arthur, Harrison, and Taylor, 2015), we seek to specify what ‘character’ might consist of as it relates to a habit of social action. We believe an Aristotelian approach is most relevant for this task. First, the features of an Aristotelian conception of virtue<sup>11</sup> coincide with #iwill’s six quality principles, and an Aristotelian account of virtue as a habit developed over a lifetime tracks #iwill’s emphasis on social action as a ‘habit for life’ (Step Up To Serve, 2014). Second, while some varieties of character education disproportionately emphasise the individual, Aristotelian character education gives proper weight to the communal contexts in which social action takes place (Kristjánsson, 2014b, p. 58; Kisby, 2017). Third, because Aristotelian character education appeals to a universal human nature and aims at a universal conception of human flourishing, it is compatible with a wide variety of approaches and offers ‘an effective cross-cultural currency of moral evaluation’ that is capable of navigating the challenges of cultural differences (Kristjánsson, 2014b, pp. 49–55 at p. 54). Finally, unlike more technical ethical theories, Aristotelian character education demonstrates ‘respect for ordinary moral language’ (Ibid., p. 56), which makes it more accessible to a broad spectrum of social action providers and participants. For these reasons, an Aristotelian virtue theory supplies a particularly useful frame for analysing #iwill’s quality principles.

##### 4.1 Virtue as Habit (‘Habit for Life’)

On a basic Aristotelian account, a virtue is a settled disposition to think, feel, and act reliably toward good ends in the right ways at the right times across different circumstances.<sup>12</sup> Unlike a mere thought, feeling, or act, a virtue is a stable, deep, and enduring quality. It develops over time and forms part of a person’s moral identity and character (Aristotle, 1999, 1105b20–1106a14).<sup>13</sup>

Aristotelians typically understand a virtue as a kind of *habit*—a settled disposition developed over time through habituation.<sup>14</sup> Such an approach implies that the very concept of a virtue is framed by its process of cultivation. An Aristotelian account of virtue is fundamentally ‘developmental’ (see Annas, 2011, pp. 4–5, 16–32, 38; Broadie, 1991, pp. 72–74; Russell, 2015, pp. 17–20).

An Aristotelian account also provides a corrective to a purely *behavioural* conception of a habit that downplays a habit’s *emotional*, *motivational*, and *dispositional* aspects. On an Aristotelian account, a virtue is a habit that disposes one not only to *act* but also to *feel*, *think*, and *deliberate* in appropriate ways (Annas, 2011, pp. 66–82; Broadie, 1991, pp. 75–76, 81–82; Zagzebski, 1996, pp. 126–134). Thus, a conceptualisation of a habit as a more holistic disposition along Aristotelian lines might help to promote the ‘emotional intelligence’ and quality principles that #iwill prioritises.<sup>15</sup>

#### 5 Aristotelian Character Education and the Six Quality Principles



### 5.1 Developmental and Aspirational ('Progressive')

If a moral virtue is a kind of habit, it must be developed through practice, by repeating certain feelings, thoughts, or acts iteratively until they become seemingly automatic.<sup>16</sup> When we possess this habit with sufficient strength and stability, we become reliably disposed to feel, think, or act appropriately when relevant situations arise.<sup>17</sup>

This Aristotelian conception of habituation tracks the #iwill campaign's 'progressive' principle. To reflect a virtuous habit, social action must constitute an ongoing practice, not merely a one-off experience. #iwill promotes progressive social action by directing youth to new opportunities, encouraging them to take the next step after finishing a project, and supporting them through critical transition points—changing schools, leaving schools, starting jobs (Generation Change *et al.*, 2014, p. 16). Together, these efforts provide participants with the consistent and sustained experiences necessary for habituation.

Although #iwill focuses on *youth* social action, it acknowledges the importance of developing the habit into adulthood and ultimately 'for life' (Ibid., p. 14). An Aristotelian account supports this view (1999, 1099b25–1101a22). Given the difficulties, limitations, and contingencies of human experience, Aristotle believes that a complete virtue cannot be fully possessed or perfected in this life.<sup>18</sup> For this reason, an Aristotelian account of virtue is both *developmental* and *aspirational*; it is a habit developed over a lifetime of practice, oriented toward an aspirational ideal (Annas, 2011, pp. 16–32, esp. 25).

This aspirational account of virtue has practical import for the #iwill campaign. If a habit of social action is not simply an *intention* to act but a *disposition* developed over a lifetime, providers might be encouraged to spend more time not only increasing participation in social action (a behavioural outcome), but also helping youth to develop the proper emotional, motivational, and cognitive responses to perform that social action consistently and well over a lifetime.

### 5.2 Learning by Doing ('Youth-Led')

Aristotle's developmental and aspirational account also supports #iwill's emphasis on 'youth-led' social action. In particular, an Aristotelian approach affirms why childhood and adolescence are good times to cultivate a habit of social action and offers a developmental justification for enabling youth to lead.

First, Aristotle holds that the development of virtue should begin early in life (1999, 1095b5–13, 1179b32–1180b7). Otherwise, youth might acquire bad habits that would make it difficult to cultivate virtuous habits later (Ibid., 1179b5–1180a6). While character is always in the process of development (Roberts, Walton, and Viechtbauer, 2006, p. 21), early childhood and adolescence are particularly important times for developing habits that will shape decisions, choices, and character later in life (see Boerger and Hoffman, 2015). This early engagement is relevant for the habit of social action. Arthur *et al.* (2017, p. 5) show that 'those who first get involved in service under the age of 10 were found to be more than two times more likely to have formed a habit of service than if they started aged 16–18 years'.



Cultivating this habit early is especially important given trends among ‘emerging adults’, those between ages 18-29 (see Nofle, 2015). Because emerging adults experience less stability in their jobs, residences, and relationships than previous generations, they can be less embedded in their communities and more ‘self-focused’ (see Arnett, 2000, 2014, p. 159). If #iwill is able to foster social action as a habit in adolescents, participants may be able to resist some of the instability, isolation, and self-focus that often characterise emerging adulthood.

In addition to affirming #iwill’s focus on youth, an Aristotelian account offers a second justification for ‘youth-led’ social action: it ensures that participants have the type of experiences necessary for habit formation. A virtue of character, like a quality habit of social action, cannot be developed merely by reading a book or attending a lecture.<sup>19</sup> To become a stable and enduring part of one’s character, a virtue must be habituated through repeated action—much as one would learn a skill.<sup>20</sup> As Aristotle argues, ‘we become builders, for instance, by building, and we become harpists by playing the harp. Similarly, then, we become just by doing just actions, temperate by doing temperate actions, brave by doing brave actions’ (1999, 1103a34–1103b2).

This Aristotelian insight helps to illuminate a developmental motivation behind the ‘youth-led’ principle. Youth cannot develop a high-quality habit by simply watching a video or participating in a one-off project. They must learn by doing (Generation Change *et al.*, 2014, p. 12). When youth repeatedly exercise their agency in choosing, planning, and leading social action projects, they engage and develop their full selves. This Aristotelian emphasis on development is especially important since, as studies suggest, providers consider ‘leadership’ the most important capacity developed by participants (Arthur, Harrison, and Taylor, 2015, pp. 11–12). To foster such leadership, some providers train staff and provide coaches or mentors to guide youth through the process of planning and executing projects (Generation Change *et al.*, 2014, p. 15). By offering wise mentors and role models, these providers facilitate reflective action, which aligns with another feature of an Aristotelian account.

### 5.3 An Intelligent Habit (‘Reflective’)

While the cultivation of virtue requires habituation, simple repetition of action might foster a routine or mindless habit, not necessarily a virtue or ‘intelligent’ habit (Annas, 2011).<sup>21</sup> As Julia Annas emphasises, to learn and grow from our actions, we must reflect on our experiences, understand how and why we acted in particular situations, and deliberate about how we might act differently in the future (Ibid., pp. 16–40).<sup>22</sup> An Aristotelian account makes reflection central to character formation.

This Aristotelian approach aligns with #iwill’s ‘reflective’ principle. In terms of social action, youth maximise their experiences when they reflect on their actions and consider how their experiences affect themselves and their communities. This dialectic of action and reflection ensures that youth develop an intelligent habit of social action, not simply a mindless routine.

Moreover, this dialectic helps youth develop a habit of practical wisdom.<sup>23</sup> For Aristotle, practical wisdom is the intellectual capacity to recognise the salient features of a situation, deliberate how best to act, and make judgments toward action in particular circumstances (1999, 1140a25–1145a14).<sup>24</sup> Implicit in #iwill’s ‘reflective’ principle is a commitment to



cultivating this virtue of practical wisdom. #iwill does not value the *mere act* of reflection for its own sake but for its contribution to developing a *cultivated capacity*, a virtue that guides this reflection and ensures that social action is performed well. An Aristotelian approach highlights why the virtue of practical wisdom might be added to the list of #iwill's 'individual outcomes' since it is not currently captured by their focus on 'optimism', 'determination', and 'emotional intelligence'.

An Aristotelian approach, moreover, might inform #iwill's understanding of how this virtue is cultivated. Like moral virtues, practical wisdom must be learned by doing—by reflecting on one's experiences and deliberating about how to think, feel, and act in similar circumstances. In addition, Aristotle believes that youth can cultivate practical wisdom by emulating wise role models who can 'see correctly because experience has given them their eye' (1999, 1143a20–b14).<sup>25</sup> An Aristotelian approach thus highlights the need for providers to offer structured opportunities for youth to reflect on their experiences<sup>26</sup> and interact with role models who exemplify virtue and wisdom.<sup>27</sup> Such opportunities are particularly important since reflection is not prioritised by many providers (Arthur, Harrison, and Taylor, 2015, pp. 11–12). An Aristotelian approach, therefore, affirms the work of those providers, such as Envision and London Youth, who do create opportunities for youth to reflect on the capacities they have developed and train their staff to 'support young people to take the next step' (Generation Change *et al.*, 2014, pp. 15–16, 23).

#### 5.4 A Cultivated Excellence ('Challenging' and 'Enjoyable')

Cultivating a stable, enduring, and intelligent habit of social action is not easy. After all, a virtue is a kind of *excellence*, a developed capacity that allows us to act at the limit of our powers and respond appropriately to difficulties (Aristotle, 1999, 1105a8–17; see also Aquinas 1974, I-II.55; II-II.129.1–3). Without such difficulties, a virtue would not be worthy of admiration and praise (Aristotle, 1999, 1109a25–30). That a virtue responds to 'challenges' is thus built into the very structure of Aristotle's aspirational conception of virtue.

This aspect corresponds to #iwill's 'challenging' principle. By encouraging youth to confront challenging social issues, recognise their own biases and assumptions, and think critically about how to respond, providers stretch participants' capacities and push them to the current limits of their powers. Both the intensity and type of challenge can increase youth capacity and character—as long as providers are intentional about helping them through this process. If providers simply confront youth with difficult problems without providing the emotional, social, and educational support they need to learn from these challenges, these experiences may overwhelm participants. This is why an explicitly Aristotelian focus on development—supplemented by reflection and support from wise mentors and role models—is a helpful framework for the 'challenging' principle. Without this framework, the 'challenging' principle may undermine rather than support the development of social action as a habit for life.

This Aristotelian approach also highlights a second aspect of the 'challenging' principle downplayed by some providers. Not only does virtue respond to challenging *situations*, but the *process* of cultivating virtue itself is challenging. Even if youth *know* the right thing to do, they may not be *motivated* to do it. And even when they do the right thing, they may be motivated by self-interested reasons that do not accord with virtue. Aristotle identifies these two states,





respectively, as ‘incontinence’ and ‘continence’ and argues that moral formation should aim to move the incontinent and continent to a state of ‘virtue’, where one is able to act reliably from a settled habit of character.<sup>28</sup> If #iwill seeks to foster a habit of social action, then it must encourage youth to perform social action when they are not motivated to act, and to act for virtuous reasons when they are so motivated.

As mentioned above, one way #iwill encourages this progression is through ‘recognition’. At first glance, recognition might seem to undermine an Aristotelian commitment to character. Aristotle, after all, argues that fully virtuous action should be done for its own sake, not for extrinsic rewards (Ibid., 1105a29–35, 1140b7–8). Shouldn’t youth, then, be motivated by the benefits to their community and the development of their own character, not solely by awards and accolades?<sup>29</sup>

An Aristotelian approach offers nuanced insight into this question. Its aspirational aspect emphasises that perfect virtue requires doing the virtuous action for its own sake rather than for extrinsic rewards, but its developmental aspect acknowledges that praising youth for acting virtuously can be one way to cultivate virtue. Indeed, praise offers positive reinforcement that helps youth overcome internal resistance to doing the right thing and motivates them to act virtuously in the future (Ibid., 1101b33–34, 1172a20–26). The hope is that the more youth act virtuously, the easier it will be for them to do it again.<sup>30</sup> Eventually, they might overcome all internal resistance to acting virtuously and see the reason for acting virtuously for its own sake—regardless of recognition. They might even find a certain kind of pleasure and ease in acting virtuously, knowing they are doing the right thing when it might otherwise be difficult (Aristotle, 1999, 1120a24–27).<sup>31</sup>

This Aristotelian process of initially acting virtuously for the wrong reasons before coming to act virtuously for its own sake—what some call ‘putting on virtue’ (Herdt, 2008)—offers two useful resources for #iwill. First, it supplies the missing link between ‘challenging’ and ‘enjoyable’ aspects of social action. In presenting the ‘challenging’ principle, #iwill is careful to emphasise that social action must be ‘stretching and engaging, as well as exciting and enjoyable’ (The Campaign for Youth Social Action, 2013a, p. 6), but it does not adequately explain why it includes ‘enjoyable’ social action within the ‘challenging’ principle. An Aristotelian approach provides one way to conceptualise the relation. While social action might be ‘challenging’, it must also be ‘enjoyable’ enough to motivate youth to continue doing it, especially when it is difficult or overwhelming.<sup>32</sup> While finding social action ‘enjoyable’ might not be the best reason to do it, it could help participants ‘put on virtue’ when they do not yet see the joy in acting virtuously for the sake of their community and their own character development. An Aristotelian developmental conception of virtue provides a way to incorporate an ‘enjoyable’ aspect of social action into the ‘challenging’ principle by highlighting how ‘enjoyment’ can be both a means of virtue cultivation and a quality that attends mature virtuous action (1999, 1104b5–16; see also Burnyeat, 1980, pp. 76–77; Annas, 2011, pp. 66–82).

Second, an Aristotelian approach provides a way to reconcile #iwill’s focus on ‘recognition’ with a developmental framework focused on character. On an Aristotelian approach, offering recognition to those who excel in social action or demonstrate impressive commitment and character serves several educational functions. For example, it provides youth with access to



role models to emulate and motivates them to perform similar actions, even if initially for the sake of recognition.<sup>33</sup> Eventually, as participants see the value of benefitting their community and developing their character, they may be less motivated by awards and recognition. They may even find pleasure in performing social action and thereby act with the characteristic ease that follows from possessing a virtue.

One danger is that this approach might reinforce an achievement culture that overemphasises recognition, particularly since studies suggest that some forms of extrinsic recognition can undermine rather than enhance intrinsic motivation (Deci *et al.*, 2001). But not all extrinsic rewards have the same effect (Ryan and Deci, 2000). Activities that are challenging, interesting, or enjoyable enhance intrinsic motivation, and rewards that affirm the agency, autonomy, and competence of the individual, that are offered within a supportive environment, and that are valued by their community can enhance the integration of a value into one's identity (Ibid.). These qualifications are important for #iwill since its efforts to offer recognition are situated within the six quality principles. That social action is 'challenging' and 'enjoyable' helps to increase intrinsic motivation; that it is 'youth-led' encourages agency and autonomy; that it is 'embedded' and 'socially impactful' facilitates the sense of belonging that promotes internalisation; and that it is 'reflective' and 'progressive' supports integration into one's identity, all of which serve to decrease the undermining effects of extrinsic rewards.

The value of an Aristotelian approach is that it joins these different principles into a coherent conceptual framework that emphasises both the aspirational ideal of virtue and the developmental role of recognition, not as an end in itself but as a means to cultivating good character.<sup>34</sup> Such an approach might encourage providers to reframe recognition as an occasion for education rather than simply an opportunity to win esteem. Moreover, it might challenge providers to be more explicit and intentional about the purpose of the awards, whom they choose to recognise, and why they choose them. In light of research about intrinsic and extrinsic motivation, for example, providers might reward youth who have effectively exercised their agency, engaged challenging situations, and exhibited growth in character, all of which might enhance intrinsic motivation.<sup>35</sup> In other words, framing an award less as a 'prize' than a 'reward' for growth might facilitate the process of 'putting on virtue'.

### 5.5 Community as the Context of Character ('Embedded')

For Aristotle, the development of character does not occur in isolation but in community, within cultures, relationships, and practices that shape us in fundamental ways. Human beings are, to use Aristotle's terms, social and political animals embedded within communities, from families and households to cities and states, all of which condition our aims, identity, and character (1999, 1097b9–12, 1169b17–23, 1170a12, 1179a34–1180b7; see also Annas, 2011, pp. 21–22, 52–65). Participating in community is part of what it means to be human.

An Aristotelian anthropology thus affirms #iwill's commitment to 'embedding' social action within particular communities. #iwill emphasises embeddedness as a way to make social action 'accessible to all and well integrated into existing pathways to become a habit for life' (Generation Change *et al.*, 2014, p. 14). Embeddedness encourages motivation by reducing barriers to social action, making opportunities more 'visible', and incentivising youth to connect to their own communities (Ibid.). It offers support, examples, and instruction from



peers and mentors in the community, and it encourages habituation by utilising ‘existing pathways’ to make social action more accessible and sustainable (Ibid.).<sup>36</sup>

Although #iwill relates both the ‘progressive’ and ‘embedded’ principles to developing the habit of social action, an Aristotelian account provides conceptual resources for delineating the two principles. Broadly, the ‘progressive’ element pertains to the relationship between social action and the process of habit formation, regardless of where that process happens. The ‘embedded’ principle captures the role that a young person’s particular context or community plays in developing the habit. The ‘progressive’ principle thus pertains to the *process* of habituation while the ‘embedded’ principle highlights the *communal context* of that process.

Within this communal context, Aristotle emphasises the role of friendship in character formation. Friendships provide pleasure and support, offer useful instruction and examples, and supply occasions to habituate virtue and serve others.<sup>37</sup> These Aristotelian insights align with #iwill’s justification for embedded social action. Indeed, Arthur *et al.* (2017, pp. 22–24) found a positive correlation between possessing a habit of social action and having a parent, guardian, or friend that also serves in the community. These role models provide youth with examples, support, and encouragement.

An Aristotelian approach offers an additional justification for embeddedness: accountability. For Aristotle, friendships provide occasions for mutual accountability and correction. Friends hold a mirror to each other, correct each other when they go wrong, and acknowledge when the other’s actions harm or hinder the community they share (1999, 1172a11–14; cf. 1155a13–16). This insight offers a useful supplement to #iwill’s ‘embedded’ principle. ‘Embedded’ social action might promote accountability by encouraging youth to engage in existing communities where they are more likely to be held accountable and where they will be more aware of how their social action helps or harms a particular group of people.<sup>38</sup> In this way, accountability might help to ensure that embedded social action is also responsible and ‘socially impactful’.

## 5.6 Connecting the Individual and Community (‘Socially Impactful’)

So far, we have explored how #iwill’s habit of social action aligns with features of an Aristotelian virtue. At this point, one distinction between a habit and a virtue becomes critical: whereas habits, like skills, can be ordered toward good or bad ends in good or bad ways, virtues are necessarily good habits oriented toward good ends in the right ways (Aristotle, 1999, 1103b8-25, 1105a17-1105b9, 1106a16-24, 1120a24-28).<sup>39</sup> This distinction explains why a habit of social action must be considered a virtue, not a mere habit or skill.

Helpfully, #iwill offers resources to conceptualise the habit of social action as a virtue. Indeed, its six quality principles, which parallel the features of an Aristotelian virtue, specify how this habit can be ‘good’. To complete the comparison, however, we need to specify what constitutes the ‘good’ toward which #iwill’s habit of social action is directed. Here, #iwill’s ‘socially impactful’ principle and ‘double benefit’ model become especially relevant. #iwill holds that youth social action must be ‘socially impactful’ and positively influence the



communities in which the action is performed. #iwill promotes youth social action that achieves a ‘double benefit’ for both individual participants and the community being helped.

In Section 3, we argued that one limitation of #iwill’s current outcomes framework is a lack of clarity about how individual and community benefits relate. An Aristotelian approach further illuminates Arthur, Harrison, and Taylor’s (2015) positioning of character as the link between individual and community outcomes and suggests an even more comprehensive model for understanding the relationship between individuals and communities.

Aristotle identifies the ‘good’ toward which virtue aims as ‘flourishing’ (1999, 1097a35–1098a21). In modern Western societies, we often interpret ‘flourishing’ as an individualistic form of happiness, a state of subjective joy or satisfaction. Aristotle, however, offers a more capacious view that defines flourishing in terms of objective well-being, not subjective mental states. For Aristotle, flourishing consists in achieving the excellences or virtues characteristic of a being of a certain kind. A flourishing human being, for example, achieves a kind of excellence in the distinctive activities, dispositions, and relationships that form a human life.<sup>40</sup> If a human life is fundamentally social and embedded within particular communities, an individual cannot fully flourish when the community is not flourishing, and a community cannot fully flourish when an individual member is not flourishing (Ibid, 1097b9–12, 1169b17–23, 1170a12). An individual is related to the community as a part to a whole.

This Aristotelian account affirms the importance of #iwill’s ‘double benefit’ model but also adds a twist to how the model is conceptualised and communicated. Consider Figure 5 below, with the centre circle representing an individual and the surrounding circles representing various communities of which an individual is a part. This model visualises the ways in which individuals—and thus individual outcomes—are nested within various communities. Of course, this figure is simplified for visual clarity: communities are often nested within other communities and overlap in asymmetrical ways, while others hardly overlap at all. The diagram below can accommodate asymmetries or variations, so long as the individual is fully circumscribed within their respective communities.



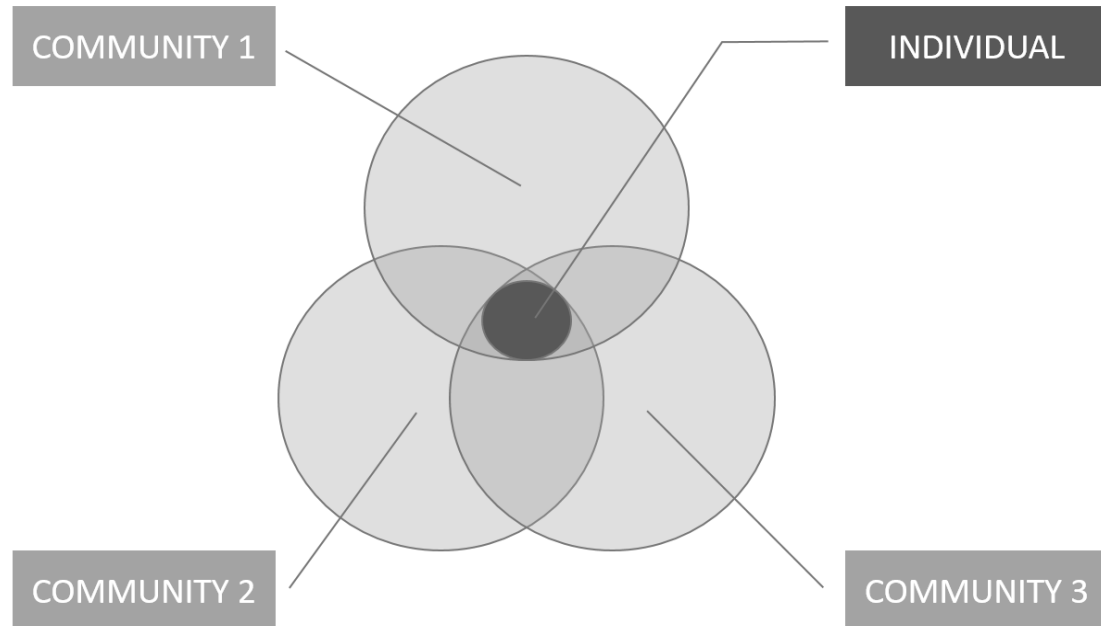


Figure 5: An Aristotelian double benefit model.

Notice how this Aristotelian model compares with the two models in Figures 3 and 4. The original double benefit model in Figure 3 presents individual and community benefits as completely separate, with emotional intelligence as the only link. The revised double benefit model in Figure 4 rightly recognises a stronger connection between individual and community outcomes by presenting the two as partially overlapping circles, with character as the link. The Aristotelian model in Figure 5, however, fully embeds the individual within various overlapping communities, highlighting how both types of individual benefits should not be understood apart from their communal contexts.<sup>41</sup>

This model has four implications for #iwill and youth social action providers in general. First, an Aristotelian model provides conceptual clarity on the relationship between individual and community benefits, which, as mentioned in Section 3, is missing from #iwill's current framework. More conceptual clarity might help social action providers and youth consider, practically, how the benefits relate to each other.

Second, the Aristotelian model promotes benefits for individuals and communities while discouraging outcomes that sacrifice or diminish benefits to one or the other. As it stands, the current model suggests that certain individual outcomes fall outside the circle of community, which creates the risk that social action might achieve individual benefits that neglect, or even undermine, benefits to the community. Consider the recent phenomenon of 'voluntourism', where individuals (often youth) parachute into a distant community for a week or two at a time, performing community service with little knowledge of the existing community or its larger social structures. While such work can help to address discrete needs, voluntourism can also cause harm (Guttentag, 2009), not least for its potential to propagate neo-colonial attitudes among participants (Palacios, 2010). As such, voluntourism can sometimes undermine community outcomes rather than support them. An Aristotelian model that

recognises the interrelation between individuals and communities places constraints on the types of social action that might be considered ‘socially impactful’.

Third, and relatedly, this Aristotelian model might allay a powerful objection to youth social action. One concern is that some forms of social action (especially when conceived as pure ‘charity’) perpetuate power differentials, intentionally or not, by encouraging participants to perform a kind of ‘self-sacrifice’ for the sake of the community.<sup>42</sup> This presumption of privilege prevents participants from forming genuine relationships of solidarity with those whom they encounter. An Aristotelian model might help participants avoid this hazard by showing they are not separate from the community but part of it. Their flourishing is tied to the flourishing of their community.

Finally, this model emphasises moral and social virtues downplayed in #iwill’s current outcomes framework. Arthur, Harrison, and Taylor (2015) note that #iwill’s individual outcomes tend to prioritise *performance virtues* and neglect *moral virtues*.<sup>43</sup> Positioning ‘character’ as the link between individual and community outcomes helps to bring moral virtues back into view. An Aristotelian approach further specifies these virtues and how they relate to quality social action. In this context, a particularly relevant virtue is *justice*, which governs social relationships and ensures that others are given their due.<sup>44</sup> For social action to promote just relationships within and between communities, participants need to develop not only ‘optimism’, ‘determination’, and ‘emotional intelligence’, but a virtue of justice, which would enable them to understand social relationships and structures, recognise how to put disordered relationships and structures aright, and motivate them to do this important work. Justice thus encourages ‘socially impactful’ action that promotes just relationships and directs character education toward social and structural concerns, not simply toward the individualistic ones that have often been its focus (Kisby, 2017, pp. 16–17). Without an explicit focus on justice, social action risks unintentionally promoting unjust relationships or structures.

Of course, as Aristotle understood, to know what justice demands in particular situations requires the virtue of practical wisdom (1999, 1144b31–1145a2). Without practical wisdom, we may know what justice demands in the abstract, but not know how to act justly in particular circumstances. To ensure that social action is just, reflective, and socially impactful, practical wisdom is necessary.

The relationship between justice and practical wisdom highlights the relationship between #iwill’s ‘reflective’ and ‘socially impactful’ principles. It also suggests that virtues of justice and practical wisdom might be useful additions to #iwill’s list of individual outcomes. While these virtues may be implicit in #iwill’s quality framework, an Aristotelian approach that recognises the interconnection of the virtues and the overlapping relationships between individuals and communities explains why they ought to be a more explicit part of the framework. A focus on justice and practical wisdom can help to ensure that social action is done for the right reasons and in the right ways.

## 6 Conclusion



This article has attempted to show how #iwill's conception of a habit of social action aligns with an Aristotelian account of virtue. In particular, #iwill's 'progressive' principle coheres with an Aristotelian emphasis on habituation 'for life', and its emphasis on 'youth-led' social action fits with an Aristotelian approach to learning by doing. #iwill's commitment to 'reflective' social action elevates the importance of Aristotelian practical wisdom, while its focus on 'challenging' and 'enjoyable' social action aligns with the aspirational and developmental process of 'putting on virtue'. Finally, #iwill's emphasis on 'embedded' and 'socially impactful' action corresponds with an Aristotelian account of the integral relationship between individuals and communities.

Throughout our analysis, we have also attempted to show how an Aristotelian account can inform #iwill's framework and address the four conceptual challenges identified in Section 3. First, it provides a more capacious conception of a habit as a cognitive, motivational, and affective disposition that cannot be reduced to behavioural outcomes or intentions toward future participation. Second, it clarifies the relationship between the two spheres of the double benefit model in a way that gives proper weight to community outcomes. Unlike character education frameworks that emphasise 'personal ethics' at the expense of 'public ethics' (Kisby, 2017, p. 16), this model directs social action toward community flourishing, acknowledges the social sources of individual development, and constrains social action that does not benefit both the community and the individual. Third, an Aristotelian approach highlights the value of moral and intellectual virtues, such as justice and practical wisdom, that ensure social action is sensitive to particular circumstances and promotes just relationships and structures. Finally, it offers resources that can increase clarity and consistency in how #iwill's framework is understood and applied by diverse providers.

While these aspects of Aristotelian character education might supplement #iwill's quality framework, we acknowledge that there are limits to an Aristotelian approach (Kristjánsson, 2014b, pp. 61–65), particularly as it has been applied recently by proponents who take a more individualistic approach to moral and political issues and direct character education toward personal and professional 'success' rather than human flourishing (see Kisby, 2017, pp. 8, 13–17). In advancing our Aristotelian account, we have attempted to avoid these limitations by linking character education directly with social action and highlighting how individual outcomes cannot be considered apart from the community in which they are embedded. With Kisby (2017), we recognise that character education, while necessary, is not sufficient, and that a comprehensive account of a habit of social action would benefit from insights from other approaches, especially those of citizenship education (see also Althof and Berkowitz, 2006). But since activities like youth social action provide important avenues for integrating character education and citizenship education (Park, 2017), we hope to have shown one practical way that an Aristotelian account can contribute to the education of socially active citizens.

While #iwill is only one campaign, its ambitious goals, widespread support, and sophisticated conceptual framework make it a particularly valuable model for others to emulate. As #iwill and other campaigns seek to increase the quantity and quality of youth social action, we believe an Aristotelian approach can provide valuable conceptual resources that amplify efforts to cultivate social action as a virtuous habit for life.<sup>45</sup>



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## Endnotes

<sup>1</sup>A young person who has participated in ‘meaningful’ social action has taken part in social action in the past 12 months at least every few months or in a one-off activity lasting more than a day and has recognised the benefit to themselves and others (Ipsos MORI, 2015).

<sup>2</sup>This is drawn from frameworks developed by McNeil, Reeder, and Rich (2012) and the CBI (2012).

<sup>3</sup>Significant work has been directed toward understanding these principles and helping organisations integrate them (Generation Change *et al.*, 2014; Bown, Harflett, and Gitsham, 2014; Arthur, Harrison, and Taylor, 2015; #iwill, 2017b).

<sup>4</sup>This is reflected in funding to support the #iwill campaign (Cabinet Office and Nick Hurd MP, 2014).

<sup>5</sup>Youth-led social action is also emphasised by the National Citizen Service (Booth *et al.*, 2015) and the Russell Commission (2005, p. 7).

<sup>6</sup>The Campaign for Youth Social Action (2013a, p. 13) invited further research on the #iwill campaign since ‘the campaign, and the definitions and principles that underpin it, will evolve and develop over time’.

<sup>7</sup>Youth are typically asked about their intentions to continue participating in social action (Booth *et al.*, 2014; Ipsos MORI, 2015; Kirkman, Sanders, and Emanuel, 2015; National Youth Agency, 2013).

<sup>8</sup>Studies have attempted to fill the gap in quantitative evidence on community outcomes (Tyler-Rubinstein *et al.*, 2016), for example, with cost-benefit analyses (Cameron *et al.*, 2017, p. 5).

Nonetheless, research in this area remains limited.

<sup>9</sup>We utilise these categories of virtues to add clarity, but we acknowledge that some philosophers classify virtues differently. For example, what some call ‘intellectual’, ‘moral’, and ‘performative’ virtues can all be ‘civic virtues’ when used in communal contexts or oriented toward civic ends, which usually applies in the context of youth social action.

<sup>10</sup>Arthur, Harrison, and Taylor (2015, p. 19) found that although providers understand the importance of moral virtues, they are unclear on how to measure them. Providers focused on employability may also perceive performance and intellectual virtues as disproportionately important for getting a job and performing well and thus downplay moral virtues (*Ibid.*, p. 10).

<sup>11</sup>We engage a broadly *Aristotelian* account of virtue, not necessarily *Aristotle’s*, though we occasionally draw on Aristotle’s insights to explicate the view.

<sup>12</sup>This account of virtue is shaped by Annas (2011) and Zagzebski (1996, pp. 84–137).

<sup>13</sup>See Russell (2015, pp. 20–23) for a helpful overview.

<sup>14</sup>Aristotle differentiates virtues of thought from virtues of character partly by how they are acquired: ‘Virtue of thought arises and grows mostly from teaching’, while virtue of character ‘results from habit’ (1999, 1103a15–18).

<sup>15</sup>See also Arthur *et al.* (2017, pp. 9–13).

<sup>16</sup>For Aristotle’s discussion of habituation, see Aristotle (1999, 1103a15–1104b4).

<sup>17</sup>Aristotle offers an example: ‘abstaining from pleasures makes us become more temperate, and once we have become temperate we are most capable of abstaining from pleasures’ (1999, 1104a34–1104b1).

<sup>18</sup>As Annas argues, ‘Virtue is not a once for all achievement but a disposition of our character that is constantly developing as it meets new challenges and enlarges the understanding it involves’ (2011, p. 38).

<sup>19</sup>See Aristotle (1999, 1103b27–30, 1179a34–1179b32) and Wilburn (2007, pp. 71–73).

<sup>20</sup>On the ‘skill analogy’, see Annas (2011, pp. 8–51) and Russell (2015). For the distinction between skills and virtues, see Aristotle (1999, 1105a26–b5) and Zagzebski (1996, pp. 106–116).

<sup>21</sup>For Aristotle, virtue requires that we not only perform the right action but also perform it for the right reasons (1999, 1105a17–b9). See Annas (2011, pp. 13–15), Broadie (1991, pp. 108–109), and Kisby (2017, p. 12).



<sup>22</sup>See Aristotle (1999, 1095a2–4, 1095b4, 1141b10–23, 1142a12–15, and 1143a20–b14); Broadie (1991, pp. 72–74); Russell (2015, pp. 19–20); and Burnyeat (1980, pp. 70–73).

<sup>23</sup>On the relationship between reflection and practical wisdom, see Jubilee Centre for Character and Virtues (2014).

<sup>24</sup>Russell (2015, pp. 27–29) offers a helpful comparison between practical wisdom and skills. For a connection to social action, see Arthur *et al.* (2017, p. 10).

<sup>25</sup>Compare to Aristotle (1999, 1095a2–4, 1105b7–9, 1107a1–3, 1140a25–1141b23; 1142a12–15). See also Annas (2011, pp. 12, 16–32), Broadie (1991, pp. 73–74), and Burnyeat (1980). Contemporary scholars have affirmed the developmental importance of emulating role models who exemplify virtue and wisdom (Narvaez and Lapsley, 2005, pp. 150–159; Russell, 2015, pp. 32–36; Vianello, Galliani, and Haidt, 2010; Colby and Damon, 1992; Kristjánsson, 2016; Zagzebski, 2017).

<sup>26</sup>Arthur, Harrison, and Taylor (2015, p. 24) make a similar recommendation.

<sup>27</sup>Recent research found that youth who had developed a habit of social action were also more likely to identify with exemplars of moral and civic virtues than those without a habit (Arthur *et al.*, 2017).

<sup>28</sup>For Aristotle’s discussion of continence and incontinence in relation to virtue and vice, see 1999, Books 2 and 7. See also Burnyeat (1980, esp. 86–88) and Wilburn (2007, pp. 74–76).

<sup>29</sup>For a helpful distinction between merely doing virtuous actions and acting virtuously for its own sake, see Broadie (1991, pp. 85–90) and Burnyeat (1980, pp. 77–78).

<sup>30</sup>Recent evidence confirms that recognition and the habit of service are positively correlated. See Arthur *et al.* (2017, p. 33).

<sup>31</sup>See also Burnyeat (1980), Annas (2011, pp. 40, 66–67), and Russell (2015, pp. 26–27, 32–33).

<sup>32</sup>Arthur *et al.* (2017, p. 28) found that ‘respondents who enjoyed their service “a great deal” were 47% more likely to be in the Habit group than those who enjoyed it “a fair amount”’.

<sup>33</sup>Recognition might also make particular quality norms salient and help participants internalise these norms when developing their character. On how making norms salient shapes character, see Miller (2014, pp. 232–233).

<sup>34</sup>Aristotle (1999, 1105a27–1105b9) holds that virtue must be chosen for its own sake. Burnyeat (1980, pp. 77–78) offers an insightful account of how we develop this capacity.

<sup>35</sup>For a similar suggestion in relation to rewards for intellectual virtue, see Baehr (2015, p. 214).

<sup>36</sup>In the wider literature on habits, it is argued that important others, such as parents, friends, partners, and teachers, influence whether or not a behaviour becomes habitual (Andolina *et al.*, 2003; Clary and Miller, 1986; Law, Shek, and Ma, 2013; Hart and Fegley, 1995; Pancer and Pratt, 1999; Callero, Howard, and Piliavin, 1987; Marta and Pozzi, 2008). Arthur *et al.* (2017, p. 33) found that ‘those with a habit of service were more likely to be at educational institutions which had actively encouraged their involvement rather than passively allowed them to participate’.

<sup>37</sup>For Aristotle’s extended discussion of friendship, see 1999, Books 8 and 9. Aristotle thought that friends are necessary for all persons (1155a5, 1169b3–23), can exemplify and mirror behavior (1169b34–1170a4, 1171b12–13), share ‘conversation and thought’ (1170b6–19), lighten burdens in stressful times (1171a22–31), and present opportunities to habituate virtuous actions and affections (1155a6–10, 1171a22–27, 1171b13–28). For a helpful analysis of Aristotle’s philosophy of friendship, see Cooper (1980) and Kristjánsson (2014a).

<sup>38</sup>Arthur *et al.* (2017, p. 22) found a positive correlation between participating in youth social action and having a parent, guardian, or friend who also serves in the community. They also found that those with a habit of social action ‘were more likely to say they had the support and encouragement from their friends and family that they needed to be involved in service’ (p. 23).

<sup>39</sup>On the relationship between virtue and goodness, see Annas (2011, pp. 100–118) and Zagzebski (1996, pp. 89–102, 110–113).

<sup>40</sup>See Aristotle (1999, 1097b22–29, 1106a17–24, 1139a16–18). See also Russell (2015, pp. 20–23) and Annas (2011, pp. 119–168).



<sup>41</sup>This Aristotelian model might be conceptually consistent with the revised double benefit presented by Arthur, Harrison, and Taylor (2015) in Figure 4. Since they focus on the relationship between *types of outcomes* rather than individuals and communities themselves, the difference may simply be in the presentation of the model, not its content. But given that presentation and perception shape practice, a revised Aristotelian model might more effectively inform how providers implement the ‘embedded’ and ‘socially impactful’ principles.

<sup>42</sup>For discussion, see Catlett and Proweller (2011); Marullo, Moayed, and Cooke (2009); Morton (1995); Tilley-Lubbs (2009).

<sup>43</sup>#iwill’s individual outcomes (which include ‘determination’, ‘managing feelings’, and ‘self-control’) may more easily accommodate moral virtues—such as courage or temperance—that govern *internal* affective and volitional responses to particular obstacles or difficulties rather than moral virtues—such as justice—that govern *external* relationships with others.

<sup>44</sup>See Aristotle (1999, Book 5).

<sup>45</sup>For valuable feedback and permission to use Figures 1–4, we are grateful to Rania Marandos, the #iwill campaign, and Step Up To Serve (Figures 1–2); and to Tom Harrison and the Jubilee Centre for Character and Virtues at the University of Birmingham (Figures 3–4). We also wish to thank the editors and anonymous reviewers for JSSE and several colleagues who offered helpful suggestions on previous versions of this article, including Sarah Banks, Jonathan Brant, Edward Brooks, Shelby Clark, Kristján Kristjánsson, and audiences at the Jubilee Centre conference on ‘Virtues in the Public Sphere’ at the University of Oxford (2018) and the annual meeting of the South Atlantic Philosophy of Education Society at High Point University (2018). For support of this research, we are grateful to the Jubilee Centre for Virtues and Character, The Oxford Character Project, The Templeton World Charity Foundation, and Wake Forest University.

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## Studying Politics or Being Political? High School Students' Assessment of the Welfare State

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- This article examines and discusses students' understanding the welfare state, vis-à-vis intrinsic and extrinsic goals.
- The data consists of 71 accounts on welfare regimes prior to teaching and was elicited through a projective task.
- The results display an understanding of the welfare state consistent with extrinsic goals, i.e. as an issue to engage with as a political being, rather than as a disciplinary issue.
- The article argues that students' difficulty to recognise the difference between 'politics' and 'the study of politics' is problematic in regard to intrinsic goals, but not necessarily in regard to extrinsic goals.

**Purpose:** This article examines high school students' understanding of the welfare state as a political issue and discusses how it can be approached in the classroom. The study was conducted within a social-science educational context and departs from a perspective from which educational goals can be seen as intrinsic (goals closely connected to the academic disciplines) or extrinsic (goals formulated by the political sphere, e.g. students' deliberation on political issues). These variant goals can pose a dilemma for teachers and students alike as they engage in highly political topics.

**Design & methodology:** To explain the structure of the dilemmas of teaching issues that can be understood politically in a social-science context, this paper focuses on students' assessment of such topics before teaching and how they generally reason different political views on the welfare state. The data consist of written documents produced by tenth-year students in response to two accounts of the best welfare state. Using a qualitative content analysis, the data were analysed to identify students' approaches to a political issue and their normative reasoning.

**Findings:** The results display an understanding of the welfare state that is consistent with extrinsic goals, i.e. as an issue to engage with as a political entity rather than exclusively as a social scientist. It was noted that students experience difficulty in recognising the difference between politics and the study of politics.

**Practical implications:** The study contributes to an understanding of the influence of normativity on students' thinking and represents an attempt to bridge the difficulty of combining intrinsic and extrinsic goals in social-science education.

**Keywords:** Social-science education, politics, political thinking, intrinsic and extrinsic goals, welfare state

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## 1 Introduction

This paper examines high school students' responses to a political issue encountered within social-science education – the welfare state. Social-science and other school subjects have versatile goals and are intended to qualify, socialise and offer opportunities for deliberation to students (Biesta, 2010). These goals can be described as either intrinsic or extrinsic: *intrinsic goals* are those that are closely connected to the academic discipline associated with the specific school subject. Social-science is an interdisciplinary subject and is predominantly connected to the academic disciplines of political science, sociology and economics. Thus, intrinsic goals are mainly linked to the qualifying dimension, i.e. advancing students' ideas and the understanding of the principal substantial and procedural concepts of the disciplines (Husbands, Kitson, & Pendry, 2003, p. 29; Strandler, 2017). However, *extrinsic goals* also exist, namely, the aims formulated in the political sphere that specify the values and ideas that society desires students to imbibe. Besides, these societal aims also allow students to engage in public deliberation and take a stand on political issues. Thus, in the classroom, social-science teachers must make allowances for academic investigation and for students to explore political ideas. These goals do not precisely contradict one another; however, their coexistence can lead to dilemmas for teachers and students as they engage in highly political topics. To unearth the structures of this dilemma, we must come to understand how students reason politics, both in disciplinary terms, with regard to social-science as a discipline, as well as in terms of individuals as political beings.

Research on teaching and studying political issues in connection with the roles of values, emotions and ideology is scarce in social-science education (Lundholm & Davies, 2013; Sheppard, Katz, & Grosland, 2015). However, a closely connected body of research on political cognition and attitude persistence in connection with knowledge can be found in the literature on political science. Taber (2011) concludes that citizens generally maintain their present beliefs and do not tend to change them when presented with new information; i.e. they keep biased knowledge even when evidence presented to them contradicts their existing understanding. This appears to be particularly true for a wide range of controversial, prominent issues, including gun control and drugs (Taber & Lodge, 2006; Taber, Cann, & Kucsova, 2009). In addition, people who have strong convictions display reluctance in coming to terms with new information. In educational research, studies on issues such as the environment and evolution (Sinatra, Southerland, McConaughy, & Demastes, 2003; Rickinson, Lundholm, & Hopwood, 2009) demonstrate similar results. This body of literature notes three challenges that students may encounter: reasoning knowledge, overcoming bias and correcting misconceptions. However, the existing conceptual change literature focuses on learning goals as being related to disciplinary thinking and not as learning outcomes related to extrinsic goals, such as being engaged in matters political. Finally, frictions between intrinsic and extrinsic goals have garnered little attention.

Departing from the theoretical framework of intrinsic and extrinsic goals (Husbands et al., 2003; Strandler, 2017), this paper examines students' approaches to, and understanding of, a highly political issue, namely, the welfare state, and discusses how intrinsic and extrinsic goals could be handled when treating political issues in the classroom. Previous research has arrived at a conceptual uncertainty regarding the various emotions that students might experience in



their discussions of politics (Sheppard et al., 2015), and this study is intended to contribute to discussions on one of these emotions, namely, ideological conviction, and the role it could have in understanding political issues. Elicited by a projective task (Barton, 2015), the data are supplied by 71 written accounts of two different welfare regimes (Esping–Andersen, 1990). The paper considers students' thinking before teaching, as well as their views on a political issue, rather than in deliberation and engagement with them outside of school. The following research questions are examined:

- How do students understand variant ideological accounts of the ideal welfare state?
- How can these approaches be understood in relation to intrinsic and extrinsic goals?

## 2 Theoretical Framework: What Should Social-Science Education Provide?

School subjects, including social-science, have versatile goals, which can be divided into intrinsic and extrinsic goals (Husbands et al., 2003; Strandler, 2017; Biesta, 2010). Intrinsic goals are disciplinary in nature, intended to qualify students by advancing their knowledge, skills and abilities in specific subjects and arenas. Extrinsic goals are, by contrast, societal aims formulated by the political sphere, which include socialising youth into a given society and giving them opportunities to come into their own. Biesta (2006; 2010; 2012) calls these goals qualification, socialisation and subjectification (derived from the German word *Subjektivität*. Biesta (2012) notes that it is a 'bit of a struggle to find the right concept' in English); these domains are separate but can be seen as a single entity in the context of the purpose of education in general and above all for each particular school subject. Biesta (2010) describes the frictions that exist among the dimensions, such as when disciplinary knowledge clashes with students' perceptions of the world and its societal issues. In agreement with Biesta, I suggest that for a meaningful determination of what constitutes good political education, all three domains must be engaged (Biesta, 2012). Naturally, each domain's goals must be formulated differently in the different contexts entailed by education's presence in the national political arena. Biesta (2012) writes of education in general; however, the model given can be used to understand the specific role of, and challenges to, social-science education concerning citizenship education.

### 2.1 Intrinsic Goals: Knowledge as Powerful Knowledge

The knowledge, skills and abilities imparted through qualification can be understood using Young's (2008; 2013) and Young and Muller's (2013) concept of 'powerful knowledge'. Young argues that curricula makers must turn their focus to the best available knowledge, i.e. the knowledge cared for and developed by disciplinary communities. Knowledge can of course always be questioned but the well-established principles and academic rules within a disciplinary knowledge community are responsible for the best knowledge that our societies can provide. Thus, school curricula should be based on the knowledge produced by these disciplines:

Subjects, I argued earlier, are re-contextualized from disciplines which are a society's primary source of new knowledge. The link between subjects and disciplines provides the best guarantee that we have that the knowledge acquired by students at school does not rely solely

on the authority of the individual teacher but on the teacher as a member of a specialist subject community. (Young, 2013, p. 15)

Young's argument is two-fold. First, it concerns social justice. Everyone has the right to obtain a given amount of knowledge, and it should not be limited to an elite. In this sense, public schools play an important role in providing all students with the best knowledge available. Second, if education is based on this knowledge, it can guarantee that students are not left to the sole authority of an individual teacher. For Young (2013), specialist knowledge is important (and powerful) because it enables students to transcend the limits of their everyday experiences and unreflective opinions. Young's argument for the power of knowledge is not subject-specific but rather a discussion of what exactly constitutes powerful knowledge in various subjects. Counsell (2011) and Biddulph and Lambert (2017) have begun this work in education in history and geography. In previous work (Sandahl, 2015; cf. Newmann, 1990; Barton, 2017), I have proposed important procedural concepts for social-science, such as evidence, inference, structure–agency and perspective, which can open up students' understanding of social-science topics and take them beyond their everyday experience. It is commonly argued that this disciplinary knowledge is unnatural in relation to everyday understanding and must be taught explicitly in schools (Sandahl, 2015; Wineburg, 2007).

## 2.2 Extrinsic Goals: Deliberation and Taking a Political Stance

Subject knowledge and disciplinary thinking can play a crucial role in students' preparation for civic life. However, schools have other assignments as well, as noted above. Historically, socialisation has been a prime assignment for schools as they foster citizens of a nation state: they are responsible for passing on social, political and cultural values and behaviours to support society's preservation. For scholars such as Biesta (2010), subjectification has, historically, been insufficiently emphasised. Those in the sphere of facilitating students' education should of course pay great attention to student individuality by allowing their values to matter and not always predetermining the answers. However, this does not mean that students should only give their own opinions on societal affairs; they should rather meet others' opinions and experience opposition towards their own worldviews. Progressing towards becoming an emancipated individual is not merely a process that is gone through by an individual; it requires plurality and difference. Teachers' most important task in subjectification is to allow students to express themselves and experience challenges to their perspectives from their peers. Where education only gives the accepted answers and does not allow students to be recognised as independent and capable, it limits itself to qualifying and socialising for an existing societal order.

In citizenship education, this allowing of challenges is presented in the form of deliberation, which typically involves political debate on controversial and unresolved societal issues. Within this tradition, school offers a unique arena for the expression of different perspectives – even segregated schools are more pluralistic and offer more perspectives than the students' home environments (Parker, 2008; Hess, 2009). Consequently, school is ideal for deliberative discussions in a context where students can discuss issues and experience real ideas – it is a democracy in the making (Hess, 2008; 2009; 2015; Englund, 2000; 2006). An education in social-science that focuses on this domain would centre the perspectives of students in the

beating heart of classroom activities, where teachers would function principally as moderators and facilitators of deliberative discussions and students would have the opportunity to share and discuss societal issues. An important part of these discussions is plurality – students realise that ideas and worldviews exist that are different than their own.

### 2.3 Friction Between the Goals

In Sweden, social-science is the school subject that bears the most responsibility for political education from years one to 12 (compare Sweden [Sandahl, 2015] with other Nordic countries [Christensen, 2011; Børhaug, 2011] in this regard). It is an interdisciplinary subject that has no specific disciplinary equivalent; however, it is taught based on knowledge from political science, sociology and economics. It was politically created as a school subject in the wake of the Second World War, and it has always had disciplinary content and citizenship goals, which are intended to strengthen civic participation. In the present Swedish curriculum, citizenship aims are described as a cross-curriculum goal, which is centred in the subject of social-science (Swedish National Agency for Education, 2011). Thus, social-science teachers are expected to address disciplinary knowledge, along with providing space for political and societal debate, in the classroom. This dual mandate can create friction between intrinsic and extrinsic goals (Biesta, 2010; Sandahl, 2013). Discipline-based teaching does not preclude discussions but gives primacy to academic knowledge, thereby risking the alienation of young people from attempting to try, unaided by others, political ideas, and share their experiences of the political world (Barton, 2009). Teaching that is based in deliberative ideas, on the other hand, does not exclude teachers' intervention in cases where students' ideas are based on misconceptions but nevertheless accords primacy to students' own meaning-making with regard to societal issues, thereby risking the equation of opinions to facts (Lee, 2005).

## 3 The Welfare State and Previous Research in Relation to Political Issues

This research project examines part of a module on the welfare state in the Western world. As a topic of enquiry, the welfare state spans social-scientific disciplines, including political science, sociology and economics. Pierson (2000) describes the origin of interest in the welfare state for social sciences as follows:

because it so clearly reveals the significance of political choices. Variations in public social provision have big effects on social life, contributing to substantial cross-national differences in outcomes such as income inequality, women's labor force participation, and levels of unionization. (Pierson, 2000, p. 791)

As a study area in social-science curricula, the welfare state includes financial aspects and the different effects on social life in different welfare regimes. Esping–Andersen's (1990) typology of the liberal, the conservative and the social-democratic regimes characterises the range of regimes, which have similar internal logics (Swedish National Agency for Education, 2011). In context, this means that welfare states are to be studied and analysed not only as instrumental arrangements but also with a view to the fact that welfare programmes are political expressions of moral conceptions and values (Kildal & Kuhnle, 2005); i.e. they inhabit a contested political issue.

Research on students' reasoning political issues and the role of values, emotions and ideology in relation to knowledge has been scarce in social-science education (Lundholm & Davies, 2013). However, a rich body of literature exists on political cognition and attitude persistence concerning knowledge within political science. In a review of the literature, Taber (2011) remarks that 'citizens are rarely, if ever, dispassionate when thinking about politics', noting that they are prone to keep their existing present beliefs rather than changing them when confronted with new information. Although people do attempt to weigh evidence objectively, feelings and emotions play a crucial role in their processing of information; this is defined as biased knowledge (Taber et al., 2009). In that study, people were found to tend to acknowledge facts in accordance with beliefs (confirmation bias) and discard information contradicting their opinions (disconfirmation bias). Over a wide range of (controversial) issues, such as affirmative action, gun control and drugs, a pattern is noticeable – people question arguments, sources and evidence when they pose a threat to prior beliefs (Taber & Lodge, 2006; Taber et al., 2009). Furthermore, those with stronger beliefs or ideologies exhibit stronger resistance to new information and more reluctance to search for arguments that are against their own opinions.

Values and beliefs play an important role in young people's learning over a wide range of disciplines, such as the study of evolution in science education (Sinatra et al., 2003) or environmental issues (Rickinson, Lundholm & Hopwood, 2009). In social-science education, the lack of precise conceptualisation of what emotions mean in studying about societal issues has been exhibited by several researchers (Lundholm & Davies, 2013; Sheppard et al., 2015). In general, students' encounters with scientific and disciplinary topics in school pose challenges. In education and psychology research (Sinatra, Kienhues & Hofer, 2014), three major challenges have been identified: first, the challenge of reasoning knowledge and how knowledge is constructed (epistemic cognition); second, the challenge of overcoming bias (motivated reasoning); and third, the challenge of overcoming misconceptions (conceptual change). Motivated reasoning corresponds to findings in political science (Taber, 2011), and studies suggest that it is common in the social sciences as well (Kahne & Boyer, 2017a, 2017b). In the literature, emotions are often seen as the driving force that supports engagement and motivation in learning but also as directing the focus of that engagement (Rickinson et al., 2009). Kahne and Boyer (2017b) find that knowledgeable students display a greater amount of bias than do their less-informed peers. However, the results of research into changes of opinion generally correspond to the intrinsic goals of school subjects, not to their extrinsic goals, such as deliberation or students' political positioning; these goals are also central for school curricula (Biesta, 2010; Englund, 2006).

#### 4 Methods

This study focuses on a particular dataset that was collected during the course of a broader research project at an upper-secondary school. For this project, the researcher followed a class of tenth-year social-science students as they worked through a module on Western welfare systems. This module was crafted to advance students' disciplinary reasoning, in particular



their ability to use second-order concepts such as causal analysis and perspective taking (Sandahl, 2015; Barton, 2017). The module was also explicitly intended to challenge students to adopt new perspectives and to question positions that they had taken as a given. The lessons were planned in collaboration between the author and the teacher, and content material and specific tasks were laid out in alignment with curriculum requirements to promote students' ability to perform the following tasks:

- a) analyse social issues and identify causes and consequences using concepts, theories, models and methods from the social sciences and
- b) search for, critically examine and interpret information from different sources and assess their relevance and credibility. (Swedish National Agency for Education, 2011, p. 2)

The module also included segments in which the students were asked to express the personal values, feelings and ideas they had in connection with the material, as well as the lessons on the welfare state, orally and in writing. The module included 12 lessons, and on eight occasions, the students were asked to keep a log connected to specific questions and tasks. The teacher conducted the actual teaching; however, the author was present at all of the lessons in one of the classes and helped facilitate the performance of certain class tasks. The teacher also gave the same teaching module to two parallel classes. The author was not present at those classes but had access to the students' logs. In total, there were 86 documents.

The particular data for this study are from the first log entry from the first lesson of the module for all three classes. In preparation for this lesson, the author and the teacher prepared two accounts of how the ideal welfare state should be structured. These texts were intended to elicit (Barton, 2015) students' responses by allowing them to focus on something external, as 'visual, verbal, or written stimuli to encourage participants to talk about their ideas', (Barton, 2015). The texts were based on arguments presented by social-democratic and liberal think tanks – with the first text advocating a tax-funded, universal social-democratic system and the other promoting a more liberal, privately funded system. The texts had roughly the same number of words (554 and 568, respectively). The two accounts were distributed physically (on sheets of paper) and read aloud to the students, during which time they were asked to note comments, ideas and impressions of the texts (Mason & Boscolo, 2004). The students' thinking was the centre of attention rather than their engagement. Out of 86 students, 15 were not present or chose not to respond in the first log (N = 71); the logs varied in number of words: from 90 (C8) to 647 (B12).

A content-analysis model was generated to compose appropriate coding questions for the students' written accounts (Cohen, Manion, & Morrison, 2009). The students' motivated reasoning was an important target (Sinatra et al., 2014) – determining how they reasoned with reference to their own political standpoints was an important objective. Motivated reasoning among the students was analysed using a continuum from opinionated/non-opinionated. Second, the students' epistemic approach was examined (Sinatra et al., 2014) – the construction of their arguments in connection with the texts they were responding to. This was analysed with reference to a continuum from descriptive to analytic. These content-analysis parameters allowed the researcher to operationalise the aspects and place students with reference to their approach to the topic – in an attempt to understand the issue from a

disciplinary perspective (intrinsic goal) or as a political debate that they partook in themselves (extrinsic goal). However, the understanding of the students was not always logical and consistent such that each student's response could be framed easily within a given stance. However, their individual answers can be based in different, contradictory worldviews simultaneously. This content analysis had the accounts coded in keeping with the most salient worldview contained in each written answer, i.e. according to the continuums described above.

## 5 Results: Four Ways of Understanding a Political Issue

All but one student responded to the two texts on the ideal welfare state using a normative stance, expressing a political view regarding which welfare system they preferred. However, their understanding of the issues at play and how they formulated their expression of the content of the texts were distinctive. A great deal of variation was found within each stance. Some displayed their opinions less overtly, while others did so to a greater extent. These variations are described below. The four stances seen were labelled a) the social-science stance; b) the politicising stance; c) the political-rhetoric stance and d) the non-political, descriptive stance.

### 5.1 The Social-Science Stance: Analytical and Non-Opinionated

Although the vast majority of the students recognised ideologies within the texts and could place them on a left–right continuum, not all approached the topic in a fully social-scientific way, distinguishing facts from opinions analytically. In the first stance, the most salient pattern was where students understood the texts as objects of analysis, thus meeting the main goal of social-science education. Twenty-one student responses were labelled as expressing this social-science stance; however, variation was seen within this group. Some students who took this stance did not take a strong position but distanced themselves from the political views expressed in the texts – rather trying to make sense of what the arguments were. They did tend to hold a belief; however, this was not an important part of their reasoning. Instead, they contemplated ways in which these different ideological perspectives could easily be turned into dogma or became political rhetoric:

It seems like both texts have the same goal, but their way forward is different. I saw two political sides very strongly when I read the texts, the right and the left ones. You can trace their arguments and see their logic, and I think it is important to understand both perspectives, and I think that most people are prejudiced like me and don't try to make sense of the arguments. To listen, take in the arguments, question them feels strange in the beginning and you stick to the beliefs you have. It's so easy to just see the political side you like. ...//... While you [the teacher] were reading, I wrote in my notebook: 'why does communism always lead to control and liberalism always lead to segregation?' (C23)

Such reflections were common among the expressions of the social-science stance. The students often underlined the importance of different perspectives, and they approached the texts in an analytical way, trying to understand them in a political context, i.e. as political texts. The student quoted above (C23) did not take a clear position although it was easy enough to understand what ideology was preferred. The student below (A7) took a stronger stand but

separated personal preferences from reasoning, motivating the political position by expounding why the student held a particular opinion in this case:

I saw that they are different in their line of argument. They're political texts without any arguments against their own case but could be seen as advertisements for ideas. In that sense, they both sound great because they're selling their vision of a perfect society with a happy end for all where citizens are happy and equal. However, being a Swede I've only had experience of the Swedish system and I mostly agree with that system. (A7)

The student demonstrated self-awareness in the expression of how the students' lived experience in a social-democratic system influences the student's preferences – if you only have experience of one welfare system, it is hard to relate to other ones. The student was, however, able to compare the more liberal welfare system in the US to the Swedish system. Other students who took the stance expressed why they chose one text over another with more ideology; however, they were also very aware that these were ideological choices:

The texts were very different in their approach and had strong arguments for their cause and showed evidence for their cause in different ways. The arguments were mostly used to pinpoint their own cause and contradict the other side's arguments. With the ideology I hold, the other text does not take social background into account. From my perspective I think it is more realistic to have high taxes in order to make sure that everyone can have an education and equal opportunities. (B1)

Examples such as these demonstrate an understanding among students that made their own ideological views secondary when compared with the analysis; the students had particular arguments for their choices, such as the use of taxes to ensure equality, reduce class distinctions or help vulnerable people from living on the street. However, the common denominator for the social-science stance was an analytical approach to the texts – the students tried to make sense of the arguments and to contrast the texts. However, the reasoning was not always non-opinionated. Some students who took this stance took no strong position but most demonstrated an understanding that this should be explained by personal preference and that such preferences had consequences for their stand, thereby expressing a kind of 'bias awareness'.

## 5.2 The Politicising Stance: Analytic and Opinionated

The consciousness of bias that the students who took the social-science stance exhibited was not as clearly present among students who took other analytical answers. The 18 who chose a politicising stance were aware that they had ideological beliefs; however, emotional reasoning affected how they approached the texts. This student (A13) saw good arguments in both texts and demonstrated a degree of consciousness about the chosen stance:

My opinion from the start is that a tax-funded system is necessary in order to create an equal and fair society. ... I reacted to the other text's arguments 'that private entrepreneurs can make welfare more efficient' and that's just wrong. The authors also based their arguments on 'freedom', which I interpret as an emotional argument. That made me think. Even though I believe that the state should 'meddle' to make things better, they had a point that people should also be able to decide for themselves. I prefer the first text because of my ideological



view. And I believe that the problems we're in are because of the right-wing government we used to have. (A13)

The student's argument in this case was based on the students' beliefs in specific societal values such as equality and fairness, but immediately, the student decided that the arguments in text 2 were just wrong. There was an understanding of the point of arguments regarding freedom, but problems were to be blamed on the liberal/conservative government. Finally, the student ended the argument asking whether there were 'some arguments that I like in the second text as well – perhaps the market should have a role to play after all?', which indicates a sort of confusion regarding where the student stood. Her analytical stance was somewhat coloured by her emotions regarding the political issue at hand.

However, most answers from students taking this stance showed a higher degree of analysis, demonstrating content knowledge and strong political interest. The student below (A6) provided elaborate arguments in favour of a social-democratic welfare state (guaranteeing the right to a good quality of life in terms of housing, food, healthcare and education); however, these answers were framed within the understanding that welfare is part of the Scandinavian system and that the other side only cared about profit. Furthermore, the student only briefly engaged with the arguments in the second text, stating that a market solution is not realistic:

Out of the two ideas presented in the texts, I find the tax-funded system the best. The public supply money according to their incomes and society distributes money back in form of healthcare, infrastructure, schools and other things that are part of the welfare system. I'm not a communist, but I find Marx's principle fair: 'From each according to his ability, to each according to his needs'. If you compare this to the market solution where profits are supposed to fix welfare problems, it doesn't work. Furthermore, there are democratic complications. The state can claim that they're acting on behalf of the people, while corporations only act according to the wishes of their board members. (A6)

The student's ideological preference was stated as fact and not as a premise for a particular argument, and words such as 'obvious' underlined this style of thought – the student believed that the only conclusion is the one that is to be reached in the way it was done here. However analytical the response was, it was nevertheless argued from a fixed position. Nevertheless, some students who took this stance expressed some uncertainty as they contrasted the two arguments. The student below (B5) dismissed the second text, but at the same time, certain problems in the preferred ideology were acknowledged:

My conclusion: the second text, on a liberal model, might sound great, but it doesn't work and becomes really unfair. I understand the freedom argument, but often it's on someone else's expense. On the other hand, we have problems with authoritarianism in socialism... I believe that a strong state with a planned economy is better though, maybe with better ways for the democracy to function – perhaps with more direct democracy. (B5)

Other students taking this stance demonstrated a more personal understanding of the welfare system – basing it on their specific life experiences. The student below (C25) expressed the understanding that the texts reflected two different approaches and that they are typical for two (clashing) ideological ideas that are represented in the debate in contemporary society and then swiftly linked this to personal experiences:



I have relatives in the United States, so I know a lot about their system, which is based on the private sector. I have seen what terrible consequences that system creates for people without access to public health and some people can't even afford an education. This is something I'm not OK with, and I think that the only solution is a strong welfare state. I'm extremely lucky to live in Sweden where I have free access to health care – something that is extremely important in my case. Also, about the free medication I get here, if I had lived in the United States, I would have had to pay 100,000 krona [*approximately 10,000 Euro*] for the medication I need. So, I like the current system better not only when I think of myself but also when I think of others. (C25)

However, this student, in reflecting upon personal experiences, expanded them and acknowledged their truth for others as well. This expression of a more analytical approach was typical in many responses; however, they nevertheless engaged with the texts as political beings, distinct from their peers with a social-science stance – for the politicised stance, the extrinsic goals of social-science education are more explicit.

### 5.3 The Political-Rhetoric Stance: Descriptive and Opinionated

Other students used less analytical language while still reading beyond the literal content, becoming more involved in the argument, a stance that was expressed by 22 students, but again, there was a certain variety among them. The student quoted below (C18) employed a more everyday analysis, based on the lived world, to explore how a more liberal model would affect the students' own family:

When I read the second text, I had a chilling feeling inside. Honestly, that kind of thinking is creepy and has become more common in Sweden today – we are more or less set on capitalist (market) solutions ... I almost feel offended being a second-generation immigrant myself ... I'd say that individuals who don't need any help would profit from a freer system because they are already in a good financial situation. But for someone like me, living with a single mom and three siblings, it would be almost impossible to get on without welfare. Unless the single parent works herself to death, hits the brick wall, becomes worn out etc. But then, that parent still needs public health that they are supposed to find money for and that will make it impossible to support four children! (C18)

In this example, the expression of the student's emotions was more important than trying to understand the texts. Political ideas from elsewhere led the student to have negative feelings, and the student was almost offended. The focus of this response was text 2, and arguments from the student's own experience were only implicitly held to be valid for other people.

Some students who took this stance displayed greater heights of analytical language, and they made inferences from the texts, such as linking them to different political ideologies; i.e. they were reading beyond the literal content. Still, the political stance is immediately clear. The student below (A2) illustrated this position. In the summary, the student wrote that the two texts demonstrate different ideological stands, but at once assumed a position against the more liberal text:

The first text wants a society for everyone without private entrepreneurs making money out of tax-funded means. The other texts claim that lowering taxes will create more jobs, but how do we know? If they're wrong, the tax revenues will drop and the welfare state will collapse.

Some people are dependent on government funding for a reason, and new jobs can't always fix their problems. Revoking their funding would be a punishment for them without allowing them to contribute through work. ... It would be a vicious circle for them. (A2)

Students taking this stance recognised that the texts represented different ideological approaches to the welfare state; however, they responded by criticising the political perspective with which they had the strongest disagreement. Some students who took this stance, such as the one mentioned below (C11), refused to even treat the argument seriously:

The first text is promoting a solidarity system, collectively funded with taxes. Left-wing. The other text is the opposite. That person talks about freedom and individuals and that people should be able to decide for themselves. When I read this text, I'm amazed by how that person thinks. Can this really be a real person's opinion? I definitely don't agree with this person's ideas. He/she can't see society as it is, and it's really selfish with no solidarity. My first impression is this: Is this person even nice or caring? Because they're not really thinking of the best for the people. I liked the second text, however. It made my blood pump and my adrenaline rush, and it really made me start thinking. I liked the first text because it's close to my ideas, but the second text really got me going. (C11)

The student related the liberal stance to amorality and questioned whether someone who holds such a position could be a caring individual. However, it is noteworthy that the student found both texts interesting, although for different reasons. The second text sparked an emotional reaction, which the student appreciated, thus prompting the opinionated stance.

Many other students who took this stance did give a description of both texts but then directly abandoned the description and stated which view they preferred, giving few supporting arguments, such as 'I think this is really naïve' (A9). Their own political view was considered to be the most important, and the text that did not accord with it was dismissed:

The first text gave me hope and engagement. It had very good examples about why we need a welfare system for everyone. ... The other one was more right-wing and claimed that the market can find solutions and allow freedom for people to choose. This text gave a feeling of discomfort and hopelessness. It's based on right-wing propaganda and will only favour the wealthy and most privileged families. This way will only increase the problems we see today, and the 'solutions' the text proposes will actually make the situation we are in right now worse for those people who are in trouble and I think these ideas are founded on ideas rooted in ignorance and egoism. (A8)

Thus, what distinguished the responses by students taking this stance was the immediate outpouring of political rhetoric from the students, with little effort being made to try to comprehend the arguments. The intrinsic goals of social-science education, to think analytically using the procedures, models and tools of the discipline, appeared less important for the purposes of trying to make sense of the texts for these students.

#### **5.4 The Non-Political Descriptive Stance: Descriptive and Non-Opinionated**

The last stance had the fewest representations in the data, with ten answers in total. These answers demonstrated little by way of basis for their conclusions. All but one expressed a position; however, students taking this stance did not show motivated reasoning for their



choice. Description dominated the texts. The response of the only student who did not express a position (C8) can serve to exemplify the descriptive and unbiased understanding present in all of the answers:

Text one is arguing for defending the welfare system with high taxes in order not to make financial matters worse for some individuals. The arguments are about schools and hospitals and that high taxes can be used to create more resources. Text two promotes individual freedom through the privatisation of resources. Its arguments are about creating work so people can pay for themselves and make them free from state intervention. Both texts could be seen as a description of Sweden today. (C8)

The student read the texts, summarised them and drew the brief conclusion that the texts described a debate in contemporary Sweden without providing any support for this inference. The responses of other students who took this stance were dominated by long descriptions of the arguments in the text, ending with short reflections. The example below (B2) exemplifies these answers, with their short reflections:

Certainly, the second text had good arguments. If people didn't have to pay so much in taxes, they could keep their money instead of being on welfare. I liked the second text better ... it had arguments I agree with, like the importance of free education. Sweden is a very unique system ... it said so in the text as well. (B2)

Other students taking this stance imbued the texts with more of their own ideas but only to the extent that these were expressed in relation to the wording of the texts. These students did not really reflect upon the differences in the texts or their links to ideology but found them equally interesting, almost as if the conflicting arguments matched each other. Politics did not appear uninteresting to them; however, they did not appear to see a conflict. Again, students answering this way were far less common, and I would suggest that they did not necessarily display lack of political interest. Rather, they seemed to struggle with the texts and with making sense of the arguments. One student wrote as follows:

I don't get the arguments. Lowering taxes in order to let people be able to afford to pay them ... I don't know. Perhaps it's because people have their ideological standpoints already set. I did get some of the arguments that seemed more reasonable, like the one that said that our taxes wouldn't be sufficient for a growing population. I preferred text 1 because in text 2, there were some concepts I didn't get and the argument was clearer in the first text. (A17)

This particular student exhibited several difficulties that challenged student understanding of the texts. The first argument that the student referred to was an argument that advocated lower taxes to create jobs that would help people become self-reliant. Furthermore, both texts claimed that an ageing population would create future challenges for the welfare state. The reasons for this descriptive stance are probably varied. Some students may not have been interested in politics, and others might simply have been forced to struggle with the texts at a cognitive level.

## 6 Conclusion

Although the vast majority of students recognised ideological leanings in the texts and could place them within a left–right continuum, most students approached the topic from a political angle, expressing political values and beliefs about the kind of welfare state they would support. Some students demonstrated an understanding in which they approached the texts from a social-scientific stance, attempting to make sense of the text, interpret its arguments and display an awareness of bias, in accordance with intrinsic goals (Husbands et al., 2003; Strandler, 2017). However, it was more common for students' political beliefs and values to come to the fore and for them, in opposition to the social-scientific disciplinary approach, to become entangled in arguments over which societal goals they preferred and why certain arguments in the texts were wrong, bad or ignorant. Nevertheless, some students displayed a higher-level analytical approach, whereas others became entangled in ideological rhetoric and did not attempt to interpret the texts. Furthermore, many students' arguments were based on lived experience; they used these experiences to form a sense of the kind of welfare system they preferred. It should be noted that the two texts on the ideal welfare state probed the students, eliciting demonstrated political values and beliefs, which is consistent with the extrinsic goals of social-science education.

I argue that the various approaches that students took in this project imply two important conclusions. First, students provide their own political and ideological understanding when confronted with discussions of contemporary issues. Their thinking and articulation are those of political animals (Aristotle, 2013; Yack, 1993); they use their voices to communicate moral concepts such as fair and unjust; and they are drawn to political ideas that are in keeping with those moral standpoints. When students encounter a characterisation of a political issue, such as the welfare state, they respond as political beings who have their own ideas about society. This is, however, consistent with the disciplinary idea that the welfare state involves more than instrumental arrangements, even revolving around moral conceptions and values (Kildal & Kuhnle, 2005). Students' lived experiences thus play an important part in guiding them in their political reflections on right and wrong. Even those students who approached the topic analytically and in a non-opinionated way demonstrated that their experience of the world was internalised with their understanding of how a welfare system could and should be organised.

Second, students experience difficulty in recognising the differences between politics and the study of politics. Even though the texts were presented in a social-science classroom in school, most students took political stands rather than trying to impress the teacher or researcher with an attempt to exhibit knowledge of politics. To practice social-scientific thinking that is informed by disciplinary ways of understanding evidence and arguments may seem unnatural for students (Wineburg, 2007) and as something to be taught. I suggest that the intrinsic goals of disciplinary knowledge, including learning about the political ideals of other political cultures through perspective taking, can broaden students' everyday understanding. We saw a few students making attempts to understand how values such as fairness and freedom can be interpreted differently and considered to be guiding principles for specific ideals regarding societal development. As Robert (2014, p. 198) and other scholars have shown, our knowledge of the world must always be from a certain standpoint; we see the world from where we are



used to regard ourselves as beings rather than from other perspectives. In addition, important second-order procedural and disciplinary concepts, such as evidence and inference, could play a role in helping students practice an enquiry mode wherein they can transcend their own experiences (Sandahl, 2015; Barton, 2017).

It appears clear that political beliefs, values and emotions, not disciplinary thinking, drive student engagement and interest in societal issues (Barton, 2009; Rickinson et al., 2009; Kahne & Bowyer, 2017a, 2017b). Political issues, such as the welfare state, evoke engagement and open up students' lived experiences. Thus, it is possible to think of the political as beginning in what Habermas (1987) called the life-world, with students interpreting and engaging political issues by making meaning of them within their own context. This leads us to a central issue with regard to combining intrinsic and extrinsic goals in social-science education. If the aim of social-science education is solely the qualification of students' thinking, a politicising approach is a challenge for teachers to overcome, although this is not necessarily true if the pedagogical goal is to allow students to become their own as is implied by Biesta's (2010) subjectification. However, this division into domains and goals risks a binary conception of the goals of social-science education. Following Biesta (2012), I would argue that the domains are integrated within the classroom, and in class, teachers must combine approaches. It is tempting to separate teaching into two spheres: in one, students are taught to think like social scientists, advancing in disciplinary ability and considering political issues as objects of study; in the other, students are invited to expound their own political ideas. I believe that this is not a suitable way forward (Englund, 2006).

Important and pressing societal issues can and should be discussed from a disciplinary perspective; however, it remains unclear whether students will make meaning from this if the life-world is not included. Certainly, disciplinary understanding can enable the making of sense; however, to ensure that meaning can be made out of it, it must incorporate students' preconceptions, emotions and understanding, allowing these to be tested in the classroom. I argue that resistance is a key concept here – the origin of resistance to one's ideas may not always be other people but instead can come from knowledge produced within the disciplines of the social sciences, e.g. perspective taking, where students learn to discuss and see political issues from different standpoints (Sandahl, 2015). Such knowledge, in the best of worlds, can at least give wings to students' inclinations to challenge and question opinions – both their own and others'. Previous study of citizens' disposition to retain beliefs even in the face of contradictory evidence (Taber, 2011), paired with the heated contemporary discourse, makes this a pressing issue for social-science education in its preparation of students' civic competence and their active participation in society.

I suggest that we require additional conceptual and empirical study to develop a social-science education that integrates disciplinary thinking and the life-world. It is perhaps that we need to understand social-science education as a dual, but integrated, world: on one hand, it features the cold discipline of a world that engages in issues founded on evidence, causality, structure/agency and perspective taking; on the other, it would consist of dynamic experiences, identities, myths and legends that make up the life-world. Furthermore, I suggest that the political must always begin and end in the life-world. However skilled we might be in our political analyses, we cannot escape the values and beliefs that we bring into our



understanding of the world. The welfare state is perhaps typical in this way – it does not only include knowledge of how different societies structure their systems alone but also embodies determinations of what is fair and just in relation to norms and values. Because we are all political animals, we all have ideas in such subjective dimensions. Still, a disciplinary approach and its epistemic rules can remind us that our perspective often indicates to us what we see as wrong, bad or ignorant; they can shed light on our biases, granting us an understanding of them. It is a somewhat undirected political driving force that lies embedded in the metaphor of the political animal. Perhaps the goal of social-science education is to take the student on a journey from a political animal to becoming a *homo civicus* (Dahl, 2005). I argue that this is what most educators wish for as the result of their work – responsible citizens with ideas on how to change and preserve society, albeit not necessarily interested in the details of policymaking and political processes.

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## Country Report: Civic and Citizenship Education in Polish School

**Violetta Kopińska**

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- Assumed shape of school civic education, resulting from analysis of school core curricula is based primarily on the transfer of knowledge, adaptive and reconstructive function of education.
- The model of civic education is based on thin conception of democracy. It is functionalistic and socialisation model.
- The reform of education implemented since 2017/2018 school years doesn't change civic education significantly. However, there has been a change in the political context in which civic education has taken place.

**Purpose:** The aim of this paper is to reconstruct the shape of current civic education in Polish schools.

**Methodology:** The results of the analysis presented in this article are based on the following research question: What shape of civic education can be reconstructed on the basis of the researched sources? The method of collecting data is finding secondary sources and documents. The method of analysing data is content analysis. The research sample includes legal act regarding education law, new school core curricula that have been implemented since 2017/2018 school year and publications showing results of research on civic education in Poland.

**Findings:** Within the framework of civic education in Polish schools, emphasis was placed on knowledge and on adaptive and reconstructive function of schools. Deficiencies in terms of skills and attitudes assumed in the core curricula indicate that neither has there been an establishment of active citizenship, nor has any emphasis been placed on developing attitudes. Results of the research indicates that legal regulation regarding social bodies such student self-government fail to give these authorities significant powers and opportunities for the experience of democracy by students are very limited. Civic education in Polish schools is not learning in democracy, it is learning about democracy.

**Key words:** citizenship and civic education, Polish schools, core curriculum, social and civic competences, democratization of school life

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## 1 Contemporary political culture and civic education in Poland

Until 1989, civic education in Polish schools and the school subject *wychowanie obywatelskie* (citizenship upbringing) were strongly ideologized (Szczegółka 1965, 1969; Siwek & Zajączkowski, 1971, 1979; Erasmus 1976, 1977, 1978; Erasmus et al., 1980; *Wychowanie Obywatelskie 1969-1989*)<sup>1</sup>.

Things began to change in the 1990s, after the overthrow of communism. The earliest programs of *wiedza o społeczeństwie* (knowledge about society) were approved by the Ministry of National Education in 1995 and 1996.<sup>2</sup> Currently, civic education is conducted as part of civics, but it is also emphasized that civic competences are of an intersectional nature, and schools should develop them throughout the entirety of education, as an element of all school subjects.

Civic education in the former Eastern-bloc countries has a specific nature. The concept of citizenship, and consequently of civic education, become hybrids. On the one hand, there are designs, models, as well as good practices developed in other democratic countries. On the other hand, the context of introducing and adapting these changes encounters obstacles that are difficult to overcome, such as the persistent suspicion toward the state, which results in the formation of citizenship in opposition to the state and a negative assessment of civic activity (Wnuk-Lipiński 2005, p. 114). Civic education under such conditions is regarded as “highly suspect,” and therefore pushed to the side. This particular situation is also influenced by general social trends and changes therein. Contemporary civic education in school is therefore a mixture of all these: elements often accidentally taken from various educational models, “cleansed” of civic activity, trapped in what is still a rather traditional educational system that focuses on the transfer of knowledge.

The aim of this paper is to reconstruct the shape of contemporary civic education in Polish schools. However, I do not intend to carry out this reconstruction within a historical perspective. Rather, this article is an attempt to capture the characteristics of current school civic education. I call this an attempt with the full awareness of the limitations resulting from the adopted methodology. Yet, it is my hope that the characteristics and analyses presented below will offer insight into civic education in schools and complement—or perhaps slightly change—the perspective of widely available research in this field, such as ICCS (Schulz et al., 2010) or Eurydice (European Commission/EACEA/Eurydice, 2017). However, before getting to this point, I will briefly outline the political context surrounding Polish civic education, which remains relevant to the interpretation of the results of the analyses presented below.

In 2015, Poland underwent a shift in the allocation of political powers, which means a significant shift in political culture (Kwiatkowska et al., 2016). The parliamentary elections were won by the conservative, Eurosceptic party *Prawo i Sprawiedliwość* (Law and Justice - PiS), which received 37.58% of the votes and secured the majority of seats in the Sejm (the lower chamber of the two-



chamber Parliament of the Republic of Poland). One of the important points of the party's electoral program was the education reform consisting of the dissolution of middle schools.<sup>3</sup> Middle schools existed in Poland since 1999, and were introduced in the atmosphere of numerous protests. After several years of functioning, the situation stabilised, and these schools became part of the "landscape" of formal education. Although experts pointed to both the pros and the cons of the functioning of middle schools, in the 2015 election campaign the focus was on populist arguments that justified the above mentioned dissolution primarily on the basis of intensified didactic and educational problems within these institutions. The return to the older system of education (8-year primary school and post-primary education with a duration of 3, 4, or 5 years) was primarily justified with arguments regarding increased child safety, greater educational impact (a single school over eight years), and a return to the past<sup>4</sup>. The change in the structure of education was widely discussed, there were numerous protests, and scientific communities addressed open letters on the matter to the Minister Edukacji Narodowej (Minister of National Education - MEN), Anna Zalewska. On the Ministry's part, numerous meetings—so-called social consultations—were organized in many places, the aim of which was less to consult and more to present the assumptions underlying this reform. There was no place to ask questions or formulate opinions. The purpose of the change in the structure of education quickly became confirmed in the enacted legal acts, and, beginning in the 2017/18 school year, the reform began to be implemented in schools. As the structure of education changed, it became necessary to introduce new core curricula. These were prepared at an express rate within a single year. Of course, such a pace was unfavourable to the deliberated changes. The core curricula have changed in detail; some subjects to a larger, others to a lesser extent. The most visible change concerns the number of specific requirements. For example, the number of requirements in social and civic competences has more than doubled, indicating that the new core curricula are even more detailed than the previous ones.

Currently the most widely debated change concerns the way in which the increased requirements are spread over the different stages of education. One result of the dissolution of middle schools was that part of the core curriculum was transferred to the newly created seventh (in the school year 2017/18) and eighth (in the school year 2018/19) grades of primary school, and some to post-primary schools. As a result, organizations of parents (e.g. Rodzice mają głos [Parents have voice], Rodzice przeciwko reformie edukacji movement [Parents against the reform of education movement])<sup>5</sup>, as well as teachers, began to inform the media about the educational overload of the new seventh-year pupils due to the vast amount of tasks required for the completion of the final grades of primary school. The Rzecznik Praw Dziecka (Polish Commissioner for Children's Rights - RPD), Marek Michalak, revealed the letters he received from students and their parents (RPD, 2017a) regarding this situation, and on November 30, 2017 he requested of Minister Zalewska to consider changes in this regard. He also appealed to the education superintendents<sup>6</sup>. In a subsequent official statement to the Ministry of Education (August 14, 2018), the Commissioner for Children's Rights also referred to the report titled "The situation of students in



the seventh grade of the reformed primary school,”<sup>7</sup> which showed that 48% of teachers believe that the subjects they teach are too extensive, especially in the case of Polish (75%), history (75%), geography (64%), mathematics (62%), and English (59%). As these teachers claim, they are unable to realise all of the curricular content during classes: on average, they realise 60% of the material in class, while the rest the pupils must learn at home<sup>8</sup>. Minister Zalewska, responding to the report, undermined its reliability and called it “an image of subjective assessments”<sup>9</sup>. Subsequent statements by the Commissioner for Children’s Rights, dated October 1, 2018 (RPD 2018a), and November 28, 2018 (RPD 2018b), drew attention to the necessity of analysing the core curricula, particular with regard to the scope of requirements and the number of hours allocated to meet them. In response, the Ministry pointed out that the responsibility for the proper organization of the educational process lies with the teachers and school principals.

The above is just one thread in the discussion of the educational reform, but it is important because it is related to the changes in the structure of education, and therefore also to the core curricula. However, it should be emphasised that despite the change in the number of requirements, the shape of social and civic competences reconstructed on the basis of the core curriculum of general education has not changed significantly (Kopińska 2017b). The new core curricula repeat the same errors that were seen in the old ones (Kopińska & Solarczyk-Szwec, 2016, pp. 153-155, Kopińska & Solarczyk-Szwec 2017, p. 277-281). They exhibit and neglect similar areas of civic education (compare chapter 4 below). However, there has been a change in the political context in which civic education has taken place. This concerns both government policy understood more broadly, as well as educational policy, especially the area that directly affects the shape of civic education. The following statement was included in the introductory part of the core curricula:

*“School activity directed at wychowanie (upbringing) is one of the basic goals of the state’s educational policy. The task of wychowanie (bringing up) the next generation belongs to the family and the school, which in its activities must take into account the will of the parents, but also to the state, whose duties include creating proper conditions for wychowanie (upbringing). The task of the school is to focus the educational process on values that set wychowawczy (upbringing) goals and criteria for its assessment. Wychowanie (upbringing) oriented toward values assumes, first and foremost, the subjective treatment of the student, and values encourage people to make the right choices and decisions. In the didactic and educational process, the school undertakes activities related to places important to national memory, forms of commemoration of figures and historical events, the most important national holidays and state symbols” (MEN 2017a, MEN 2018).*

The new core curricula to a greater extent articulate issues related to the formation of patriotic attitudes, primarily patriotism understood in terms that are national and megalomaniacal, rather than civic and critical. Nevertheless, patriotism reconstructed on the basis of the previously existing program had the same character: Poland-centric, idealizing its own national group, with



little criticism of its own history, steeped in the cult of a hero spilling his own blood for his homeland (Kopińska, Majchrzak, Szwech, 2017). The present change concerns the way in which the current core curricula emphasize this even more strongly, appealing to patriotism directly. This is especially important in the context of government policy.

## 2 Example: The Rainbow Friday

Another example illustrating the context in which civic education is implemented in Polish schools is the recent action by the Ministry regarding the initiative of the NGO “Kampania Przeciw Homofobii” (Campaign Against Homophobia - KPH) to organize in October the so-called Rainbow Friday in schools. On the KPH website one can read about the purpose of this action:

*“Rainbow Friday is an action initiated by the social organization Kampania Przeciw Homofobii (Campaign Against Homophobia), held for three years on the last Friday in October. The aims of the action are to show LGBTQI youth that there is also a place for them in school—that they can feel safe there and fully realise their potential. Although the initiator of Rainbow Friday is the Kampania Przeciw Homofobii (Campaign Against Homophobia), it is the teachers, together with the students, who themselves conduct classes, decide on the content and activities that will take place as part of the action. Educational materials provided to schools by KPH serve as inspiration for how to conduct these classes” (Tęczowy piątek. Pytania i odpowiedzi, 2018 [Rainbow Friday, Questions and Answers, 2018]).*

It is worth emphasizing that the obligation to conduct anti-discrimination education in Poland results from many international conventions in which Poland partakes. In addition, the preamble to the Ustawa z dnia 14 grudnia 2016 r. - Prawo Oświatowe (the Act of 14 December 2016 - Educational Law – UPO)—the most important legal act in the field of education law—poses that:

*“Schools should provide each student with the conditions necessary for his or her development, and prepare young people for the fulfilment of civic duties based on the principles of solidarity, democracy, tolerance, justice, and freedom” (UPO, 2016).*

Furthermore, the core curricula themselves contain requirements (though not many) regarding tolerance, respect of others, and a respect of diversity. Despite this, the Ministry of National Education indicated that the KPH initiative does not fall within the scope of the curriculum, and therefore parents’ permission to conduct this type of activity is required. Subsequently, it was reported that schools in which “Rainbow Friday” was organized would undergo inspection, and if any irregularities were detected, disciplinary proceedings against the school principals would be carried out<sup>10</sup>.

In response, KPH organized an action called “Write to Minister Zalewska regarding Rainbow Friday”<sup>11</sup>. The following message is displayed on the KPH website:



*“Write to the Minister of Education why you think Rainbow Friday is needed in Polish schools. Show that young LGBT people are important, and that every pupil has the right to feel safe in their school”* (Napisz do Pani Minister Zalewskiej w sprawie Tęczowego Piątku, 2018 [Write to Minister Zalewska regarding Rainbow Friday, 2018]).

Within two weeks, 806 letters written by students, parents, and teachers were received and delivered to the Ministry of National Education (Niech Zalewska nas usłyszy, 2018 [Let Zalewska hear us, 2018]). On December 3, 2018, the Rzecznik Praw Obywatelskich (Commissioner for Citizens’ Rights – RPO), Adam Bodnar (RPO, 2018a) also defended anti-discriminatory education, sending a letter in this matter to the Minister of National Education (RPO, 2018b). In this letter, Bodnar pointed out the lawfulness of all classes concerning issues of tolerance and non-discrimination, and stressed their importance in education. He also wrote that he received information about incidents involving “summoning students for individual conversations with the headmasters, collecting statements from them about participation in the action [Rainbow Friday – auth.], controlling their dress, confiscating items related to the action (e.g., pins), or using threats of lowering conduct grades.” Bodnar assessed such occurrences as grossly violating students’ rights and affecting their sense of security at school. He requested from the Minister of National Education information regarding activities undertaken in connection with the introduction of anti-discrimination content to schools and other educational institutions as part of projects carried out by non-governmental organizations, and to indicate the legal basis of inspections carried out on schools participating in Rainbow Friday, as well as to provide a detailed list of planned and already-implemented activities, and copies of internal documentation regarding those inspections that had already been carried out (RPO, 2018b).

These are just some of the events that shed light on the context of modern civic education in Poland. I selected them because of their importance to the present discussion. On the one hand, they show the general climate of the contemporary reformed (or, as many think, “deformed”) Polish schools, which does not bode well for civic education because it means that an even greater focus will be placed on what can be evaluated through external examination.

The results of the analysis presented in this article<sup>12</sup> are based on the following research question: What shape of civic education can be reconstructed on the basis of the researched sources? Civic education in school is here understood broadly. Therefore, the issue does not only concern teaching and learning within individual school subjects, but also the development of civic competences through the experiences and activities that, although taking place at school, exceed the scope of those subjects.



### 3 Civic education in school: Organization and scope

Civic education in Poland (Artych & Witkowska, 2014; Kopińska & Solarczyk-Szwec, 2016) is implemented as a cross-curricular theme, integrated with other subjects, and as a stand-alone subject, *wiedza o społeczeństwie* (“knowledge about society”, which resembles/be similar to civics). The organization and the scope of the subject of *wiedza o społeczeństwie* (knowledge about society) - as in the case of other school subjects - is regulated by generally applicable legal acts of which the most important are the decrees of the Minister of National Education: concerning the framework teaching plans (MEN 2017, MEN 2012) and the core curriculum of general education (MEN 2017a, MEN 2018).

In the first three years of school education (children aged 7–9 years)<sup>13</sup>, there is no division into subjects. Instead, specific areas of education—e.g., mathematics education, or artistic education—are distinguished on the basis of the planned educational goals. Civic education is included here primarily in the area called *edukacja społeczna* (social education). Over the following six years of primary school, civic education is included as part of various subjects, the most important of which are history, Polish, and geography. In the last (8<sup>th</sup>) grade of primary school, pupils (14-years-old) have one hour of *wiedza o społeczeństwie* (“knowledge about society”) per week (MEN 2017a). At the next stage of education—post-primary school (4-year high school, 5-year technical school, 2-year first-degree vocational school), the subject *wiedza o społeczeństwie* (“knowledge about society”) is continued for two years at one hour per week: for the first two years in high school (Fig.1), and the last two years of technical school. The frequency of 1 hour per week concerns the so-called basic scope of the subject, which is implemented for everyone.



Fig. 1: Frame of working hours in Polish 4-year high schools – division into compulsory subjects.

	Compulsory subject	Weekly working hours (45 min.)				Total in the four-year education period
		First year	Second year	Third year	Fourth year	
		Basic scope				
1.	Polish language	4	4	4	4	<b>16</b>
2.	Foreign language	3	3	3	3	<b>12</b>
3.	Second foreign language	2	2	2	2	<b>8</b>
4.	Philosophy or arts or music*	1	-	-	-	<b>1</b>
5.	History	2	2	2	2	<b>8</b>
6.	Knowledge about society (civics)	1	1	-	-	<b>2</b>
7.	Base of entrepreneurship		1	1	-	<b>2</b>
8.	Geography	1	2	1		<b>4</b>
9.	Biology	1	2	1		<b>4</b>
10.	Chemistry	1	2	1		<b>4</b>
11.	Physics	1	1	2		<b>4</b>
12.	Mathematics	3	4	3	4	<b>14</b>
13.	Informatics	1	1	1	-	<b>3</b>
14.	Physical education	3	3	3	3	<b>12</b>
15.	Civil defense and security education	1	-	-	-	<b>1</b>
16.	Classes with form master	1	1	1	1	<b>4</b>

\*The principal of school decides which subject is realised during the first year.  
 The legal regulation give possibility to introduce optional subjects in school education.  
 In extended scope the number of hours taken per week is increased:  
 - In the case of Polish language, knowledge about society, philosophy, or optional subject like: history of music, history of arts, Latin language and ancient culture – it is additional 8 working hours per week ;  
 - In the case of foreign languages, history, geography, biology, chemistry, physics, mathematics, and informatics – it is additional 6 working hours per week.  
 The subjects realised in extended scope are established by the school. Every student can choose 2 or 3 subject executed in this way.

Source: MEN (2017). Rozporządzenie Ministra Edukacji Narodowej z dnia 28 marca 2017 r. w sprawie ramowych planów nauczania dla publicznych szkół (Dz.U. 2017, poz. 703) [Decree by the Minister of National Education of March 28, 2017, concerning the framework plans for teaching public schools], <http://isap.sejm.gov.pl/isap.nsf/DocDetails.xsp?id=WDU20170000703> , access: 2018-12-12.



In addition, it is possible to implement an extended scope based on the profile of the class<sup>14</sup> or a decision by students who want to take the matriculation examination in the subject<sup>15</sup>. Implementation of the extended scope of the subject indicates an additional 8 hours per week (MEN 2018). Secondary schools of the new type (4-year high school and 5-year technical school) will start functioning from the 2019/20 school year. Currently, old type 3-year high schools and 4-year technical schools are still in existence; there, *wiedza o społeczeństwie* (knowledge about society) is offered in the basic scope of 1 hour per week (throughout one year), and in the extended scope of 6 additional hours per week (MEN, 2012; Kopińska & Solarczyk-Szwec, 2016, p. 29). In these schools, graduates of the dissolved middle schools are taught, where the scope of *wiedza o społeczeństwie* (knowledge about society) included 65 hours during the three-year education cycle (MEN 2012), which translated into one hour per week for two school years. As it was reported by Eurydice, Poland is among the few countries where citizenship education is implemented as a stand-alone subject. However, the number of school years in which citizenship education is provided as a compulsory separate subject is not so high like in Estonia, France, Slovakia and Finland (7-12 grades) (European Commission/EACEA/Eurydice, 2017, p. 44). Currently, in Poland it is three grades.

The scope of *wiedza o społeczeństwie* (knowledge about society), resulting from the core curriculum at the level of the last grade of primary school, includes 12 thematic blocks: the social nature of humans; family; school and education; human rights; juveniles vis-à-vis the law; local community; regional community; national/ethnic communities and the homeland; civic participation in public life—civic society; mass media; democracy in the Republic of Poland; international affairs (MEN 2017a). In contrast, the themes for secondary schools (4-year high schools, 5-year technical schools) are constituted (in the basic scope) by 7 blocks: humans and society; civic society; public authorities in the Republic of Poland; human rights and their protection; law in the Republic of Poland; selected problems of public policy in the Republic of Poland; contemporary international relations.<sup>16</sup> The analysis of the requirements formulated in both the subject of *wiedza o społeczeństwie* (knowledge about society) and others is presented below (chapter 4). Like in most former Eastern-bloc countries (but also in Sweden, France, Spain, Austria, and Switzerland), in Poland general aims, specific objectives, and learning outcomes are formulated in national curriculum for citizenship education (European Commission/EACEA/Eurydice, 2017, p. 46). However, this construction of core curriculum results from the approach to it, not from the specific position of citizenship education.

In Polish schools there is no obligation to use textbooks. The decision regarding the use of textbooks and the choice of a specific one depends on the school and teachers. In practice, using a textbook in school is an unwritten rule. Every textbook that can be used in school has to be approved by the Minister of Education. This decision is made on the basis of experts' assessment. Currently, there are 12 textbooks (four for primary schools; and nine for post-primary schools,



including six within the basic scope and three within extended scope) for wiedza o społeczeństwie (knowledge about society) approved by the ministry for school usage.

Figure 2: The cover of the civic education textbook for primary school: Iwona Janicka, Arkadiusz Janicki, Aleksandra Kucia-Maćkowska, Tomasz Maćkowski, *Dziś i jutro. Podręcznik do wiedzy o społeczeństwie dla szkoły podstawowej*. [Today and tomorrow. The knowledge about society textbook for primary school] Nowa Era sp. z o. o., Warszawa 2017

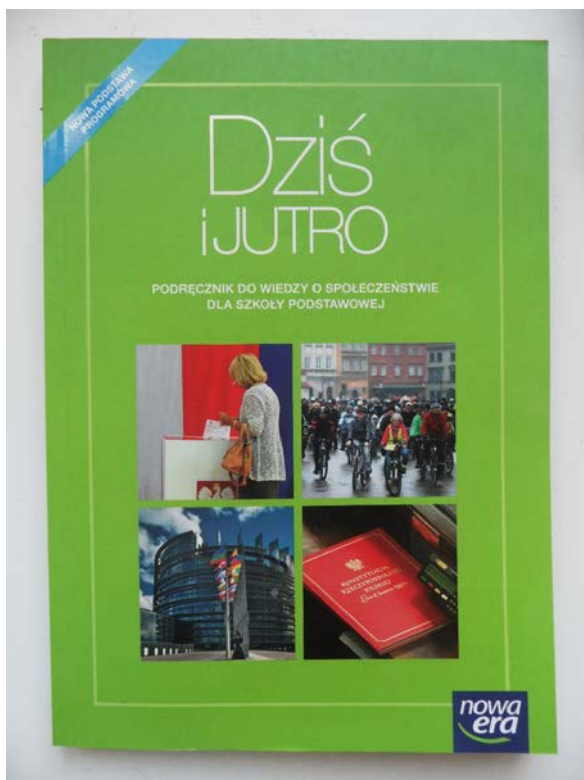


Photo: V. Kopińska

The content of wiedza o społeczeństwie (knowledge about society) is quite similar to scope of Swedish subject social studies (Arensmeier, 2018, p. 10-11) but in Poland, active participation, and critical and scientific ability is much less exposed, even on assumption level. The respect for differences which is expressed in educational law in Italy (Albanesi, 2018, p. 22) in Poland is not even declared; though tolerance is articulated in Polish educational regulation (see chapter 2). Detailed analysis of school core curricula of general education gives more specified image of citizenship education in Polish schools.

#### 4 Social and civic competences expressed in core curricula<sup>17</sup>

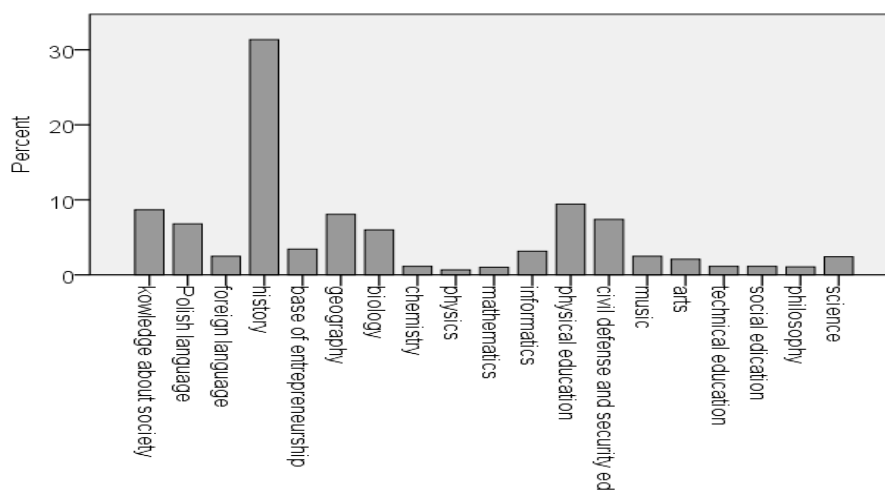
Core curricula in Polish schools consist of a couple of parts. The first one determines the general aims and tasks of a given type (primary, post-primary), and includes general characteristics of individual subjects. The second, most comprehensive part, contains the general aims of every subject (called general requirements) as well as learning outcomes (called detailed requirements).

The general and detailed requirements are regarded as units of analysis in this research. However, in this article I am presenting the results concerning detailed requirements, whereas general requirements are the context of this analysis.

The research took into account core curricula for all the compulsory subjects and two optional subjects which are 'ethics' and 'family life education'. The analysis consisted of selecting from among all the core curricula requirements those that fall within the scope of social and civic competences (1736 detailed requirements were selected from among 3515), followed by searching for analytical categories<sup>18</sup> in selected requirements.

First of all, it is worth noting the school subjects in which social and civic competences have been placed. As shown in Fig. 3, these competences are generally concentrated in several subjects. The most, over 31%, can be found in history. A significant number of them is also found in wiedza o społeczeństwie (knowledge about society) (8.7%), physical education (9.4%), civil defence and security education (7.4%), geography (8.1%), Polish (6.8%), and biology (6.0%).

Fig. 3. Social and civic competences in the Polish school curricula, including division into subjects.

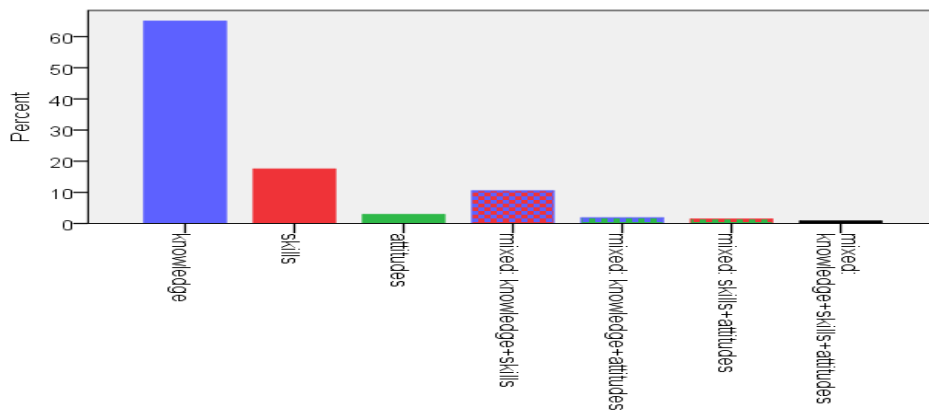


Source: own research



Important for the assessment of the shape of civic education in contemporary schools is yet another general result. The structure of the surveyed requirements based on inclusion in the area of knowledge, skills, and attitudes is presented in Fig. 4.

Fig. 4. Social and civic competences in Polish core curricula—division into the area of knowledge, skills, and attitudes.



Source: own research

The area of knowledge is interpreted in these analysis as involving learning outcomes concentrating on memorising; recreating from memory; characterising; exchanging; discussing concepts, facts, procedures, models, etc. The area of skills includes those learning outcomes that focus on performing specific activities (psychomotor sphere) or those related to higher-level intellectual skills (designing, constructing, creating, evaluating, verifying). Then, the area of attitudes includes those learning outcomes that appeal to feelings, principles, valuation, readiness to react in a specific way (affective sphere) (Kopińska 2017a, p. 104).

Fig. 4 clearly shows that the Polish core curricula are dominated by requirements related to the area of knowledge. It should be added that the requirements related to knowledge dominate the majority of school subjects in which most of the social and civic competences were included (indicated in Fig. 3). They constitute 87% of the requirements analysed in the subject of history, 75% in geography, 98.9% in biology, 76.4% in civil defence and security education, and 63.6% in wiedza o społeczeństwie (knowledge about society).<sup>19</sup> Skills dominate only two subjects: Polish and physical education. However, in the former subject the focus is on simple communication skills (sending and receiving verbal and non-verbal messages), and in the latter on the skills needed to ensure physical health.

Taking into account the division into the area of knowledge, skills, and attitudes, the analysis of social and civic competences in the core curricula suggests that the reconstructed form of civic education is based primarily on the transfer of knowledge, not the development of skills or attitudes. In Poland, civic education in school is more concerned with learning about citizenship and democracy, rather than learning in citizenship and democracy. In addition, of importance is the fact that only 6.5% of the surveyed requirements can be described as those that fulfil the emancipatory function of the school, which consists in preparing people for the critical assessment of reality, for overcoming imposed restriction, and for changing the surrounding reality into a better one (Kwieciński 1995, p. 21). The function of the other requirements is the reproduction of the national and universal culture, the reconstruction of the social structure, and the insertion into the existing social order (Kwieciński 1995, p. 21). This suggests that, in its assumed form, civic education in Polish school has a socializing and adaptive character, because it focuses essentially on inserting individuals into the existing socio-political order (Biesta 2009b, pp. 153–154).

However, let us look at which requirements dominate the core curricula, and which appear the least or have been omitted completely.

Table 1 presents the most numerous categories found in the area of knowledge, skills, and attitudes identified in the examined core curricula.

As can be seen from Table 1, among the categories that have the highest numbers in specific areas, those in the lead concern history and cultural heritage at both national and European levels.<sup>20</sup> Categories such as knowledge of human rights (14) and their protection (11), respect for human rights, knowledge about diversity and cultural, religious, and other identities (11) are not included in Table 1 due to their low frequency of occurrence. Although these categories are present, over 70% of them are found in one subject: civic (called ‘knowledge about society’). Whereas the category of communication skills has been identified in a high number of requirements, 66.4% of them refer to very elementary skills related to sending and receiving verbal and non-verbal messages. However, missing are many communication skills that are particularly important for functioning in a democratic society. I will return to this observation in the analysis of data from Table 2.



Table 1. Social and civic competences in the core curricula: most frequently occurring analytical categories in the area of knowledge, skills, and attitudes.

Analytical category/learning outcome	Number of detailed requirements in which the analytical category is present	Percentage of detailed requirements in which the analytical category is present
<b>Knowledge</b>		
knowledge about the history and cultural heritage of the country	344	19.8
knowledge of major events and trends in European and world history, knowledge of the cultural heritage of Europe and the world	248	14.3
knowledge about social problems, processes, and phenomena	69	4.0
knowledge concerning the political and legal system—national level	56	3.2
knowledge concerning behaviour in crisis situations (threatening to life and health)	54	3.1
knowledge about threats to the environment and its protection	53	3.1
understanding of the rules of conduct and behaviour generally accepted in various societies and environments	38	2.2
<b>Skills</b>		
communication skills	107	6.2
ability to take action to ensure physical (and mental) health	72	4.1
ability to evaluate the actions of others	65	3.7
ability to behave in accordance with the rules and regulations prevailing in different environments	43	2.5
ability to judge critically	39	2.2
<b>Attitudes</b>		
readiness to accept responsibility related to participation in various communities, functioning in various social roles	9	0.5
conviction about the need to protect the environment	8	0.5
respect of differences	8	0.5
a sense of belonging in one's own surroundings	8	0.5

Source: own research

Another numerically important category is knowledge of social problems, processes, and phenomena. Nearly 80% of requirements related to this category are located in two subjects: geography (56.5%) and wiedza o społeczeństwie (knowledge about society) (23.2%). These requirements were mainly set for post-primary schools, that is, for 15–18/19 year-olds (72%). Also





worthy of note is the relatively high value in the category of “critical judgment”, which is particularly important from the perspective of civic education.

Data included in Table 1 also show that only 8–9 requirements received the highest numbers in the category of attitudes. This is true in the case of “respect of differences.” During the first three years of school education there are two requirements related to this category, five requirements in the following five years, while in the last stage, designed for 15–18/19 year-olds, only one. This last one is quite narrow, referring to the respect of differences arising from musical preferences.

Table 2. Social and civic competences in the core curricula least frequently occurring categories.

Analytical category/learning outcome	Number of detailed requirements in which the analytical category is present
knowledge and application of the concept of equality	0
knowledge of the forms of civic opposition	1
knowledge about the role and meaning of conflict and contestation in the state	1
ability to create an atmosphere of trust	1
ability to speak up in a group	1
ability to identify and talk about one’s own problems	1
ability to participate in democratic decision-making processes	0
ability to participate constructively in the activities of local and neighbourhood communities	1
ability to critically evaluate media messages regarding political and legal issues	1
ability to critically evaluate specific solutions or practices related to the political and legal system	1
ability to understand different points of view	1
readiness to evaluate the actions of people under one’s command	0
readiness to change one’s opinion and to reach a compromise	1
sense of belonging to the EU, Europe, and the world	1
readiness to participate in democratic decision-making processes	1
readiness to evaluate and correct the effects of one’s own work	1
negative assessment of, and readiness to overcome prejudices, racism, and discrimination	1
supporting diversity and social cohesion	1

Source: own research

A low number was also recorded in the category of “respect of human rights” (7). During the first three years of school education there are two such requirements, over the next five years—three, two of which are found in the subject of wiedza o społeczeństwie (knowledge about society). In the final years of school education there are two such requirements: one in wiedza o



społeczeństwie (knowledge about society), and the other in music (respect for creators and recipients). Such a small representation of categories related to “respect of differences” and “respect of human rights” is not justified even in the context of building of the core curriculum itself. Both at the second (designed for 10–14-year-olds) and at the third level of education (designed for 15–18/19-year-olds), only the general requirements relating to the above-mentioned categories have been articulated, which means that they must be further specified. This result is worth considering in the context of previous comments concerning the real possibilities of implementing anti-discrimination and equality education in contemporary schools. The core curriculum assumes the development of competences in this area, although admittedly they occupy a rather marginal position. If we combine this with the conservative politics conducted by government (e.g. the attitude towards LGBT+ people, or national patriotism, combined with political actions and decisions that show that, in the government’s understanding, the concerned civic community has more of an exclusive than inclusive nature) then these requirements are not only sparse, but can become no more than a guise.

On the basis of the analyses it can be concluded that many categories, especially in the area of skills and attitudes, do not find their proper representation in the core curriculum. Table 2 lists those categories that appeared only once, or not at all. It is worth emphasizing, however, that identifying a given category two or three times (in a document meant to design an educational program lasting 12/13 years) does not mean that it is sufficiently represented.

Data presented in the table show that among the least-rated categories in the core curricula can be found such important categories as: the ability and readiness to participate in the democratic decision-making process; the ability to understand different points of view; the ability to speak up in a group, to talk about one’s problems, but also readiness to change one’s own opinions, to reach a compromise. Although the skill of critical judgment is a relatively well-represented category in the Polish core curriculum (Table 1), it turns out this does not apply to political and legal issues (Table 2).

## 5 Civic education in Poland: research review

In 2009, Poland took part in the International Civic and Citizenship Study (ICCS)<sup>21</sup>, a project which assessed young people’s knowledge and attitudes. In Poland, 4081 students were enrolled in the study (mean age: 14 years and 9 months), 150 school principals, and 2,238 teachers (Wiłkomirska 2013). In these studies, out of all the countries Polish students came in sixth place in the field of civic knowledge. At the same time, these studies showed differences in the results achieved among the Polish youth. A large group of students achieved results in the two lowest levels (28%), which means that these students either did not know the principles of democracy (8.6%), or knew only general principles—such as equality, social cohesion, and freedom—and tied them to examples of situations illustrating the threat or defence of these principles (Wiłkomirska 2013, pp.



103–105). Their competences were limited to a simple understanding and interpretation of social phenomena without the ability to think relationally (Wiłkomirska 2013, p. 104). Deficiencies were particularly visible in areas that required critical thinking (Wiłkomirska 2013, pp. 123–128). The average results for the 150 Polish schools covered by the survey showed that only in one out of four schools students achieved an average score corresponding to the highest level of knowledge highlighted in the cited studies (Wiłkomirska 2013, p. 106). At the same time, these studies show that specific features of the school environment—such as an open atmosphere of school discussions or activities related to the elections to school councils—also have a positive impact on the results in civic knowledge (Wiłkomirska 2013, pp. 170–171). The research cited above shows that Polish teachers assessed the impact of students on school decisions at a level much higher than the students themselves. There would be nothing extraordinary in this, because disproportions in this area were observed in most countries. But firstly, the assessment of Polish teachers was among the highest, and, secondly, the discrepancy between teacher and student ratings was the greatest in Poland (Wiłkomirska 2013, p. 187). The result showing low student assessment of the influence of young people on decisions taken at school, taken in combination with a high teacher assessment is therefore very worrying, because it offers little hope for a change in the situation. It should be emphasized that the very legal structure of the bodies that can potentially democratize Polish schools does not make it any easier. It is true that in Polish schools there is an obligatory representation of both the parents—the parent council (Starzyński, 2005)—and the student self-government, but their rights are limited. The student council has no legally determined decision-making power other than the ability to decide on its own regulations (Article 85 of the Act of 15 December 2016—Educational Law). The legal competences of the student self-government have an opinion- and proposal-giving character. The scope of democracy experienced by pupils in schools is not secured by appropriate legal regulations. The mere establishment of student representatives, even if taking place under the conditions of democratic elections, offers no guarantee as to the influence of this representative body on the decisions taken at school. Therefore, a lot depends on the school's culture, understood as rules referring to the relations between all participants of the school life. This is confirmed by research from 2015 (Cierzniewska et al., 2017) conducted among 13–15-year-olds in Poland, which showed that the main variable in the assessment of student self-management is the school itself (Gackowska, 2017, p. 287–320; Cierzniewska & Gackowska, 2017, p. 321–332). Summing up this research, the authors state that young people have a very limited influence on their school life. Their fields of activity are strongly limited by constant teacher control, which creates a mere veneer of self-governance and, as a result, discourages action (Cierzniewska et al. 2017, p. 371). The above studies largely confirm the results of other research carried out seven years ago on the same age group (Kopińska 2009), in which I identified the following problems of student self-governance: a limited scope of activities undertaken within the framework of student self-government activities (focus on sports and entertainment activities), and, consequently, a lack of a sense that the students' interests are represented by the self-government bodies (Kopińska 2009, pp. 312–313). Unfortunately, this means that little has changed in this area over the years, which in turn may support the



preservation of a specific pattern of student self-government. And this makes it difficult to implement any changes in this regard.

In terms of the democratization of school life, the creation of appropriate conditions for the development of student self-government activities is not the only aspect that leaves much to be desired. Another social body that offers an opportunity to experience democracy at school is the school council (Articles 80–81 of the Act of December 14, 2018 — Educational Law). It is made up in equal numbers of representatives of teachers, pupils, and parents. This body has been equipped with significant competences (the most important of which is the introduction of changes to the school statute and the ability to petition the supervising authorities for an evaluation of the school's activities, its principal, and individual teachers—these applications are binding for this body). However, legal provisions stipulate that the presence of this body in the school is not mandatory. It can be appointed through the initiative of the school principal, at the request of the teachers' council, the parents' council, and in post-primary schools (for 15–18/19-year-olds) also at the request of the student self-government. If not appointed, its function is exercised by the teachers' council, which is made up of all the teachers and headed by the school principal. As a result, the presence of the school council is rare in Polish schools. Śliwerski's research into 561 Polish schools showed that only 4.1% of them had a functioning school council (Śliwerski 2013). When asked why a council had not been established, over 40% of schools replied that such a need was not communicated to them. On the other hand, in the vast majority of schools in which councils could be found, the initiative for their creation came from the principals or from the teachers' councils. In only five cases was the situation different (Śliwerski 2013, pp. 201–203). This suggests that many Polish schools do not see the need to democratize school life, which unfortunately impacts the evaluation of their culture. That, which is obligatory, is implemented. If schools are required to have a student self-government and a parents' council, those bodies are functioning. But since legal regulations fail to give these authorities significant powers, their role varies, often having much more in common with tokenism than actual participation.

ICCS research from 2009 shows that the majority of Polish teachers (65.3%) leave the burden of teaching civic education in the sole hands of *wiedza o społeczeństwie* (knowledge about society) teachers. At the same time, the most important goal of civic education for civics teachers is to disseminate knowledge about the rights and obligations of the citizens, and among the changes they proposed it is postulated, above all, that the number of hours in the field of *wiedza o społeczeństwie* (knowledge about society) be increased. Of course it is worth emphasising that these results come from 2009. Unfortunately, there is no newer research regarding this problem. However, civics teachers express formal approach to teaching *wiedza o społeczeństwie* (knowledge about society). They connect it with different features of school system like: low position of *wiedza o społeczeństwie* among others school subject or cons for testing as a tool of evaluation of student competencies (Wywiół, 2017).



Besides, results of research regarding monitoring of implementation of school curricula (Choińska-Mika & Sitek, 2015) indicate that education in Polish schools ends up running into difficulties in terms of coherence between the assumptions defined within a specialized subject and education on the whole. Furthermore, it is considered as something that decidedly does not exceed the scope of specific school subjects.

## 6 A thin and functionalistic conception of democracy

The analysis presented above can be summarized as follows:

- Within the framework of civic education in Polish schools, emphasis was placed on knowledge and on its adaptive and reconstructive function. A much smaller number of requirements in the area of skills and attitudes, combined with “overloaded” national core curricula leads us to assume that skills and attitudes that fit into civic competences will be marginalized in school education as those that are not subject to testing.
- Implementation of civic education through all its possible paths, that is, as a separate subject, cross-curricular theme, and integrated with other subjects (European Commission/EACEA/Eurydice 2017, pp. 29–37) is assumed in the core curriculum, but a thorough analysis shows that social and civic competences are concentrated in only a handful of subjects. Furthermore, the implementation of civic education by means of a separate subject starts relatively late at the age of 14–15, and is implemented for a very limited amount of hours for three years. In addition, the responsibility for civic education is primarily relegated to the teachers of *wiedza o społeczeństwie* (knowledge about society), which ultimately suggests that its cross-curricular character is rather doubtful.
- Based on the analysis of social and civic competences included in the core curriculum, it can be seen that civic education in school focuses primarily on historical knowledge, which further underlies its reconstructive character. The adaptive character of civic education is indicated by the fact that the core curriculum highlights knowledge about the political and legal system at the national level, and although the skill of critical judgment is also significant here, it does not concern political and legal issues. Also marginalized is knowledge concerning various forms of civic opposition. It is also worth noting that although there are relatively many requirements in the core curriculum related to the knowledge of social problems, processes, and phenomena, they are unfortunately found in essentially two subjects and only at the level of post-primary school.
- Deficiencies in terms of skills and attitudes assumed in the core curricula indicate that neither has there been an establishment of active citizenship, nor has any emphasis been placed on shaping attitudes. Seemingly optimistic results of the 2017 Eurydice report, which indicated the presence of parents’ and students’ representation in schools, acquire a different tenor when we add to this a legal analysis of the construction of these bodies. It turns out that they do not have significant legal competences, which means that the

degree of democratization of each school depends on its individual culture. This is confirmed by the research results, on the basis of which it can be concluded that the majority of schools create very limited opportunities for the experience of democracy. There is also a relatively high discrepancy between student and teacher ratings, which in turn suggests that any need for change in this area might go unnoticed.

It is important to note that the analyses presented above are limited in that they generally refer to the assumed shape of civic education in Poland, enriched by research results that shed light on the problem of democratization of school life. For this reason, the following conclusions should be treated as incorporated in the analysed sources.

Civic education in Polish school does not fit into any of the models built on the classic concepts of citizenship. It is not a model of education based on the civic republican concept of citizenship (Hoskins et al., 2015, p. 433). Although present here are national issues and patriotism, while issues of diversity remain overlooked, marginalized, or at the very least overshadowed (this effect may be further strengthened by the current political context), civic activity and participation are not emphasized at all. All the more, the Polish model of civic education does not fit into the cosmopolitan/post-national/critical conception of citizenship (Hoskins et al., 2015, p. 434; Delanty 2000). An analysis in the context of the types of citizenship proposed by Westheimer and Kahne is also hampered by the lack of exposure to civic activism, whether from the perspective of a personally responsible citizen, a participatory citizen, or a justice-oriented citizen (Westheimer & Kahne 2004). The adaptive character of Polish civic education may, however, be conducive to the formation of law-abiding members of society, which, when combined with charitable actions taking place in schools, may eventually approach the personally responsible type of citizenship (Westheimer & Kahne 2004, p. 3, 27). Nor can it be said that civic education in Polish school is based on the liberal model of citizenship (Hoskins et al., 2015, p. 433), although it is certainly a model of education that is based on a thin conception of democracy. This kind of conception “typically envisions democracy as an accomplishment and as a neutral political system,” not as a way of life in Dewey’s understanding (De Groot, Veugelers, 2015, p. 29). A model of civic education based on such an understanding of democracy is usually referred to as the socialisation and functionalist model, in which individuals are inserted into a specific political and social order (Biesta 2009b, p. 153). This is precisely how civic education in Poland may be characterized. It is also worth emphasizing that civic education in Polish school is rather individualistic, although this effect may result from the “language” of the core curriculum (formulating learning outcomes). However, if we assume that the model of civic education based on the liberal concept of democracy should emphasize the citizen’s right to engage in civic activities, and refer to basic liberal values (Hoskins et al., 2015, p. 433), it is difficult to see Polish civic education as one of its examples. It is neither learning in a democratic environment, nor preparation for being a citizen, understood as the development of civic competences within a full structure (knowledge, skills,

attitudes), not necessarily through the proper organization of the school environment, but through the creation of training scenarios. It is learning about democracy and citizenship.

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## Endnotes

<sup>1</sup> See more about history of civic education in Poland in: Kopińska & Solarczyk-Szwec, 2016.

<sup>2</sup> Wiedza o społeczeństwie, program nauczania dla szkoły podstawowej, nr DKO-4014-9/96 z 27.09. 1996 r., WSiP, Warszawa 1998 [knowledge about society, primary school curriculum, no. DKO-4014-9/96 from September 27, 1996, WSiP, Warsaw 1998]; Wiedza o społeczeństwie, program nauczania dla szkoły średniej (liceum ogólnokształcącego, technikum i liceum zawodowego), nr DKO-4015-11/96, WSiP, Warszawa 1997 [Knowledge about society, secondary school curriculum (high school, technical school, and vocational school), no. DKO-4015-11/96, WSiP, Warsaw 1997].

<sup>3</sup> General education schools of the second degree, three-years for youth aged 13–15.

<sup>4</sup> The structure of education in Poland, taking into account changes resulting from the reform introduced in the 2017/18 school year—see European Commission/EACEA/Eurydice 2018. *The Structure of the European Education Systems 2018/19: Schematic Diagrams*. Eurydice Facts and Figures. Luxembourg: Publications Office of the European Union. p. 23; [https://eurydice.org/pl/wp-content/uploads/2018/10/the\\_structure\\_of\\_the\\_european\\_education\\_systems\\_2018\\_19.pdf](https://eurydice.org/pl/wp-content/uploads/2018/10/the_structure_of_the_european_education_systems_2018_19.pdf)

<sup>5</sup> See more about parental organization in Poland: Starzyński, 2005.

<sup>6</sup> Schools are supervised by educational superintendents.

<sup>7</sup> This report was created at the request of the Polish Commissioner for Children's Rights by a research team from the Maria Curie-Skłodowska University in Lublin, Poland. 3328 students from the 7<sup>th</sup> grade, 617 parents of 7<sup>th</sup>-grade students, 959 7<sup>th</sup>-grade teachers, and 76 primary school principals participated in the study—press release on the subject: (Anna Zalewska: Wystąpienie RPD ws. siódmoklasistów oparte na subiektywnych ocenach, 2018 [Anna Zalewska: The statement presented by the Commissioner for Children's Rights on seventh graders based on subjective assessments, 2018]), <https://www.portalsamorzadowy.pl/edukacja/anna-zalewska-wystapienie-rpd-ws-siodmoklasistow-oparte-na-subiektywnych-ocenach,112564.html>.

<sup>8</sup> Dzieci z 7. klasy są przeciążone nauką, pracami domowymi i doświadczają przemocy. Nowy raport, 2018 [Children in the seventh grade are overloaded with learning, domestic work, and experience violence. New



report, 2018], <https://www.o2.pl/artykul/dzieci-z--klasy-sa-przeciazone-nauczaniem-domowymi-i-doswiadczenia-przemocy-nowy-raport-6286443194808449a>.

<sup>9</sup> Anna Zalewska: Wystąpienie RPD ws. siódmoklasistów oparte na subiektywnych ocenach, 2018 [Anna Zalewska: The statement presented by the Commissioner for Children's Rights on seventh graders based on subjective assessments, 2018], <https://www.portalsamorzadowy.pl/edukacja/anna-zalewska-wystapienie-rpd-ws-siodmoklasistow-oparte-na-subiektywnych-ocenach,112564.html>.

<sup>10</sup> "Tęczowy Piątek" w szkołach. MEN przeprowadzi kontrole, 2018 ["Rainbow Friday" in schools. MEN will carry out checks, 2018], <https://www.tvn24.pl/wiadomosci-z-kraju,3/teczowy-piatek-w-szkolach-men-przeprowadzi-kontrole,880215.htm>, MEN: Jeżeli Tęczowy Piątek zostanie zorganizowany w szkole z pominięciem procedur, będzie to złamanie prawa, 2018 [MEN: If Rainbow Friday will be organized at school without following procedure, such action will break the law, 2018 ], <https://www.gosc.pl/doc/5114454.MEN-Jezeli-Teczowy-Piatek-zostanie-zorganizowany-w-szkole-z>.

<sup>11</sup> Napisz do Pani Minister Zalewskiej w sprawie Tęczowego Piątku, 2018 [Write to Minister Zalewska regarding Rainbow Friday, 2018], <https://kph.org.pl/napisz-do-pani-minister-zalewskiej-ws-teczowego-piatku/>.

<sup>12</sup> The method of collecting data is finding secondary sources (Rubacha 2008, p. 157–164) and documents. The method of analysing data is content analysis. The research sample includes:

- Decree by the Minister of National Education of March 28, 2017, concerning the framework plans for teaching public schools (MEN, 2017);
- Decree by the Minister of National Education of February 7, 2012, concerning the framework plans for teaching public schools, as amended (MEN, 2012);
- Annex No. 2 to the decree of the Minister of National Education of February 14, 2017, concerning the core curriculum of preschool education and the core curriculum of general education for primary school, including pupils with moderate or severe intellectual disabilities, general education for technical school of the first degree, general education for vocational school, as well as general education for post-secondary school (MEN, 2017a);
- Annex No. 1 to the decree of the Minister of National Education of January 30, 2018, concerning the core curriculum of general education for general secondary school, technical secondary school, and vocational secondary school of the second degree (MEN, 2018);
- Publications showing results of research on civic education in Poland.



<sup>13</sup> The structure of education in Poland—see European Commission/EACEA/Eurydice 2018. The Structure of the European Education Systems 2018/19: Schematic Diagrams. Eurydice Facts and Figures. Luxembourg: Publications Office of the European Union. p. 23; <https://eurydice.org.pl/wp-content/uploads/2018/10/the-structure-of-the-european-education-systems-2018-19.pdf>

<sup>14</sup> For example, in a class with a humanistic profile, the extended scope of the curriculum for the subject of wiedza o społeczeństwie (knowledge about society) can be implemented.

<sup>15</sup> If they choose to do so, they declare whether they want to take the exam in the basic or extended scope.

<sup>16</sup> The scope of the subject of wiedza o społeczeństwie (knowledge about society), implemented in existing schools of the old type (3-year high school, 4-year technical school) – see Kopińska, Solarczyk-Szwec, 2016, pp. 69-75.

<sup>17</sup> The results presented in this part of article come from the research project which was conducted in 2018 by researchers from the Department of School Education in the Faculty of Education Sciences, Nicolaus Copernicus University in Poland: Dr hab. Violetta Kopińska, Prof. dr hab. Hanna Solarczyk-Szwec, Prof. dr hab. Beata Przyborowska, Dr Izabela Symonowicz-Jabłońska, Dr Kinga Majchrzak, Dr Iwona Murawska, mgr Sandra Lesiakowska. The aim of this project was to identify and evaluate social and civic competences included in the national core curricula of Polish schools. The first edition of this project (regarding the previously applicable core curricula) took place in 2015. Selected results were published, among others, in: Kopińska, Solarczyk-Szwec, 2017.

<sup>18</sup> We created a catalogue of 122 analytical categories constructed on the basis of literature (Argyle, 2002; Biesta, 2009b, 2011; Hoskins et al., 2008; Martowska, 2007, 2012; Martowska & Matczak, 2013; Riggio, 1986), education and political documents (Raport referencyjny, 2013; Strategia rozwoju kapitału społecznego 2020, 2013; Recommendation of the European Parliament and of the Council of 18 December 2006 on Key Competences for Lifelong Learning), and also the analysed core curricula. Analytical categories which are a part of the catalogue are the learning outcomes in the areas of knowledge, skills, and attitudes which belong to the vast area of social and civic competences.

<sup>19</sup> These results do not include the so-called mixed requirements that combine the area of knowledge with the area of skills and / or attitudes.

<sup>20</sup> Although the category also covers knowledge about history and cultural heritage outside Europe, the learning outcomes contained in the school curriculum basically relate to Europe.

<sup>21</sup> Poland did not take part in ICCS 2016 edition. Funding of the research was refused by Polish authorities.





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## "Austria is celebrating itself" The House of Austrian History A Press Report

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- The opening of the Haus der Geschichte Österreich (HGÖ - House of Austrian History) is the culmination of a discussion which has taken nearly one hundred years.
- The discussion is the result of a struggle between political parties over the right to seek a definite interpretation of the Austrian interwar period.
- The didactical-conceptual orientation of the announced project has the potential to both discuss and question politically influenced interpretations of the Austrian interwar period.

**Purpose:** On the occasion of its one hundredth birthday, the Republic of Austria has opened a history museum in November 2018 called the House of Austrian History. The considerations towards this are almost as old as the republic itself. This article shall analyze why political parties could not agree on a specific project for so long and illustrate the decision-making process and its implementation before ultimately categorizing the didactical-museographical concept of the exhibition from a historical-didactical perspective.

**Design/methodology/approach:** The basis for the analysis is provided by Austrian daily newspaper coverage of the House of Austrian History. The body of sources limits itself to the period between January 2008 and January 2019 and has been evaluated based on the analysis of its content.

**Findings:** In the course of the discussion, which preceded the opening of the House of Austrian History, the Austrian People's Party (ÖVP) and the Social Democratic Party of Austria (SPÖ) debated bitterly for decades about how to best interpret Austrian contemporary history and were unable to find common ground. Eventually, both the SPÖ and the ÖVP were able to agree on a concept whereby the museum would focus upon the controversial, politically influenced metanarratives of the Austrian interwar period themselves. With the SPÖ having departed from the government, however, the museum's future remains uncertain.

**Keywords:**

House of Austrian History, Austria, historical culture, history policy

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## 1 Introduction

2018 is a year of remembrance and memory for the Republic of Austria. Remembrance of the annexation of Austria into Hitler's Germany in 1938 and the foundation of the republic one hundred years ago find themselves at the forefront. In November 2018—just in time for the occasion of Austria's one hundredth birthday—a museum called *Haus der Geschichte Österreich* (HdGÖ; in the following as: House of Austrian History)<sup>1</sup> will open in the Hofburg in Vienna, occupying itself with the country's contemporary history. In order to ensure the museum's opening in the anniversary year of 2018, the original plans were drastically scaled down. The museum's funds were slashed and the exhibition space was reduced to one third of what was originally envisioned; at the opening, only a temporary special exhibition<sup>2</sup> about the founding of the republic is on display.



Photo 01: Entrance portal of the House of History (© Bernhard Trautwein, January 10, 2019).

In terms of the direction in which this *House of Austrian History* will develop in the medium term and what will be displayed inside, there has still been little information released. The financing of the *House of Austrian History* beyond 2019 is also yet to be explained. It even remains uncertain where the *House of Austrian History* will be housed in the long-term. The current location in the museum complex of the Viennese Hofburg on *Heldenplatz* is of a temporary nature only. In the medium term, it is planned for the House of History to be relocated to a new building on *Heldenplatz*. However, the existing political majority in Austria has changed since the project started, and the current government is yet to reveal its intentions for the *House of History*.

The deliberations on the creation of a museum of Austrian contemporary history are as old as the republic itself. In 1919, directly after the foundation of the republic, the establishment of a chamber of Austrian history was unsuccessful.<sup>3</sup> In 1945, after the liberation from National Socialism, the preparations for a "*Museum of the First and Second Republic*" were already at an advanced stage. However, the exhibits which had been set up in the Viennese Hofburg were eventually removed.<sup>4</sup> In the middle of the 1990s, the debate over the establishment of a history museum intensified after a consensus had been reached across all party lines that Austria would require an institution which occupied itself with the history of the republic as well as with contemporary history. Above all, it was the two governing parties at the time, the SPÖ (Social Democratic Party of Austria) and the ÖVP (Austrian People's Party), who developed specific concepts, plans, and a whole row of feasibility studies.<sup>5</sup> According to opinion polls, a majority of the Austrian public also stood behind the plans.<sup>6</sup>

However, despite the House of History project being integrated into all coalition agreements since the turn of the millennium, the political parties were still unable to agree on a definite project.<sup>7</sup> Despite cross-party commitments, being embedded in coalition agreements, the public's approval and the fact that there were already fully-developed suggestions, concepts, plans, and feasibility studies simply waiting to be implemented, it was not until the beginning of 2015 when a political settlement was reached, which was celebrated in the Austrian press as the cutting of the "Gordian knot."<sup>8</sup> How it ultimately came to be—considering the long lead time and the almost perfect political overall conditions—that only a mini exhibition with an uncertain future was opened, constitutes the focal point of this article. In doing so, not only the historical-ideological differences and positions which were behind the debate and which made political agreement impossible for such a long time will be presented in detail, but also the process itself—in the course of which the originally ambitious plans of 2015 were gradually "vaporized" and downsized—shall be revisited. Finally, the question of the direction in which the *House of Austrian History* should develop in the medium term and how to categorize what we know about this so far according to a historical-didactical perspective shall also be pursued.

## 2 "Contemporary History in Austria is [...] politically still a hot potato"<sup>9</sup>

As already indicated in the introduction, there had always been intensive discussions dating back to the foundation of the republic in 1919 which centered on the establishment of a museum dealing with Austrian contemporary history. In the middle of the 1990s, the debate once again gained momentum. It had become obvious that the museum landscape in Austria was displaying serious shortcomings in the area of contemporary history. Central aspects of Austrian contemporary history such as Austria's Nazi past and the interwar period were, at most, only discussed within the limits of temporary special exhibitions or special collections. There was no museum specializing in the recent history of the republic with its own collection of contemporary history exhibits.<sup>10</sup>

Subsequently, the political parties commissioned concepts, had a whole row of feasibility studies and policy documents developed and vetoed each other's proposals and counter-proposals, without being able to agree on a specific project.<sup>11</sup> Superficially, it was the quarrel

about the precise location of the planned institution which seemed to dominate. The actual points of conflict, however, lay elsewhere:

On the one hand, *the Social Democratic Party of Austria and the Austrian People's Party* had completely different ideas concerning the museological-didactical objective of the project. Whilst the *Social Democrats* wanted to conceive of the "House of History" as a kind of education, research, documentation, and community center, the *People's Party* campaigned for the creation of a museum of the republic and a house of history which placed emphasis on preservation and the formation of identity.<sup>12</sup>

On the other hand, profound historical-ideological differences in opinion and distrust between the *Social Democrats* and the *People's Party*, whose roots reach back to the Austrian interwar period, came to light in the course of the debate.<sup>13</sup> Although the two main parties<sup>14</sup> had succeeded in developing Austria into a consensus democracy or consociational democracy after the liberation from National Socialism and the re-establishment of the republic in 1945, contemporary history remained, up to the present day, "politically still a hot potato."<sup>15</sup> The Austrian interwar period in particular was evaluated in a completely different way by both parties.<sup>16</sup> It was a time when the predecessors of the *Social Democratic Party* and the *Austrian People's Party* were so unable to find reconciliation that the democratic-republican order of the young Republic perished in 1933 amidst this antagonism, oppositional social democracy was banned, and Austria was governed by Christian-social chancellors in an authoritarian manner and without the parliament's involvement. The *People's Party* honored the efforts of the so-called "Christian-social Corporate State" to preserve Austria's statehood in the interwar period and mythologized Chancellor Dollfuß - he was murdered in a failed coup d'état by Austrian National Socialists in 1934 - as a martyr and resistance fighter against National Socialism. The *Social Democrats*, on the other hand, held Engelbert Dollfuß and the Dollfuß-Schuschnigg regime which has been termed "Austrofascism" responsible for the exclusion policies against social democracy, the failure of Austrian democracy, the subsequent civil war, and the so-called *Anschluss* (*Annexation of Austria into Nazi Germany; in the following: Anschluss*) of Austria into Nazi Germany.<sup>17</sup> The Austrian press mainly attributed the fact that the *Social Democratic Party* and the *People's Party* could not agree on a specific project which inevitably would also have had to deal with the highly controversial Austrian interwar period to this old, historical-ideological conflict with which the country has never come to terms.<sup>18</sup>

### 3 "[W]hen hardly anyone reckoned with the fact that something would happen in Vienna regarding the House of History"<sup>19</sup>

The endless number of concepts, roadmaps, and feasibility studies which emerged beginning in the 1990s remained stored and unused for a long time in the party offices and relevant ministries. It took until 2014, "when hardly anyone reckoned with it,"<sup>20</sup> as the Austrian press later summarized, for the *ÖVP* politician and then-Governor of Lower Austria, Erwin Pröll, to give a new impetus to the proceedings: He announced the opening of a *House of History* in the Lower Austrian capital of St. Pölten. The management of the project was entrusted to the historian Stefan Karner, who was quickly judged by certain newspapers to have close ties to



the *Austrian People's Party*.<sup>21</sup> Press coverage reported that, in light of the impending one-hundred-year anniversary of the Republic and presumably to avoid falling behind with respect to the *House of History* which was initiated by the *Austrian People's Party*, the *Social Democratic Party* of Austria was forced to act quickly in order to be able to produce "a worthy anniversary project on a national level."<sup>22</sup> It was therefore only a few months later when the SPÖ Minister for Culture Josef Ostermayer presented his plans for a "*House of History*" in the Viennese Hofburg which was to open—at least partially—in November 2018, in time for the occasion of the one-hundred-year anniversary of the foundation of the First Republic. The completion of the permanent exhibition was set for the year 2019.<sup>23</sup> The project was assigned to the Viennese contemporary historian Oliver Rathkolb, who was then immediately referred to by the media as having a close relationship with the *Social Democratic Party*.<sup>24</sup>

The fact that now two Houses of History were to emerge within a short period of time was interpreted by press coverage as an unofficial contest between the *Social Democratic Party* and the *People's Party* over the right to seek a definite interpretation of Austrian contemporary history. In this context, several commentators warned against a presentation of history influenced by party politics and an appropriation of Austrian contemporary history by the two governing parties.<sup>25</sup> The politicians responsible for these projects, Minister for Culture Josef Ostermayer of the *Social Democrats* and the ÖVP Governor of Lower Austria, Erwin Pröll, attempted to quell these suspicions in a series of newspaper articles, interviews, and statements. They emphasized that the two museums would pursue different focal points—both chronologically and in terms of content—and that they would by no means be in competition with each other. Furthermore, they denied following any political motives and promised that they would not interfere with the content-related work done by the commissioned experts.<sup>26</sup> The two experts Oliver Rathkolb and Stefan Karner also assured the press of their political independence and explained that their respective projects would not be in competition with each other.<sup>27</sup>

However, concerns still remained. It soon became evident that both initiatives were indeed pursuing similar spatial and temporal objectives. Although the beginnings of Lower Austrian regional history were also to play a role in St. Pölten, the main emphasis of the exhibition was, as in Vienna, to be placed on the time after 1848. Even in terms of contextualization, similar approaches were chosen: Whilst the history of Austria's neighboring countries was also to be included in St. Pölten, the *House of History* in the Hofburg in Vienna was to discuss Austrian history against the backdrop of the development of Central Europe.

The fact, however, that the *People's Party* and the *Social Democratic Party* were able to agree on a specific project in 2015, after decades of debating and quarrelling, was also attributed by press coverage to a window of opportunity which Josef Ostermayer had skillfully used to his advantage.<sup>28</sup> By downsizing the *Weltmuseum Wien*, the former *Museum für Völkerkunde* (Museum of Ethnology)<sup>29</sup>, which at the time was under reconstruction, the SPÖ politician succeeded in attaining the necessary exhibition space in the Hofburg and acquiring financial resources for the *House of Austrian History* without requiring additional budgetary funds. As quoted by the press, Austria, said Josef Ostermayer, would thus be getting "two museums for the price of one."<sup>30</sup> His political approach certainly yielded Josef Ostermayer recognition in the

press. He showed "decisiveness,"<sup>31</sup> cut "the Gordian knot"<sup>32</sup> and submitted a "doable concept"<sup>33</sup> without "waiting a decade to plan, finance, and carry out a new construction."<sup>34</sup>

However, the decision to place the *House of Austrian History* in the Hofburg in close proximity to the *Heldenplatz* received a mixed reception. Some commentators saw in the decision a unique opportunity to "unequivocally, and in a republican-democratic manner, occupy"<sup>35</sup> the imperial Hofburg and the Heldenplatz, where on 15 March 1938 Adolf Hitler had declared the so-called *Anschluss* of Austria into the German Reich and which is considered in Austria to be historically burdened. There were however also those who feared that an "Austria-themed museum on Heldenplatz [...] would always be in the shadow of 15 March 1938"<sup>36</sup> and who preferred a non-specified "more neutral location."<sup>37</sup> In addition to this, the necessary changes in the space utilization concept of the Hofburg were another aspect that did not meet with undivided approval. The envisaged exhibition space was criticized as being "too small for a content-related and methodically nuanced presentation"<sup>38</sup> which was furthermore described as being completely inadequate "in order to create a modern atmosphere which would also appeal to young people."<sup>39</sup>

The question of the financing of the *House of History* was afforded relatively little attention by press coverage. Initially, it was the higher costs in comparison to the *House of History* in St. Pölten which caused particular concern.<sup>40</sup> However, it was also criticized that the designated funds did not suffice in terms of implementing the ideas which had already been developed.<sup>41</sup> In turn, the historian Eva Blimlinger<sup>42</sup> spotted deficits in the long-term financial safeguarding of the House for the time after the developmental phase—and was to be proved right in the end.<sup>43</sup> The Ministry of Finances had also led a similar argument by criticizing the overall cost estimates of the project and pointing out that "several questions and details, in particular the total amount and the subsequent costs, still remained unsolved."<sup>44</sup> Finally, there were also those who had questioned the whole project itself in the face of scarce state funds.

The main criticism, however, concerned the lack of a content-related overall concept. When Josef Ostermayer presented his project to the public in January 2015, he could present neither specific museological and didactical concepts nor plans revealing "what should even be displayed in the museum."<sup>45</sup> He merely announced that the *House of History* must "not become a dry affair,"<sup>46</sup> but a "place where history must be discussed."<sup>47</sup> In order to create an overall concept and to clarify open questions, Ostermayer commissioned a team of historians under the leadership of Oliver Rathkolb.<sup>48</sup> Lasting right up until the presentation of the concept, a fierce controversy over the objective and content-related orientation of the *House of History* broke out and was discussed in detail by press coverage.

There had only been agreement on the fact that a typical museum would be inappropriate in terms of appealing to a young demographic and that a modern *House of Austrian History* would need a concept that "did not limit itself to collecting, preserving, and presenting exhibits of contemporary history, but instead allowed the *House* to become an open forum for discussion about the past, present, and future."<sup>49</sup> With regards to the question of how much importance should be attached to the exhibits and material objects in the planned exhibition, there were however already varying points of view. Whilst some were "strongly in favor of the

use of new media and virtual exhibitions,"<sup>50</sup> others warned of "presenting everything digitally merely for the sake of new trends."<sup>51</sup>

However, the specific main contents also proved to be a point of controversy and discord. Indeed, *SPÖ* minister Ostermayer and his counterpart from the *People's Party*, State Secretary Mahrer, had declared that the historical-ideological divisions between the two parties had been overcome and that the Austrian interwar period no longer harbored any potential for conflict.<sup>52</sup> Despite this, it was apparent that concerns still remained. Members of the *People's Party* in particular frequently became anxious about an appropriation of the *House of Austrian History* by the *Social Democratic Party* and a politically motivated representation of Austrian contemporary history. In this respect, the *People's Party's* culture representative Maria Fekter warned that the "project [...] risked manifesting enemy concepts for the future which would bring about a division in society."<sup>53</sup> Later, on the occasion of the resolution of the *House of History* in parliament, with the *Social Democrats* and the *People's Party* voting in favor of it, Maria Fekter promised "to ensure that the *House of History* would not become an *SPÖ*-museum."<sup>54</sup> However, concerns about the *Social Democratic Party* having too strong an influence over the *House of History* were also voiced by the *FPÖ* (Freedom Party of Austria), who warned that Ostermayer was planning a "politically biased *House of History* [...] which would lean towards a 'leftist ideology.'"<sup>55</sup>

Numerous newspaper commentators also perceived the *House of Austrian History* and Oliver Rathkolb as having close ties to the *Social Democratic Party* of Austria. In this vein, the *House of History* was described as a "red project"<sup>56</sup> and Oliver Rathkolb as an "*SPÖ* sympathizer,"<sup>57</sup> a "red contemporary historian,"<sup>58</sup> and a "social-democratic purveyor to the court"<sup>59</sup> respectively. Minister for Culture Ostermayer attempted to downplay the criticism and pointed to the fact that Rathkolb had "also received general approval outside the circle of *Social-Democratic* party members."<sup>60</sup> The majority of press coverage also shared this opinion, describing Oliver Rathkolb as a "brilliant,"<sup>61</sup> internationally renowned, and successful contemporary historian and proven expert of Austrian history and identity. In addition to this, those historians who had publicly spoken out during the debate over the *House of History* did not have any doubts about Rathkolb's professional expertise and his qualifications. Even for the historian and former *ÖVP* Governor of Salzburg Franz Schausberger<sup>62</sup>, Rathkolb was "first and foremost [...] certainly a good historian—who happens to have political origins."<sup>63</sup>

Oliver Rathkolb himself brushed off the accusations. He explained in several articles that "as a contemporary historian he is used to the fact that politicians get involved or at least try to."<sup>64</sup> He emphasized however that there would be "no politicization."<sup>65</sup> In this context, Rathkolb referred to the advisory committee made up of international experts which would not only watch over "the complete freedom of decision-making granted by the Minister for Culture,"<sup>66</sup> but would also guarantee that there would be "no content-related controversies regarding the interpretation of the 'Corporate State' for example."<sup>67</sup> Rathkolb continued by saying that the *House of History* would portray the numerous controversies of Austrian contemporary history, such as the historical-ideological quarrels between the *Social Democratic Party* and the *People's Party* about the interwar period, from different angles and put them up for discussion so that visitors would be able to pass their own judgement.<sup>68</sup> Press coverage believed that,



ultimately, Rathkolb had succeeded with his concept to "put aside the fears of the black 'Austrian half'"<sup>69</sup> and thereby obtain the *People's Party's* support without losing the trust of the *Social Democratic Party* of Austria at the same time.

#### 4 "There is still the impression of a quick-fix, simply to meet the target date of 2018"<sup>70</sup>

In autumn 2015, the roughly one hundred-page implementation concept was presented.<sup>71</sup> Accordingly, the *House of Austrian History* would cover the time between 1918 and the present, whilst frequently referring to the year 1848. As laid out in the concept, the permanent exhibition itself would be divided into three main topics (the development of democracy and its ruptures; war, violence, and peace movements; Austrians' experiences with the Holocaust and the persecution and extermination policies of the National Socialists—victims and perpetrators). The idea was, to introduce a contemporary communication style and an incisive narrative, in order to invite to a critical exploration of Austrian history.<sup>72</sup>

The Austrian daily newspapers received the concept highly enthusiastically.<sup>73</sup> They celebrated the "outstanding historian Oliver Rathkolb"<sup>74</sup> and the "competent [...] director of the national library,"<sup>75</sup> who by 2018 would create an "interactive, multimedia center of contemporary history spanning over 3,000 m<sup>2</sup> for young and old, far away from political historiographies, in a place where Austrian history had been written."<sup>76</sup>

In March 2016, the *SPÖ* and the *ÖVP* decided together in parliament on a *House of Austrian History* and finally set out the budgetary, organizational, and legal general conditions.<sup>77</sup> In organizational terms, the *House of Austrian History* was assigned to the Austrian National Library<sup>78</sup>, receiving its own management and budget, however. In addition to this, an advisory committee was installed, consisting of academics who had been assigned by the gubernatorial conference, the *SPÖ*-led ministry of culture, and the ministry of science which was headed by an *ÖVP* minister, and who—together with the general management of the Austrian National Library—were charged with posting and filling the director vacancy in the *House of History*.<sup>79</sup> Furthermore, the National Council commissioned the establishment of a concrete schedule up until the museum's inauguration in the year 2018.<sup>80</sup>

At the presentation of the schedule in May 2016, there was widespread disillusion. The ambitious aim of Josef Ostermayer to open the *House of Austrian History* in the anniversary year of 2018 was no longer feasible.<sup>81</sup> Moreover, the political environment had changed due to a government reshuffle. As a further consequence, the ministry of finance led by the *People's Party* vetoed the budget which had already been pledged. Despite this, Josef Ostermayer's successor, Thomas Drozda, explained that he still wished to achieve "the sensible objective of finishing in time for the anniversary of the republic in 2018."<sup>82</sup>

After budget negotiations with the *ÖVP* Minister of Finance Schelling, Thomas Drozda finally presented in October 2016 what was, according to him, "in terms of both budget and content [...], a much better"<sup>83</sup> and "pragmatic solution."<sup>84</sup> Schelling and Drozda had reduced the budget of thirty-six million euros down to ten million, and nearly halved the exhibition space

from 3,000 m<sup>2</sup> down to 1,800 m<sup>2</sup>. By doing so, the *House of History* would be able to then at least partly operate in the anniversary year of 2018. Like his predecessor, Drozda reiterated the intention to accommodate the House in "an entirely new building on Heldenplatz"<sup>85</sup> in the medium term.

The press was divided in its appraisal of the new, strongly reduced version of the *House of History*. Thomas Drozda's „better“<sup>86</sup> solution for „the new ‘House’“ which in fact isn't one at all<sup>87</sup> was described as "a quick-fix"<sup>88</sup> which was only necessary in order "to meet the target date of 2018."<sup>89</sup> Furthermore, the reduction of the exhibition space was also criticized. In this vein, the press called it "grotesque [...] that costumes of knights' armor and historical musical instruments took up nearly three times as much space in the building in which the *House of Austrian History* has emerged as the presentation of Austrian history itself,"<sup>90</sup> which was now being shown in a "suite of rooms"<sup>91</sup> rather than in a "*House of History*."<sup>92</sup>

However, some newspaper commentators showed understanding for the budget cuts "in the face of record unemployment in the country."<sup>93</sup> Moreover, "it would have been impossible to do more, what with the tight schedule leading up to November 2018."<sup>94</sup> Thomas Drozda, therefore, "did not make the worst decision, considering the limited leeway the coalition gave him"<sup>95</sup> and had made it possible that Austria would "have a holding organization for history museums until the one-hundred-year anniversary of the republic"<sup>96</sup> which would "perform good work"<sup>97</sup> and "continue to be open to possibilities."<sup>98</sup>

The head of the expert advisory committee, Oliver Rathkolb, was above all pleased that the *House of History* had finally "got the ball rolling."<sup>99</sup> He added that it would not matter whether the museum was "bigger or smaller by 1,000 m<sup>2</sup>."<sup>100</sup> However, he promised, together with the international expert advisory committee, to ensure "that the temporary solution will not become a permanent solution."<sup>101</sup>

After the advisory committee of academics had been selected, the director vacancy was posted in November 2016.<sup>102</sup> Among the 13 applications, there were four women and only one applicant from abroad.<sup>103</sup> In a tie, the former museum curator and culture manager Monika Sommer-Sieghart and the director of the Stadtmuseum Graz Otto Hochreiter both occupied the top place on the shortlist.<sup>104</sup> The fact that Monika Sommer-Sieghart was eventually entrusted with the management of the *House of History* prompted some newspapers to argue against the law for equal opportunities and against quota systems.<sup>105</sup> Apart from that, her hiring was welcomed as a "provisional keystone in the long-term construction site that is the *House of Austrian History*."<sup>106</sup> The new director described the *House of History* as a "project of the heart"<sup>107</sup> and said she was confident of being able to meet the politically decreed inauguration date of November 2018, despite the exhibition space having not yet been completely adapted at the time of her appointment and "the absence of infrastructure, employees, and even a website."<sup>108</sup>

With regard to the question of what would even be displayed in the House of Austrian History, Monika Sommer-Sieghart explained that "the development of democracy and its ruptures [...]" would play "a central role."<sup>109</sup> According to her, the *House of Austrian History* would not pass judgement on the great coalition conflict over Austrofascism and the Corporative State, "but

instead exhibit it"<sup>110</sup> and open it up for debate so that visitors would be able to form their own opinions.<sup>111</sup>

##### 5 "In case it should now come to a coalition without social democrats, would the House be history before it opens?"<sup>112</sup>

In May 2017, the government coalition of the *Social Democratic Party* and the *People's Party* finally broke down. In the national elections that then followed in October 2017, the existing political majority changed significantly, and it soon became clear that Austria would receive a new government without *Social-Democratic* participation. In light of the establishment of a black-blue coalition consisting of the Christian-Conservative *People's Party* and the right-wing populist *Freedom Party*, the media began to speculate about the future of the *House of History*. On the one hand, as reported by the media, the *People's Party* "was not particularly enthusiastic about the *House of Austrian History*, which was based on the conceptual groundwork of Oliver Rathkolb."<sup>113</sup> On the other hand, the former ministers Josef Ostermayer and Thomas Drozda had failed to provide the *House* with substantial financing. The financial planning beyond 2019 was based solely on an oral agreement of the now former minister Drozda. Due to this, some commentators speculated that, without the *Social Democratic Party* in the coalition, the *House of History* could be history before it even opened.<sup>114</sup>

Up until the opening day, practically no specific ideas were leaked out to the public in regard to what exactly would be displayed in the *House of Austrian History*. This uncertainty over the exhibition's contents did not go unnoticed by the academic members of the advisory committee and in the summer of 2018 two members resigned from the board, claiming that there was still "no overall concept available concerning the technical direction of the *House*,"<sup>115</sup> that "the question of the exhibition's narrative structure"<sup>116</sup> was yet unsolved, and that information regarding the "exhibition's central statements as well as context-related stances"<sup>117</sup> were missing.

Meanwhile, the team of director Sommer-Sieghart has put a website online, assumed control over the exhibition spaces, curated an opening exhibition, and developed a communication concept. The planned opening date was successfully met and since the 10<sup>th</sup> of November 2018, the day of the 100<sup>th</sup> anniversary of the Austrian Republic, the *House of Austrian History* has been open to visitors.

The inaugural exhibition entitled "Aufbruch ins Ungewisse - Österreich seit 1918" (Into the Unknown – Austria since 1918) displays key issues of the Austrian Contemporary History in seven sections. The sections one to six are organized thematically and focus on the founding of the first Austrian Republic ("Long Live the Republic!"), the Austrian economy ("Economic Miracle?"), the period of fascism ("Dictatorship, Nazi Terror and memory"), the changing of borders ("Borders change?") and on equality ("Equal Rights?!"). In addition to this, a seventh section ("Make Images!") presents pictures on important events and themes of the Austrian History in chronological order.<sup>118</sup>



The way Austria's contemporary history is displayed in the *House of Austrian History* was intensely discussed by the newspapers right after the inauguration of the museum. In general, commentators were delighted that the project had finally been completed in time.<sup>119</sup> Nevertheless, the opinions on how the exhibition was showing what, differed considerably. The author and journalist Otto Brusatti, for instance, described the *House of Austrian History* as a moral institution which, with a flood of posters, copies, documentaries and lectures, presented contemporary Austrian history as "a story of minor and major heroic deeds"<sup>120</sup>. In his opinion, the exhibition avoided a critical examination and the discussion of uncomfortable truths.<sup>121</sup>

Other commentators were less critical. They described the exhibition as a successful, exciting and instructive presentation of the contradictory Austrian contemporary history and stated that there were only few points of criticism with regard to the displayed content.<sup>122</sup> Also, the former ÖVP politician and president of the parliament, Andreas Kohl, expressed himself complaisant in a newspaper commentary. For him, the exhibition was an "exciting journey through history"<sup>123</sup> which was also addressing the controversial phases of Austrian contemporary history, such as the question of the Dollfuss-Schuschnigg regime between 1934 and 1938, or the role of Austrians in the National Socialist era in a careful, fair and well-balanced manner. Nevertheless, he criticized that the exhibition would ignore or omit important aspects and themes of Austrian contemporary history. He complained that Austria's way of dealing with its Nazi past was, from his perspective, presented almost exclusively in connection with the affair surrounding the ÖVP politician and former Presidential candidate Kurt Waldheim, without also going into the role of the SPÖ, which had cultivated a highly problematic hand in dealing with Austria's National Socialist heritage, too. He furthermore regretted that achievements of ÖVP Chancellors and politicians were neglected in the exhibition, whereas the era of SPÖ Chancellor Kreisky was given much space.<sup>124</sup>

Once again, however, the focus of the press coverage was not on what was to be seen in the museum, but on the rooms and the overall concept. There was a broad consensus that the exhibition space in the Hofburg was unsuitable for the demands of a modern historical museum. Most commentators described the exhibition as too small, too cramped, and overcrowded.<sup>125</sup> Also the signage of the exhibition was judged unsuitable, as it did not succeed in giving orientation to the visitors. According to the critics, the visitors were literally lost in view of the sheer number of objects, display boards and installations which did not rely on a chronological, narrative structure but depicted contemporary Austrian history in thematic sections and from different perspectives. Visitors would therefore depend on guided tours. The responsibility for this situation was given to the politicians in charge, who had failed to provide the *House of Austrian History* with the sufficient facilities, financial and human resources. Compromises and cutbacks had therefore been inevitable.<sup>126</sup>

From a historical-didactical perspective, however, the *House of Austrian History* adopts a highly ambitious approach. History is presented there as a retro-perspective construction which is rooted in the present and orientated towards future interests, with the potential to substantiate, support, strengthen - but also question - collective and individual identities. Moreover, the *House of Austrian History* approaches Austrian contemporary history by dealing

with present-day key issues and with the help of thematically and chronologically arranged sections, which are presented and discussed from various perspectives.<sup>127</sup>

#### **A compilation of student statements after visiting the House of History**

"The exhibition had a well-structured structure. Especially the small details, which can only be noticed on closer inspection, give the exhibition its true greatness. (...) Compared to other exhibitions on similar subjects, this one has something for every character, from politics to society, to sport. The exhibition appears varied."

"However, you cannot dedicate yourself to all the exhibits within one or two visits because there are so many. So you make a subjective selection of what you want to see. However, when you exclude what seems to be uninteresting, this is not helpful for the whole understanding of Austria and its history."

"(...) nevertheless I have to say that I personally found a little too much information in a confined space, which made the exhibition a bit confusing. (...) The museum is very modern and therefore interesting because it offers a new perspective on Austrian history."

"It was a good idea, but too crowded. That made it difficult to see everything and unfortunately you overlooked a lot."

"I found the whole room overcrowded because there was a lack of space. The rooms should have been arranged better and everything could have been arranged more clearly."

"There were so many special things that the choice was almost too difficult for me. But if I had to choose 3 objects, my choice would probably be the Nazi game, the wooden horse and a notebook, in which the opponents of National Socialism were taken together. (...) I found the way of protesting with a horse interesting. A fascinating way of protesting, isn't it?"

"Whoa! Really amazing, but I was just in the house of history and even for youngsters it is interesting and really exciting. Anyone who is interested in Austrian history or simply in our country in general should give it a chance. So try it and stop by at the exhibition 'Into the Unknown'."

(Excerpts from student's written reports on their visit to the House of Austrian History. January 11, 2019, Vienna.)

The next weeks and months will show whether Monika Sommer-Sieghart and her team have succeeded in practically implementing central historical-didactical principles like present- or-



future-oriented approaches, activity orientation, and multi-perspectivity and subject orientation. There still remains a golden opportunity that, instead of a typical national history museum with a well-polished consensual narrative backed by the Grand Coalition, Austria has received a functioning and modern place of learning, where the politically influenced meta-narratives of the Austrian interwar period, which have accompanied the realization of the *House of Austrian History* for such a long time, have once and for all been broken up, put up for discussion, and perhaps even vanquished. Whether this is the case, whether the opening of the *House of History* has been successful, whether the *House of Austrian History* has done justice to its own aspirations, whether it will be accepted by visitors, and whether it is capable of encouraging them to pass their own judgement—all this will be revealed within the coming months.

Meanwhile, many classes and pupils / students have already visited the *House of Austrian History* and teachers have to wait long to get a guided tour. In order to find out whether the exhibition is attractive for the young generations and how the exhibition concept affects them, the author of this article has accompanied one class during their visit in January 2019.<sup>129</sup> After the visit, the pupils had to write down their impressions.

In these reports the pupils explained that the large number of objects in the exhibition provided new approaches to Austrian history and would satisfy diverse interests. Some, however, also described the exhibition as confusing, because too much information was presented in a too small place. Visitors would thus have to make a subjective selection, which, according to the pupils, is not helpful for understanding Austria and its history, especially because important aspects will sometimes go unnoticed. The reports also revealed that the presentation of the Nazi past of Austria and its reappraisal dominated the exhibition. In relation to this, the other thematic sections of the exhibition received less attention.



Photo 02: Waldheim Horse (© Bernhard Trautwein, January 10, 2019).

This can also be confirmed in the list of the three most interesting exhibits of the museum. In their reports, all pupils named the so-called Waldheim horse,<sup>130</sup> which in the exhibition is used to illustrate the paradigm shift in dealing with the Nazi past in post-war Austria, among the three most important and interesting exhibits of the House of Austrian History. Still, despite all criticism, the pupils drew a rather positive picture of the *House of Austrian History*. Apparently, the visit of the exhibition and the guided tour had been a "varied" experience. After analysing the reports, one can say, that the *House of Austrian History* has successfully created an attractive exhibition for pupils, and therefore done justice to at least one of its various aspirations.

As far as the future of the *House of Austrian History* is concerned, much remains to be clarified. So far, there have been no decisions made about the long-term safeguarding of the project, nor has it been considered in which direction the *House of Austrian History* should continue to develop after the anniversary celebrations of 2018. Up to this day, the new government has not shown any signs of changing the legislation about Austria's federal museums, nor are there any indications that point to either scrapping the *House of Austrian History* completely or modifying it. There are no specific plans for the politically indefinitely postponed relocation of

the *House of History* to the oft-mentioned new building on Heldenplatz, either. On the occasion of the creation of a commission to discuss the future of the *House of Austrian History*, the President of the Austrian Parliament, Wolfgang Sobotka, declared in January 2019, that "everything was open".<sup>131</sup> The Republic's self-congratulatory birthday present, which was completed in record time, now threatens to go to waste as a half permanent, half makeshift solution which in the medium term will remain in the "Neue Burg."



Photo 03: "Eigene Bilder machen – Erinnerungen an die ‚Gastarbeit‘" [Making Your Own Pictures – Memories of ‚Guest Work‘] (© Bernhard Trautwein, January 10, 2019).



## Endnotes

<sup>1</sup> <https://www.hdgoe.at/> (last accessed 12 January 2019) .

<sup>2</sup> <https://www.hdgoe.at/exhibition> (last accessed 12 January 2019) .

<sup>3</sup> Andrea Brait, "Ein Museum, das seinesgleichen sucht" [A museum without equal], *Der Standard*, September 05, 2017.

<sup>4</sup> "Karl Renners Lieblingsschöpfung. Von 1946 bis 1957 wurde in der Hofburg ein ‚Museum der ersten und zweiten Republik‘ aufgebaut" [Karl Renner's favorite creation. From 1946 to 1957, a museum of the first and second republic was set up in the Hofburg], *Der Standard*, November 08, 2008.

<sup>5</sup> "Um Geduld wird gebeten" [Patience is requested], *Kleine Zeitung*, Mai 05, 2016.

<sup>6</sup> "'Volksanwalt' Helmut Zilk" [Ombudsman' Helmut Zilk], *Die Presse*, June 22, 2002.; Stefan Weiss, "Die Bühne als ewiges Politikum" [The stage as an eternal political issue], *Der Standard*, August 21, 2015.

<sup>7</sup> "Gemeinsam einsam: 21er Haus und Haus der Geschichte" [Lonely together: House 21 and the house of History], *Die Presse*, January 16, 2014.

<sup>8</sup> Peter Diem, "Ein bürgerliches Trauerspiel. Der politische Streit um das geplante Haus der Geschichte Österreichs" [A bourgeois tragedy. The political quarrel over the planned House of Austrian History], *Wiener Zeitung*, September 28, 2015.

<sup>9</sup> Michael Gehler, "Ein Haus der Geschichte, Republik, Zukunft?" [A house of History, Republic, Future?], *Die Presse*, October 09, 2015.

<sup>10</sup> "Österreich feiert sich selbst", [Austria is celebrating itself] *Kurier*, November 12, 2008.

<sup>11</sup> "Ein Leidensweg".; Brait, "Gedächtnisort", S. 612ff.

See some of these proposals:

<https://www.bundeskanzleramt.gv.at/documents/131008/0/Haus%20der%20Geschichte%20c3%96sterreich/9a01bfa9-cfef-46e7-8794-96aed6a92d46> (last accessed 12 January 2019);

<https://www.bundeskanzleramt.gv.at/documents/131008/0/Umsetzungsstrategie%20e2%80%93%20Haus%20der%20Geschichte%20c3%96sterreich,%20barrierefre/0a5ba4d4-eb5e-4799-9525-c4ecbd1353d4>. (last accessed 12 January 2019);

<https://www.bundeskanzleramt.gv.at/documents/131008/0/Haus%20der%20Geschichte%20Konzept%20Teil3/9ded4a4b-a212-4c3a-840d-46475c163533> (last accessed 12 January 2019);

<https://www.bundeskanzleramt.gv.at/documents/131008/0/Haus%20der%20Geschichte%20c3%96sterreich%20Konzept%20Teil1/dd7484b4-a017-40a4-9112-6051a0b3d52a> (last accessed 12 January 2019);

<https://www.bundeskanzleramt.gv.at/documents/131008/0/Haus%20der%20Geschichte%20Bericht/c0f30d88-c8ea-4f24-8775-dee86fdcc164> (last accessed 12 January 2019).

<sup>12</sup> "Ein Leidensweg".; Brait, "Gedächtnisort", S. 625-628.

<sup>13</sup> Trautl Brandstaller, "Haus der Geschichte – Test für demokratischen Konsens" [House of History – A test for a Democratic Understanding], *Der Standard*, April 23, 2003.; Ernst Trost, "Sie geht immer noch um, die Angst vor der eigenen Geschichte" [The fear of the own history is still wandering around], *Neue Kronen-Zeitung*, September 21, 2003.

<sup>14</sup> In the history of the Second Republic, the SPÖ and ÖVP temporarily represented up to 90 percent of the Austrian voters, "Nationalratswahlen. Historischer Rückblick" [Legislative election. A historical review], [http://bmi.gv.at/412/Nationalratswahlen/Historischer\\_Rueckblick.aspx](http://bmi.gv.at/412/Nationalratswahlen/Historischer_Rueckblick.aspx) (last accessed 12 January 2019).

<sup>15</sup> Gehler, "Ein Haus".

<sup>16</sup> To understand the politically influenced metanarratives of the Austrian interwar period, see: Anton Pelinka, "The Dollfuss/Schuschnigg Era in Austria. A Reassessment" (London: Routledge, 2017); Gerhard Botz, "The coming of the Dollfuss-Schuschnigg Regime and the Stages of its Development", in: *Rethinking fascism and dictatorship in Europe*, ed. António Costa Pinto, Aristotle Kallis (Basingstoke: Palgrave Macmillan, 2014), 121-153.



<sup>17</sup> "Mythen, Fakten und blinde Flecken in der Geschichte Österreichs" [Myths, facts and blind spots in the history of Austria], *Die Presse am Sonntag*, March 12, 2017.; Thomas Kramar, "Lasst den Faschismus sein!" [Let fascism be!], *Die Presse am Sonntag*, April 10, 2016.; Thomas Trenkler, "Die Angst vor der Vergangenheit" [The fear of the past], *Kurier*, October 04, 2015.

<sup>18</sup> Diem, "Ein bürgerliches Trauerspiel".

<sup>19</sup> Bernhard Baumgartner, "Explainity in der Clusterstele" [Explainity in the Clusterstele], *Wiener Zeitung*, September 08, 2017.

<sup>20</sup> Baumgartner, "Explainity".

<sup>21</sup> Baumgartner, "Explainity".

<sup>22</sup> "Auferstehung einer Idee: Das Haus der Geschichte" [Resurrection of an Idea: The House of History], *Kurier*, December 02, 2014.

<sup>23</sup> Baumgartner, "Explainity".

<sup>24</sup> "Österreich ist Land der Länder" [Austria is a country of provinces], *Salzburger Nachrichten*, February 03, 2016.

<sup>25</sup> "Pröll prescht mit Museum vor" [Pröll is pressing ahead with a museum], *Salzburger Nachrichten*, April 11, 2015.; Stefan Weiss, "Haus der Geschichte Niederösterreich. Kaiserrock, Staatsvertrag und Dollfußbild" [House of Lower Austrian History. The emperor's clothes, the state Treaty and the portrait of Dollfuß], *Der Standard*, September 09, 2017.; Stefan Weiss & Nina Weißensteiner, "Ein Provisorium fürs Republikjubiläum" [A provisional solution for the Republic's anniversary], *Der Standard*, October 25, 2016.

<sup>26</sup> "Pröll prescht mit Museum vor", *Salzburger Nachrichten*, April 11, 2015.; "Die Republik bekommt ein Museum" [The Republic gets a museum], *Salzburger Nachrichten*, September 10, 2015.

<sup>27</sup> Thomas Götz, "Haus der Geschichte. Wie Erwin Pröll Wien ausbremste", [The House of History. How Erwin Pröll stopped Vienna] *Neue Vorarlberger Tageszeitung*, April 11, 2015.

<sup>28</sup> "Dollfuß – kein Problem mehr. Der Kulturminister über seine Pläne für den Heldenplatz" [Dollfuß – no problem anymore. The Minister of Culture on his plans for Heldenplatz], *Kurier*, February 21, 2015.

<sup>29</sup> <https://www.weltmuseumwien.at/> (last accessed 12 January 2019)

<sup>30</sup> "Neue Burg' teurer als geplant?" [Is the New Viennese Hofburg more expensive than planned?] *Die Presse*, Mai 07, 2015.

<sup>31</sup> Gerald Matt, "Eine gute Entscheidung" [A good decision], *Vorarlberger Nachrichten*, November 03, 2015.

<sup>32</sup> Diem, "Ein bürgerliches Trauerspiel".

<sup>33</sup> Diem, "Ein bürgerliches Trauerspiel".

<sup>34</sup> Diem, "Ein bürgerliches Trauerspiel".

<sup>35</sup> Heidemarie Uhl, "Haus der Geschichte. Was für die Hofburg spricht" [House of History. The benefits of the Viennese Hofburg], *Die Presse*, March 13, 2015.

<sup>36</sup> "Das Durchhaus der Geschichte" [Passage through history], *Salzburger Nachrichten*, February 07, 2015.

<sup>37</sup> "Das Durchhaus".

<sup>38</sup> Gudula Walterskirchen, "Ein Antifa-Museum im Kuhhandel für Werner Faymanns Wiederwahl" [An antifascist museum in the horse trade for Werner Faymann's re-election], *Die Presse*, March 02, 2015.

<sup>39</sup> "Neue Burg".

<sup>40</sup> Stefan, Weiss, "Kulturspenden werden steuerlich absetzbar. Minister Ostermayer gab Einblick in Details des Kulturbudgets für 2016" [Cultural donations will be tax deductible. Minister Ostermayer gave insight into details of the cultural budget for 2016], *Der Standard*, November 19, 2015.

<sup>41</sup> Richard Kriesche, "Ein Haus der Geschichte und der Zukunft" [A house of history and the future], *Der Standard*, January 12, 2016.

<sup>42</sup> Eva Blimlinger was a member of the scientific advisory committee of the House of Austrian History. In the summer of 2018 she resigned from the board.



- <sup>43</sup> "Blimlinger gegen Haus der Geschichte" [Blimlinger against House of History], *Wiener Zeitung*, January 5, 2016.
- <sup>44</sup> "Heldenplatz: Schelling hat keine Stoptaste gedrückt" [Heldenplatz. Schelling didn't press the stop button], *Kurier*, November 27, 2015.
- <sup>45</sup> "Platzsuche", *Kleine Zeitung*, July 18, 2015.
- <sup>46</sup> Kerstin Kellermann, "Am Judenplatz. Bilderausstellung von Adolf Frankl in Gefahr. Denkmal als Spiegel der Synagoge" [At Judenplatz Exhibition of paintings by Adolf Frankl in danger. Monument as mirror of the synagogue], *Augustin*, December 21, 2016.
- <sup>47</sup> Walter Hämmerle & Ina Weber, "Am geplanten ‚Haus der Geschichte‘ in der Hofburg scheiden sich die Geister" [Opinions differ on the planned 'House of History' at the Hofburg], *Wiener Zeitung*, March 26, 2016.
- <sup>48</sup> Wolfgang Sablatnig, "Geschichte an einem sprechenden Ort" [History in a place of historical relevance], *Tiroler Tageszeitung*, December 25, 2015.
- <sup>49</sup> Trautl Brandstaller & Peter Diem, "Federkrone und Wappenadler" [Feather crown and heraldic eagle], *Wiener Zeitung*, December 06, 2014.
- <sup>50</sup> Stefan Weiss, "Die Republik und ihr Gedächtnis" [The Republic and its memory], *Der Standard*, October 14, 2015.
- <sup>51</sup> Trautl, "Federkrone".
- <sup>52</sup> "Die Republik".
- <sup>53</sup> Trenkler, "Die Angst".
- <sup>54</sup> "Gesetz für Haus der Geschichte" [Act for House of History], *Die Presse*, March 18, 2016.
- <sup>55</sup> "Ursula Stenzel, die FPÖ und die 'Volkschädlinge'" [Ursula Stenzel, the FPÖ and the 'Volkschädlinge'], *Kurier*, September 28, 2015.
- <sup>56</sup> Ernst Langthaler, "Zwei Häuser, aber welche Geschichte?" [Two houses, but what story?], *Die Presse*, May 07, 2015.
- <sup>57</sup> "Mann der Geschichte. Zur Person Oliver Rathkolb" [Man of history. About the person Oliver Rathkolb], *Kurier*, May 14, 2016.
- <sup>58</sup> "Unterwegs in die Dritte Republik" [On the way to the Third Republic], *Die Presse*, Mai 23, 2016.
- <sup>59</sup> Gerfried Sperl, "Das Haus der Geschichte ins Museumsquartier" [The House of History to the Museumsquartier], *Der Standard*, August 17, 2015.
- <sup>60</sup> "Haus der Geschichte ist auf dem Weg" [House of history is on its way], *Vorarlberger Nachrichten*, March 18, 2016.
- <sup>61</sup> "In Hofburg wird Geschichte geschrieben" [History is written in the Hofburg], *Heute*, September 25, 2015.
- <sup>62</sup> Later Franz Schausberger became a member of the scientific advisory committee of the House of Austrian History.
- <sup>63</sup> "Österreich ist Land".
- <sup>64</sup> "Die Chance auf ein zweites Museums-Quartier" [The Chance of a Second Museumsquartier], *Oberösterreichische Nachrichten*, August 08, 2015.
- <sup>65</sup> "Im Banne eines historischen Schlüsseljahres" [Under the spell of a historic key year], *Der Standard*, January 29, 2015.
- <sup>66</sup> "Die Chance".
- <sup>67</sup> "Die Chance".
- <sup>68</sup> "Die Chance".
- <sup>69</sup> Harald Walser, "Ein Haus, eine Republik und ihre Geschichte" [A house, a republic and ist history], *Der Standard*, August 13, 2015. (Harald Walser was a politician of the Greens).
- <sup>70</sup> "Hätte mir mehr Kühnheit von dieser Bundesregierung erwartet" ["I expected more boldness from this federal government"], *Der Standard*, October 25, 2016.
- <sup>71</sup> Ina Weber, "Small bis medium" [Small to medium], *Wiener Zeitung*, September 10, 2015.

- <sup>72</sup> Weber, "Small".
- <sup>73</sup> "Republiks-Geschichte an imperialem Ort" [History of the republic in an imperial place], *Tiroler Tageszeitung*, November 16, 2015.
- <sup>74</sup> Gerald Matt, "In Hofburg wird Geschichte geschrieben" [History is written in the Hofburg], *Heute*, September 25, 2015.
- <sup>75</sup> Matt, "In Hofburg".
- <sup>76</sup> Matt, "In Hofburg".
- <sup>77</sup> "Geschichte zunächst nur in Teilen" [History only in parts], *Salzburger Nachrichten*, May 06, 2016.
- <sup>78</sup> <https://www.onb.ac.at/> (last accessed 12 January 2019).
- <sup>79</sup> The following persons were nominated in the advisory committee of the House of Austrian History: Oliver Rathkolb, Aleida Assmann, Eva Blimlinger, Gerhard Baumgartner, Franz Schausberger, Wolfgang Madterthaler. "Start im Oktober für das Haus der Geschichte" [The House of History starts in October], *Die Presse*, September 15, 2015.
- <sup>80</sup> "Um Geduld".
- <sup>81</sup> Michael Wurmitzer, "Haus der Geschichte: Vorstudie veröffentlicht" [House of History: Preliminary study published], *Der Standard*, May 06, 2016.
- <sup>82</sup> "Drozda forciert HGÖ-Eröffnung" [Drozda pushes HGÖ opening], *Tiroler Tageszeitung*, September 12, 2016.; "Drozda hält an Haus der Geschichte fest" [Drozda sticks to the house of history], *Tiroler Tageszeitung*, May 19, 2016.
- <sup>83</sup> "Haus der Geschichte eröffnet 2018" [House of History opens in 2018], *Wiener Zeitung*, October 21, 2016.
- <sup>84</sup> Stefan Musil, "Haus der Geschichte soll 2018 eröffnen. Klein & billiger!" [House of History is scheduled to open in 2018. Small & cheaper], *Kronen Zeitung*, October 23, 2016.
- <sup>85</sup> Stefan Musil, "Geschichte wird abgespeckt" [History is slimmed down], *Kronen Zeitung*, October 23, 2016.
- <sup>86</sup> "Haus eröffnet".
- <sup>87</sup> Stefan Weiss, "Haus der kleinen Geschichte" [House of small history], *Der Standard*, October 21, 2016.
- <sup>88</sup> "Hätte mir mehr Kühnheit erwartet".
- <sup>89</sup> "Hätte mir mehr Kühnheit erwartet".
- <sup>90</sup> "Hätte mir mehr Kühnheit erwartet".
- <sup>91</sup> "Hitler-Balkon' bekommt eine Kunstinstallation" [The Hitler balcony becomes an art installation], *Salzburger Nachrichten*, July 27, 2017.
- <sup>92</sup> "Die wahren Gründe" [The real reasons], *Kurier*, December 25, 2016.
- <sup>93</sup> Weiss, "Haus der Geschichte. Verständliches Ärgernis" [House of History. Understandable annoyance], *Der Standard*, October 25, 2016.
- <sup>94</sup> Musil, "Klein & billiger".
- <sup>95</sup> Weiss, "Haus der Geschichte".
- <sup>96</sup> Weiss, "Haus der Geschichte".
- <sup>97</sup> Weiss, "Haus der Geschichte".
- <sup>98</sup> Weiss, "Haus der Geschichte".
- <sup>99</sup> "Haus eröffnet".
- <sup>100</sup> "Ester Schritt zum Haus der Geschichte" [First step on the road to the House of History], *Tiroler Tageszeitung*, October 21, 2016.; Katrin Nussmayr, "Haus der Geschichte: Drozda erwägt Neubau" [House of History: Drozda considers a new building], *Die Presse*, October 21, 2016.
- <sup>101</sup> Nussmayr, "Drozda".
- <sup>102</sup> "Das Haus der Geschichte sucht jetzt eine Leitung" [The House of History is looking for a manager], *Kurier*, November 11, 2016.
- <sup>103</sup> "Überblick", *Oberösterreichische Nachrichten*, December 13, 2016.; Thomas Trenkler, "Das Plantschen geht weiter" [The dabbling continues], *Kurier*, January 1, 2017.

<sup>104</sup> "Monika Sommer wird Haus der Geschichte leiten" [Monika Sommer will be the head of the House of History], *Kurier*, January 26, 2017.

<sup>105</sup> Barbara Petsch, "Eine Mutter von vier Kindern für das Haus der Geschichte. Die neue Direktorin, Monika Sommer-Sieghart, sei willkommen" [A mother of four children for the House of History. The new director, Monika Sommer-Sieghart, is welcome], *Die Presse*, January 27, 2017.; Michael Tschida, "Gleiche und Ungleiche" [Equals and unequals], *Kleine Zeitung*, January 27, 2017.

<sup>106</sup> Reinhold Reiterer, "Frau Direktor geht ins Museum" [Mrs. Director enters the museum], *Kleine Zeitung*, January 27, 2017.; "Von der Vergangenheit für die Zukunft lernen" [Learning from the past for the future], *Salzburger Nachrichten*, January 27, 2017.

<sup>107</sup> "Geschichte als Projekt des Herzens" [History as a matter close to the heart], *Tiroler Tageszeitung*, January 27, 2017.

<sup>108</sup> "Projekt des Herzens"; "Und wieder macht eine Linzerin Karriere" [Once again, a woman from Linz makes career], *Oberösterreichische Nachrichten*, January 27, 2017.

<sup>109</sup> "Wie schaffen wir ein demokratisches Museum?" [How to create a democratic museum?], *Die Presse*, May 26, 2017.

<sup>110</sup> Jasmin Bürger, "Österreichs Identität auf der Spur" [Tracing Austria's identity], *Oberösterreichische Nachrichten*, June 10, 2017.; Stefan Weiss, "Jetzt sind die Geschichtsmuseen dran" [Now it's the turn to the history museums], *Der Standard*, May 26, 2017.

<sup>111</sup> Weiss, "Geschichtsmuseen".

<sup>112</sup> Katrin Nussmayer, "Monika Sommer-Sieghart leitet Haus der Geschichte" [Monika Sommer-Sieghart is the head of the House of History], *Die Presse*, January 27, 2017.; Thomas Trenkler, "Eine Urne als Glücksbringer des Hauses der Geschichte" [An urn as a lucky charm of the house of history], *Kurier*, October 23, 2017.

<sup>113</sup> Trenkler, "Eine Urne".

<sup>114</sup> Trenkler, "Eine Urne".

<sup>115</sup> "Haus der Geschichte. Blimlinger und Baumgartner verließen Beirat" [House of History. Blimlinger and Baumgartner left the advisory board], *Der Standard*, July 7, 2018.

<sup>116</sup> "Haus der Geschichte. Blimlinger".

<sup>117</sup> "Haus der Geschichte. Blimlinger".

<sup>118</sup> <https://www.hdgoe.at/aufbruch-ins-ungewisse> (last accessed 12 January 2019) .

<sup>119</sup> Stefan Weiss, "Haus der Geschichte eröffnet. Ein Jahrhundertsprung auf sechzig Metern" [A century jump at sixty meters], *Der Standard*, November 7, 2018.

<sup>120</sup> Otto Brusatti, "Haus der Geschichte Österreichs. Begnadet für das Schiache?" [House of Austrian History. Blessed for the ugly?], *Die Presse*, December 7, 2018.

<sup>121</sup> "Begnadet für das Schiache?" ..

<sup>122</sup> "Haus der Geschichte eröffnet".

<sup>123</sup> Andreas Kohl, "Vielversprechender Beginn – mit Luft nach oben!" [A promising start with potential for improvement], *Der Standard*, November 19, 2018.

<sup>124</sup> "Vielversprechender Beginn".

<sup>125</sup> "Haus der Geschichte eröffnet"; "Vielversprechender Beginn"; "Begnadet für das Schiache?".

<sup>126</sup> Michael Huber, "Haus der Geschichte Österreich. Ein erster Rundgang" [House of Austrian History. A first tour], *Kurier*, November 7, 2018.

<sup>127</sup> Thomas Winkelbauer, "Welches Haus? Welche Geschichte? Welches Österreich?" [What house? What history? Which Austria?], *Der Standard*, April 14, 2015.; "Republiks-Geschichte".

<sup>129</sup> I accompanied Monika Erckert and her 17 students at the age of 16 and 17 years from the Viennese Grammar School Wenzgasse (<http://www.wenzgasse.at/>) (last accessed 12 January 2019) , who visited the House of Austrian History on the 10th of January 2019.

<sup>130</sup> The Waldheim horse is probably the most prominent material relict of the anti-Waldheim protests in Austria. The protests marked a paradigm shift in Austria's dealings with its Nazi past and, were triggered

by the candidacy of former UN Secretary General Kurt Waldheim for the office of Austrian Federal President in 1986. In the course of the election campaign, the Austrian media had revealed that Waldheim had incompletely and partly incorrectly reported on his time during the Second World War in which he had been an officer of an SA equestrian corps in Greece. The debate whether Waldheim had personally been involved in Nazi war crimes and the mass deportation of Jews in Greece, or whether he had at least known about it, resulted in an internationally led, controversial and fierce debate that strongly polarized the Austrian public. On the one hand, Waldheim became an identification figure for the war generation, who, as Waldheim himself had put it, had only "fulfilled their duty" in the Wehrmacht.

On the other hand, Waldheim's memory gaps and his selective depiction of the Nazi past provided the starting point for a long overdue reassessment of Austrian Nazi history, which continues to this day. For the first time, the founding myth of the Second Republic was challenged and Austria was no longer seen exclusively as the first victim of National Socialism, but as a country whose inhabitants were complicit in the crimes of National Socialism.

Kurt Waldheim's election and presidency were accompanied by numerous protests in Austria and abroad. The wooden horse, which carries a SA-cap, also goes back to these protests. It was constructed on the occasion of Waldheim's inauguration by a group of artists under Alfred Hrdlicka as a kind of Trojan horse which concealed within itself the attitude of those in Hitler's army who claimed merely to have been doing their duty. At the same time, however, the wooden horse also refers to a statement by the then Federal Chancellor Fred Sinowatz, who laconically stated that he accepted that "Waldheim was never in the SA, only his horse".

After his investiture, Waldheim remained internationally isolated, was banned from entering the USA, and finally renounced re-election. A personal engagement in war crimes, which he had always denied, could never be proven to him. However, a commission of historians concluded that he must have been well informed about the crimes.

<sup>131</sup> Stefan Weiss: „‘Alles offen‘ beim Haus der Geschichte“ [House of Austrian History. 'Everything is open'], *Der Standard*, January 11, 2019.; "Expertenteam für Haus der Geschichte" [A team of experts for the House of History], *Wiener Zeitung*, January 4, 2019.

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