

Social Science Literacy I: In Search for Basic Competences and Basic Concepts for Testing and Diagnosing Political and Economic Literacy

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Birgit Weber

Challenges of Social Science Literacy – Editorial

Since international tests compare the performance of students in different subjects, the issue of literacy in the social science subject is becoming more pressing. The successes and failures in international tests influence the national education policies considerably. First, the inclusion of subjects in international comparisons has consequences for their importance. Second, the race in the Olympics of education leads to an increasing focus on the output of educational processes, also measured in the central exams. Social Sciences can refuse to take part in the national comparison studies with the price of losing much more importance; they can participate with the danger of undermining their goals. This raises a lot of questions: What competences students need in this social world to reason about it and to act responsibly? What is the foundation of concepts from social science students need for guidance and understanding their place and role as an individual in society? The social science disciplines, as sociology, political science and economics in a narrow sense, history, law and geography in a broader sense, supported by philosophy, pedagogy and psychology are able to select them for educational purposes or determine such educational aims. This Journal wants to resume and discuss competences and core concepts for political and economic teaching and learning as Social Science Literacy". Contributions in this issue do not only discuss and recommend competences and core concepts from a domain specific political or economic point of view, but also from an interdisciplinary or psychological point of view. They analyse preconditions and interdependencies as well as obstacles and problems of development and diagnosis core concepts and competences of Social Science Literacy.

Keywords:

Social Science literacy, competence, core concepts, political literacy, economic literacy

The definition of key competences and key concepts represent a particular challenge especially for the social sciences. As a topic social sciences are not well anchored in school systems, but are spread over a wide number of subjects and school activities. From 1st to 4th class the first perspectives on the social, economic and political world are introduced. Social, economic and political learning between 5th and 9th or 10th grade exists in schools compulsory or elective in different proportions of hours and different grades. It can be a subject of its own or separated in different subjects or combined together with history, geography and law. It exists in a lot of different combinations as politics/sociology, politics/history, politics/economics, economics/geography or economics/law. In 10th to 12th grade it is partly as social science than politics and economics or taught separately as sociology, politics, economics or business.

Besides this curricular situation the challenge for social science education would also occur because of the subject itself independent of its anchoring or organization. The social, economic and political challenges of the world are not only complex and interdependent, but they also change dynamically. There are key future challenges for which in social sciences and in social groups different and opposing interpretations and solutions are available, whereas also national cultures and institutions differ. The school social sciences – in its integrated or separated form of organization – can also be misused for producing only acceptance of social, economic and political order, even

if they are problematic, or to create the conditions for certain political or economically desirable solutions. The school social sciences can just as easily be misunderstood as miniature academic social sciences reproducing its highly specialized knowledge interests and perspectives without asking for the meaning of and significance to the learner.

As almost any international survey of student knowledge refers to literacy standards for teaching and learning, social sciences tend more and more to define its own sets of concepts, competences and literacy standards. This happens against the background that as a knowledge domain the social sciences are characterized as loosely structured, with competence often based on the performance of fewer heuristic procedures than in the well structured domains (like e.g. the "hard" sciences). Given the curricular diffusion and the requirements for standardization, the different didactics in the social sciences – e.g. the didactics of political or economic education in Germany – currently are trying to characterize their specific domain specific key concepts and competences in contrast to each other, finally allowing testing performance with the simplest possible quantitative measurement. Although this communication process is essential for professionalization and importance of the subject in order to reduce arbitrariness of subjective teacher opinion, curricula or examination constructors and textbook producer, a lot of problems are connected with this process. One problem occurs by simplification of complex challenges, the other by reducing dynamics by reproduction of unilateral recognition of the specialized ways of relating science. Other problems arise as the definition of concepts and competences cur-



rently can hardly be based on the empirically derived evidence, to which extent learners' understanding is age-appropriate or over- or under-challenged. It is also not possible just to transmit scientific concepts to the learner without regarding their perspectives on contemporary economic and political realities, without looking at their preconceptions, specific socialization effects and belief systems that affect student attitudes and the outcomes of social science educational activities.

Seen the intense proliferation of definitions of literacy as well as of subsequent approaches to teaching and learning, this new emerging field of scientific needs inquiry as well as debate in social science. The domain lacks a coherent set of core concepts because the (academic) reference domains like political science, economics and sociology fail to provide agreed upon basics that are interdisciplinary enough to feed a common knowledge base for teaching and learning. The discussion is urgently necessary what core competences should be fostered in the social sciences, what relevant scientific concepts for guidance and analysis, understanding and explanation, judging and decision, acting and designing in the social, political and economic world are useful. On the one side seen the differences between political and economic education it is crucial to define the different competences and concepts separated, but on the other side seen the requirements of composed and integrated subjects as well as the interdependencies of the social, economic and political order it is an urgent task to look for differences and similarities as well in the acquired competences but also with regard to the use of concepts, models, values and ideologies. Common didactic approaches could allow the combination of perspectives without ignorance of the differences and without dominance from one didactic approach upon the other.

Necessary as well is the discussion and development of instruments that can be used to diagnose and test without undermining the key objectives of the subject. So for example a gap can occur, when on the one side analytical, judging and evaluating perspectives are needed, while the measurement of concepts leads more to factual knowledge. The goals of social science education are ambitious: consumers and producers, employees and employers, members of groups in society and citizens of the nation and the world, who are able to act as well as change the rules, but also to judge and evaluate in self-determined, enlightened, responsible, critical but also constructive way should be fostered by social science literacy. But how can this be diagnosed and tested?

This Journal aims at resuming and discussing the state of the discipline(s) on the topic of "Social Science Literacy: In Search of Competences and Core Concepts for Political and Economic Teaching and Learn-

ing". With this requirement the journal will start with this issue and continue with Social Science Literacy II in 2011. The contributions in this issue discuss the need of basic competences and basic concepts and recommends special competences and special basic concepts for social science literacy. They discuss and analyse their preconditions, development, obstacles and problems, arguing from a domain specific political or economic point of view or from an interdisciplinary or psychological point of view.

JAN LÖFSTRÖM, ARJA VIRTA and MARKO VAN DEN BERG lead directly into the heart of the problem and the necessity of searching core concepts and competences for social science literacy. With their question "Who actually sets the criteria for social studies literacy" they point to the necessity of an agreement about adequate core concepts and curricula for social science literacy. By a case study of the situation in Finland they present the gap between vague criteria in a national core curriculum and central exams that can be interpreted by the constructors of national exams, which could be little relativized by teachers and students, who are in charge of assessment. The Finnish case study is also interesting, because Finnish students assess with high knowledge but with low interest for political activity. Presenting the development and verified with empirical evidence the contribution gives plausible hypothesis to how such a gap can appear and gives some recommendation of what kind of concepts as intellectual tools should be at hand to support the development of competences as an analytic gaze, critical reasoning and preparation for actual participation. The problems Löfström, Virta and Van den Berg point at, do not only occur if the interpretation power is handed over to the constructors of exams, but also to the constructors of international comparison tests. They show the necessity to search and discuss core concepts and core competences for social science literacy, but also adequate instruments, which are able to diagnose and test those abilities without leaving crucial competencies behind.

LILIANA MAGGIONI, EMILY FOX and PATRICIA A. ALEXANDER bridge the gap between epistemology debate and competences in the social studies domain. With a psychological point of view epistemological beliefs function as a path leading to competence as those beliefs influence comprehension and understanding as well as interpretation and evaluation of arguments. In their study "The Epistemic Dimension of Competence in the Social Sciences" Maggioni, Fox and Alexander present picturesque results of students' problems of understanding. They found out that students are constantly changing their epistemological beliefs without being conscious of it, when they try to collect plausible facts by ignoring conflicting elements tend-



ing to simplify their thinking process. If the teaching process concentrates on textbooks as the only truth, if the way of thinking and evaluating has not been cleared up, whereas the task regarding multiple perspectives is only used to found self assumptions with factual information by ignoring others this fact can also be a result of the way of teaching. The authors conclude that competences and concepts should be brought into a broader horizon of the entire process of building knowledge in the disciplines, so that students are able to see that human knowledge is restricted as well as possible. Only if the epistemological beliefs are taken into account, the teaching can reduce arbitrariness, meaningless formalities and overcomes creating only mechanical skills or sterile bits of information.

In an extremely changing world with a high grade of uncertainty with opposing solutions the question to find determined concepts seems to be a dubious enterprise. JEAN SIMONNEAUX and ALAIN LEGARDEZ present with the example of globalization the difficulties to find remaining concepts in ages of uncertainty especially for social science teachers, when controversial discussions in the real world show a lot different interpretations. As an important competence of social science literacy they suggest the empowering of students to judge controversial topics of socially acute questions. These questions building upon human situation without being discipline-centred make teaching a delicate task between the extremes of heating or playing down, combined with the important task to interpret the current affairs as well as the scientific debate. At the example of globalization Simonneaux and Legardez present the variety of meanings of the term depending on economic, social or political kind of view. Through examining economics, history, geography, politics and sociology as different schools of thought as well as the extreme positions of ideologies and different kind of social practices the authors present a way to find out relevant concepts in social acute questions, to orientate within ideologies and to differ between social practices as a means for standardizing and differentiation in interdisciplinary social science literacy. Those concepts, ideologies and practices should not be used as aims of teaching, but as means for a better understanding of the world. Besides the epistemologies of positivism/Scientism and utilitarianism they suggest critical realism as inevitably necessary in social science education. Although epistemologies have different connections with didactic strategies, a critical strategy compared with others and critical attitude can help to hide before simplifying solutions. With this way of thinking the authors help with analytic tools for conscious didactic decisions without defining narrow overlasting concepts in a world of uncertainty and controversies, which is to

be examined by disciplines but could not to be split up into them.

BERND REMMELE draws our attention to a special core concept in economics education in order to present the problems of modelling competences according to relating scientific concepts and the age-specific abilities to handle complexity. In his contribution “Two peculiarities of economic education” he explains at the example of the market that the comprehension of this fundamental concept draws a lot of problems for understanding and comprehension. Experiencing a market as a place of economic interaction within social embeddedness could thwart the understanding of the concept market in its function of coordination individual actions. Those problems are the consequence of the characteristics of the market as unintended systemic effects and unintuitive feedback processes in a temporal dimension. Remmele recommends the necessity to enfold a “system competence” with systemic reasoning about cumulative or aggregated effects instead of looking at single action, personification, directional causes and faults. In contrary to typical didactical strategies the author suggests in regard to Vygotsky to teach the market system from an abstract scientific perspective, willingly distancing from intuitive concepts, thinking about top-down replacement of concepts, confronting students with other metaphors as rules of reflections or let them experience systemic effects in simulation games. With this example and the necessary competences it also seem to be clear that there is a long way to measure those competences with a quantitative approach and it also seem to be prematured to define concrete competence models for testing, when we are not in charge of empirical diagnosis of age specific requirements.

With the Core concept „political compass“ ANDREAS PETRIK proposes to fill the “Ideology gap in Civic Education”. Regarding the crucial role of individual value orientation for political judgement abilities to Petrik such a compass of values, ideologies and forms of social order is urgently needed for a political literacy to help political orientation, judgement, stating and participating with one’s own point of view. With this contribution he wants to set a counterpoint against the value neutral mainstream fostering of only objective thinking and analytic skills. Based on the model of Herbert Kitschelt and examining alternative cleavage models Petrik creates a differentiated political compass with four ideal-typical forms of democracy and their non-democratic extremes between the two axis of a distributive or economic cleavage and a communitarian or social-cultural cleavage referring to ultimate political values. Upon this construction empirical evidence of Kitschelt’s socio-demographic approach and the social milieu Approach of the European and



World Value Surveys is placed in order to find out the connections between social milieus and the political value orientation. At least Petrik demonstrates ways of teaching by using the political compass to sharpen student's political orientation. In order to give students a chance to locate their preferences he suggests questionnaires of compasses with highly controversial issues and his "Found-a-Village-Project" confronting students with conflicts to debate basic political issues, orientate in values and ideologies and judge current politics.

Searching for core competences needs to ask if there are competences that are more important as others and how competences influence each other. From a psychological point of view FRANK REICHERT questions whether the objective political knowledge, the political reasoning or rather the subjective political competences are more important to influence different types of political participation from electoral and conventional over unconventional up to non-normative activities, and how they mediate with each other. With his study of 76 19 to 36-year-old university students, who studied psychology, he finds out that political structural knowledge might be explaining electoral participation. His results show that political knowledge loses its explanation power, since it seems to be mediated by subjective competence, whereas political participation in school shows impacts on feeling competent and the willingness to participate. Political reasoning and analysis also are proven crucial for participation. Reichert detects mediation of political knowledge via subjective politi-

cal competence, whereas political knowledge seems to be more necessary for voting; subjective political competence seems to influence non electoral political activities. During individual development subjective and objective political competencies seem to overlap more and more in their influence on participation. The conclusion is obvious: If various kinds of political competence and knowledge have more or less diverse effects on various forms of political action and if school will help to develop competently active and reflective citizen, it is necessary to foster political knowledge as well as the ability of political analysing and reasoning and it is crucial to give the chance for engagement.

With this issue about Social Science Literacy we can publish one of the central topics at social science education right at the end of the 10th anniversary of JSSE. Sincere thanks are given to

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Jan Löfström, Arja Virta, and Marko van den Berg

Who Actually Sets the Criteria for Social Studies Literacy? The National Core Curricula and the Matriculation Examination as Guidelines for Social Studies Teaching in Finland in the 2000's

The issue of how to define the content of social studies literacy has become topical in Finland in the 2000's in a new way as a result of social studies having been instituted as an independent subject in upper secondary school and in basic education. Freedom from the ties confining social studies in the role of a subdivision of the subject history has entailed a need to profile social studies and also to problematize the parameters of social studies literacy more clearly and consciously than before. However the question remains as to who defines the content of social studies literacy. In this article we will argue that in Finland today the most central role in this respect is being played not by the national core curricula where the competence aims of social studies teaching are rather vague, but by the social studies exam in the national matriculation examination. This is not necessarily a bad situation in terms of the outcome but it is noteworthy that the task of operationalizing social studies literacy is here as if "outsourced" to a small group of social science and social studies education experts who design social studies exam questions, whereas the authority responsible for developing the national core curricula only sanctions very general descriptive objectives for social studies teaching.

Keywords:

Social studies literacy, political literacy, civic literacy, assessment, criteria, Finland

Clearing the theoretical ground – the concept of literacy in the context of social studies

Generally, the objectives of social studies and civics in the European school systems have been geared toward ICCSDs transmission of knowledge and socialization of the young but with the advent of information society, public demands for lifelong learning, and programmatic declarations to expand democracy at all levels in society the objectives have gradually moved in the direction of enhancing the competences and skills of the young to participate in society as active citizens. The situation differs, of course, from country to country in terms of how politics of education is situated in the wider frame of public policies, what demands are placed on schools in producing results which are readily measurable and quantifiable, and how the content of democratic citizenship is understood, for example. In this paper we discuss the Finnish situation, based largely on our experiences as teacher educators and as designers of the national matriculation examination social studies exam. We think that one reason why the Finnish case can be of special interest to colleagues in other countries is the rather striking discrepancy between Finnish adolescents' excellent performance in the knowledge items and very weak interest in the issues of political and civic life in the two most recent large-scale international assessments of civic knowledge and attitudes, CIVED (1999) and ICCS (2010). The competences of the Finnish young seem curiously bifurcated, alerting us to analyze the content of social studies literacy and also, more specifically, to identify the major chal-

lenges in enhancing the social studies literacy of the Finnish young.

Social studies literacy is an ambiguous concept, given that both of its components, social studies and literacy, can be understood in several ways. Social studies is a conglomerate subject which has a different content in different school systems, often incorporating history and geography in addition to civics and economics. However in this article we will focus on those parts of social studies which are connected to social sciences more specifically.

Initially literacy has pertained to the skills of reading and writing but the scope of the concept has both deepened and broadened, and both these dimensions of change are embedded in more general cultural and social developments. The changes are related to the new conceptions of learning and teaching which emphasize active learning and knowledge construction instead of a traditional conception of learning as knowledge reception. A "deep" interpretation of literacy implies functional and critical literacy, whereas a "broad" interpretation can be characterized as analogies or metaphors for understanding or competences which are related to various fields (historical literacy, science literacy, moral literacy and political literacy, social science literacy, etc.), or technologies (visual literacy, digital literacy, etc.). (Virta 2007, 11-13.) Also when we here discuss issues that are mostly related to the social scientific elements of the subject social studies, it can be argued there are different forms of literacy also within the broad area of social studies literacy, such as civic literacy or political literacy. Although the concepts including the word 'literacy' are not directly favoured in the Finnish discourse on social studies education, elements of these 'literations', and goals related to them, can be observed also in the Finnish context.



The aforementioned concepts have also been used and defined in different ways by different authors. For example, Henry Milner (2002) uses civic literacy as a concept referring primarily to the skills and knowledge needed in society and also to the skills needed in political participation. Moreover, he suggests there is a close connection between the concepts of civic literacy and social capital. Ian Davies (2008) presents a summary of the British discussion on political literacy and concludes that political literacy has been characterized as “a compound of knowledge, skills and procedural values” (respect for truth, reasoning and tolerance) and that it is also close to political action and engagement. Related to these concepts we can add Tiina Ekman’s (2007) notion of democratic competence whose components are knowledge about political processes, political self-confidence, attitudes, and political behaviour. These do not cover all the area of social studies but in general they embrace the levels of knowing, understanding, and using knowledge.

A major contradiction embedded in the goals of social studies in any society is that the subject has a double mission, to educate students in critical literacy and to function as a channel of socialization, although the latter may not be that obvious in the written curricula. However, the gap between socialisation and critical competence, or counter-socialisation, is often not perhaps very dramatic as the requirements in contemporary developed societies are fairly broad in terms of what qualities citizens are expected to show (Ochoa-Becker 2007).

The tradition of Finnish social studies – transmission of factual knowledge

The social studies subject content in the Finnish school consists of elements in civics (politics), economy, social policy and law. The subject does not have a very prominent status in the Finnish compulsory education as it is usually taught only in the final year of basic education, on Grade 9. The number of lessons per week was increased with one in the latest reform in 2004; the lessons now amount to three per week. In upper secondary schools there are two compulsory social studies courses, *Politics and society*, and *Economics*, each equal to one lesson per week. *The National Core Curriculum for Upper Secondary Schools, 2003*, mandates two additional courses, *Citizens and law*, and *Europeanism and the European Union*, that each upper secondary school has to offer but they materialize only if adequate number of students will sign up for the course.

According to the *National Core Curriculum for Basic Education, 2004*, social studies should contribute to the students’ critical capacity and knowledge and understanding of society, but there is obviously also a social ethos as the objectives also imply that the students become interested in civic participation, learn

to develop their abilities as responsible consumers and actors in society, and know the legal consequences of their actions. The students are also expected to learn the basics of enterprise and understand its importance for society. However, social ethos is totally ignored in the criteria for student assessment in social studies which divide in two categories only, “Acquisition and use of social information”, and “Understanding social information”. The criteria thus betray a narrower understanding of the concept of social studies literacy than the general objectives formulated for the subject in the core curriculum (*National Core Curriculum for Basic Education, 2004*).

The *National Core Curriculum for Upper Secondary Schools, 2003*, defines the aims of social studies teaching at a somewhat more advanced level in terms of what kind of cognitive processes it refers to. For example, it propounds that the students should be able to handle the major concepts of civic life and economy and form well-grounded opinions on social and economic issues that involve value-laden judgments. Like in the *National Core Curriculum for Basic Education*, the students’ ability to acquire and judge critically information about society is also emphasized (*National Core Curriculum for Upper Secondary Schools, 2003*).

The aforementioned objectives appear conducive to educating active critical citizens, yet one can argue that regarding the core concepts of social studies and the means of promoting the competences which constitute the directives of social studies teaching, the *Core Curricula*, like most of their predecessors, are helplessly vague. We assume this is often the case in curriculum texts across the countries: the objectives are stated at such a general level that teachers are not likely to find useful instruments for their work there. The elevated words on students’ critical citizenship notwithstanding, the *Core Curricula* present a conventional and institution-centred list of items the social studies courses have to cover, ranging for example from “the population structure of Finland” to “purpose, roles and forms” of social policy (*National Core Curriculum for Upper Secondary Schools, 2003*). The kind of dynamic analytic concepts that social sciences operate with – authority and cooperation, public and private, norm and role, etc. – do not feature in the *National Core Curricula*, power and democracy being the major exceptions (Löfström 2001).

We would argue that the aforementioned conventionality and institutionalism in the *Core Curricula* for social studies is part of a tradition where the parameters of social studies teaching are effectively set very much in terms of factual knowledge rather than particular analytic and critical competences. The tradition has been visible, for example, in the matriculation examination where the social studies questions until the mid-1980’s invariably would concern facts about the constitution, institutions of civ-

ic society, and the models of economy. An analysis by Arja Virta (2000) shows that still in the 1990's the civics textbooks in basic education were also largely descriptive and declarative, implying a direct socialization of the pupils in the prevailing political and social structures. In fact, in the 1999 CIVED survey the Finnish social studies teachers themselves voiced the opinion that social studies teaching in basic education tilted too heavily toward transmitting factual knowledge whereas there was too little practice on civic participation and thinking skills and too little reflection on the questions of values (Suutarinen 2007).

We can propose two intertwining causes for this persistent tradition in social studies in Finland. The first is the historical origin of the subject as a vehicle of conservative civic education. Embarrassed by the growing intensity of political antagonisms in the Finnish society in the early years of the twentieth century and the Civil War, in 1918, the political authority saw civics as a tool for socializing the young into conservative values and institutions of the Republic. Internal political tensions remained strong in Finnish society after Second World War. In the precarious situation those responsible for politics of education considered it best that social studies (civics) would remain an ostensibly neutral space for transmitting "cold facts" about society, economy and law, without any critical analysis of the prevailing structures. For example, one prominent figure in social studies education declared, in 1958:

"[Social studies] presents what society is like. It does not explore society, nor does it pose problems about society for us to solve. It does not give advice or norms to heed. It does not predict the development of society. It does not give verdicts on whether some social phenomenon or state of affairs is good or bad" (Kerkkonen 1958).

This approach would remain alive in the decades to come, demarcating descriptive accounts and factual information as the content that the social studies teachers could claim as legitimately theirs in all circumstances and against every critic – also in the turbulent years of the 1970's when they tried to avoid criticism from the politically active Leftist teenagers as well as from the suspicious Right-wing circles (Arola 2002). From the 1970's onward the political landscape was, however, characterized by an aspiration for political consensus and avoiding committed ideological debate (Taivalsaari 1990). Understandably it was not a fertile ground for social studies to become politically more engaging.

The second explanation for the lack of dynamic analytic qualities in the social studies is that in the curriculum the concepts constituting the scaffolds for teaching have often been concepts referring to institutions, like parliament or elections, which do not very much help to explain the form of knowl-

edge in social sciences and to interpret social and political processes. In the early twentieth century it was the history teachers who got the task to address issues of economy and constitution in the class. This mandate was formalized in 1963 when social studies was introduced officially in the national core curriculum of the upper secondary school as part of the dual subject History and Civics. Hence social studies teachers have usually been experts in history rather than social sciences; they have majored in history (MA) and have additionally studied two or three social sciences (oftenmost economy, politics and/or sociology), nowadays 25-35 ECTS in each and the total of social science studies amounting to 60 ECTS at the minimum. Thus their competences in social sciences is often rather shallow, and one can assume this may easily result in teachers having difficulty in generating analytic and critical perspectives in the social studies classes. It is noteworthy that when Arja Virta studied upper secondary school students' knowledge structure in history and in social studies she found that the students' answers on social studies exam questions often failed to show coherent structure and would rather consist of dispersed factual statements (Virta 1995). We suggest this may reflect not only the students' but also the teachers' difficulties to construct coherent analytic perspectives on political and economic issues.

Social studies covers a field of topics that fall in the diverse realm of social sciences, from economy and political science to sociology and law. Hence it may be too much to ask that the social studies curriculum could closely reflect the form of knowledge of all those academic disciplines. The *Economics* course in upper secondary school is structured rather closely upon the scaffolds of neoclassical economics and concepts like supply and demand have a central role there, but the course *Politics and society*, for example, is not in the same degree hinged upon the concepts of political studies and sociology. As a whole, social studies is in this respect different from history, and the difference was strikingly visible in the criteria for student assessment on grade Nine (*Perusopetuksen päättöarvioinnin kriteerit...*, 1999), which mentioned explicitly a number of concepts relevant to historical thinking (continuity, chronology, evidence, cause and effect, etc.) but which outlined students' expected competence in social studies only in very general descriptive terms. As a point of interest it can be noted that the 1999 criteria differ from the *Core Curriculum for Basic Education, 2004*, in that the first document includes, albeit vague, references to the nature of societal knowledge and it mentioned skills like "being able to use public services" and "being capable and becoming encouraged to use channels of influence in society", but these were dropped in the 2004 *Core Curriculum*.



The matriculation examination as a proxy of social studies literacy criteria

The aforementioned issues have been discussed by Finnish social studies educators in a number of texts in the past 20 years (e.g. Ahonen 1996; Löfström 2000; Virta 2000). However the question of core concepts and competences in social studies literacy has become more pressing lately also because of the reform of the national matriculation examination: since 2006 upper secondary school graduates can take a separate exam in subjects like geography, physics, chemistry, philosophy, history and social studies which previously were all placed on the same tray in one single exam where students could freely choose the exam questions they would answer. The system with separate exams for these so-called realia subjects was supported, among other things, with the argument that it would better allow designing individual exams so that they will more validly assess the competences typical of each subject.

As the social studies core curriculum has been rather vague on competences also the designers of the social studies matriculation examination have faced a challenging situation where they, in fact, are the major interpreters of the objectives and aims of social studies teaching and learning. Preparing the exam questions they effectively make authoritative statements about what the core concepts and competences in the subject are. The group designing the exam consists of four to six university teachers and researchers in the fields of history, social sciences and social studies education, and the only mandatory guideline for their work is that the exam, according to *The Amendment in the General Upper Secondary Schools Act, 2004/766 (18 §)*, has to assess if the students have attained the knowledge and the competences required by the national core curriculum for upper secondary schools. There is feedback from social studies teachers to the expert group in that teachers can ventilate their views regarding the exam in various meetings with the representatives of the expert group. Thus communication between the expert group and the teachers can not be regarded as one-way only (Gunnemyr 2010). However it is not incorrect to say that the expert group has an exceptionally central role in translating the diffuse objectives of social studies teaching in the *Core Curriculum* into a set of more operational concepts. As the teachers understandably are keen to prepare their students for the matriculation examination as well as possible they can also be assumed to take heed of what the matriculation examination questions are like and what skills and competences they actually test. Thus also the social studies exam may have considerable influence on how teachers in upper secondary schools conceive the components of social studies literacy, as the teachers themselves have pointed out (Virta 1998, 131-139; Vuorio-Lehti 2006).

Let us look briefly at what kind of tasks exactly are set in the questions in the social studies exams. The matriculation examination is arranged twice a year, in the spring and in the autumn, thus in 2006-2010 the social studies exam has been arranged ten times, the total amount of exam questions during this period amounting to 106. As a rule, each social studies exam has ten optional questions and the student may answer to six of them. Some questions include two or more parts and the student is asked to show different modes of cognitive processing in them (for example first comparison, then judgment or creating a synthesis). This multi-layered nature of some questions notwithstanding, we would argue on the basis of a crude analysis that the 106 social studies exam questions can be divided in three groups, each group comprising about one third of the total number of questions:

- 1) Questions where the student has to reiterate factual knowledge more or less in the same format as it can be found in school textbooks.
- 2) Questions where the student has to assess the plausibility of a particular statement or to consider the consequences or the advantages and disadvantages of a particular political, economic or judicial situation.
- 3) Questions where the student has to analyze and interpret one or more pieces of text documents, images, statistical data or maps, explain it or draw inferences from it, and to set the information in a wider national or global framework with the help of his/her background knowledge.

As examples of the first group we take the following exam questions, the first from Spring 2010, the second from Autumn 2009 (translation by authors):

"How is marriage, cohabitation, and registered partnership initiated, how are they dissolved, and what legal consequences do they have, respectively?" (6 points)

"How is power divided in the European Union between The European Parliament, The European Commission, and The Council of the European Union?" (6 points)

In the second group we can place the following questions, for example, the first from Autumn 2009, the second from Autumn 2008:

"Ponder what are the effects of the following actions on an individual Finnish citizen:

- a) The State cuts the VAT on food in Finland. (2 points)*
- b) The state loan raising is increased substantially in the State Budget in Finland. (2 points)*
- c) The European Central Bank raises its principal rate of interest." (2 points)*

"Give an account how consultative referenda have been used in Finland and ponder on the strengths and weaknesses of such referenda from the perspective of how they realize democracy." (6 points)

Finally, in group three we find questions of the following type (Spring 2009):



"The quotes below discuss the economic relations between the US and China and their development in recent years.

- a) Explain the underlined economic concepts in the quotes. (3 points)*
- b) Compare the views that George Bush and Stephen Jeffrey have on the impact of the yuan's value on the US economy and explain the logic that their assessment is based upon. (3 points)*
- c) On the basis of the quotes and other information you have, discuss the development of the US and Chinese economies in recent years. (3 points)*

'One of the issues that I emphasised to [China's vice-premier] Madame Wu Yi, as well as the delegation, was that we're watching very carefully as to whether or not they will appreciate their currency. [The US] \$233bn trade deficit must be addressed. And one way to address it is through currency revaluation [of the yuan].'

- US President George Bush Jr. reports on his discussions with the Chinese delegation on May 2007, Financial Times, 25.5.2007

'The biggest myth of all is that a revaluation of the [Chinese currency] yuan would greatly reduce America's trade deficit. The real cause of the deficit is that Americans spend too much and save too little.'

- Stephen Jeffrey, Lost in transition, Economist.com, 17.5.2007

'The [US November 2007] trade gap widened by more than expected, with economist forecasting a deficit of \$59bn compared with \$57.8bn in October. The US [monthly] trade deficit with China shrank slightly to \$24bn, down from a record high in October when shops were receiving shipments of toys in time for Christmas. However, the figures brought the year-to-date deficit with China to \$237.5bn at the end of November, already eclipsing the annual record of \$232.6bn set in 2006.'

- BBCNews 11.1.2008

The expert group seeks to design each exam so that there are questions from all these three categories and that the questions mobilize a wide range of cognitive skills, from rather simple rendering and organizing of factual knowledge to comparison, analysis, and more complex multiperspectival interpretations and explanations. From our own experience of having participated in the expert group we would argue that occasional disagreements on the balance between more complex and more traditional questions notwithstanding, the group members think it is important that the exam encourages the students to test the limits of their intellectual capacity rather than fail to provide such challenge. However there are some technical and economic limitations which effectively obstruct designing the exam so that the students would be given the task of producing something more extensive where their own active input is more central, for example, designing a community develop-

ment project, contributing to political debate or planning a small enterprise. Thus the exam is vulnerable to the critique that it does not nowadays provide a very wide perspective on students' competences or their social studies literacy.

The school textbooks in social studies have developed considerably during the last 20 years, they operationalize the *Core Curriculum* well, and in terms of the material and exercises that are intended to help the readers to practice their analytic and critical thinking they also have followed the developments in the social studies matriculation examination question.

Finnish adolescent's social studies literacy in recent studies

In this article we have so far not addressed the issue of Finnish adolescents' societal knowledge and civic engagement but it is relevant to do it briefly here. The question of how to set the parameters of social studies literacy is, we think, not only a question of arriving at a theoretically valid operationalization of social studies literacy but also identifying where the most acute challenge in promoting the adolescents' citizenship might be.

Our earlier critical remarks on the Finnish tradition of social studies notwithstanding, the state of social studies literacy among the Finnish young is not desperately bleak. In the international surveys on adolescent societal knowledge and attitudes, CIVED 1999 and ICCS 2008-2009, the societal knowledge of the 14-year-old Finnish young has been well above the international average despite the fact that the tests have been administered in Grade 8 where the Finnish young have not yet studied civics at all as it is usually in the syllabus of Grade 9. However the Finnish adolescents' attitudes to active citizenship and civic participation have been clearly below the international average (Suutarinen 2002; Schulz, Ainley, Fraillon, Kerr, Losito 2010). Obviously this is a challenge for social studies teaching but where should we locate the problem in terms of which areas of social studies literacy might be most concerned?

Apparently knowing facts about society and the key concepts of politics and economy is something the Finnish young master relatively well. This is perhaps not surprising, given that the Finnish teachers in the CIVED survey considered social studies is very much tuned toward teaching facts, as we pointed out earlier. It is worth noticing that the questions in the CIVED where the Finnish students had most difficulties were the ones which concerned connections of politics and economics, that is to say questions where the student should be able to conceptualize society as an entity of complex and multiple intertwining structures and modes of power (Suutarinen 2002). This may, in fact, reflect the fact that in the social studies curricula and in the textbooks economy often appears



as a separate realm with few sociological or political dimensions.

At this point it is important to note that the results above are from studies which target 14-years-old adolescents in basic education. After basic education there appears to be polarization, however, in that the young in vocational schools have much lower levels of civic knowledge than those in upper secondary schools (Elo 2009). This may be an indirect outcome of the students' differential socio-economic background which then also relates to differences in social and cultural capital, but it is also noteworthy that the amount of social studies teaching in vocational school is nowadays extremely small.

In a recent study Marko van den Berg has interviewed Finnish upper secondary school students about their societal interests. He has asked them about their views of the past and future developments at the national and global level and about their expectations concerning their own life. According to the students, social development has been and will continue to be strongly guided by economy rather than politics. Congruently with this they would explain change in the world in terms of economic developments rather than political programs. In their opinion increasing income differences is primarily an outcome of differences in personal abilities. Their views about the national and global prospects were rather pessimistic and again implied a strong belief in the determining role of economy. As for their own future they were fairly optimistic and believed that social success and failure "depends on yourself" (van den Berg, 2010). There is thus a kind of discrepancy between the students' strong belief in individual agency and their skepticism about the role of collective political pursuit in the world ruled by impersonal forces of economy. The results in van den Berg's study seem to resonate with the earlier survey findings where the Finnish adolescents had some difficulty in recognizing more complex societal dynamics, like connections between politics and economy.

The Finnish adolescents in the CIVED and the ICCS surveys had very little interest in politics, and this attitude comes forth clearly also in the interviews that van den Berg (2010) has made for his study. However it seems that the negative attitudes of the adolescents are directed against party politics rather than politics in a broad sense: according to a number of recent surveys the young at large are actually concerned at issues like environmental protection and human rights, but as for the programs of the political parties they regard them as too vague and indistinguishable from each other, as opposed to the more narrowly focused objectives of many new civic organizations. Moreover the young are polarized in their interest in societal issues so that we find a number of young participating very actively in civic life but equally those who have

no such engagement at all (Myllyniemi 2008; Paakkunainen 2007; Suutarinen 2000)

Where does this leave us with regard to identifying the major challenges in improving Finnish adolescents' social studies literacy and civic competences? It seems to us that the scepticism of the young about the meaningfulness of active civic participation and engagement has probably following explanations: society appears often too complex for the young to grasp, and politics seems to lack ideological differences and tensions that would motivate personal investment of time and effort in politics. According to Anu Kantola, since the 1990's there has been a trend in the Finnish political culture that the decision-makers have wanted to distance themselves from outspoken political ideologies and have rather presented themselves as administrators who rationally only react to the necessary demands from external forces, mostly economy (Kantola 2002). In this framework the social implications of the decisions are often not acknowledged. As public affairs easily seem like technocratic administration, it should not come as a surprise if the young fail to see politics as a meaningful field of civic activity. Here there is a challenge to be tackled also in the future social studies core curricula of the Finnish school.

Operationalizing social studies literacy in the future national core curricula

A point we have wanted to convey is that the matriculation examination is nowadays in Finland a major vehicle, or actually *the* major vehicle in defining the parameters of social studies literacy and disseminating them to schools. That is to say the elements that are constitutive of social studies literacy are stated not so much by the authority responsible for curriculum development generally, The National Bureau of Education, but by a group of social science and social studies education experts who design the questions for social studies matriculation examination, guided by their conviction of what informed citizens should be capable of in their political and economic thinking. We have been involved in designing the exam, and we would like to believe that the outcome of our endeavour has not been irreconcilable with the overall objectives of social studies in the *Core Curriculum*; in fact, we believe that experienced specialists in social sciences and social studies education can exert a positive influence on social studies teaching in upper secondary school through this channel. Yet we also believe that the skills and competences that constitute social studies literacy should be clearly stated also in the *Core Curriculum* whereas now they are primarily discernable in the matriculation exam.

Regarding the two challenges that we proposed in the previous chapter we think that the way to proceed in developing the social studies curricula is, first, to

give a more prominent place to the dynamic core concepts of relevant social sciences in the core curricula, and, second, to give space and clear guidance on students' practicing their analytic gaze and critical reasoning on issues of values and ideologies. As for the first suggestion, in fact there is a kind of inventory that has been made on potentially most fruitful social scientific core concepts and their usability in social studies teaching; it suggests that concepts like role, identity, norm, control, status, segregation, mobility and modernity, or pairs of concepts like state and civil society, private and public, or power and cooperation would bring to social studies a more dynamic element as they would offer the students tools to handle and conceptualize their environment and their experiences in a way which is not easy with the conventional core concepts of social studies like elections, president, constitution, etc. (Löfström 2001). In this approach we are following the argument presented, amongst others, by Howard Gardner, that disciplines and their conceptual structures "serve as points of entry for considering the deepest questions about the world" as they provide students with intellectual tools to approach the world (Gardner 1999, 157). More specifically, we find support to our stand, for example, in the study by Sirkka Ahonen (1990), on how children explain historical events: the ability to reconstruct historical interpretations – that is, to think historically! – which would meet the criteria of rationality and critical evidentiality required an advanced consciousness of the concepts like interpretation, evidence, change, and cause which are precisely the major constitutive elements of historical disciplinary epistemology (Ahonen 1990).

As for our second suggestion, let consider an example: *The National Core Curriculum for Upper Secondary School, 2003*, mandates that the objective for the students is to "be capable of forming justified personal views of controversial social and economic issues that are bound to values" It is definitely positive that the important objective of multiperspectival thinking is explicated but we think it should be dissected more so as to give the teacher a better idea on through what kind of methodology formation of "justified personal views" can be practiced and where to look for such "controversial social and economic issues that are bound to values". For example, the objectives can be that the student will be able:

- * to follow public discussion and media reporting on social and economic topics,
- * to analyse their underlying values and ideologies,
- * to judge critically the motivations for social and economic decisions, and
- * to assess the implications of these decisions from different perspectives and from the point of view of different population groups.

Here the curriculum would explicate what concrete targets will be approached (media reporting, etc.),

what phenomena will be the object of analysis (values, "ideologies"), and what will be the envisaged outcome from the analysis (judgments, assessments). This example focuses on only one particular line in the *Core Curriculum*. We would suggest that the objectives of social studies teaching and, consequently, the elements of social studies literacy could reasonably encompass following items: The students:

- can analyse the logic in the arguments used when discussing social and economic questions, and can identify what kind of major premises or ideological traditions of social and economic thinking are present in them,
- can identify different types of sources of societal information and understand their differences as vehicles of communication (advertisements, interviews, media reports, political party programs, official statistics, etc.),
- know how knowledge about society is produced and on what grounds one can assess the credibility or plausibility of that information,
- can formulate independently their own views about societal questions on the basis of available information,
- understand that the notions about society and economy are contingent upon people's aspirations and intentions and that they are historically changing, and
- can make informed assessments on how societal decisions may have different effects on individual citizens of different population groups.

In addition to the two suggestions above we also have a third: there should be space in the Core Curricula also for students' opportunities to practice real participation in civil society. Competence in such participation is, in fact, mentioned as an objective in the *National Core Curriculum for Upper Secondary Schools, 2003*, but it does not feature in any concrete sense in the list of subject contents in the *Core Curriculum* and there is no reference to this competence area in the part which concerns student assessment in social studies.

The ideas about the objectives and content of social studies teaching that we suggest in this paper are surely not unfamiliar or alien to the social studies teachers, some of whom, we believe, also put them into practice in their work. However it is important that the parameters of social studies literacy and the methodologies of improving that literacy should be stated more clearly in the core curricula so that the aforementioned teachers would also have a solid moral and judicial support for their decisions.

It may have become clear in the chapters before that social studies literacy in our view predicates a perspective where society, as a collective of citizens, is taken seriously as an analytic category and a major framework of individual experience. Given that



there has been a rampant “ideology of privatisation” (Baumann 2008) in the Western World in the past odd twenty years where many people have become accustomed to looking for individualized explanations to problems which are rather socially generated, social studies in the tapping that also we here champion could have a healthy corrective and balancing effect

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on young citizens’ world views. In that way, we think, social studies teaching could finally aspire to respond to Michael Apple’s exhortation that citizens need to be educated to “critical literacy, powerful literacy, political literacy which enables the growth of genuine understanding and control of all the spheres of social life in which we participate” (Apple 2000, 42-43).

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Liliana Maggioni, Emily Fox, and Patricia A. Alexander

The Epistemic Dimension of Competence in the Social Sciences

To investigate competence in the social sciences, we propose to define competence as a particular configuration of the learner's cognition, strategic repertoire, motivation, and orientation toward knowing. Specifically, we focus on epistemic beliefs and on the changes that a view of knowing as a complex, effortful, generative, evidence-seeking, and reflective enterprise entails. In this context, we discuss how familiarity with the processes used to justify knowledge claims within specific disciplinary communities can provide useful tools to develop the kind of adaptive and consistent thinking that characterize competence in different domains and how this focus may aid the identification of characteristics common across domains. We use our empirical exploration of adolescents' development of competence in the domain of history to illustrate the implications of this theoretical framework, to highlight the relations between domain-specific epistemic beliefs and kind of understanding that students built as a result of reading multiple texts, and to suggest what pedagogical practices may have influenced students' orientations toward knowing in these three history classes.

Keywords:

competence, higher-order thinking, epistemic belief, historical thinking

Give a man a fish and you feed him for a day.
Teach him how to fish and you feed him for a lifetime.
(Chinese Proverb)

1. What is Competence?

Where does one begin the search for competence and core concepts for teaching and learning in the social sciences? As travelers need to know their destination in order to decide how to prepare for the journey, we believe that a specification of what we mean by competence and why we believe it is a worthy educational goal is a necessary step in framing the rest of this contribution and in providing a justification for our focus on the epistemic dimension of competence.

While all the social sciences have the social reality as their object of study, each of them directs its investigations at one of its many dimensions (e.g., economic or sociological) and thus uses methods that specifically facilitate that distinct line of inquiry. As such, competence in the social sciences embraces a broad range of *competences*, both in terms of contents and methods of inquiry. In the United States school systems, such a range is further broadened by the tradition of clustering under the umbrella of social studies disciplines as diverse as history, economics, political science, geography, sociology, anthropology, and psychology, usually brought together by the common purpose of fostering the development of a democratic, well-informed citizenry and promoting literacy and civic responsibility (Martorella 2001, 14-16; National Council for the Social Studies 1994). Thus, the task of identifying a set of concepts, information, and procedures whose mastery would define competence in this diversified domain is very challenging. More importantly, we believe that such list would fall short of identifying the salient traits of competent individuals and the components of educational programs able to

foster the kind of critical literacy necessary to gain an understanding of the social world with all its complexities. Rather, we propose to define competence as a particular configuration of the learner's cognition, strategic repertoire, and motivation (Alexander 1997). Moreover, we focus on the epistemic dimension of competence; that is, on the set of beliefs, concepts, and attitudes that individuals entertain about the process of knowing and the nature of knowledge in general and in respect to a specific domain of study.

This focus is supported by educational psychological research, which strongly suggests that epistemic beliefs influence key components of the learning process, such as comprehension, understanding of multiple texts, strategic processing, interpretation of controversial issues, and evaluation of arguments (Bråten 2008; Bråten, Strømsø 2006; Davis 2003; Hofer 2004; Kardash, Howell 2000; Muis 2007; Ryan 1984, Schommer 1990; Stanovich, West 1997). It is also supported by research addressing the development of expertise in specific domains, which has identified the influence that ideas about how knowledge is generated in that particular domain, and thus about its justifications and limits, have on learning (Elby 2001; Lee 2004; Wineburg 2001a).

2. What Does Competence Look Like?

More specifically, competent learners have consolidated their subject-matter knowledge around domain-defining principles and concepts. For example, in history such principles include chronology, identification of continuity and change, and individuation of relations of cause and effect among events (Lévesque 2009). Competent learners have overcome the fragmentation that tends to characterize domain knowledge in novices and have, thus, become increasingly able to broaden their knowledge base by integrating new information and insights in a cohesive and more coherent structure. For example, competent history learners can situate knowledge about specific events of the past within a broader timeframe, orga-



nized around colligatory, superordinate concepts (Lee 2004)—concepts that identify general trends and series of changes and reflect the directions that prior inquiries into the past have taken (e.g., the Renaissance, the Enlightenment, the Cold War). Having had multiple exposures to domain-specific problems and tasks, competent learners have also developed a varied strategic repertoire, and the flexibility necessary to employ those cognitive tools that will best serve in the specific circumstance. At the same time, the strategies and ways of thinking typical of the domain have become more familiar and their enactment has come to require less cognitive effort, providing space for increasing the complexity of the factors considered at any given time. For example, in history, competent learners are familiar with the analysis of primary and secondary sources and with the use of heuristics such as sourcing and corroboration.

Such cognitive and strategic development will result in better learning outcomes if the goals set by individual learners (and fostered by the educational context) promote knowledge-seeking in that domain, which both builds upon and builds up personal interest in that particular field. This motivational support is fundamental for sustaining the restructuring required to develop the kind of knowledge characterizing competent learners. In fact, such restructuring can be radical, including the need to address the entrenched misconceptions easily developed during the period of acclimation in a domain. For example, in history such restructuring might entail the common misconception that history and the past coincide and thus the tendency to conceptualize colligatory concepts such as the Renaissance as facts, stripped of their historiographical context and the controversy and debate surrounding them. Such restructuring is not easily achieved and often comes at the expense of considerable mental effort and with much cognitive discomfort.

3. The Epistemic Underpinnings of Competence

As signaled in the introduction and suggested by the examples, we want in particular to focus on changes regarding learners' domain-specific epistemic beliefs, because we view competence as characterized by the capacity for and engagement in higher-order knowledge restructuring. This requires the capacity and tendency to reflect about the nature of and the warrants for knowledge formed about a specific object (e.g. a specific aspect of the social world), and to critically evaluate the available information and the understandings gained so far about a specific issue. For example, in reading a text about the development of the arts during the XV century, a competent history learner will recognize that a statement such as "Leonardo da Vinci was born in 1452" requires dif-

ferent justifications than the statement "The Renaissance was born in the XIV century." The information conveyed by the former statement could have been easily known by Leonardo's contemporaries and its trustworthiness requires a verification of facts. Conversely, the concept of Renaissance did not exist in the XIV century, but was introduced by later historians to identify certain sets of changes which took place in Europe. Hence, the trustworthiness of the latter statement requires an evaluation of arguments. In other words, competence entails what elsewhere we defined as higher-order thinking; that is, "the mental engagement with ideas, objects, and situations in an analogical, elaborative, inductive, deductive, and otherwise transformational manner that is indicative of an orientation toward knowing as a complex, effortful, generative, evidence-seeking, and reflective enterprise" (Alexander et al. in press, 11).

This definition applies to competence across every domain, but the specific instantiation of knowledge in a specific domain is shaped by the characteristics of its focus. In this respect, familiarity with the processes used to justify knowledge claims within disciplinary communities can be very helpful in suggesting what strategies can better facilitate the development of reliable knowledge in a specific situation. Thus, while the view of competence that we propose provides a general framework for thinking about the factors that characterize competence across all the social sciences, it leaves the specifications of the characteristics of such thinking to the specific domains, in which learners' characteristics and the characteristics of what is to be known are brought together in the generation of knowledge. For example, the competent history reader pondering on the beginning of the Renaissance has developed an understanding of the processes used by historians to select, analyze, interrogate, corroborate, and evaluate a variety of sources to build historical arguments grounded in evidence.

It is precisely because we see knowledge as the relation between a knower and an object of knowledge that we find it theoretically indefensible to pit conceptual knowledge against procedural or strategic knowledge, or to strip conceptual knowledge of its epistemic underpinnings. How could one gain an understanding of a particular aspect of the social reality without, at the same time, being aware of the methods that make that goal reasonable? In our view, it would be like trying to reach a destination without traveling the path that leads to it. Although this approach may sound enticing because it is seemingly effortless and efficient, it has a major drawback, in that it impedes the exercise of critical judgment and thus never affords learners the opportunity to grow in competence or take charge of their journey. Failure to develop such competence implies much more than missing the opportunity to develop mini-social scientists. Moreover,



although we focus here on the development of competence in individual learners, this journey does not happen in a social vacuum. Rather, it takes place within a disciplinary context, where standards of justifications for knowledge claims inform the communal discourse. Familiarity with the warrants that make assertions more or less acceptable within the disciplinary community is a key factor for a critical understanding of such discourse, and can open up to learners the possibility of becoming, if they so wish, active participants instead of passive spectators in such a community.

For these reasons, we suggested that competence in a domain “should be marked by adaptive and consistent (...) thinking” and “by performance that is principled in its focus and disciplined in its processing” (Alexander et al. 2010, 26). In our work, we used the linking of competence with higher-order thinking to map the different dimensions of learning for competence in regard to reading, history, and science and found the result fruitful for understanding domain-general and domain-specific aspects of competence (Alexander et al. in press). We believe that a similar approach can be used by social science educators to identify the traits of competence within each disciplinary area and to identify characteristics common across all the domains.

4. The Framework at Work: Studying the Development of Competence in the History Classroom

Up until now we have been talking about competence in its relation with the development of knowledge and, in particular, we have considered the epistemic dimension of competence and its role in knowledge development. In the rest of this article, we discuss our empirical exploration of the development of competence in the domain of history, by studying adolescents’ history-specific epistemic beliefs and their performance in building historical understanding by reading multiple texts. Features and results of this work have been extensively reported elsewhere (Maggioni 2010; Maggioni, Alexander, Rikers 2009; Maggioni, Fox, Alexander 2009, 2010). Here, we provide a brief overview of this work and focus on the implications of these studies for the identification of classroom and curriculum factors that may foster or hinder the development of competence in history.

Prior research has identified several traits characterizing how experts think historically (e.g. Wineburg 2001b). For example, historians differed from other participants (e.g. students and teachers) in their conceptualization of text, which they immediately perceived as an utterance of an author. Thus, in reading historical documents, they were always mindful of the author’s purposes and used various heuristics (e.g., corroboration, sourcing, contextualization) to build understanding out of the sources at their disposal,

overcoming, in the process, difficulties due to their initial lack of prior knowledge about a specific topic (Wineburg 2001c). On the other hand, high-school students and K-12 teachers discounted the presence of an author and analyzed the texts to extract nuggets of information (Paxton 2002; Wineburg 2001a). Although they employed a variety of cognitive and metacognitive strategies (e.g. backtracking, summarizing, and connecting to prior knowledge), the understanding these students and teachers were able to build from text remained limited.

Research has also traced the development of concepts that are key components of competence in history (e.g. evidence, historical account, cause, empathy, and context) across elementary and middle-school students (Lee, Ashby 2000; Lee, Dickinson, Ashby 1997; Lee, Shemilt 2003; VanSledright 2002). These concepts are closely related to views about the nature and justification of historical knowledge; that is, they have a strong epistemic overtone. Consider, for example, the concept of historical account; those who view history as a copy of the past tend to conceptualize historical accounts (i.e. written or oral narratives about past events) as chronicles that report “what happened.” On the other hand, those who view history as resulting from the interaction between a historian’s question and the remnants of the past tend to conceptualize historical accounts as interpretive narratives based on what the historian selected as relevant evidence.

These bodies of work provide a very useful framework to analyze the development of students’ competence in history because they identify and describe essential components of principled knowledge that mark competence in this domain. They also suggest that competence in history implies specific epistemic beliefs. Yet, in these prior studies, epistemic beliefs have mainly been inferred from individuals’ performance on tasks that required building historical understanding out of the analysis of multiple sources (e.g. Wineburg 2001a). On the other hand, studies explicitly assessing students’ epistemic beliefs have used domain-general questionnaires (e.g. Bråten, Strømsø 2006) not directly assessing beliefs especially critical in the history domain (e.g. beliefs about the nature of historical evidence and historical accounts). For this reason, we decided to use two different measures to assess students’ capacity to think historically when asked to build meaning out of the reading of multiple texts and their history-specific epistemic beliefs.

4.1 Methods

Specifically, we designed three class-level case studies involving two junior (11th grade) Honors US History classes and one freshman (9th grade) class comprising students identified as challenged readers by their middle school teachers. In each class, we selected four students representing a variety of motivational and



academic profiles to act as informants. We collected data from the students twice, first at the beginning and then at the end of the second quarter of their fall semester. We asked them to complete a performance task: thinking aloud while pursuing an answer to a historical question about a particular event by reading a set of 6 texts regarding that event. To avoid practice effects on the performance task, we assembled two sets of different texts, as parallel as possible in terms of length, difficulty, and construction of argument.

We probed students' history-specific epistemic beliefs in a structured interview following the performance task, asking them to express and justify their degree of agreement or disagreement with a set of statements designed to mirror three different epistemic stances derived from the literature. The first position focuses only on the object of knowledge and views history as authorless and isomorphic to the past. The second focuses only on the knower and mirrors a fundamentally subjective view of history. The third views history as resulting from the interaction between historians' questions and the archive and thus reflects awareness of the criteria that facilitate understanding of the past. In addition, we conducted several class observations and interviewed the teachers of these students, asking them to complete one of the performance tasks and to respond to the same set of epistemic statements.

4.2 Results: Epistemic Beliefs and Historical Understanding

Our findings suggest that students' epistemic ideas about history aligned with the kind of understanding they were able to build while reading multiple texts. Although this group of students expressed a broad range of epistemic ideas, a common trend across all the interviews was that the history-specific epistemic beliefs voiced by individual participants could hardly be characterized as a well-integrated system. Rather, students tended to shift very quickly (often within the same utterance) from an idea of history as a copy of the past to the belief that history is merely an unjustified (and unjustifiable) opinion. Although sometimes aware of the inconsistency of such position, they were unable to overcome it. For example, in evaluating whether she believed that history was simply a matter of interpretation, Monica said: "I don't know, some of it is interpretation, but a lot of it is facts, I don't know." This cognitive impasse was even more poignantly expressed by Jack, while he was considering the justifiability of historical claims: "I somewhat disagree with this, because historical claims [silence]. I somewhat agree with this because historical claims is pretty much interpretation by historians [silence] ah, I don't know."

Similarly, during the performance task, students took the texts for the most part at face value, treating

them as conveyors of information, a behavior that we found in line with the idea of history as the copy of the past, a past that records itself in documents and artifacts. In so doing, students tended to conceive the texts as authorless, behaving as if meaning could be extracted independently from any consideration of the author. They tended to select snippets of information from the different texts, dismissing conflicting elements. They also wove into their responses additional and often inappropriate components coming from prior understandings, guesses, beliefs, and misconceptions, as long as those additional elements fit well in a story that appeared plausible in their eyes, a behavior that correlates well with the idea of history as unjustified opinion.

This approach was clearly described by Monica, who explained how she built her argument in this way: "I based on prior knowledge (...) I came up with an argument and then went into the readings for things to support the argument and I picked up other information to add to what I was saying." Students also tended to equate perspective to bias, and to believe that, ideally, historical knowledge should bypass the historical witness to get as directly as possible to the "facts," or, if not feasible, to discriminate "biased" from "unbiased" witnesses and consider only the latter. Overall, they tended to simplify the meaning-making process, reducing it to a matter of counting up how many texts supported each "side" of the issue addressed by the question.

We found that students' conceptualization of the task was heavily influenced by the instructional context of the history classroom, where their teachers mainly used primary sources for fostering interest, personal connections, and more generally, to convey a sense of the "reality" of history. Thus, several class activities and tasks asked students to use primary and secondary sources (indiscriminately) to extract or rehearse information, with a focus on fostering the acquisition of various strategies to gather, connect, and elaborate information from texts.

Although teachers sometimes asked students to analyze a particular text, identifying its author, audience, and point of view, the role that these analyses could have played in the process of building historical knowledge was not made explicit, with the consequence that students concluded that information about the source and the author of texts was "just redundant" (Elizabeth). At best, students looked at the references to answer ad hoc questions, as Jack aptly described: "I don't read the author, I kind of sort of glance at it, so I can pretty much absorb information, pretty much. I don't really use the author, as long as it is not in a response or anything." Rather, the overwhelming preponderance of class discourse implied a view of texts as conveyors of information, with some attention paid to the possibility that sources could at



times be biased and thus useless, a view repeatedly reinforced by the assignments that students completed, by the use of primary sources during lectures, and by the kind of historical knowledge assessed by quizzes, tests, and exams. As one student, Mark, put it: “[T]here is really never an emphasis placed on checking your sources, because in high school there is a textbook. Obviously, I mean, once in a while you run across a teacher that says maybe the textbook is wrong, but that’s still a maybe, so...”

In addition, when teachers asked students to consider multiple perspectives in regard to a specific historical issue, they mainly aimed at fostering students’ capacity to take a side (more or less arbitrarily) and argue for their choice by providing factual support. These tasks might have prompted students’ analysis and elaboration of the texts and thus facilitated retention of information. Yet, they also introduced the false perception that there are always and only two sides of every issue, together with the idea that claims and evidence that do not serve one’s argument are to be explained away or ignored. We found this approach compatible with the epistemic beliefs emerging during the structured interviews and students’ behavior on the performance tasks. On one hand, it highlights the need to ground one’s claims in evidence, while on the other hand, personal opinions decide which evidence should be picked, and which discarded.

5. Implications: The Epistemic Dimension of Competence

While the epistemic beliefs that emerged during the interviews and the way in which students approached the performance task were in many respects lacking the marks of domain competence as we have defined it, considered from the perspective of the school context, these students showed themselves to be able to use the tools and the processes provided in the classrooms to reach the goals set by the school system. For example, when using multiple texts in class to address specific questions, Eric said that he found it very hard to justify his argument, because he did not “know exactly why” he chose a specific side. Yet, including a few examples from the texts usually got him “a pretty good grade,” since he was able to support his position with evidence from the texts. This standard of justification, which made Eric successful in the eyes of his teacher, provides much weaker warrants for historical knowledge than the criteria used in the disciplinary community, where providing support for one’s interpretation is only part of the justification process. Conflicting evidence or alternative arguments also need to be weighed and addressed, with the consequence that the past can be better understood in its nuances, richness, and contradictions. Using pieces of disciplinary heuristics (such as citing evidence in history) without understanding how

their power comes from their grounding in the entire process of building knowledge in the discipline reduces them to arbitrary and therefore meaningless formalities.

It is exactly for this reason that we suggest that the definition of competence is crucial for identifying the key elements of the educational trajectory in the social sciences. In particular, we suggest that epistemic beliefs play a very special role in shaping the kind of knowledge that will spring from the relation between the learner and the object of knowing typical of a domain. Only when conceived within this broader horizon do heuristics, core competences, and core concepts become useful tools that facilitate understanding of any kind of reality, be it physical, historical, social, political, or economic. Without such breadth, they easily become mechanical skills and sterile bits of information that can hinder the journey toward competence and understanding.

Chris offered a clear illustration of this. During the semester, he became increasingly aware that different historians may present different sides of the same event. He was also aware of the change that he was undergoing and, during the interview, he commented that he used to think that “facts were facts” but now he believed that “it’s on who writes it, it’s their interpretation of how history was seen.” Yet, Chris’s criteria for building historical understanding remained very limited, and thus, once he abandoned the idea that knowledge is independent from a knower (i.e. facts are facts) he found himself on an epistemic slippery slope. Although interpretation had become an undeniable factor in the generation of historical knowledge, his conceptualization of it was still too fuzzy and detached from evidence to address the need for justification. Thus he concluded that “you read all the documents and then you believe what you want to believe,” an approach that would have probably served him well on most of his classroom assignments but that might also convince him that human knowledge is too weak to attain any truth about the past and so, why bother?

It is precisely in this respect that we believe that the social sciences could play a distinct role in the curriculum, provided that they do not reduce competence to a discrete, decontextualized set of strategies and notions, but address it in all its entwined cognitive, strategic, motivational, and epistemic dimensions. The different questions they ask about the social reality and the diversity and ingenuity of their processes of inquiry could offer a precious example of how human knowledge is at the same time limited and possible. Limited, because no single social science or the sum of them all can exhaust the mystery of human beings, but also possible, because each science can contribute to shedding light on some aspect of social life. Engaging students in the exploration of the



multifarious aspects of social life will then not only fulfill their present need to understand such a key, and profoundly human aspect of the world in which

they live, but also equip them with those cognitive and affective tools that enable them to participate fully in the reality they study.

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Jean Simonneaux and Alain Legardez

The Epistemological and Didactical Challenges Involved in Teaching Socially Acute Questions. The example of Globalization.

Teachers are being asked to manage a specific didactic situation which falls into the category of what we have proposed to call “socially acute questions (SAQs)”. A SAQ is a question which is acute in society, in background knowledge and in knowledge taught. Thus, teaching SAQs demands socio-epistemological reflexivity in the processes of knowledge production and in the social conditions in which this knowledge emerges; teaching SAQs will give priority to interdisciplinary, scientific and ethical reasoning. The split between ideology and science can certainly be examined when considering a socially acute question which is the subject of debate in society. In the example of the globalization taught: the diversity of analysis in the economic domain gives rise to great uncertainty because it justifies practically opposing policies; within a transdisciplinary framework, the globalization includes concepts, ideologies or social practices in a double movement of standardization and differentiation. By way of SAQs, we have attempted to show that learning stakes are numerous. However didactic choices must be supported by socio-epistemological survey, the identification of an epistemological posture and the definition of a didactic strategy.

Les enseignants sont appelés à gérer une situation didactique spécifique dans l’enseignement des «questions socialement vives (QSV) ». Les QSV sont des questions qui donnent lieu à débat dans la société, dans les savoirs scientifiques et dans l’enseignement. Ainsi, l’enseignement des QSV nécessite une réflexivité socio-épistémologique dans le processus de production du savoir et dans les conditions sociales d’émergence de ces savoirs; l’enseignement des QSV donnera la priorité au raisonnement interdisciplinaire, scientifique et éthique. La scission entre l’idéologie et la science peut être examinée lors de l’examen d’une QSV qui fait l’objet d’un débat dans la société. Dans l’exemple de l’enseignement de la mondialisation: la diversité des analyses économiques donne lieu à une grande incertitude en justifiant des politiques quasi-opposées; dans un cadre transdisciplinaire, la mondialisation recouvre des concepts, des idéologies ou des pratiques sociales dans un double mouvement d’uniformisation et de différenciation. Nous avons tenté de montrer que les enjeux de l’apprentissage sont nombreux dans les l’enseignement des QSV. Les choix didactiques doivent être soutenues par une enquête socio-épistémologique, l’identification d’une posture épistémologique et la définition d’une stratégie didactique.

Keywords

Socially Acute Questions, education, globalization, transdisciplinarity, epistemological posture, didactic strategy

Introduction

Over the years, globalization, has been interpreted in many, sometimes very different, ways and has generated heated debate. Media coverage of socio-political events (the G20, the Annual Meeting of the World Economic Forum in Davos, the World Social Forum, the hunger riots...) or economic events (Chinese imports, factory closures...) rekindle the issues connected to globalization. When faced with the current social-economic questions, different groups offer differing opinions and solutions. For example, in France recently, the introduction of a carbon tax caused a huge debate which was relayed by the press. Likewise, and for a lot longer, issues linked with globalization have given rise to many, sometimes very different, interpretations and fuelled heated discussions (e.g. on the problems of offshoring or the recent financial crisis). When it comes to teaching about these socio-economic issues, feedback from students can be just as

varied as the reactions observed in society, because they often feel directly concerned. Which educational goals can be pursued by teachers? How can a teaching activity, on a subject such as globalization, be analysed? We assume that teachers are being asked to manage a didactic situation which falls into the category of what we have proposed to call “socially acute questions (SAQs)”. Integrating SAQs in education leads to analyse competencies expected from the citizens in a specific way: to participate into the public debates, to argue an opinion or to take a position about social issues. The priority is then often given to a literacy in which social science is necessary but not sufficient for making choices. Teaching SAQs aims to combine school knowledge with social facts, and thus with the complexity of current events. The issue is to develop a social science literacy to promote competencies to empower students about controversial topics.

We will present the theoretical issues pertaining to SAQs, we will then propose a socio-epistemological approach to the globalization process before going on to outline the didactic possibilities for teaching the issues related to this process.



1. Theoretical issues

1.1 SAQs

In recent years didactic works have appeared grouped together under the term “Socially Acute Questions (SAQs)” (Legardez, Simonneaux, 2006). These questions are defined in reference to an analytical grid for the production of knowledge taught, inspired by the work of Y. Chevallard (1985) on didactic transposition.

A “socially acute question (in two senses)” is a question which is adapted (or which is required to be adapted) so as to be taught in school and has the following characteristics:

- it is a question which is *acute in society*: this type of question challenges the social practices of all the actors in the school (inside and outside the institution) and reflect their social representations; society considers it to be an important matter (globally or in one of its components) and it stirs up debate (from disputes to conflicts); it often gets media coverage so the majority of the actors in school are familiar with it. Its social production in society renders it an ‘acute’ question in the first sense
- it is a question which is *acute in the background knowledge*: debate (controversy) exists among specialists in the disciplinary fields or among experts in the professional fields. Within a large proportion of disciplinary knowledge relating to human and social sciences (or even in certain areas of the so-called exact sciences), several paradigms are in competition. Moreover, the references are often to be found in social cultural and political practice which are also the subject of debate (often controversy). Some of these practices result in certain explicit or implicit background references in the knowledge taught in school. The social production in scientific or professional spheres, in social, political and cultural movements renders this type of question ‘acute’ in the second sense.
- it is an *acute question in knowledge taught*: the question becomes all the more “potentially acute” in what is learned in school because it is acute on the other two levels of knowledge (social and background).

SAQs are often “hot questions” because they have not yet been backed up or stabilized from a scientific point of view. They may remain acute for long periods and change intensity over time and in the different parts of society; we describe these questions as “potentially socially acute”. “The social question” which runs through modern history, “the question of revenue” (distribution and redistribution) the “question of nationality” all fall into this category.

1.2 SAQs and SSIs

Today, SAQ constitute a recognised line of research which is expanding in France in the area of didactics (Legardez, Simonneaux 2006; Simonneaux, Simon-

neaux 2009); it can be linked to what the Anglo-Saxons refer to as Socio-Scientific Issues (SSIs).

In science education the notion of ‘socio-scientific issues’ has been introduced as a way of describing social dilemmas impinging on scientific fields (Kolsto 2001; Sadler, Zeidler 2004; Sadler *et al.* 2004; Zeidler *et al.* 2002).

SAQs may be *socio-sociological* issues like globalization, immigration, unemployment or *socio-scientific* issues including genetically modified organisms, cloning, and cellular phones. These questions have implications in one or more of the following fields: biology, sociology, ethics, politics, economics or the environment. SAQs are subject to controversies and they are marked by doubts in the scientific knowledge and in the social implications. SAQs are the subject of controversies between specialists from the disciplinary fields or between experts from the professional fields. SAQs challenge social practices and reflect social representations and value systems; they are considered by society to be an issue and give rise to debate; they attract so much media coverage that the majority of students have, at least, a superficial knowledge of them (Legardez 2006). To be able to deal with this type of issue, students have to know how to recognize and interpret data, to understand how different social factors can have different effects and to understand that stakeholders often have diverging opinions (Sadler *et al.* 2004). There is no single valid and rational solution. This does not mean that all solutions are equal.

1.3 SAQs and teaching

Such questions enter schools in several different ways. Sometimes, current affairs are used as a reference to ‘motivate’ students: e.g. terrorism, war, social unrest, the environment...At other times, social demand (coming from politicians, parents, unions, associations, intellectuals and other social groups involved in these matters) leads to the integration of such and such an issue into the school sphere: nationality, religion, sexuality, road safety, the environment, sustainable development... Finally, the institution modifies the syllabuses, creates new disciplines; society ‘passes’ these questions on to schools, which results in their transformation into an “academic form”.

Nevertheless, socially acute questions do not always appear in the form of “questions” in the school curricula. They are often topics to be taught which refer to acute questions and/or social knowledge. They are not, however, presented as problematized school content. They may no longer resemble social questions because of their transformation, by the didactic processes, into “neutral” school topics. The teacher has then to find a way of maintaining the correct distance between what he is teaching and scientific knowledge, as well as with the social practices used as references; he can activate (“heat up”) or neutralise



“play down”) the acuteness of the issue. When teaching issues which generate very cut and dried opinions, there lies a risk of losing the real significance of what is learned because of the constant “playing down” or “heating up” of conflicting values in the class. An examination of the “institutionalized knowledge taught” (the syllabuses and instructions) and the “knowledge vectors” (the textbooks) allow us to pinpoint and compare the level of problematization offered to teachers for the teaching of these issues... and therefore also issues related to globalization.

Consequently, deciding on the teaching content as far as SAQs are concerned is a particularly delicate task. The goal may be to foster an adherence to certain points of view or simply to encourage future citizens to form informed opinions. For over forty years French agricultural education was used as an instrument for explaining and promoting French and European agricultural policies. The teaching was both “played down” and clearly biased as it was used to serve a political project. It was not until 2000 that the agricultural policies were called into question. Schools are caught between political instrumentation and their goal of producing free-thinking citizens. Analysis of the references on which the knowledge taught is to be based is essential to understanding the educational project being set up.

When we analyse the teaching of an SAQ we need both to find out the level of the students’ social knowledge, e.g. by carrying out a survey on their representations-knowledge of the socio-economic issues which have been given an “academic form” (Legardez 2001; Legardez, Simonneaux 2008), and we also need to work on the didactic transposition of knowledge produced within the disciplinary fields of reference and which circulate in society, in particular by carrying out a socio-epistemological survey. We will develop here, the latter line of analysis.

1.4 From didactic transposition to the socio-epistemological survey

Didactic transposition (Chevallard 1985) allows us to examine the process of constructing knowledge taught; knowledge is thus considered from an anthropological point of view, as a subject which is in circulation and under construction in society. The transposition of knowledge is therefore analysed in different stages taking us from the scholarly body of knowledge to the knowledge to be taught (in the curricula, the textbooks), then on to the knowledge taught (in practice by the teacher) and finally to the knowledge learned by the students. Martinand (2001) introduced social practices of reference into the process of constructing knowledge taught because education also has a position in society.

The theoretical framework of SAQs leads us to acknowledge the existence of debates in the scientific

spheres, media and more widely in society, and also leads us to consider these debates within the context of school education. SAQs are complex questions which cannot be simplified to the extent that we forget the uncertainties and controversies. During these debates the different social and economic actors including lobby groups can express their diverging interests.

Teaching SAQs demands socio-epistemological reflexivity in the construction of the knowledge taught (Simonneaux L.). It is a question of examining the characteristics of the knowledge but also the processes of knowledge production and the social conditions in which this knowledge emerges. This analysis is not a matter of simple selection; it must also anticipate and clarify the optimum conditions for and the potential barriers to learning, paying particular attention to the coherence and inconsistency that exist between different analytical frameworks. This initial scientific and socio-media-related investigation seems essential to the didactic processing of a socially acute question because it will enable the teacher to put together a (inter)disciplinary and or SAQ specific problematic. When the educational challenge relates to a discipline, what prevails is the way knowledge is structured according to the logic of that particular discipline and each of the disciplinary concepts is examined in turn, whereas when the challenge is more educational or oriented towards citizenship, the focus of the didactic construction is on the socially acute question which will give priority to interdisciplinary, scientific and ethical reasoning. It seems to us that the latter approach, complementary to the disciplinary approach, is however necessary when teaching complex and controversial topics because it helps to avoid exaggerated disciplinary reduction since science is the reconstruction of reality. We must not forget that “*scientific research chooses its subjects from the world “artefacts”, that is to say in the artificial world, created in the laboratory precisely because these subjects are easier to study and easier to experiment with*” (Larochelle, Desautels 1992, 112).

Within this socio-epistemological reflexivity, the scientism of human sciences, particularly of the social sciences, is regularly questioned in terms of its methods – between modelling and empiricism – and in terms of the links between economic theory and ideology. Within the teaching of social sciences in high school, the importance placed on an empirical approach has been acknowledged: “*theories within the social sciences make use of facts and, in particular, important economic and social events*” (Guesnerie 2008, 8).

The world as it is observed by the social sciences is a world which changes rapidly: socio-economic events (political or social events, financial crisis ...) evolve faster than the analytical tools that are available to us; the description of the world changes more



quickly than the tools used to describe it. Presenting a vision of globalization before or after September 11 results in the presentation of two completely different worlds. The same is true if you present globalization before or after the 2008 financial and economic crisis. History deals with world changes in the long term; to be relevant, social sciences have to analyse events in the short term or while they are actually happening. Dealing with social sciences in school means dealing with current affairs while taking into account the interest and risk involved in the immediate processing of events. It also encourages a projection into the future with all its uncertainties. Making use, in the classroom, of documents produced by the media, illustrates this situation very well. What is it, then, that distinguishes the work of the teacher, the scientist and the journalist? The work of the social science teacher is a cross between the interpretation of current affairs and scientific analysis.

Isabelle Stengers (1993), examines the dialectic between empiricism and theory when studying what she calls "field science". Field science is not concerned with demonstration or proof but with a continuous confrontation with the reality, which may possibly contradict but more often modify, improve or complete existing theories or models. The "field" has specific and very different characteristics to a theoretical construction; it pre-exists, is only relatively sound and is the support for interdisciplinary practices. *"The time for proof, which in the laboratory used to be solely dependant on scientific temporality, is in fact associated here with the very time spent on the diagnostic processes, with the time which will possibly transform a doubtful factor into a quantifiable but perhaps irreversible process. In this respect, for those in power, field scientists are troublemakers not allies because they are interested in exactly what, when referring to the theoretical and experimental sciences, those in power make us disregard "in the name of science" (Stengers 1993, 164). Since the year 2008, the economic crisis has raised questions about economic theory and policies and offers a perfect illustration of this "field science" that Isabelle Stengers referred to. This invasion by the "field" modifies scientific activity. The intrusion changes the evidence "what one "field" allows us to confirm, another "field" can contradict without the evidence being false and without being able to consider the situations as intrinsically different" (ibid, 159). At this point the approach becomes a "narrative" one where the selection and uncertainty of the clues combine with the variations in the simulation models used in the construction of controversies. "Scientists are no longer the ones who provide us with sound evidence instead they offer us uncertainty". (ibid, 163).*

Moreover, the inconsistencies in analysing social phenomena persist according to the paradigms, the emergence of a new paradigm does not necessarily lead to

the refutation of a former paradigm as Kuhn (1962) suggests in the so-called "experimental" sciences. Faced with the multiplicity of social science paradigms, knowledge is rebuilt to ensure a coherence in the school discipline (Chatel, 2002). Social science education's intent to foster critical citizenship contributes to this coherence. "Thus not one but a whole range of possible answers are expected, coupled with acceptable and logical reasoning" (Chatel 2002, 43).

We can go one step further with this critical view of the sciences. According to Gérard Fourez (1996) all theories serve an ideology: *"Not only do the sciences never completely distinguish themselves from the ideological, but we can also propound that the statement "such and such a result is scientific" is deeply ideological. In fact the aim is, above all, to render the result in question socially legitimate by referring to the abstract notion of scientism rather than having a specific debate on the matter"* (ibid, 82). Using different wording, which implies that the sciences should abandon their pretensions, Jean-Paul Fitoussi's position can be considered similar when he states that everything is based on hypotheses which reflect the convictions of individuals rather than an objective and scientific knowledge of social and economic realities (Fitoussi 2004).

The phenomena linked to globalization can be broached in a scientific manner or through personal value systems. This separation of ideology and science has not always existed. The so-called human sciences were defined, for many years, as moral sciences and the split between ideology and science can certainly be examined when considering a socially acute question which is the subject of debate in society. Where education is concerned, it is even more important to consider the value systems because school is also a place where values are transmitted (Simonneaux 2008). Accepting this principle means accepting that the references cannot be limited to scientific productions.

Regarding the teaching of an SAQ, a socio-epistemological reflexivity is therefore structured by examining the different possible theoretical references and their paradigms, and the links which can be established with empirical descriptions, social facts or ideologies. An SAQ is then, a question which has an interdisciplinary focus and constitutes a "rationality island" (Fourez 1997), i.e. an interdisciplinary modality of reasoning, shared by a group of individuals who are confronted with a real situation. A rationality island is built according to a human situation and not centred on a particular discipline. The teaching of SAQs is based, from a scientific point of view, on interdisciplinary reflection and is completed by studying the actors involved, what is at stake and the debates which are very much alive in society on the SAQ in question.



2. A socio-epistemological approach to globalization

Beyond identifying the heterogeneity of knowledge, there is the matter of qualifying the uncertainties and controversies arising from different theoretical approaches. There is an excess of scientific production on the subject of globalization which encourages us to attempt to offer a global and synthetic vision.

2.1 Globalization: a recent notion with semantic and lexical inaccuracies

The term “international” has been used since the end of the 18th century following the emergence of the Nation-State. However, the term “mondialisation” only made its appearance in France at the beginning of the 60s, a few years after the Anglo-Saxon term « globalization » (Dagorn 1999). The term, which appeared first in the press, describes the global spread of local phenomena. The Anglo-Saxon notion of a “global village” was introduced at the end of the 60s to conjure up the image of a rapid communication system, common to everyone all over the world (Mc Luhan). Twenty years later, the economists were the first to develop and use the notion, chiefly in an article by Théodore Levitt, now considered to be emblematic (Levitt 1983). The triad concept was first described by a Japanese economist (Kenichi Ohmae) in 1985; it is a concept which was then taken up and widely reused by geographers. The economic dimension continued to be associated to the term and gradually replaced the word “internationalisation”.

The English term “globalization” can be translated into French in several different ways: “la globalisation” refers more to the financial dimension when used in an economic context but in a cultural and sociological context it has the connotation of unity “global village”. Other terms have also appeared sometimes with a very specific meaning because of the link to a particular author “le mondialisme” (Passet 2001), “l’universalité” (Serres 2001), “la mondialité” (Zarifian 2004)... -or to a socio-historical context (alter-globalization linked to protest movements – Seattle, Genoa, ATTAC...). This polysemy of the notion of globalization is without doubt a primary source of confusion. The term can be used (and taught) according to a variety of different meanings depending on whether the dominant aspect is economic, social or political.

2.2 Multiple references in the social sciences

Several paradigms are at the basis of various “schools of thought” but, to simplify matters, the economic approaches fall into two categories:

– Firstly, the standard theory of international trade (Ricardo’s theory, HOS model – Heckscher, Ohlin, Samuelson) and the “New Trade Theory” for which Paul Krugmann (1998) is recognised as the key figure. These theoretical approaches are based on the

notions of resources, production factors, comparative advantage, market, imperfect competition, differentiated products, externality and development poles.

– Secondly, the development economy. François Perroux then Amartya Sen (1992) are considered to be the founders of this category which makes very little use of modelling. They have based themselves on the concepts of unequal trade, international division or again on development analyses which integrate the institutional regulation of the cultural dimensions. The indicators are varied: trade terms, direct foreign investment, human development index... They are interested in the relations between North and South but also in the rise in exclusion and of poverty in the North.

This diversity of analysis in the economic domain gives rise to great uncertainty because it justifies practically opposing policies. From an empirical perspective, studies into the evolution of inequality are contradictory or questioned in terms of the indicators or methodologies retained (Laïdi 2002). The controversies concern, therefore, both the plurality of the analytical frameworks used and the effects of globalization.

From an historical and geographical perspective, Fernand Braudel and Immanuel Wallerstein’s (2002), « world systems theory” is reinvested. Jacques Le Goff uses an historical approach to demonstrate that globalization today is merely a new form of a concept of globalization which dates back to the 16th century to the emergence of capitalism and the pre-eminence of the economy (Le Goff, 2001). Guy Bois (2003) analyses globalization as the result of imposing a neo-liberal « new world vulgate » (a dogmatic ‘pensée unique’ or conformity of thought) referring to a technological utopia and the exaltation of an exacerbated form of individualism. The fact that geographers took up the triad concept has led to an evolution in the way the world is analysed; moving from a dichotomous model (North-South or pre-1989 East-West bloc) to a cluster model (NAFTA, EU, ASIAN, Mercosur...) which links regionalisation and globalization in terms of economic flows. Political analysis examines the “governance” aspect by observing the role and power that has been devolved to the Nation-States in the face of increasing pressure from multinational companies and the possible need for supranational-regional entities. Olivier Dollfus (1998), bases his spatial analysis on the link between networks and territories because the spatial and social distances have been modified resulting in a concentration of power and populations.

From a sociological perspective, Dominique Wolton (1998), focuses on the multicultural aspects in his analysis of globalization; exchanges in the “global village” do not lead to cultural standardization but should be based on the acknowledgement of multiculturalism in order to avoid withdrawals into communitarism.



Huntington (2000) uses a cultural approach through religion which defines the civilisations considered as being more relevant than the Nation-States. Recent political events (September 11 2001, the wars in Iraq and Afghanistan) have struck a chord with the theory of an ideological clash between the West and its enemies (Huntington, 2004) which, however for some people, is drifting dangerously towards a dichotomous, or even racist vision.

Within a transdisciplinary framework, globalization is analysed as a breakdown in the ways we function, an upheaval which requires a new mode of regulation (Michel Beaud, 1999) or as the latest embodiment of the age-old process of westernizing the world which is leading to its downfall (Serge Latouche 2000).

2.3 Social practices between neo-liberalism and humanism

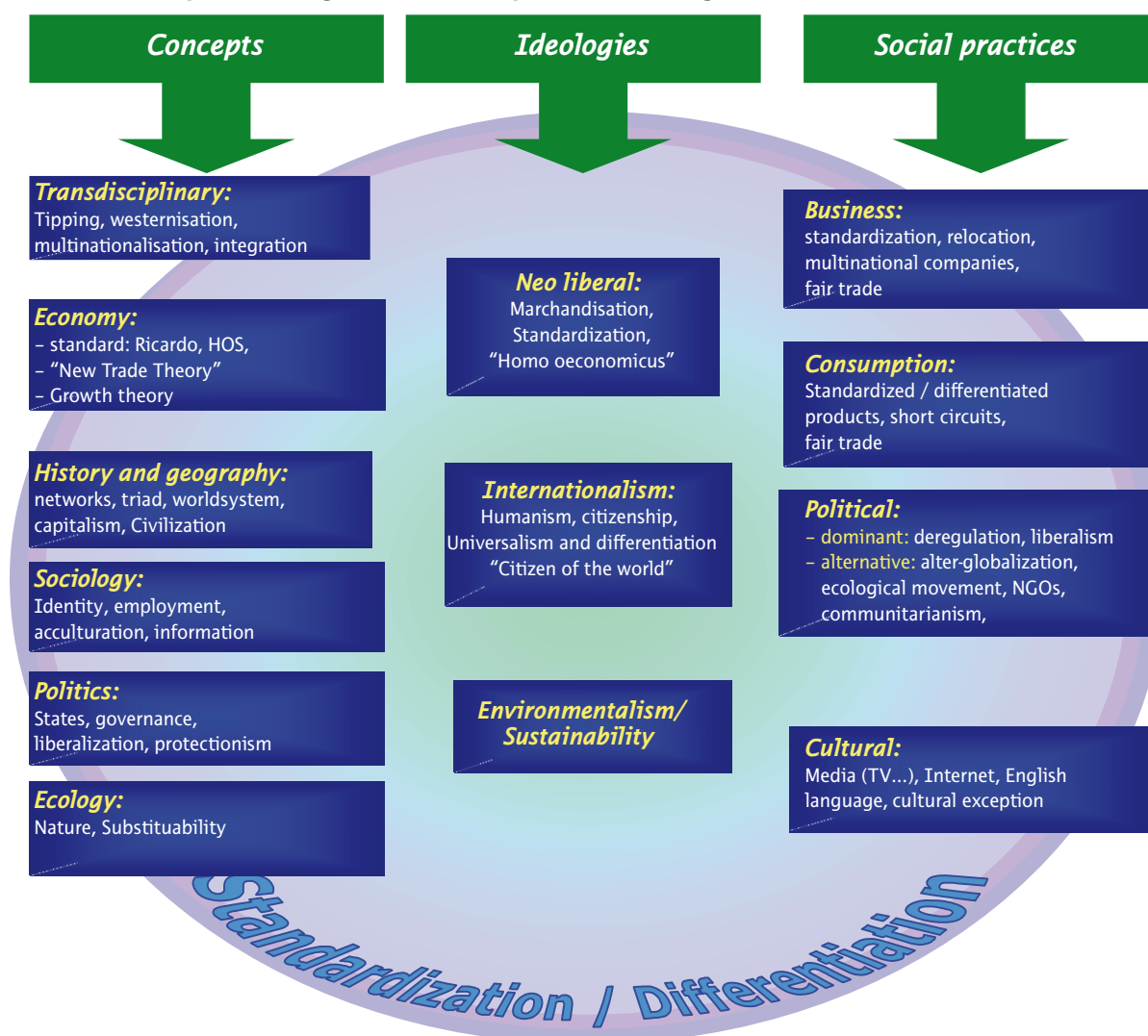
In the debate surrounding globalization we can identify two opposing systems of values which serve as a reference: neo-liberalism and "mondialisme" (globalism) (all the other positions are located somewhere between these two poles). "Neo-liberalism" is the ideology underlying market globalization. This ideology is based on the commodification of trade, which it justifies in return, and the standardisation of products while at the same time exploiting the differences. It postulates that the market is the most efficient means regulating trade with the pre-eminence of the individual (or of the individual's theoretical model, the homo economicus). In contrast, "mondialisme" (Passet 2001) refers to a form of humanism. Recognition of the collective is complementary to the acknowledgement of its individual members; it is a balance between uni-

versalism –all individuals are equal – with a respect for differences. The reference to global citizenship is in line with this school of thought which can be considered similar to alter-globalization (Simonneaux, Legardez 2006).

Still without claiming to be exhaustive, we can group together the social practices connected to globalization as follows:

- corporate practices which in the majority take neo-liberal ideology as a reference (offshoring, financial globalization, multi-nationalisation...) or more rarely a "social" ideology (fair trade); the practices of consumption mediated by the market by means of highly standardised and uniform products (Coca-Cola, Nike...) or on the contrary products which differ greatly, short supply chains or fair trade;
 - political practices whether they are dominant (deregulation, opening borders and markets, a global mode of governance –WTO..., neo-imperialism...) or whether they are dissenting or anti-authority like the alter-globalist protesters (Genoa, Porto Alegre...), the activities of associations such as ATTAC or the actions of NGOs, and also the practice of communitarian withdrawal;
 - cultural practices, whether in the media (television, Internet...) or the leisure sector (Disney...) participate in either creating uniformity within the "global village" or in reinforcing cultural exception by way of practices based on cultural differentiation.
- Thus the process of globalization can be analyzed and taught including concepts, ideologies or social practices in a double movement of standardization and differentiation.

Table 1: Concepts, ideologies and social practices about globalization's references



2.4 Interpretations of globalization in the light of crises and current affairs

One method of uncovering the problematics linked to globalization is to draw on current socio-economic events which (potentially) debrief controversial situations. These situations may emphasize specific actors and what is at stake but they will also challenge the tools used to analyse the situations thus transcending the usual disciplinary divisions.

Gaining awareness of a global environmental crisis (climate change, pollution, depletion of resources...) only confirms the economic and cultural interdependence traditionally associated with globalization. This environmental crisis justifies the setting up of new modes of regulation and global governance: not only does the WTO's mode of economic regulation have to take environmental constraints and resource depletion into account, but the environment also becomes such a global challenge in itself that specific political regulation (Rio, Kyoto, Copenhagen...) or even regulation by a “scientific governance” (IPPC pro-

moted by the UNO) is required. Many environmental issues are both international and global matters: the effects of Chernobyl were not limited by national borders. It is claimed that anthropogenic global warming (itself a matter of dispute) has an effect on populations which have not necessarily caused it, since it is felt in all the continents and will have an affect on future generations: the top polluters are not the ones who suffer most from the consequences. Realization has perhaps come a bit late but has had a big impact because firstly, the changes are due to human activity and secondly not everyone will suffer the impact and consequences to an equal extent.

The 2006/2008 food crisis occurred at a time when the world believed itself to be protected from famine. It led to a heavy increase in the basic agricultural raw materials (wheat, rice, corn...) on world markets and caused the famous “food riots” in developing countries (The Ivory Coast, Senegal, Haiti...) but also in richer countries (Egypt, Argentina, Mexico...). These events not only raise the economic question of world

market regulation, but also provoke questions on economic development, poverty, North – South relations, the disappearance of food producing crops in favour of a global market system based on export crops...The food crisis raises other more sociological questions like the standardization of eating habits and, more generally, cultural uniformity.

More recently but in a very brutal fashion, the banking crisis, triggered by the collapse of Lehman Brothers, had repercussions on the global banking system and developed into a financial crisis (2008), which in turn contributed, to a large extent, to today's lasting economic crisis. This crisis illustrates perfectly the interdependence of the world's different economic systems and shows the changes in the relations between rich nations and emerging markets like China and India.

These different approaches to globalization seen from the angle of the environmental, food or financial crises may constitute a didactic choice in which understanding the world takes precedence over the disciplinary concepts. When we use current issues as a starting point, the disciplinary questions take second place and disciplinary content serves a citizenship goal which is considered to be of greater importance. The three pillars of sustainable development (the economy, society and the environment) are therefore present in the interdisciplinary issue of globalization. This convergence of SAQs and interdisciplinary issues (globalization, sustainable development, the economic and environmental crisis...) must be highlighted because it enables us to introduce into school, the major challenges facing society and current affairs.

3. Didactic perspectives

3.1 The socio-epistemological survey

A "socio-epistemological survey" seems essential and is worth carrying out with the teachers. Indeed it will help define the learning stakes by means of their participation in structuring the references without however defining the teaching goals or methods. This attempted summary will lead to an identification of the learning stakes, both for the institutional heads and the teachers. It is also true that the uncertainty and differing positions circulating on the subject of globalization are not all of the same nature or intensity and this leads us to put their "acuteness" into perspective. Beyond the notions and concepts it seems important to us to identify the elements giving rise to debate, or may even be at the origin of the protests, the controversies.

We must emphasize here, how difficult it is to find consistency in the set of references that can be used to help us describe the globalization aspects of SAQs. Indeed, we cannot avoid handling these debates or controversies as part of our education on globalization: not only do we find these oppositions outside school, in the media but they also have to be dealt

with by the students. Should ideology be kept out of education because, in principle, it is absent from scientific discourse or on the contrary should it be included with a view towards citizenship education following the line of thought "Science and Techniques in the Experimental Sciences"? (Latour 1987). By examining the ideologies and social practices according to theoretical approaches, we are able to define teaching SAQs as a method used in citizenship education which associates knowledge acquisition with social and ethical debates. Handling debates and controversies is part of scientific and citizenship training; refutation and reasoning are scientific activities. Furthermore, the analysis raises questions about the message conveyed to students concerning science, the social sciences and the relationship between the sciences and society. Citizenship education involves acquiring cognitive, social and ethical abilities (Audigier 1999) and illustrates the sometimes contradictory objectives assigned to schools concerning knowledge acquisition and the assimilation of a system of values.

3.2. Epistemological postures

An overview of the knowledge, the debates, the uncertainty and the actors concerned shows a multiplicity of learning stakes involved with globalization or SAQs in general. We can analyse the didactic choices made by means of the epistemological postures which can be identified and retained. The perception of the sciences will also condition the way in which the teaching is designed, whether in respect of the perception possibly encouraged in the syllabus or the teachers' perception. The epistemological posture reveal the perceptions, an adherence to or a rejection of different values, the validity associated with the sciences. Several epistemological postures are possible regarding SAQs.

The first posture is positivist and scientific inspired by Auguste Comte. Science is considered to be an essential element leading to progress. Disciplinary and academic construction is the basis of this posture. The confidence placed in the scientific approach becomes almost a fundamental belief which plays a part in sacralising science; the researcher is the essential actor. The didactic choices give priority to an analysis according to the disciplines and their various concepts. The disciplinary content, and the way it is divided up, constitutes the basis of all learning. An education in globalization will base itself on the different economic or sociological theories to explain the globalization phenomenon. The theoretical concepts prevail over the characterization of globalization.

Utilitarianism constitutes a second posture, which could assert both the utilitarianism of John Stuart Mill and the pragmatism of Dewey. In this case, knowledge takes on meaning through the actions it helps to produce, the operational dimension is paramount, and the value of knowledge lies in the power to act



on reality. We look upon knowledge as a resource from a productive perspective. The expert, engineer or administrator who makes the right decisions is the emblematic figure targeted by this posture. This utilitarian posture when it is applied to globalization, will favour using, as a starting point, the opinion of one of the specific actors (the entrepreneur, the consumer, the politician...or even the trader) with his tools and his scope for action in the context of globalization.

Critical realism, which could be linked to the works of Jürgen Habermas (1987) and Ulrich Beck (2001) or to the "Sciences, Techniques and Societies" line of thought, constitutes a third posture which is often proposed in the framework of SAQs. Events, of more or less catastrophic impact, occurring in the 80s (Chernobyl, Bhopal, HIV infected blood, BSE...) have shaken our confidence in scientific progress and the gap between scientists and society is widening. The sciences produce breakthroughs but also controversies and risks. It is necessary to develop a "scientific reflexivity" (Beck 2001) to confront the risks produced by scientific activity. The scientists' questions and doubts are no longer confined to research but fuel public debate. On the subject of the economic and financial crises it is not only the speculative practices that are criticised but also the uncertainty and consequences of the use of certain management tools which is under debate, particularly concerning those tools used in sectors of finance management which generated spin-offs and speculative bubbles. The educational goal will be to try to give priority to training citizens to have a critical view of the sciences.

The final epistemological posture concerns relativism. We can refer particularly to the work of Feyrabend who considers that science cannot proclaim itself as a superior form of knowledge because no universally validated method can be attributed to the sciences. It thus becomes difficult, or even impossible, to distinguish scientific processes from any other belief or myth. Although it may be possible to discuss this position from a philosophical perspective, it is very difficult to defend within the context of an education system which describes itself as scientific. We mention it here for the record.

Each of these epistemological postures has different educational goals, a specific way of discussing the problems of globalization and a selection of particular references to be used. Choosing an epistemological posture may be explicit but is more often implicit according to each person's relation to knowledge (Charlot 1997). In order to pinpoint the different epistemological postures in education, beyond the declared teaching objectives, we propose to identify the diversity of sources and documents used or referenced (research papers, the media, businesses, political or associative institutions...), the categories of actors or referenced institutions (companies, citizens, states, banks, NGOs...),

the importance given to the concepts used, to the empirical data and to opinions. The evaluation of the learners in terms of the teaching objectives is another indicator of the epistemological posture because it highlights what the teachers consider essential.

It seems to us that although the scientific and utilitarian postures appear to be valid, or at least complementary, as is the critical posture on academic university courses in economics or on vocational courses, the critical stance is most relevant when the social sciences have a citizenship slant. This posture thus becomes, for us, an inevitable step at some stage of the course but not necessarily to the exclusion of the other postures when working towards specific goals.

3.3 From epistemological posture to didactic strategy

The different epistemological postures we have identified shed light on learning objectives but should not be confused with the didactic strategies which are determined by the means and the scenario set up in the class to fulfil an objective. We have identified four possible strategies (Simonneaux 2010): historical or doctrinal, problematizing, decision theory and critical.

The historical or doctrinal strategy which corresponds to a lecturing posture where the "master" delivers the teaching content leaving very few opportunities for communicational interaction. This is done with a view to achieving a clearly defined and identifiable objective.

The problematizing strategy focuses on the students' cognitive activity; the objective is to arrange things so that the students take an active part in the construction of knowledge. Interaction in the classroom is essential and learning how to learn could be the slogan for this strategy.

The decision theory strategy is based on involving the students in an activity. Priority is given to exercises, concrete cases, field studies.

The critical strategy tries to develop a critical sense, putting knowledge into perspective by preparing students to handle complex issues and to call knowledge into question.

We favour a set-up, at least during the training course, which combines a critical posture with a critical strategy and has a citizenship slant because it does not simply provide a solution to or a simplified vision of the SAQ, but enables the learners to identify what is at stake and the related controversies. This configuration aims to encourage a sense of commitment in the learners which will help them become active citizens. This choice does not in any way exclude other configurations which should however be adapted to the educational goals and didactic customs. Certain configurations, however, seem to us to be incompatible (positivist posture/critical strategy), others may be found to be disturbing or even paradoxical (doctrinal strategy/critical posture).



Table 2: Examples of teaching activities according to the didactic strategy and the epistemological posture on globalization.

	Positiviste/Scientist	Utilitarian	Critical realism	Relativist
Historical/ Doctrinal	Lecture on a theory as a starting point (e.g. HOS theorem)	Presentation of a tool, of a method or an indicator (e.g. growth of international trade for a company)	Lecture and criticism of different theories (e.g. the limits of the theory of comparative advantage)	
Problematizing	Analytical work based on different theoretical texts (e.g. HOS theorem/ Krugman..)	Comparative study of different tools or analytical methods (e.g. firms strategic international choices)	Analysis of the positions, reasoning or contradictory data (e.g. comparison of opinions and reasoning of Stiglitz and the WTO)	
Decision theory	Identifying economic theories in reasoning (e.g. analysing government or international texts)	Analysis of empirical data in order to draw conclusions or make decisions (e.g. Foreign investment in different countries)	Case study of a controversy or a global crisis (e.g. food crisis or financial crisis)	
Critical	Incompatible ?	Analysis of a firm, analysis of economic policy	Debate or role play in the classroom on the effects of globalization (e.g. does globalization reinforce the North-South inequalities?)	

Conclusion

In the majority of countries, globalization is on the secondary education syllabus where it has replaced trade internationalization by broadening the question. However, there are variations in the learning stakes depending on the levels and courses of study. In France the citizenship goal of social sciences is explicit in general high schools, the operational goal may prevail on certain vocational courses, particularly business courses. By way of SAQs, we have attempted to show that learning stakes are numerous and that there is no ideal way of teaching globalization however certain didactic choices which can be supported by socio-epistemological surveys, the identification of epistemological postures and the definition of a didactic strategy. Evaluating the efficacy of these choices remains difficult and cannot be compared if the targeted learning objectives are different.

Our proposals relate to high school education, they must allow the distinction between the purposes of literacy whose objectives are firstly to form responsible citizens, able to understand the current economic and social news, and the purposes of a vocational education or preparation to pursue graduate studies in social sciences. Within the citizenship education, the analysis of educational activities in terms of the SAQ is intended to link the different cognitive, ethical and social competencies (Audigier, 1999). The analysis of an education in globalization from the perspective of Socially Acute Questions (SAQs) has enabled us to evoke the multiplicity of references and to emphasize the citizenship challenges in learning about uncertainty and controversies. There is no perfect teaching solution but there is a process which can help teachers make an enlightened choice depending on the educational aims assigned to them.



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Bernd Remmele

Two Peculiarities of Economic Education

Zwei Besonderheiten ökonomischer Bildung

In order to model economic competences and to draw the didactic-methodological consequences it is necessary to take into account specific conditions of the conceptual development concerning economic issues and the respective learning paths. In this respect economic education has to deal with two fundamental peculiarities. First, the concept of the market as system unintendedly coordinating a multitude of actions is not transparent in the individual action. Thus, the learning paths to this concept of market cannot just build on the concept of the market as the concrete place of economic interactions. Second, the market's systemic coordination of feedback processes, particularly the negative ones, is rather unintuitive. Intuition prefers unidirectional linear causal relations. These two interrelated peculiarities are present in the cognitive development of economic concepts. Competence requirements have to be defined respectively and methodological choices in teaching systemic 'phenomena' have to reflect this constraint.

Um ökonomische Kompetenzmodelle zu entwickeln und daraus didaktisch-methodische Konsequenzen zu ziehen, ist es notwendig bestimmte Bedingungen der konzeptuellen Entwicklung ökonomischer Zusammenhänge sowie diesbezüglich relevante Lernwege zu berücksichtigen. In dieser Hinsicht muss sich ökonomische Bildung mit zwei Besonderheiten auseinandersetzen: Erstens, das Konzept des Marktes als System nicht-intendierter Koordination einer Vielzahl von Handlungen ist in der einzelnen Handlung nicht einsichtig. Daher kann der dieses Konzept betreffende Lernweg und entsprechende Lehrmethoden nicht einfach am Marktkonzept als konkreter Ort konkreter wirtschaftlicher Interaktionen ansetzen. Zweitens, die systemische Koordinationsleistung des Marktes in Bezug auf Rückkoppelungsprozesse, insbesondere negative Rückkoppelungen, ist relativ unanschaulich. Unsere Anschauung präferiert unidirektionale lineare kausale Verknüpfungen. Die beiden Besonderheiten stehen somit in engem Bezug zur kognitiven Entwicklung ökonomischer Konzepte. Kompetenzanforderungen und die Wahl von Lehr/Lernmethoden in Hinsicht auf systemische ‚Phänomene‘ müssen daher diese Bedingungen bedenken.

Keywords

economic competences, cognitive development, market concept, system dynamics

1. Introduction

The definition of a competence model, particularly its stages, or the respective development of a curriculum have to take account of relating scientific concepts, but also of the general learning paths and abilities in respect of these concepts. Concerning this important relation economic education has to deal with – among a lot of other issues – two fundamental peculiarities specific to the domain. First, as the capacity of the market to coordinate a multitude of actions is an unintended systemic effect it is not present or transparent in individual action. Consequently – as a way to learn – it can hardly be extracted from the analysis of individual economic interactions, where intentions are usually used as a main category of conceptualization. This is not only true for spontaneous concept development but also for didactically guided learning processes. Economic education has thus to rely on a more abstract approach to this concept, which

also has to guide the definition of competences and respective stages.¹

The second peculiarity is closely related to the first one, as will be shown below. The market's systemic coordination of feedback processes, particularly the negative ones, is rather unintuitive; this implies that concrete, i.e. mainly spatially structured, metaphors are rather misleading because they cannot (easily) represent the crucial relational structure of systemic coordination. Methodological choices in teaching such systemic 'phenomena' have to reflect this constraint and resort to methods which tap other sources, particularly more temporally structured or intrinsically

1 Retzmann et al. (2010) have outlined standards for economic education for general education. It distinguishes between three main fields of learning and instruction – broadly speaking: action, interaction and systems. This is in a very specific way unlike differentiations which directly build on differentiations of science of economics (e.g. Kaminski et al. 2008: 8ff). With regard to competences it is insufficient to derive the differentiation of basic fields of economic education from the scientific domain. Due to the different learning paths particularly institutions have to be distinguished between transparent and intransparent ones, hence some 'institutions' belong to interaction and others refer to systems, as an own field of learning and instruction.



more reflective metaphors as well as methods which unfold the specific relational structure.

These peculiarities are consequences of a specific path of cognitive development in relation to specific economic concepts which have to be regarded in relation to their formal conceptual complexity. Definitions of economic competences and expectations concerning their development have thus to reflect the age-specific potential concerning the steps of the respective learning paths referring to – among others – formal cognitive development.

Until now these two peculiarities of economic education are not sufficiently explored in the pertinent scientific discourse – neither concerning the respective conceptual development they are based on nor concerning competence-related didactical consequences. The systemic perspective is not significantly differentiated concerning specific learning paths and their possible methodological-didactical framing. The structural dimension of metaphors is also hardly present in the discourse of economic education.

In the remainder this paper tries to bring together some theoretical approaches and some evidence as well as tentatively advance this scientific discourse.

2. The first peculiarity: two separate perspectives on economic phenomena

Economic education has mainly to deal with fostering two fundamental competences: on the one hand the ability to undertake or participate (in a reflective manner) in concrete economic actions or interactions, and on the other hand the ability to conceive and judge abstract economic processes and systems. This directly relates to two different perspectives on economic phenomena, i.e. based on the individual and its actions or on the abstract functioning of the system. Accordingly, Hodgson (1993, 398) analyses theoretical approaches based on the divergence of starting from methodological individualism or “aggregates at the systemic level”. The claim of the first peculiarity that (unintended) systemic coordination of the market is not transparent in the individual (intentional) action can be rephrased as a clear separation of the participant perspective and the observer perspective concerning economic phenomena. Concerning social knowledge there is in general the distinction between the participant perspective and observer perspective. The social knowledge of the participants is transparent during social action and a specific observer’s perspective taken by the interacting persons is important to control these interactions. The observer’s part can however also be a theoretical *ex post* construction which is not and cannot be part of the single interactions. Taking account of both fundamental competences thus implies that the development, i.e. also conceptual development, of these perspectives has to be reflected.

It is a major achievement of Vygotsky (1986) that he systematically included formal instruction as an essential factor in its own right into the theoretical discussion of conceptual development. His basic distinction of spontaneous and scientific concepts and his ‘zone of proximal development’, which is mainly related to the latter, scaffold this inclusion. Scientific concepts can be represented verbally in instruction and can be developed by relating them to other concepts – at least partly independent of spontaneous concepts which are mainly based on ‘unconscious’ experience. From Vygotsky’s point of view it is thus not imperative that (top-down instruction of) scientific concepts have to be based on (bottom-up experience of) spontaneous concepts. “Scientific concepts would be unnecessary if they were reflecting mere appearances of objects, as empirical concepts do. The scientific concept, thus, stands in a different relation to the object, in a relation achievable only in conceptual form, which, in its turn, is possible only through a system of concepts.” (Vygotsky 1986, 173) It is an assumption of this paper that concerning the systemic nature of certain economic issues there is almost no alternative to such a conceptual approach; it has to be taught from an abstract scientific perspective – partly even wilfully distancing one’s perspective from spontaneous/empirical and thus intuitive concepts.

On first sight it might however seem that also the systemic economic observer perspective could also be derived from the participant perspective by (instructionally guided) abstraction or decentration or respective learning paradigms. This might, e.g., be the case for social norms which are of course also relevant in economic interactions: “...the child can generate prescriptions through abstractions from the experience itself (either as an observer or participant)” (Turiel 1983, 43). Social norms reflect the balance of intentions (interests) and can thus be abstracted and generalized from interactions. The observer can or even has to take the role of a participant to make the situation transparent, i.e. in this regard perspective taking and abstraction from this can even be a spontaneous process.

However in relation to the market system the distinction between the two perspectives is a fundamental one. They are separate in a strong sense because the capacity of the market to coordinate a plethora of actions is a systemic and unintended effect, which cannot be abstracted from the characteristics given in the individual perspective. The core scientific concepts in economics are thus not based on spontaneous ones, but have to be based on other (scientific) concepts and thus on formal instruction.

This strong separation is thus a domain specific one as the high relevance of systems as ‘object’ of the observer perspective is proper to the economic domain. The economic observer is a specific observer in the



respect that on the one hand the degree of systemic coordination exercised by the market *forces*, which are seen as externally determining (aggregated) behaviour, is very high.² On the other hand economy has a high degree of relevance for everyday life in modern societies.

In accordance with the domain specific separation of perspectives there is discussion concerning false generalizations or 'micro-macro-problems' which deal with the problem of everyday abstractions from individual experiences and situations (for an overview Zoerner 2008). However it is not necessary to put wrongfully generalized lay theories under 'ideology-suspicion' ('Ideologieverdacht'; Krol et. al. 2001, 7), because it is primarily not a problem of hidden interests but of unreflected modes of thinking.

However the most salient example for the first peculiarity, i.e. the strict separation of the participant and the observer perspective in the economic domain, is the two concepts of the market itself (and that they are frequently confounded). On the one hand there is the concept of market in the sense of a concrete place where single social (inter)actions are conducted. In each (inter)action a multitude of individual and social, intentional and structural dimensions is active. Particularly economic sociology made aware of this inclusive concept of action. Analysis of individual, market'-oriented action should thus not reduce this action to its instrumental-rational dimension but take account of its "embeddedness" in wider social structures as well (cf. e.g. Granovetter 1985; Beckert 2003). On the other hand there is the concept of market in the sense of an abstract coordination system of social actions. This coordination is conceived in a way that it – unintendedly – interrelates only one dimension but of a multitude of actions. The one interrelated dimension is of course the instrumental-rational one with an optimization on ends and means concerning scarce resources (cf. e.g. Swedberg 2003, 109). Looking at the two concepts of market the use of the word 'market' in the derived second sense is thus hardly a good metaphor as the 'rules of reflection' are almost completely different. The relation between the two markets is thus rather catachrestic.

We cannot elaborate much on the different applications of this differentiation. Just as one example

2 On a general level the differentiation of the two perspectives reflects the differentiation of external and internal causation of behaviour. "The active/reactive dimension articulates one of the crucial differences between economics and psychology: 'active' theories stress that human experiences and behaviour are initiated within the person; 'reactive' theories regard behaviour as a reaction to external environmental forces." (Furnham/Lewis 1986, 13) The active theories relate more to the internal and introspective dimension of the participant perspective whereas the reactive theories focus on the external and objectivist aspect of the observer perspective.

of making theoretical use of it Max Weber can be mentioned. Weber (1968, 635f) differentiates the two perspectives in the succession of barter interaction. Whereas he relates the dickering to the systemic market concept he conceives the agreement or the contract in its individual complexity. "The completed barter constitutes a consociation only with the immediate partner. The preparatory dickering, however, is always a social action insofar as the potential partners are guided in their offers by the potential action of an indeterminately large group of real or imaginary competitors rather than by their own actions alone. The more this is true, the more does the market constitute social action. Furthermore, any act of exchange involving the use of money (sale) is a social action simply because the money used derived its value from its relation to the potential action of others."

For specific business contracts or for sellers of goods it is probably 'more true' that this is a conscious part of the social action. For the usual consumer in a Western shop this is surely 'less true' or not true. One accepts the price or not, the respective decisions of the others are not taken into account. Obviously, also Weber does not consider conscious reflection on the others as a criterion for this social action, as he surely does not assume that using money implies considerations on the social creation or accreditation of its 'value'. The process of money-based social integration of the barter partners is thus in great parts not transparent for them during that process. The example thus also shows that the temporal aspect is structurally different to spatial relations as the past and the future are not a straight line but a condensed virtual bulk of diverse interactions.

3. The second peculiarity: unintuitiveness of the market as system

This focus on the temporal dimension is crucial for the second peculiarity, i.e. unintuitiveness of the market as system, and didactic-methodological consequences as well.

The cognitive structure which yields understanding of the systemic integration of a vast multitude of the economic dimension of actions goes far beyond the comprehension of a single integral action. Not only does it imply a 'post-formal' cognitive level, e.g. the specific integration of contextual factors (cf. Basseches 1984; Kramer, Kahlbaugh 1992; McBride 1998), but also – as part of it – the abandoning of intuitive forms of judgement. Though there are differences in the general psychological approach 'system competence' can be considered as one major aspect of post-formal development: in contrast to traditional developmental psychology which builds on reversibility (i.e. finally time-neutrality) for the structuration of cognitive stages, approaches of 'post-formality' build on complex dynamic concepts. This relates to research field



of systems dynamics as it deals with the behaviour of complex systems over time. In this regard systems dynamics focuses on dynamic interactions of different factors and on the aggregate systemic behaviour of multitudes (cf. e.g. Resnick 1998; Sterman 2002; Booth Sweeney, Sterman 2007). There is also evidence that particular training in systems thinking based on specific simulations or practises improves respective competences (e.g. Kriz 2000, 270ff; Pala, Vennix 2005; Plate 2010). This is important development of potential teaching methods concerning systemic phenomena in economy.

Now it can be made clear that the two peculiarities are interrelated. The strict separation of the two perspectives is an effect of the 'operational closure' (Luhmann) of the market system. The systemic effects are 'emergent', i.e. on another level than the level of concrete interactions from which they 'emerge'. Such a closure, based on systemic feedback processes, particularly negative feedback processes, however is difficult to grasp in contrast to the concrete level. The market's systemic coordination of feedback processes is thus far from being intuitive, in the sense that it is not given in a way easy to represent (eidetically).

Intuition is to be understood as the usual form things are presented in imagination. So, in the classical Kantian sense intuitions are the imaginative form of sensual impressions, and as such they are bound to the structure of the pure forms of intuition, i.e. space and time (e.g. Kant 1933 §24). Intuitions are thus formed by the way our senses work and how our mental system integrates these impressions. In relation to external objects it is the spatial aspect which is relevant. Objects thus conform to specific spatial rules, concerning e.g. the additivity of distances or the order of directions. Whereas Kant took the pure forms as static in the frame of transcendental subjectivity modern approaches, i.e. in regard to empirical subjects, have to take a dynamic stance (following e.g. Piaget, Inhelder 1948). Though there is significant individual development of spatiality, (physical) space sticks to some basics: e.g. an object cannot be at two places at the same time. What is however essential for the following argument is that forms of intuition are changeable also in the sense that they can be developed based on learning. In this regard, e.g., Schnelle (1980, 48) analyses forms of intuition in relation to the development of forms of 'understanding'.

So the point is not just the lack of a good spatial metaphor but a deep rooting inexpedience for such representation. Below some examples for this misleading aspect will be given. Chi et al. (1994) describe this problem based on the fundamental ontological difference of categories of matter and process. Whereas scientific concepts often refer to processes, initial concepts of students often refer to matter. Chi et al. conclude that conceptual change within concepts of

matter is relatively easy; change from matter to process however is a relatively hard learning process.

A further aspect has to be mentioned here to explain the basic unintuitiveness of feedback processes. It is the fundamental focality of human consciousness which usually ties our imagination to certain spatio-temporal and respective causal structures. As Varela (1975, 5) self-ironically states: „Self-reference is awkward.“ Also for him the representational problem is a very deep one. The main problem is that on the one hand feedback loops are always already closed – i.e. from both sides. The dynamics of such structure is a major problem for our imagination because on the other hand the focality of human consciousness ties it to a single linear process: A causes B. Our usual form of awareness is fundamentally limited in this respect, we have to focus. “Apparently our cognition cannot hold both ends of a closing circle simultaneously; it must travel through the circle ceaselessly.” (Varela 1975, 20)

This problem becomes evident, e.g., in the fact that in a control circuit with two elements mostly one is conceived as the controller and other as the controlled – however concerning these functions they are actually indistinguishable from a theoretical point of view (Glanville 1988). The output of one is always already the input of the other. The thermostat controls the status of the room temperature, while the room temperature controls the status of the thermostat. The teacher guides the students' learning, while the students' learning feeds back on the teacher's behaviour. A control circuit is always already a circuit. So you can chop it into process pieces as small as you like: $A(t_0)$ causes $B(t_1)$ and $B(t_1)$ causes $A(t_2)$ and follow these steps of causation. However this neglects the given closedness of the circuit: $B(t_0)$ already causes $A(t_1)$. Thus when sticking to intuitive linear analysis, which is a less elaborate approach (cf. e.g. Rosenberg 2002; Plate 2010), relevant systemic effects, like e.g. the presence of eigen-behavior, are difficult to imagine.

Only a few examples or symptoms of the problem can be given here. It relates, e.g., to a feature of bounded rationality – with obvious consequences for the systemic understanding of the market. Simon (1993, 92ff) discusses the limitations of human attention concerning certain feedback processes. Facing the relation of inflation and unemployment or energy and environmental policy the focus of the argument is always on one element while the other is neglected. Also the critique of patterns of ecological reasoning in, e.g., the Report for the Club of Rome on the 'Limits of Growth' (1972) is significantly based on this argument.

In addition to this general unintuitiveness of feedback loops the problem becomes even worse for negative feedbacks. Negative feedback has a (seemingly) paradoxical consequence: the effect of a process is the cause of an opposed process – something is the



cause of its negation. Consequently, developmental psychology shows that negative relations are understood later than positive ones. So, e.g., generally in processes the positive relation between its 'content' (e.g. spatial distance) and its speed is understood earlier than the inverse or negative relation between its duration and its speed (e.g. Remmele 2003, 73ff; Leiser, Beth-Halachmi 2006, 8; further, binary relations are of course easier to understand than relations with more elements, e.g. Levin 1992, 16f; Webley 2005, 49f). In our case, the market system is a constellation of many elements (costs, supply, demand, price, price of possible substitutes etc.) tied together by positive as well as negative relations. Taking into account this complexity it is not surprising that the individual (and historical) development of economic understanding requires time as well as effort and is highly dependent on respective learning contexts – including formal approaches.

Overall, the lacking intuitiveness of the market provides a conceptual frame for a set of theoretically not fully elaborated economic judgements, for which again only some arbitrary examples can be given here. In a study of Leiser and Drori (2005) about the understanding of inflation government as an (intentional) agent is taken as an isolated causal element where from an advanced (observer) perspective systemic effects are in place. "Understanding the process of inflation requires understanding beyond the level of the individual. Specifically, it needs to relate aggregate values. It seems that high school students tend to remain at the level of 'scripts', standardized accounts of who does what, and why, which leads them to attribute an excessive role to the government. In accordance with that Rosenberg (2002, 79ff) provides a more qualitative analysis of linear and systemic reasoning in relation to governmental action.³

Personification and the reference to single actions concerning the explanation of systemic market processes is a cognitively not fully elaborated form of reasoning (cf. Fend 1991, 141). It is a significant aspect of cognitive development in the economic domain to re-

duce the reference to intentional actors in relation to a systemic phenomenon like inflation. Intention is an intuitive linear relation between – in its simple variant with two elements – the intention and the intended action/aim. "The more abstract and complex the phenomena (e.g. inflation, market forces) and more particularly the more difficult it is to personify, the less children (even up to the age of 15) can understand it. Children, it seems, can understand the motives of individual actors, but not the cumulative or aggregated effect of people's economic actions." (Furnham, Lewis 1986, 28) So confounding of the two concepts of market, as expression of our first peculiarity, is itself an example of such unelaborated judgement.

The consequences of this developmental scheme are far reaching because they also affect fundamental ethical issues. At the age of 7 or 8 children frequently assume a 'just price' that corresponds with the characteristics of the traded good and implies a moral obligation for the seller. The detachment of price from concrete characteristics leading to a systemic concept which also includes the (legitimate) interests of the seller takes some years altogether (cf. Berti, Bombi 1988, 126ff).

Further, not to devaluate or not to morally judge economic action and the intention to make profit requires an advanced cognitive development. Adam Smith, who – as is well known – makes this claim for the butcher, baker and brewer etc. – makes clear in his 'Theory of Moral Sentiments' that the role of intentions is crucial for moral sentiments and that they have a fundamental social function (cf. Smith 1790, 2.3.3). To abstain from such judgement is not easy and requires, e.g., the theoretical insight into the utilitarian efficiency of the market systems in relation to the whole society. Consequently the developmental stage of economic understanding has a significant influence on the ethical judgement of individuals concerning economic phenomena (cf. Walstad 1996). Accordingly the historical development of the theoretical (at least partial) exclusion of the economic sphere from moral claims is a major scientific 'achievement', which of course in further step can be contextually reframed again. Interestingly it was Adam Smith, who was also the first to systematically use negative feedback in his scientific considerations (Mayr 1987, 197; Remmele 2003, 22, 56ff). It could even be said that the unintuitiveness of the systemic market mechanism is mirrored skewedly in his well know metaphor of the 'invisible hand'. It might be added, that it is not just a non-visible mechanism, but rather that is not working in a possibly visible way.

Hence it has finally to be mentioned that the relation between the conceptual and the intuitive or concrete metaphorical is very complex here as it is difficult to determine whether the intuitive misunderstandings of systemic phenomena are due to the

3 Though 'conceptual change' is a widely discussed and researched subject in the last decades Chi and Ohlsson (2005) state in relation to this scientific field that „the study of complex declarative learning is still in its infancy and has not yet produced a unified theory or paradigmatic framework.“ The approaches they discuss (semantic networks, theories based on the differentiation of centre and periphery, and schemas as experiential patterns) can however clearly be based on Vygotsky's claim that conceptual development of scientific concepts needs instruction which relies on providing relations to other concepts of adequate complexity and abstractness. So the unintuitive and non-spontaneous character of systemic economic issues which are at stake here needs the social framing in the 'zone of proximal development' with an already competent teacher or learning partner as learning guide, i.e. economic education requires professional economic teachers.



lacking conceptual development or the chosen (spatial) image, i.e. the general inexpedience of spatial metaphors for systemic phenomena. A first example is the concept of a border. The protectionism which can be enacted at the border of a state can be referred to the difficulty of grasping the abstract concept of comparative cost advantages or the imaginative strength of this basic spatial metaphor. On the one hand it is difficult to develop this aggregate concept, on the other hand it is difficult not to use an image like 'border', which contains something and 'protects' one side from the other. Another example, which uses a less concrete but still spatially structured metaphor, is the 'fixed pie' (cf. Enste et al. 2009, 63) which implies the conservation of quantity (of volume or area). The frequent separation of distribution and production of social welfare based on the intuition of a given amount of goods contradicts the 'systematization' of this problem, i.e. taking into account the incentive structure which is yielded by the distributive rule (for other distorting metaphors cf. Oberlechner et al. 2004, Mandelbrot, Hudson 2005).

4. Didactical consequences

Against this backdrop we face significant didactical questions: when and how can the market as a system be taught? On the one hand it is necessary to develop realistic age-specific competence expectations and respective curricular standards. On the other hand economic education has to make clear how concrete didactic-methodological approaches deal with the independence and unintuitiveness of the systemic concept of market.

The claim for realistic competence expectations implies a critique of the general postulation of 'deficits' based on the results of unreflected competence assessments. In contrast it is necessary to take account of developmental paths and obstacles. Based on competence measurement which did not take into account the mentioned peculiarities and their developmental background certain authors (e.g. Walstad, Larsen 1993, Sczesny, Lüdecke 1998, Klein, Meißner 1999) stated 'deficits' in the students economic knowledge and understanding. These 'deficits' might thus not be the result of intellectual laziness or insufficient schooling (due to lacking economic competence of teachers or of insufficient representation of economic issues in the curricula etc.) but might just be an expression of the age specific level of reasoning. It can be shown, e.g., that test items in the Test of Economic Literacy imply elaborate systemic reasoning, but that their assumed competence level is regarded rather low. (cf. e.g. Remmele 2009, 100) Generally it might also be argued that particularly multiple choice questionnaires are not

the optimal test instrument for the evaluation of complex reasoning.⁴

It is necessary to elucidate the respective age specific competence requirements on the basis of a tested competence model for the economic domain. As such a model with validated competence levels is still a desideratum, the expectations can so far only be based on plausible argument. The paper already tried to give some orientation in this respect. Concerning the question when to expect and when reasonably to start to systematically teach systemic concepts one conclusion is that systemic reasoning – as a 'post-formal' operation – has mainly to wait until the end of lower secondary education.

So finally, we have to distinguish different approaches to deal with the problem of teaching the systemic dimension of economy. The first approach follows the insight of Vygotsky that conceptual development can and partly has to be grounded on concept based instruction. This can be called a "top-down replacement" (Chi, Ohlsson 2005), i.e. the presentation of an alternative concept in parallel with a prior or intuitive one, in a way that does not use the prior one as input. The old and the new representations then compete for the control of the field concerning explanation, problem solving etc. The more capable concept will then prevail. As often stated it is, e.g., sufficient to become a proper economist – even for a parrot – when you always say: 'supply and demand'. Supply and demand is a concept, which is hard to develop from everyday experience as it implies a specific aggregation of social phenomena, and shows thus already a scientific approach (cf. Davies 2006). So fostering the use of these concepts in instruction can work in this formal concept based way.

In addition to such top-down methods also target-oriented 'horizontal' methods could be useful to teach the market as a system. To do this more temporally structured and more intrinsically reflective metaphors have to be taken into account. It has to be remembered therefore that intuition is not static, and it is not static in two different ways, which have been mentioned above. First, intuition can be developed in line with other elements of cognitive development (cf. Peirce 1981, 404f). Second, intuition is not static in the sense that it cannot process dynamic 'rules of reflection', i.e. that which is transferred by a metaphor from one field of understanding to the other, at all. In general transfer might be possible from fields of knowledge where a more advanced 'rule of reflection' is already valid due to relevant reasoning or some kind of instruction as well as experience.

4 'Deficits' are particularly detected for girls; a great deal of recurring gender differences in such tests might however be related to the test designs (cf. Davies et al. 2005).

Weather is a rather familiar phenomenon which might make it easier to grasp other complex dynamic phenomena. At least in Central Europe the weather is expected to change permanently though having seasonal characteristics and weather forecast often have a scientific appeal concerning the interdependencies of high and low pressure areas etc. Weather could thus be an adequate metaphor for equilibrium processes, which can be found also in economy from time to time. Accordingly examples from biological evolution could help to grasp feedback systems generating, e.g., ups and downs of populations of connected species (hunter and prey). One could even think of teenage cat fights as example of a complex dynamic system which is in its overall outlook constantly sensitive to nuances of individual behaviour and leads to dynamic balances of rapprochement and alienation between the bigger set of involved teenagers and which is also constantly reflective and analytic to these nuances. This last aspect might be used to demonstrate the aggregated psychological influences in market processes. It remains of course a question of individual methodological creativity to choose an adequate example for a specific topic in class. The point here is to show that there are examples, even if they might be considered strange at first sight.

Finally, a more direct approach to the topic has to be mentioned. There are methods that allow unfolding the compressed temporal-relational structure which are bulked together in certain conditions of

individual action, e.g. prices. With simulations the systemic effects can be stretched and simplified in a way that the aggregate actions and decisions of an ‚indeterminately large group of real or imaginary‘ persons reach a state of more transparency. If the complexity of systemic coordination of economic actions cannot be experienced in reality respective virtual experience might be provided in class (cf. e.g. Egenfeldt-Nielsen 2007, 100ff). The process character of systemic economic phenomena can, e.g., be experienced in auctions or competitive simulation games. The form of the coordination can be perceived as the numerically reduced sequence (and interrelation) of decisions. A further possibility is usage of (computer-based) simulations of feedback-systems which can be manipulated by the students and thus give an impression of the causal interrelation of inputs and relational variables (e.g. Arndt 2007). This is again rather a top-down approach as the target concept is build into the structure of these interrelations. Whether top-down or horizontal it should be clear now that bottom-up from everyday experience is at best an exception.⁵

5 Purchasing power might be considered such an example: purchasing power is not experienced in everyday life as it is implicit in money. However, particularly during holidays abroad the aggregated dimension of purchasing power or its comparative nature is an eternal source of irritation: ‘everything is so cheap/expensive here’.

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Andreas Petrik

Core Concept “Political Compass”

How Kitschelt’s Model of Liberal, Socialist, Libertarian and Conservative Orientations Can Fill the Ideology Gap in Civic Education

International value surveys and misconception studies reveal the crucial role of individual value orientations for political judgment abilities. But in Civic Education, political opinions are generally merely asked for or remain superficial, non-committal statements that don’t get analyzed to foster identity development, perspective-taking and tolerance. Thus, this article discusses Kitschelt’s coordinate system of political preferences as an outstanding solution to fill the ideology gap in Civic Education and therefore to enhance political literacy. At first, I will explain and outline the landscape of the four political ideologies: market-liberalism, conservatism, democratic socialism and left-libertarianism. In addition, I will trace left-libertarianism to its merely known anarchist roots. After that, I will explain how our basic political values are shaped by economic and cultural developments and how they combine to become political ideologies, social milieus and party families. As a third point, I will outline possible applications of Kitschelt’s model for the subject of Civic Education. For that, I propose a map of fundamental controversial issues to help students to discover their own political position. Finally, I will introduce the “Found-a-Village-Project” as highly interactive and controversial scenario to foster political identity formation.

Keywords:

political cleavages, ideologies, critical thinking skills, political judgment abilities, political compass, “Found-a-Village-Project”

1. The ideology gap in Civic Education

To obtain political orientation is no simple task. Most American students might wonder if Obama’s health care policy is a socialist, a Stalinist or, as it was also labeled, a fascist project. German students could ask themselves, if the Social Democrats (SPD) became a right-wing party, because they cut down on welfare or if the Christian Conservatives (CDU) did turn left, because they are about to suspend compulsory military service. Furthermore, students could get confused about market-liberals like the German Free Democrats (FDP) who appear politically left-winged, as they postulate gay marriage, but also right-winged, when urging lower taxes for businesses. Students need a dynamic core concept of political cleavages. A (political) compass – as it is defined as an instrument for finding direction – could help finding orientation within political movements, party programs and decisions and political theories, but also when it comes to a better understanding of their friends’ and families’ value orientations. This is precisely why most National Standards (see e.g. NCSS 2010 or GPJE 2004) combine their concepts with judgment abilities and individual identity development. Students should learn to distinguish between facts and opinions; they should understand the interactive formation of values and should learn to be tolerant towards different value orientations. Additionally, they should be able to analyze and solve political conflicts. But these standards don’t really take their own claim seriously. Neither American nor German programs de-

velop value systems as core concepts. Instead they emphasize value-neutral, “objective” thinking and analytical skills. The international IEA Civic Education Study (see Torney-Purta et al. 2001) focuses on basic characteristics of democratic societies, like the willingness to vote and to participate, but also on democratic skills like tolerance, compromise and cooperation. “Attitudes” are related to students’ trust in institutions, their country, opportunities for immigrants, the political rights of women, and future prospect. There we find indeed traces of political ideology, but they are neither systematically asked for nor properly interpreted.

Youth surveys do normally ask for a self-placement on the left-right scale, but since researchers do not explain their understanding of these complex terms (e.g. Schneekloth 2010, 135) they don’t get convincing and significant answers: Instead only a few percent of students dare to choose the clear left or right side, about 30% place themselves in the middle and about 20% declare not to be able to understand the categories well enough to place themselves properly. At the same time, those young people show, when asked about their primary values, indeed politically relevant ecological, religious, pacifist or private life orientations that are far from being apolitical. But they don’t understand themselves as being part of political cleavages because they never learned to do so. I call this phenomenon the Ideology gap in Civic Education.

A couple of classroom studies revealed a lack of exposure to political conflicts (see Niemi, Niemi 2007; Hess, Ganzler 2007, Grammes 1998, 299-332). Neither do many teachers want to know political standpoints of their students nor do they support politically controversial discussions in the classroom. Even verbally



open and encouraging teachers can indirectly exclude certain opinions by the power of moderation, or simply by their comments and reinterpretations, or even by ignorance. The IEA study stated only 25 per cent of students across all countries are 'often' encouraged to state their own point of view. While in theory many teachers favour critical thinking and values development, in practice they mostly deliver factual information using textbooks, worksheets and teacher talk.

Due to the absence of controversial discussions the students' own political diversity lays dormant, and they easily develop the misperception that „everybody is in the middle“. Or they might believe in the absolute truth of their values, mislabeling dissenting views as assaults unworthy of proper consideration. The resulting fear of being misrecognized, disrespected and excluded discourages students from participating in public political discussions which they sense as dangerous ventures (Conover, Searing, Crewe 2002).

The competence of distinguishing and justifying value orientations is not a random topic among others in Civic Education. Value orientations are psychologically and culturally essential for the democratic development of both individuals and even whole societies. First, they form a developmental task, an important need of self-recognition and responsibility: „acquiring a set of values and an ethical system as a guide to behavior – developing an ideology“ (Havighurst 1972, 69ff.).

Second, the European Values Study and the World Values Survey (see Inglehart, Welzel 2005 and Welzel, Inglehart 2009) conveyed empirical evidence that value orientations should be regarded as the central factor of democratization or stagnation – both in democratic and non-democratic societies. However, this is only true, according to Inglehart and Welzel, if we measure and deal with real “deep-rooted civic orientations“. Simple preferences for democracy, as stated in most political surveys, are often superficial and instrumental. Answers are mainly based on social desirability and therefore don't reveal anything about the motivation to take a stand for certain convictions. Deep-rooted civic values represent a mediating role between economic modernization and institutional settings.

Third, recent misconception research showed the crucial role of belief systems to analyze and understand political facts (Nyhan, Reifler 2010). The false belief that Iraq had weapons of mass destruction, for example remains resistant until today among conservative adherents of ex-president Bush. False or unsubstantiated beliefs can even endure corrections, depending on ideological orientations and partisan

beliefs. Even worse, there are backfiring effects: Direct factual contradiction frequently strengthens the misperception of certain ideological subgroups.

In consequence, ideological orientations themselves must become central concepts of Civic Education. It is far from being enough to understand how democracies work. Only the reflection of different democratic ideologies can lead to a congruent world view, promote tolerance as dissociation of narrow views, reflecting partisanship and the ability to change ones perspective. Or, as Joseph Adelson (1971, 1013) phrases it in his study „the political imagination of the young adolescent“: The development of a political identity as process of „struggling to formulate a morally coherent view of how society is and might and should be arranged“.

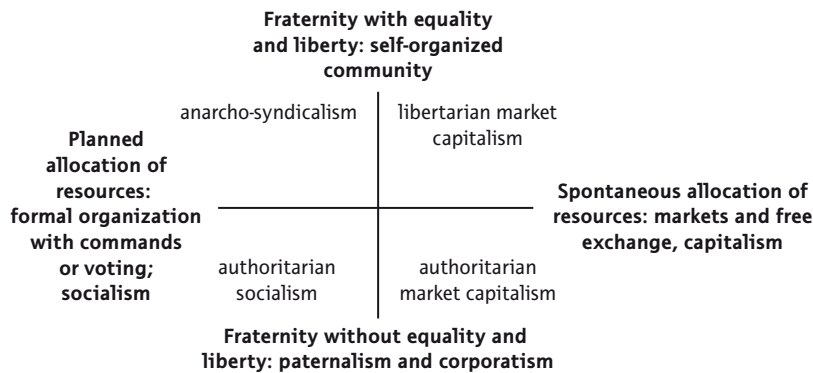
The main thesis of my article is that the model of “Ultimate values, ideologies and forms of social order” (Kitschelt 1992, 1994, 2003), with slight modifications, should be considered as indispensable scaffolding for political literacy.

2. The Kitschelt model and the competitive space of political thought

Herbert Kitschelt (1992; 1994; 2003) created his model as heuristics to outline the competitive space of political thought. He examined (new) party programs in post-communist as well as in western democracies and how people's political preference formation related to them. This “political universe” can be captured by the slogans of the French Revolution: liberty, equality, fraternity. They represent three ultimate values or societal end-states and are associated with complementary, mostly conflicting modes of social organization. The concepts of liberty, equality and fraternity vary depending on the political issue they are applied to. Kitschelt was one of the first theorists to distinguish between two cleavages that each society has to take position on: the distributive cleavage about resource allocation and the communitarian/socio-cultural one about actors, power and decision-making. This is one main reason why his heuristics is very useful for educational purposes: Whereas cleavage approaches in the tradition of Lipset and Rokkan (1967) distinguish regional divisions such as center-periphery and sometimes even more than two cleavages, such as religious-secular, economic left-right, libertarian-authoritarian and green values (see Knutsen 2009), Kitschelt's approach provides clear linkages of value families. Since every system and political program must consider both dimensions at the same time, the form of a coordinate system seems to be the appropriate type of model:



Fig. 1: Ultimate values, ideologies and forms of social order



(Kitschelt 1994, 12)

The economic or distributive axis measures possible opinions of how people should be endowed with resources. The left "equality"-pole is defined as the view that assets should be redistributed by a cooperative collective agency (the state, in socialist tradition or a network of communes, in the libertarian or anarchist tradition). The right "liberty"-pole is defined as the view that the economy should be left to the market system, to voluntary competing individuals and organizations. This is the classical left-right-conflict that dominated the cold war. But here we don't deal with a bipolar system-conflict, but with opposites on a continuous dimension of alternatives within democracies.

The other axis - cross-cutting the first one - is concerned with values of fraternity, understood as axiological principles driving institutionalization, community, forms and actors of democracy, and the quality of the process of collective outcomes. This dimension measures possible political opinions either in a communitarian or procedural sense, considering the appropriate amount of personal freedom and participation: „Libertarianism“ is defined as the idea that personal freedom as well as voluntary and equal participation should be maximized. This would be the full realization of liberty and equality in a democratic sense. Parts of that view are ideas like autonomous, direct democratic institutions beyond state and market, transformation of gender roles, enjoyment and self-determination over traditional and religious order. On the opposing end of the axis „authoritarianism“ is defined as the belief that authority and religious or secular traditions should be complied with. Equal participation and a free choice of personal behavior are rejected as being against human nature or against necessary hierarchies for a stable society.

Each fields of the coordinate system can be linked to one of the four political ideologies, each of them combining two ultimate values. Kitschelt introduces "anarcho-syndicalism" as a sort of left-libertarian socialism interfacing economic self-management and collective property with decentralist, non-hierarchical

federalist organizations. This movement corresponds mostly with modern "post-materialist" and left-libertarian values - a fact which most other authors neglect, as we will see. "Libertarian market capitalism" combines the notion of personal liberty with unconstrained reign of market exchange. Here Kitschelt uses the American linguistic convention, to call market-liberalism

"libertarian". In the European context of political theory we talk about "liberal", "right-liberal" and "neo-liberal" movements.

The integration of the two remaining ideologies is the weak point of his model. Since Kitschelt doesn't clearly define democratic limits of the authoritarian pole, he equates "authoritarian socialism" with Stalinism. Indeed Stalinism is an extreme form of socialism; nevertheless, it is not a legitimate base for democratic parties and preferences. Instead the center of the lower left corner of the coordinate system should be filled with the democratic socialist idea. According to this position, the great majority of non-owners (workers and employees) has the democratic right to control or to even annex big company owners. A strong government representing this majority redistributes wealth and is also necessary to lead and enlighten those who are not able to identify the structural causes of exploitation and injustice. This necessarily state-centered policy caused the historical socialist-anarchist conflict between Marx and Proudhon, later with Bakunin. In contrast to left-libertarian ideas of grassroots democracy or federation, Marx and Engels already promoted in the Manifesto of the Communist Party the authoritarian (but not dictatorial) role of the party.

The second problem of Kitschelt's model is concerned with the term "authoritarian market capitalism". This ideology tries to combine political authority with a free market exchange. Kitschelt (1994, 29) explains this combination mainly with "strong Christian religious affiliation" that "typically teaches compliance with established social norms". This status quo orientation promotes a "defensive attitude" about the existing distribution of wealth. This ideology is traditionally called "conservatism".

Kitschelt's coordinate system can be seen as a renewal of Karl Mannheim's (1936) classical model of utopian and ideological thinking published in 1929. From a perspective of Sociology of Knowledge he identified four historical ideal types of political consciousness that still influence political parties and individuals today: Orgiastic chiliasm or anarchism, liberalism, conservatism, and socialism. The anarchist idea,



however, is not developed historically correctly, as it is connected to pre-Marxist German farmer's liberation movement of the 16th century. Writing from a tendentially democratic socialist perspective, Mannheim underestimates the future role of 19th century grassroots ideals as Proudhon and others developed them. This original error persists in many later attempts to classify historic political thinking.

Contemporary ideology research (Arzheimer 2009) gives support to the Kitschelt perspective. Two major ideology schools can be identified: First Karl Mannheim's and Robert Lane's sociological approach to view ideologies as deep-rooted belief systems connecting a societal diagnosis with a plea for social changes. Second the more pragmatic view in the tradition of Anthony Downs "Economic theory of democracy" (1957). His main paradigm is "rational choice" rather than identification. The cognitive costs are lowered, when relevant parties can be associated with an ideology that encompasses the interests of certain social groups. Voters don't have to be informed about each single issue to make their choice. Instead ideologies allow referring to political "super issues" as fundamental controversial questions.

There are a couple of resembling coordinate systems which are, after all, less appropriate than Kitschelt's version. Arzheimer, for example proposes the Kitschelt model in a less exact version. Furthermore, there are four popular "political compasses" aiming at measuring individual political orientations: "The Smallest Political Quiz" (www.theadvocates.org), the "Political Compass" (<http://politicalcompass.org>), the "Electoral Compass" (www.electoralcompass.com) and the "Moral Matrix" (www.moral-politics.com). In the following, I will briefly summarize the typical classification problems which most of them share:

1. The "left" distributive pole is sometimes labeled as "command economy", a term which traditionally refers to a non-democratic one-party system and not to a democratically organized political redistribution of wealth.
2. The vertical axis gets sometimes de-politicized by the usage of psychological terms like "individuality" and "collectivity" without directly focusing on communitarian issues and democratic procedures.
3. Another coordinate system based on Inglehart's value research cause confusion about the position of German parties (Raschke 1993). There, the "new" Green party within the left-libertarian field shows the largest political difference with the "old" (market-)liberals (FDP), which is only true for the distributive dimension. On the communitarian dimension, Greens and right-libertarians share the notion of civil liberties; they oppose state observation and the restriction of free speech, they are more likely to tolerate social minorities etc.
4. Mainly in US-American models, Socialism is sometimes not seen as an equitable democratic orientation (as represented by European socialist and communist parties) but equated with dictatorial Stalinism. Or Socialism gets truly defined as "statist" ideology, but without labeling conservatism in an equal measure, ignoring that conservative thoughts require strong governments as well as the restricting of personal behavior that might violate traditional and religious values.
5. It is most astonishingly that National Socialism is sometimes located in the lower middle, between the socialist and conservative field of the coordinate system (Arzheimer 2009). Or, especially in the US-American compass versions, National Socialism and Socialism are regarded as rather similar or related orientations. Although, the truly conservative German historian Ernst Nolte wrote down, National Socialism is "a clearly identifiable phenomenon of conservatism" (Nolte 1984). He describes it as radicalization process of typical conservative principles like nationalism, hierarchy and obedience. Moreover, National Socialism did neither expropriate big business nor did it redistribute wealth more equally. On the contrary, the National Socialists promoted a clearly stratified society and supported directly big business research and expansion interests. To treat National Socialism as a form of socialism perpetuates simply the cynicism of this label.
6. Anarchist or anarcho-syndicalist ideas are often explicitly excluded as they are seen as having developed no broad impact in most countries. This decision ignores the great indirect impact of participative and grassroots anarchist values in all western countries since "The Silent Revolution" (Inglehart 1977) through the raise of post-materialist and left-libertarian values.¹

The last point induces me to take a short excursion on anarchist thought to eliminate the popular "bomber image" or the prejudice of a "chaotic" society without rules and order. The first person who dealt with the four basic orientations as legitimate alternatives was probably the "father of anarchism" Proudhon himself. In his late work „The Principle of Federation“ (1863) he modified his earlier anti-state position and come up with a decentralized „theory of federal government“, calling it anarchy. He developed four "forms of government" based on "two fundamental and antithetical principles" that each have their own "legitimacy and morality":

1 Kitschelt (and Flanagan similarly) criticizes Inglehart's original four-item materialism/post-materialism index for merely measuring materialist values but mainly libertarian versus authoritarian values. Inglehart's later work together with Welzel (2009) within the international team of the World Values Survey is more clearly focused on emancipative (libertarian) versus traditional (authoritarian) values. Welzel states explicit correlations between their value research and Kitschelt's results.



"Regime of authority

1. Government of all by one - monarchy or patriarchy;
 2. Government of all by all - panarchy or communism.
- The essential feature of this regime, in both its varieties, is the non-division of power.

Regime of liberty

1. Government of all by each - democracy;
2. Government of each by each - anarchy or self-government.

The essential feature of this regime, in both its varieties, is the division of power." (Proudhon 1979, 8ff.)

At that time Proudhon opposed supporters of the liberal representative government (here referred to as democrats), Conservatives (here identified with monarchy and patriarchy) and Socialists alike. With the socialist idea he agrees on the distributive dimension since he sees capitalist and corporate property as "theft". But the communitarian dimension separates the two egalitarian ideologies. Proudhon defines anarchy as „the government of each by himself“, which means „that political functions have been reduced to industrial functions, and that social order arises from nothing but transactions and exchanges.“ Here we find an early concept of the modern grassroots democracy. In his earlier work "Les confessions d'un révolutionnaire" (1849)² he already categorized anarchy as non-violent "order without leadership":

² Astonishingly, there is no entire English translation of this book.

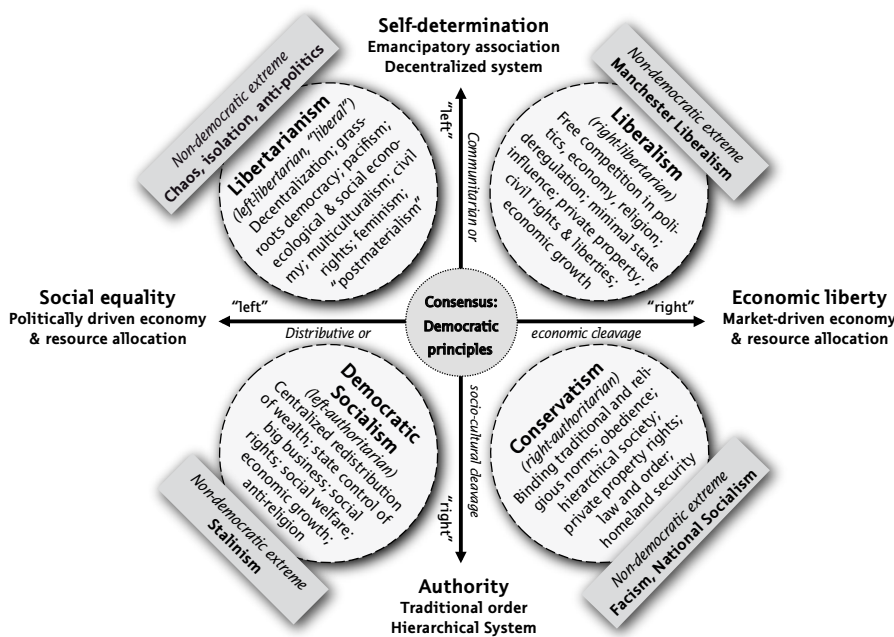
"[...] puis mettez vous-même la main à l'oeuvre; entreprenez, agissez, et ne sollicitez ni n'attaquez le Gouvernement. C'est folie et injustice de batter les murailles de l'Autorité de votre belier démocratique et social; tournez-le plutôt contre l'intertie des masses, contre le préjugé gouvernemental qui arrête tout élan populaire, et laissez tomber, par son inutilité même, le despotisme. Suscitez cette action collective, sans laquelle la condition du peuple sera éternellement malheureuse, et ses efforts impuissants. Au lieu de pourchasser le pouvoir, priez-le seulement de ne se plus mêler de rien; et apprenez au peuple à faire lui-même, sans le secours du pouvoir, de la richesse et de l'ordre." (Proudhon 1849, 194)

Proudhon criticizes the "democratic and social battering ram" which the revolutionary socialist movement uses to attack the government. Instead, the people should turn the battering ram against their own phlegm deriving from their prejudiced belief in governments, a belief that restrains their vigor. Not religion but this 'government-faith' works as 'opium for the people' (Marx). That's why Proudhon wants the people to learn collective self-initiative to create wealth and order independently of traditional and new powers which shouldn't intervene anymore.

The probably first two-dimensional cleavage model including anarchism was developed as „rough-and-ready guide to political theory" by the two British anarchist activists and writers Stuart Christie and Albert Meltzer in 1969 (Christie & Meltzer 1970, 104).

Combining the convincing parts of the different models and avoiding the five classification problems I mentioned, I am suggesting the following version:

Fig. 2: The political compass: Four ideal-typical forms of democracy and their non-democratic extremes



(Petrik 2007, 200ff.)



Following Kitschelt, the four poles of the coordinate system refer to ultimate political values. As the terms equality and liberty are used in many different ways, the supplements "social" and "economic" seem necessary. Second, the terms "politically driven" versus "market-driven" economy should be added to make clear that the economic conflict is not only about redistribution but also about the role of the state to foster an ecological or a growth-oriented economic system. Self-determination is the logical opposite of authority in the sense of heteronomy. Self-determination can be a collective choice so the term "Individualism" isn't appropriate. Second, the term 'authority' is compatible with 'democracy' whereas the term 'totalitarianism' (that some compasses use) isn't. *The concepts of self-determination and authority cover at the same time antithetical decentralized and hierarchical political systems, and opposed emancipative and traditional socio-cultural norms of everyday life.*

The anarchist or left-libertarian idea represents a historical source of modern anti-authoritarian, socially just, post-materialist, feminist, multicultural, anti-militarist and ecological grassroots politics. This concept of a "strong democracy" envisions neighborhood assemblies, national initiatives and referendums on congressional legislation, experiments in workplace democracy, and public institutions as models for economic alternatives. In contrast to Barbers (1984, 68ff., 98ff.) misinterpretation, the basic anarchist idea based on Proudhon doesn't mean „anti-politics“ but instead "order without leadership". At the same time Barbers use of the term can be understood as the undemocratic extreme of left-libertarian thought: It can become purely hedonistic, conflict-denying, generating chaos and isolation through „individual self-sufficiency“ whenever self-determination is detached from equality and collective responsibility.

Democratic socialism consists of the idea that global and national deregulation as well as an increasing social inequality can only be overcome by a strong government, which would set new rules to control, reduce and occasionally expropriate big business, in order to redistribute incomes and to supply social welfare and at least a minimal income for every citizen. Enlightenment against traditional religious and other "prejudices" is seen as the central instrument to abolish injustice and exploitation. Other than in Stalinist communism, regulations are conducted by a democratic government within the legal frame of the constitution.

The liberal idea of the invisible hand is a free market system that guarantees common wealth by competition without major state invention. The truly understood liberalism doesn't distinguish between economic and personal freedom. Private life style, sexual or religious orientations should never become subject to political intervention unless it is used to harm some-

body. Private property and economic growth are the major sources of social, cultural and economic development. Pushed forward to its extreme we would get a Manchester-Liberalism as pure capitalist market system without any social protection, a system automatically excluding many people from political participation.

The conservative idea is strongly rooted in Hobbes' view of *Homo homini lupus* („man is a wolf to [his fellow] man“). People need strong directives by traditional authorities to establish a peaceful, stable and well-ordered society. The government should at the same time protect individual property rights as well as control individual behavior in public and private life. Important moral values are supported and represented by religious authorities. The natural human inequality and destructive urges need a hierarchical order, in order to maintain justice and safety. National Socialism and Fascism represent an extreme form of a socially unequal, hierarchical and nationalist society.

Kitschelt (2003) mentions the linguistic convention to label the libertarian-authoritarian cleavage also left-right conflict, but he sticks to the convention to reserve the two terms to the economic dimension. I for myself consider two dimensions of left and right. Nevertheless, I will continue, for practical reasons, like Kitschelt does, to talk about left-libertarian and right-authoritarian orientations etc. Thus, these adjectives clearly distinguish both dimensions.

3. Empirical approaches to the formation and change of value orientations

In this chapter I will give basic insights about the individual and collective formation of political value orientation. Kitschelt proposes a micro-logical "phenomenology of preference formation" within his coordinate system (Kitschelt 1994, ch. 1.3 and 2003). With good reason, he doubts Marx's belief that ideologies emerge mainly from social classes. The Marxist view short-circuits the complex multi-layered process between economic property and collective action. According to Kitschelt, every day experiences of markets, work organization, and the sphere of consumption profoundly affect citizens' political aspirations and preferences and influence their arrangement of political values.

Market experiences stimulate the self-attribution of success and failure. Hence, the location of income in the private or public sector becomes a crucial factor for the distributive dimension: People who are less exposed to the vagaries of international competitive pressure and productivity tend to prefer political redistribution. Private sector employees and wage earners in internationally competitive sectors tend to be opposed to redistributive policies that lower their profitability and capacity to invest by higher taxes.



Whereas domestic sector companies may compensate tax burdens by increasing prices to protect owners and workers. Here Kitschelt (2003) later adds professions in charge of the allocation of scarce resources. Those "wielders of authority" are more inclined to favor voluntary contracting that "sharpen individual incentives" than on centralized redistribution that baffles personal endeavor.

The second occupational experiences concerns people's control over their work environment and their participative opportunities. Occupations that directly deal with people or cultural symbols such as education, art, communication, health care, counseling and social work offer autonomy and involve communicative skills in non-routine work processes. They foster demands for social reciprocity, individual creativity and open dialogue as cultural conception of identity. Collective decision-making structures undermine authority relations. As those occupations are rarely located in the international competitive sector (only consultants, advertising agencies, mass media) they tend economically to the left pole. One important indicator for this group of people is education, because job autonomy and education are highly interrelated.

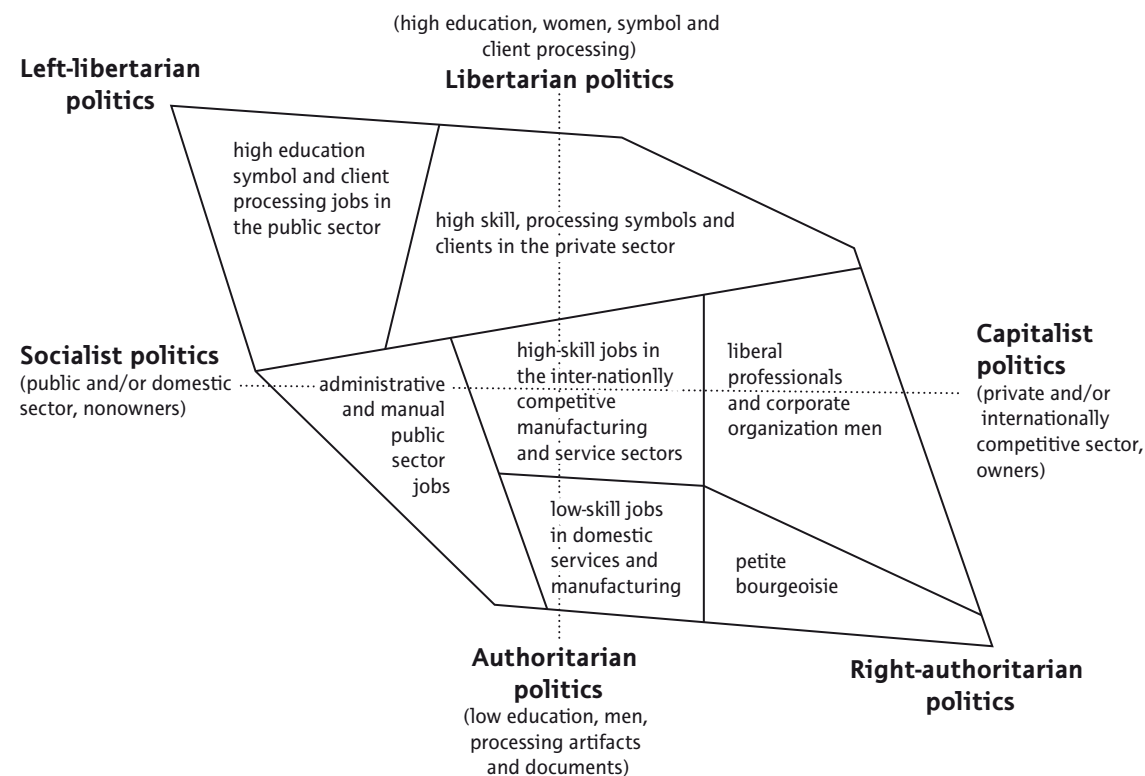
Towards the other end of the communitarian scale we find occupations with bureaucratic imperatives of costs and expediency urging employees to treat cli-

ents as standardized cases. This is the case in retail, finance, insurance, general public administration, police, and many legal services. A related tendency can be found in manufacturing, transportation, engineering design, and natural science research, where material commodities, objects or documents are processed. The standardized and objectifying work structure encourages people to prefer social compliance and unambiguous standards of behavior, to consider social action as monologue, adopted upon the commands of higher authorities. Kitschelt attributes the strongest authoritarian value orientation to the "petite bourgeoisie" of shopkeepers, craftsmen, independent salespersons, and farmers.

As women are mostly employed in people-processing, symbol-producing and client-interactive organizations and furthermore involved in reproductive activities claiming reciprocity, Kitschelt regards gender as a further indirect sign of libertarian orientations. He adds 2003 that women have a general preference for the welfare state because of their additional role as mother making it harder for them to invest in their career and making it more likely for them to fail on the market.

On the whole, Kitschelt identifies seven "political preference groups" and places them within his coordinate system:

Fig. 3: Ideology and occupational groups in advanced capitalist democracies



(Kitschelt 1994, 27)



1. Group I: Low to intermediate skill administrative and manual public service sector (mainly in the socialist quadrant)
2. Group II: High education symbol and client processing public service sector professionals (mainly in the left-libertarian quadrant)
3. Group III: Low-skilled wage earners in domestic private services and manufacturing (mainly on the authoritarian pole with tendency to economic liberty)
4. Group IV: Trade-exposed sector of high to intermediate skill wage earners (the middle with slight tendency to the market-liberal and the authoritarian pole)
5. Group V: High skill professionals and entrepreneurs in the symbol producing private sector (mainly in the market-liberal quadrant, partly in the left-libertarian quadrant)
6. Group VI: Corporate managers, owners and professionals in business services (mainly in the conservative quadrant, partly in the market-liberal quadrant)
7. Group VII: Small business without professional training, "petty bourgeoisie" (strongest market-liberal and authoritarian tendency)

In addition to the work sphere, people's values are affected by their socio-cultural experiences which they gain in their leisure time. New technologies allow

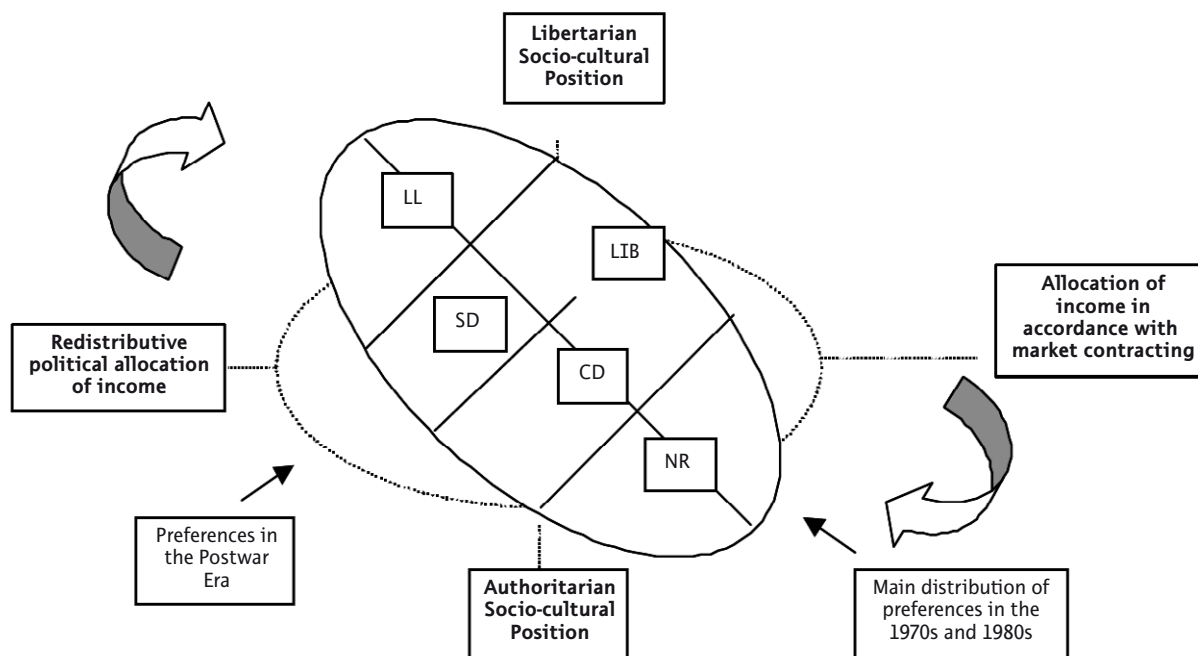
more physical and intellectual liberty. Personal styles of consumption and conduct become relatively independent forces, resulting in role conflicts between work life, traditional family values and education. But since access to knowledge is still very much linked to social classes, role conflicts between libertarian and authoritarian values are less probable in lower classes.

Kitschelt's model is far from being static. Conjunctural effects, ecological catastrophes and cultural conflicts can lead to at least temporarily different positions. The macro-logics of economic modernization promote, according to Kitschelt's own studies in 1994 and 2003, two general value-shifts in western societies. He identified five basic "party families" which in the long run have to adjust their programs according to societal value shifts:

1. Left-libertarian, mostly green parties (LL)
2. Social democratic and democratic socialist resp. communist (labour) parties (SD)
3. Market-liberal Parties (LIB)
4. Christian democrat and secular conservative parties (CD)
5. (New) right-authoritarian parties (NR)

The first value shift took place from the postwar decades until the 1970s and 1980s. The post-war decades were dominated by the cold war's distributive conflict (horizontal ellipse):

Fig. 4: Distribution of political preferences from the post-war decades to the 1970s and 1980s



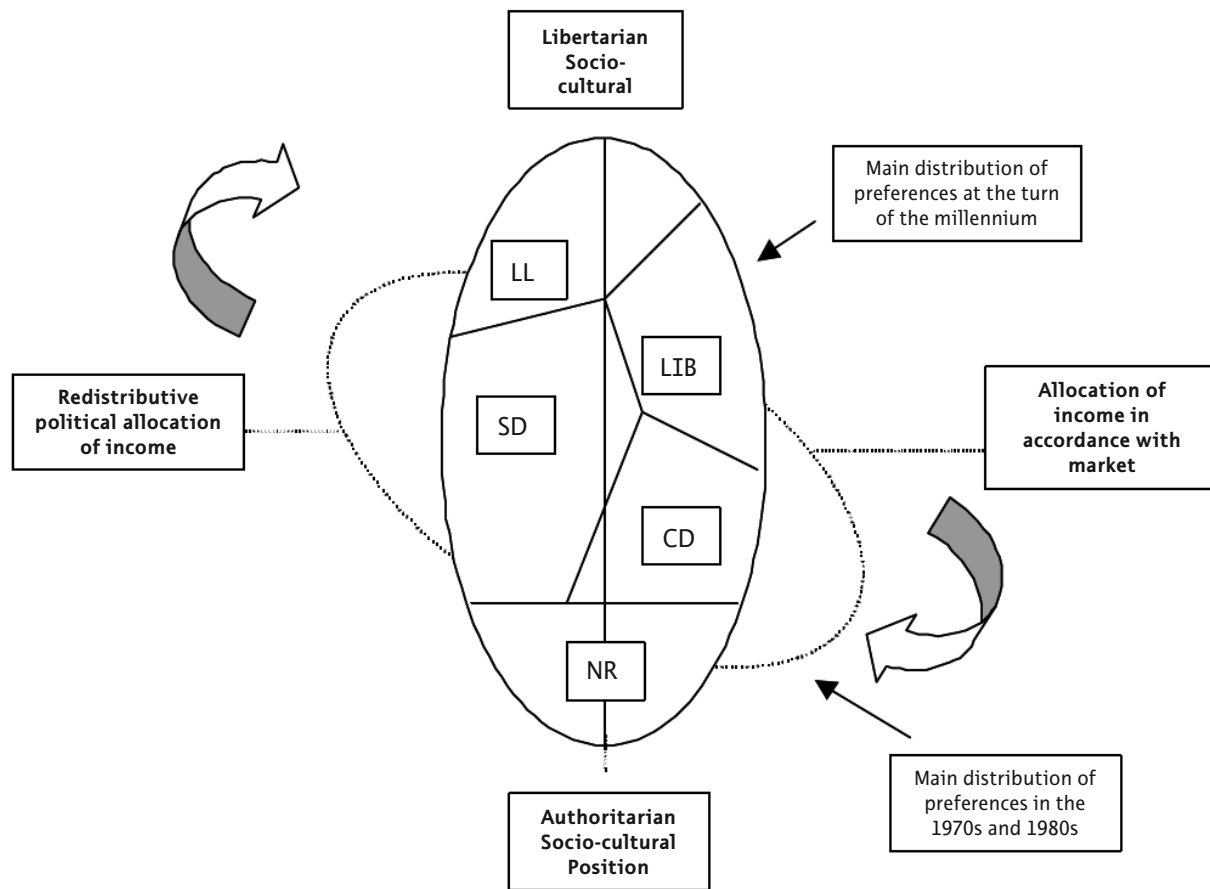
(Kitschelt 2003, 7)

Kitschelt has never argued, as some of his readers proclaim, that the libertarian-authoritarian conflict didn't exist by then. This cleavage was simply less manifested and politically articulated. According to Kitschelt, the first shift towards left-libertarian and right-authoritarian tendencies until the 1980s (diagonal ellipse) had two major structural reasons: One reason was the decrease of manufacturing jobs in favor of the "post-fordist" production and new information technology that promoted a switch from socialist to liberal values. The decline of Stalinist socialism later contributed to this tendency as well. For another thing, the increasing financial and social

personal services financed by a comprising welfare state caused a change from authoritarian to libertarian values. Thus, the increasing left-libertarian, "new social" movements and Green parties of the 1970's and 1980's resulted in an authoritarian backlash in most western states via populist and nationalist right-wing parties. Particularly losers of economic modernization and less educated male workers in manufacturing sectors, clerks or small business owners proclaimed a new authoritarianism.

The second shift increased the tendencies of the first shift in the direction of (right-)libertarian and (left-)authoritarian values (vertical ellipse):

Fig. 5: Distribution of political preferences from the 1980s to the turn of the millennium



(Kitschelt 2003, 7)

Until the new millennium, left-libertarian positions reached a "support-ceiling" because of hard budget restraints in the public sector due to crises of welfare states. That's why highly educated people profited mostly from the job growth within the market-exposed sector. Consequently, left-libertarian parties are inclined to cautiously expand their electoral space towards the market-liberal segment. The decline in the birthrate increases the necessity of a reorientation towards rather right-libertarian young people. Especially the notion of intergenerational justice initiates left-libertarian parties to advocate retrenchments of pension benefits in favor of improved education and similar tasks. Social democratic parties profit less and less from the working class segment but rally instead better educated employees, moving towards "economic centrism". This in turn alienates their old manual working base which partly switches to left-authoritarian, e.g. communist parties, or right-authoritarian ones, or they join the non-voters. Conservative parties with increasing pressure to liberalize parts of the economy and to cut down on welfare are endangered to lose their strengths among the elderly. Market-liberal parties, according to Kitschelt, are (until 2003) the "great winners" of ongoing transformations. But they have to decide whether they combine their appeal to market-liberalism with socio-cultural libertarianism or rather with more authoritarian and nationalist appeals for keeping their petty-bourgeoisie constituencies. Radical right-winged parties tend to tone down their former market liberal rhetoric in favor of "welfare chauvinist" demands to limit welfare benefits to the indigenous population, corresponding to their raising success among the working class and clerical voters. Less educated workers are internally divided between social protectionists and market-liberal tendencies.

Kitschelt couldn't consider the financial crisis of 2008 which is about to add a new shift from liberal to socialist values, as more and more people call for social protection, subsidies and state control of financial and other economic transactions. In addition, the threat of global climate change could cause a renaissance among left-libertarian ecologists, not of the classical welfare state, but of public investments, redistribution and business control to benefit the ecosystem, of course with strong market-liberal backlashes. If these slight tendencies came true, we would witness a third shift of the main sphere of preference formation in the direction of its cold war horizontal position – but with new "eco-socialist" forms of a politically driven economy on the left side of the axis. The raise of a "socio-ecological" social milieu in Germany, the decline of the market-liberal Free Democrats' (FDP) poll ratings combined with a real boost of the Green Party's ratings may be signs for that tendency (see below).

Though Kitschelt's model has influenced many scholars, there is a serious critique to it (Duch, Strøm 2004). First, the authors criticize Kitschelt's mainly socio-demographic research with factors such as age, education, white collar/student and with personal dispositions such as religiosity, post-materialism, readiness to join the ecological, antinuclear or peace movement. Instead the authors favor using direct and simple questions about distributive and communitarian issues, just like the European Values Study and the World Values Survey do. Kitschelt (1994) himself mentions these studies as a possible additional approach.

Apart from criticizing his methods the authors also question Kitschelt's findings – even though without being very convincing. They misunderstand Kitschelt's first value shift (see fig. 4) as rigid statement that "the political left is libertarian and the right authoritarian". In consequence they come up with various examples to contradict their (falsely reproduced) claim. For example, they show that leftist parties such as communists are less libertarian than rightist (market-liberal) ones – which is evidently true, but can also be understood by Kitschelt's graphics. Furthermore, they claim that conservative partisans also advocate libertarian values since their participation in "conventional political acts" is as pronounced as within the political left. Conventional participation, though, is defined as "general interest in politics, party membership, lawful demonstrations, frequent political discussion". Kitschelt never suggested that left-libertarians were mainly striving for more conventional participation and that conservatives/ right-authoritarians were apolitical or generally opposed to democratic values. Duch and Strøm, on the other hand, find out that "unconventional" participation (occupying buildings, signing a petition, joining a boycott, attending unlawful demonstrations or strikes) correlates indeed with left-libertarian values – a fact that is completely compatible with the distinction between conservative and emancipative forms of participation. Finally, the two critics stress that the socio-cultural cleavage wasn't about libertarian versus authoritarian values but about libertarian versus communitarian ones. They found communitarian concerns of "social cohesion, integration and identity politics" both within the economic left and right. Yet, this finding isn't surprising at all and doesn't contradict Kitschelt's notion of "fraternity, paternalism and corporatism" (see fig. 1). The term 'authority' is nothing but a metaphor for orientations expecting individuals to adapt to a particular context. This is the case in left-winged trade union communities as well as in the petty bourgeoisie – of course with partly different contents of their "identity politics". Duch's and Strøm's critique misinterpret the value shift as if it was only a simple axis with a clear cut left-libertarian and right-authoritarian orientation. That's why they don't correctly reflect on



Kitschelt's seven occupational groups and five party families with their partly common and partly contrary values. In fact, Kitschelt is talking about the rotation of the „salient space“ of preference distributions, which means that political parties might under certain circumstances extend their political supply without completely abandoning the core of their values.

Though I mainly agree in favor of Kitschelt's socio-demographic research, I would like to compare it to approaches that are mainly based on interviews of individuals expressing their distributive and communitarian values. Since the European Values Study and the World Values Survey mainly concentrate on the comparison of countries I refer to the social milieu approach which distinguishes "value families" of like-minded people. A social milieu is defined to combine a certain social status with a certain value-orientation. The two different schools (stemming from two former partners who dissociated) Sigma Mannheim (www.sigma-online.com) and Sinus Sociovision Heidelberg (www.sinus-institut.de) use almost the same item-battery and have created almost similar results. Sinus Sociovision has created seven meta-milieus based on empirical surveys of most important Western countries and China (see Sinus Sociovision 2005, 2009; Hradil 2006). Below I outline their descriptions, adding differentiations according to the Sigma model for Germany (Ascheberg 2006) and the new 2010 Sinus model for Germany (www.sinus-institut.de/en):

1. *Traditional*: Security, status quo, tradition, duty, discipline and order. The Kitschelt- and the German Sigma-model distinguish here two traditional milieus: the right-wing "petit bourgeoisie" or traditional lower middle-class and the left-wing trade-union-oriented, tradition-bound worker's milieu.
2. *Established*: Commitment to achievement, claim to leadership, status awareness, requirement of exclusivity, conservative attitude.
3. *Intellectual*: Open mindedness, post-materialist ecological and participative values, pronounced

cultural and intellectual interests, striving for self-actualization and self-development.

4. *Modern mainstream*: Enjoyable and harmonious life, aspiration for material and social security, family. Here the Sigma model for Germany distinguishes a modern moderately conservative *middle-class milieu* from a slightly less traditional and more libertarian *milieu of employees* in the high-tech and service sector. The newest sinus model for Germany 2010 distinguishes the (more conservative) "mainstream middle class" from a "socio-ecological milieu" of political correctness and globalization critics.
5. *Consumer-materialistic*: Will to stick with the mainstream consumer standards, but often disadvantaged and disrooted precarious people.
6. *Sensation orientated*: Search for fun and action, new intensive experiences, life in the here and now, spontaneity and individualism, provocation and unconventionality. In the Sigma model referred to as *hedonistic milieu*, the newest Sinus model talks about the "escapist milieu".
7. *Modern performers*: Young, flexible, mobile, success- and action-orientated, highly qualified, committed, motivated, fascinated by multi-media. Here the Sigma model distinguishes well-educated urban *postmodern performers* from (partly more conservative) *high achievers* in highly competitive sectors stemming mostly from the lower middle-class.

If we take these seven Meta-Milieus and the distinctions following the German models we get eleven possible milieus and therefore a slightly more differentiated but rather similar group formation than Kitschelt (see fig. 3). We can place the eleven Milieus within the political compass to identify their potential basic orientation. The postmodern and the hedonistic milieu, going beyond Kitschelt's groups, represent prototypes of the idealistic and self-experimental parts of post-materialist thinking:

Fig. 6: Potential connection between social milieus and political value orientation



(Petrik 2007)

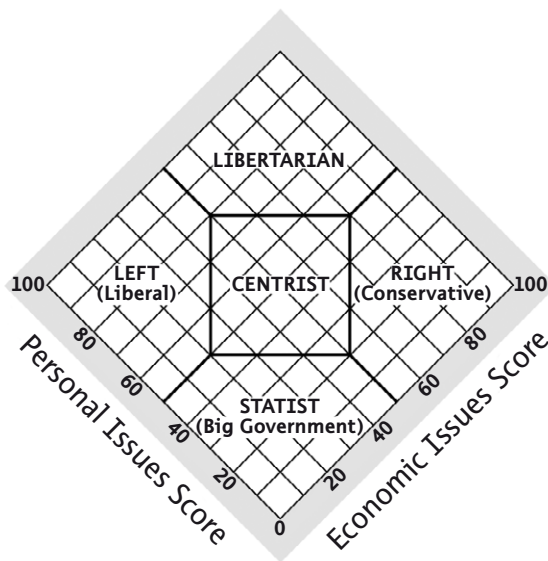
Neither Kitschelt nor the Milieu approach claim a simple connection between (often times latent) ideological preferences and voting. Many other factors such as the current personal and political situation, personalities of politicians, mass media and party propaganda shape one's actual party choice. The individual value preference mainly reveals the political identity as an important base for critical judgment.

Whereas the milieu-approach refers to politically significant values, the explicitly opposed "life-style"-approach (Dziemba, Pock, Steinle 2007) is an example of extreme de-politicization. Instead of the "fixed life patterns" that the so-called future researchers see within the milieu approach, their own research diagnoses mostly transitory lifestyles. Value types such as CommuniTeens, Latte Macchiato-Families, Super-Daddies, Tiger-Ladies and Greyhoppers lack in deep-rooted and therefore perennial values, all the above-discussed surveys are striving for. Moreover, the life style survey is obviously restricted to left-libertarian, market-liberal and modern conservative groups of people, ignoring losers of modernization who feel the necessity of an authoritarian backlash.

4. Closing the ideology gap in Civic Education: Individual positioning taught through fundamental issues and controversial debates

In this last chapter I will outline how teachers can use Kitschelt's model in the civic education classroom. It can become a basic tool to sharpen the student's political orientation by contrasting and analyzing ideologies, party platforms, social milieus, social movements, newspaper comments, textbook articles and so on. Second, it can be used to locate and develop individual political preferences. If we consider the axes as vectors, each individual can be represented by an average position showing the relative impact of ultimate political values and related issues. The four political compasses (see above) and the European Values Study as well as the World Values Survey each work with highly controversial questions that cause people to position themselves. Exemplarily, I would like to introduce the "smallest political quiz" as the simplest variation of all compasses in order to demonstrate their basic functioning. According to its explicitly right-libertarian authors, the quiz is used in many American schools and Civics textbooks (as to the imprecise term "statist" see chapter 2):

Fig. 7: The World's Smallest Political Quiz



(www.theadvocates.org)

You can find your own place in the chart by answering the following ten questions positively, negatively or indifferently (the latter risking of putting you into the center). Of course, the ID-question is only controversial in an US-American context; it would be consensual in Europe. The total of points for each answer shows an average political position:

PERSONAL ISSUES

1. Government should not censor speech, press, media or the Internet.
2. Military service should be voluntary. There should be no draft.
3. There should be no laws regarding sex between consenting adults.
4. Repeal laws prohibiting adult possession and use of drugs.
5. There should be no National ID card.

ECONOMIC ISSUES

1. End "corporate welfare." No government handouts to business.
2. End government barriers to international free trade.
3. Let people control their own retirement: privatize Social Security.
4. Replace government welfare with private charity.
5. Cut taxes and government spending by 50% or more.

At schools, political compasses are mostly used to help students to identify parties matching with their personal values. The "Electoral Compass" (www.electoralcompass.com), being the most scientific of the four, has been built for the US-presidential elections of 2008. It derived from the Kieskompas that scholars of the Vrije Universiteit of Amsterdam created in 1985 (<http://www.kieskompas.nl/>). Kieskompas was constructed as an alternative to the popular Stemwijzer voting adviser that has for his part influenced the German voting adviser "Wahl-O-Mat". Unfortunately, Stemwijzer and Wahl-O-Mat don't enable voters to determine their position within in the whole political landscape so that I would suggest replacing those models by the Kieskompas or by Kitschelt's model.

If we compare the questionnaires of the four compasses, including items of the European Values Study and the World Values Survey which are related to the distributive and the communitarian cleavage, we get a basic list of fundamentally controversial political questions:

1. Which persons and agencies should be in charge of decision-making and government?
2. How do we solve national and international conflicts and breaches of the rules?
3. What is the value base of our society? Which role should religion play?
4. How should we include strangers and social minorities in the mainstream culture?
5. How should politics influence private life styles, gender relations and sexual behavior?
6. What impact should the state have on economy and property rights?
7. How should people get endowed with resources?
8. Which are the leading economic principles and how do they impact on the educational system?
9. What role should ecology play for the economic system?

These questions represent a political key concept helping teachers to choose controversial topics that foster political judgment skills. The following table compares the essential controversial issues that the different approaches use:³

³ From the European and the World Values Survey, I mainly chose similar basic items for the two political dimensions (for a similar selection and differences between both questionnaires see Knutsen 2009, appendix). The whole item sets are available on the surveys' internet sites.



Fig. 8: Highly controversial issues used in questionnaires on individual value orientation

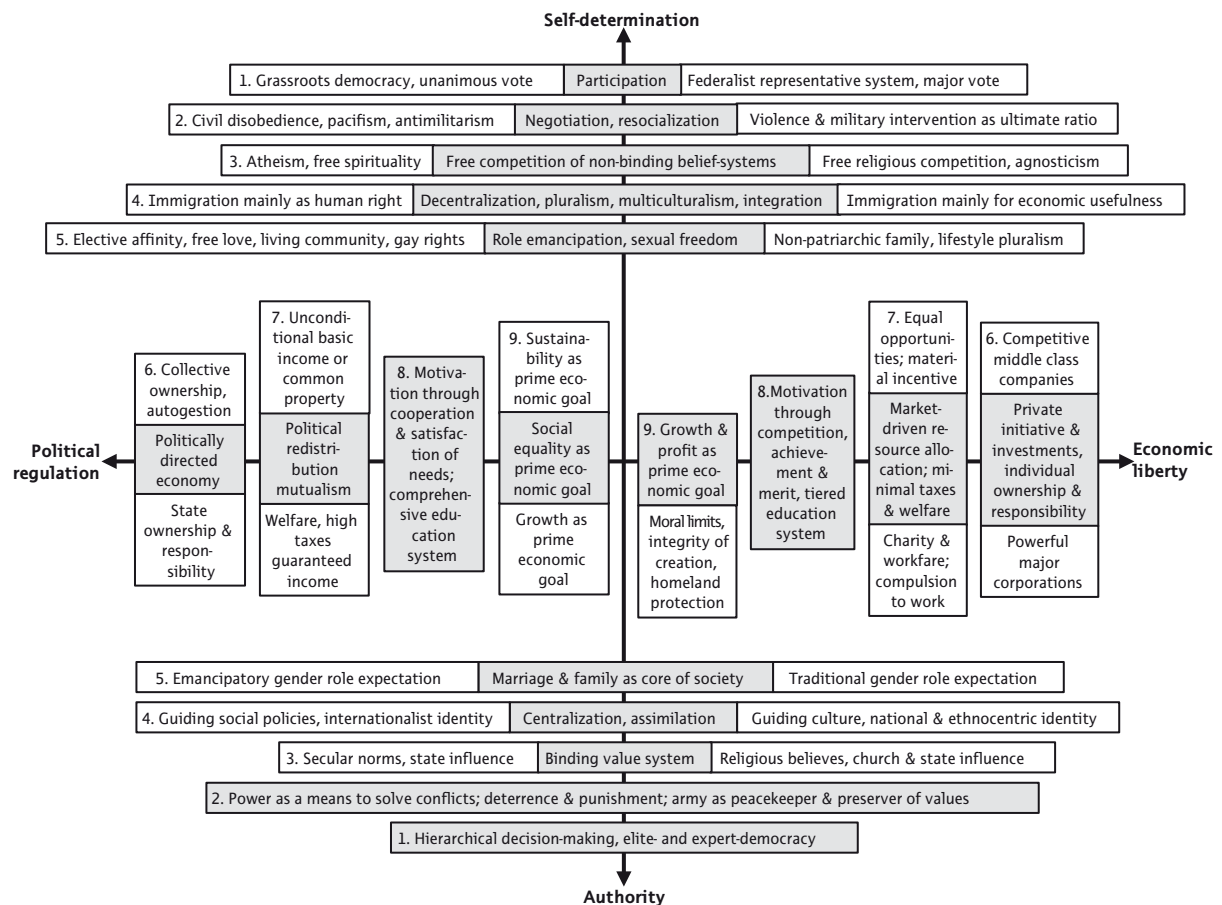
<i>Fundamental issues</i>	European & World Values Survey	Smallest Quiz	Political Compass	Electoral Compass	Moral Matrix
1. <i>Decision making & government</i>	Independence and deliberation vs. obedience in family and work, men's leadership, participation		Question authorities; one-party state; obeying and commanding		
2. <i>Conflict resolution and security</i>	Strong Defense, fighting crime, freedom of speech	Military service, censorship	Spank children, discipline, death penalty, rehabilitation, military action, civil rights and counter-terrorism	Gun control, Irak invasion; financial contribution to UN, Iran and world peace; Patriot act and civil liberties, defense spendings, death penalty, torture and security	Strong security & defense; respect of law versus causes of crime
3. <i>(Non-) religious value base</i>	Role of faith (God, Hell, Sin, Heaven...)		Religion in school, religion and morality	Creationism in science classes, stem cell research	God's existence & significance
4. <i>Inclusion and cultural identity</i>	Immigration; integration; strangers as neighbors	National ID card	Nationalism, race superiority, integration	UN, legalization of illegal immigrants	Patriotism, ethnic groups
5. <i>Private life styles</i>	Gender equality, drug abuse, homosexuality, abortion, imagination	Sexuality, use of drugs	Drug legalization, reproduction, gender roles, (same-sex) marriage, same-sex child adoption	Same-sex marriage, abortion	Equality of sexes, traditional & non-traditional life styles
6. <i>Property rights and economic leadership</i>	Private vs. government ownership	International free trade, government spendings	Corporate interests, privatization	Control of mortgage lenders, more public funding to public schools	Business benefit
7. <i>Resource allocation and redistribution</i>	Private vs. state responsibility; more equal vs. more different incomes; stable prices	Corporate welfare, private social security & charity; flat tax	Class division, welfare, charity	Tax raises vs. tax cuts for higher incomes, private retirement fund, medicare benefits, reduction of income equality, obligatory health care	Private or state-provided health care, charity
8. <i>Economic principles and educational system</i>	Competition fosters creativity vs. fosters bad features		Compulsory classroom attendance, job preparation as major aim of education	Higher wages for better teachers	Elite or equal education
9. <i>Ecology and economy</i>	Increased taxes, higher prices and/or less economic growth or jobs to protect environment		Regulations for environment protection	Exaggerated effects of global warming; carbon tax; climate change policies versus economic growth	Nature protection or exploitation

On the basis of these nine fundamental topics we can now specify the ultimate values of the Kitschelt-compass. The following version opens up the landscape of political controversy within democratic societies. The grey fields represent the corporate values of two adjacent ideologies while on the contrary the white ones refer mainly to one ideology that typically fills one quadrant (see fig. 2). This political map allows us at the same time to consider the possibilities of coalitions

and the contrasts between two ideologies sharing one ultimate value like authority, social equality, economic liberty or self-determination. It represents the important "value-bricks" of political ideology:



Fig. 9: The core curriculum of controversial distributive and socio-cultural values



Finally, I would like to summarize my “Found-a-Village-Project” (Petrik 2007; 2008; 2011). Its basic idea follows Adelson’s (1971) island-scenario as a framework for political identity development. The interviewed adolescents were asked to imagine a thousand people venture to an island to form a new society. Adelson then presented hypothetical laws and potential conflicts within the community to the youth. Should a law be passed to prohibit smoking? Should a dissenting religious group be vaccinated? Beyond that, my simulation of a deserted Pyrenees mountain village offers a more concrete institutional setting with traces of the traditional class structure, as well as a market place, a town hall, a prison and a church. Those institutions animate students more likely to debate basic political issues than the “naturalist” island. In each of the three acts, Kitchelt’s model plays an indirect or direct role:

Act one: “Discovery of controversial values”: The students get together for several town meetings to develop their own economic, political and cultural system. Those meetings are mostly highly controversial, inducing the students to establish basic debating rules. Some of the fundamental issues such as decision-making and the distribution of incomes are raised automatically, without the teacher having to

introduce them (genetic approach in the tradition of Dewey and Wagenschein). Later the teacher confronts the students with potential village situations that systematically launch the nine fundamental issues (see fig. 8 and 9).

1. Government: Should we elect a strong leader to solve personal conflicts and our economical crisis?
2. Conflict resolution: What should we do with a villager who stole 1000 € out of the common cash box?
3. Value base: Might we transform the church into a secular cultural center?
4. Inclusion: Should we accommodate four traditional Moslems from Algeria?
5. Private life: Who should decide about a village girl’s request to have an abortion?
6. Property rights: Do we accept an investor’s offer to buy one of the houses, transforming it into a hotel, building a road out of the small path, a parking on the market place, a telephone and internet line to attract more tourists?
7. Redistribution: Should the whole village pay for the reparation of the rotten roof of one of the houses?
8. Economic principles: Should villagers who are economically successful by inventing new cultiva-



tion methods, computer games etc. pay a special wealth tax?

9. Ecology: Do we want to invest in a wind powered generation and ecological farming by neglecting other possible investments?

Act two: "From values to ideologies": Now the village inhabitants get to know the four founding fathers of liberalism, conservatism, socialism and anarchism (term used as an equivalent to left-libertarianism, see above) Smith, Burke, Marx and Proudhon by original text passages. The students engage in role-plays (how would a liberal, socialist etc. village look like?) in order to learn to perform their different argumentation patterns. Later they work on developing a political compass integrating the four ideologies. Afterwards they compare their own solutions with Kitschelt's model.

Act three: "From ideologies to current politics": Finally, the villagers discuss controversial macro-political questions, like homosexual marriage, national referendums, climate change or the decline of the welfare state. First, by taking the four ideological perspectives in a role discussion and second, by stating their own point of views. So they pass through a learning path from the discovery of their proper values to political ideologies, systems and recent political issues.

I am currently using the village scenario to do case studies on "politicization types" as heuristics to deal with differently motivated political learning problems. A politicization type shows a typical argumentative and conflict resolution behavior depending on his or her basic political value orientation: An example might be latent conservative student who refuses to justify her/his claims since he/she views them as "natural" or a latent left-libertarian student who insults "dissident" villagers because of their unexpected opposition to egalitarian policies (see Petrik 2010).

Conclusions

Following the „Pragmatologic Theory of Models“ (Stachowiak 1973) Kitschelt's model appears to be a functional combination between overly simple and very complex alternatives. The one-dimensional left-right scale has always been insufficient, as it couldn't clarify, for example, the differences between an authoritarian and a libertarian left orientation. Furthermore, the ambiguous nature of (market-)liberalism between his "left-wing" civil rights orientation and his "right-wing" distributive position wasn't explained correctly. A three- or four-dimensional model would be less practical and less "dynamical". Second, it is not by accident that many scholars and publicists have chosen almost exactly the same coordinate system – most of the times without knowing each other. Every political system needs to deal with decision-making

and conflict resolution, the creation and distribution of wealth, religion, life styles and value change and inclusion of outsiders. These fundamental topics can be modeled by two dimensions in so far as most individuals, movements and parties seek a certain "average" congruence between their different communitarian and distributive insights. Supporters of authoritarian governments, for example, very rarely promote anti-authoritarian education.

By and large, Kitschelt's model is a good example of what the 'Psychology of Concepts' calls the "prototype view" (Murphy 2002, 488ff.): Here ideologies are not "classically" perceived as precise definitions but as variable concepts with strong "family resemblance". Prototypes like socialism or liberalism are summary representations of an entire category that overlap with other members of the category, without having attributes that all members (individuals, movements, parties) share. The resulting flexible operability is the major outcome of this model:

Ideologies can be contrasted and related. Hybrids can be mapped as well, see social democracy, social liberalism, Christian democracy or socialist and conservative variations of Communitarianism. Especially the New Social and Green movements can be seen in a left-libertarian and non-violent anarchist tradition. Fascism and Stalinism get contoured as two economically quite different, but at the same time similarly totalitarian extremes.

New political parties and movements can be asked for their special value cocktail. Possible coalitions between parties or movements can be proved regarding their ideological chances. Single political problems like unemployment can be compared for contrasting scientific and political solutions (see Hippe 2010).

The model helps relating every day values, social milieus and latent political orientations. Collective values shifts and backlashes can be traced. Contradictions between party platforms and actual political decisions can be mapped and explained as well.

Individual orientations can be located, even when dealing with incongruent "patchwork-identities" such as a religious socialist. An actual individual position represents an average, summary spot. The value deviations caused by special topics can be mapped as well. Students can learn to better articulate or alter their position and at the same time better understand their political counterparts as well as political parties and movements (see the top of this article).

Civic education teachers can use the model to test and widen their material's controversy. At the same time, they can assist their students to develop a tolerant and self-reflected political identity such as in the "Found-a-Village"-Project.

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Frank Reichert

Political Competences and Political Participation: On the Role of “Objective” Political Knowledge, Political Reasoning, and Subjective Political Competence in Early Adulthood¹

This article deals with the relation of objective political competences and the subjective assessment of one’s own political competence. The theoretical frame states that at least in early adulthood, only the subjective competence but not political knowledge is an autonomous and important determinant for (socio-)political participation, mediating the influence of objective political competences (or political knowledge, respectively). To test the role of subjective political competence and the (remaining) effect of political knowledge in early adulthood, empirical evidence using a sample of university students is presented. Cross-sectional analyses show that political knowledge has at least, if anything, an impact on voting, while fully mediated by subjective political competence relating non-electoral legal political activities. In contrast, the more profound competence of political reasoning has clear and stable positive effects on the intention to engage in non-electoral legal political actions – here subjective competence seems to be less important. Eventually, after a short excursus on school participation the findings are summarised and discussed by relating them back to framework and hypothesis. A concluding section proposes two opposing developmental-psychological considerations about the findings, raising further questions and giving an outlook into future research.

Keywords

civic education, political competence, political education, political efficacy, political knowledge, political participation, political reasoning

1. What it is all about: The concern of this article

Delli Carpini and Keeter (1996, 8) designate political knowledge as “the currency of citizenship” – thus, political knowledge is considered a significant resource for meeting the role of the politically active and involved citizen. But since the knowledge of politics among most citizens seems to be insufficient compared with what might be desirable for meeting the standards of being a “competent citizen” (e.g. Delli Carpini 2009; Delli Carpini, Keeter 1996; Maier 2000; Westle 2009; Westle, Johann 2010), the question raised here is whether or not it is the objective political knowledge or rather the subjective assessment of one’s own political competences which is (more) important in becoming an active citizen. Moreover, besides bivariate connections this article also looks on multivariate associations between the aforementioned variables. Therefore, the question is not only whether political knowledge is important for political action (tendencies) but also if subjective competence mediates the role of objective political competences (incl. political knowledge). Apart from political knowl-

edge, the role of political reasoning as another political competence is discussed either.

It is argued that, at least in early adulthood, only the subjective competence but not political knowledge remains an important determinant for (socio-)political participation, mediating the influence of objective political competence(s). To this end, in the next section the theoretical framework is referred, including the clarification of the central concepts, some empirical evidence for the assumption this article is based on, and the theoretical argumentation and hypothesis inherent. The then following paragraph deals with operationalisation and data collection. After that, my own empirical analyses are presented. The last but one section summarises the findings, relating them back to the hypothesis, followed by concluding theoretical considerations about developmental-psychological explanations of the findings and an outlook into future research.

2. Theoretical framework and empirical evidence

2.1 Political participation

Political participation can be understood as every activity which citizens take voluntarily to influence decisions of authorities on the different levels of the political system (Kaase 1992, 339). Therefore, political participation (or engagement which will be used interchangeable) is defined as any attempt to influence generally binding rules and decisions on any political level. Although there are many possibilities to differentiate the manifold political activities, here – by following for example Heß-Meininger (2000) – they are theoretically subdivided into *electoral* political participation (voting), *conventional*, “traditional” and more party-oriented or institutionalised political activities

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(e.g. supporting an election campaign), *unconventional*, less time intense or binding political participation (e.g. signing a political petition), and *non-normative*, illegal political (protest) activities (e.g. attending a violent demonstration) (cf. Barnes et al. 1979; Gabriel, Völkl 2008; Steinbrecher 2009; see also 3.3).

At the micro-level, the here relevant dimension where political competences belong to, one can identify three ways of explaining political participation (Verba et al. 1995; Steinbrecher 2009): *Resource* approaches take a closer look at the meaning of individual resources like *education*, income or age and gender. Personal *motives* are a second group of influential variables considered especially from the political culture perspective. They comprise not only individual values and attitudes, but also (political) interests, political trust, and political *efficacy*. Finally, the network or *social capital* approach has to be mentioned which starts from the assumption that political participation cannot be investigated independently from variables like interpersonal trust, social contacts and networks, and volunteering. Besides those attempts and by often falling back on variables mentioned as motives above for operationalisation, *rational* approaches assume that individuals get politically active if they think it is probable to satisfy their own needs to the highest possible extent (Steinbrecher 2009, 64 ff). In the following, although the focus is on political knowledge and other political competences, it should be kept in mind that competences by no means are the only variables that may be important in explaining political participation.

2.2 Political competences and participation

Drawing on the assertion that political competences are substantial for political participation, the first two approaches (and maybe the rational choice paradigm) mentioned above are of special interest: Subjective political competence can be seen as a motive or an attitudinal variable (i.e. “internal political efficacy”) while objective political competences are considered to be individual (educational) resources. In general, competences are relatively outlasting capabilities in dealing with specific demands. Thus, political competence is the ability to understand political facts and processes and to influence these with regard to one’s own interests (Gabriel 2008; Vetter 1997). It is the ability to judge politics and to act politically (Sander 2008, 73). However, as stated above competences can be objective ones or sometimes they rely just on one’s personal subjective assessment, and both of them seem to be very important in explaining political participation.

2.2.1 Objective political competences

Central objective political competences are the (actually existing) ability to analyse and judge political

incidents, problems and decisions on one’s own (*political analysing and reasoning*), to formulate one’s own political positions, convictions and opinions, and to advocate them in political negotiations (*capacity to act politically*), and *methodical abilities* (Detjen 2007; GPJE 2004; Krammer 2008; Sander 2008). In addition, *political knowledge* can be defined “as the range of factual information about politics that is stored in long-term memory” (Delli Carpini, Keeter 1996, 10). Political knowledge, especially conceptual knowledge – i.e. actual knowledge about political concepts and procedures –, goes as a basic precondition for the acquisition of the previously mentioned three competences (GPJE 2004; Krammer 2008; Richter 2008; Sander 2008). Therefore, the possession of political knowledge and its recall can be seen as a component of objective political competence: political knowledge is a “content-related competence” and, thus, a central part of political basic education and more or less a political competence itself (Richter 2008; Weißeno 2008) because it has to be acquired, must be stored and should be available. This claim is decidedly true since Torney-Purta (1995) states the political as a special and fourth basic knowledge domain besides biology, physics, and psychology – thus, politics require an own domestic-specific thinking and problem-solving on the foundation of domain-related knowledge.

As it is very difficult to adequately measure the four objective competences mentioned (incl. political knowledge), the focus is only on the cognitive dimension (and not on the methodical or agency dimension). On the one hand, this dimension contains the competence of political analysing and reasoning (short: political reasoning); on the other hand, political knowledge as contentual competence and basic prerequisite for all the other political competences is part of it (Schulz et al. 2010a). In addition, for political knowledge the differentiation between two facets seems reasonable: Johann (2010) stated that we have to distinguish between knowledge of political figures (i.e. “symbolic” political knowledge of political actors etc.) and knowledge of political rules (i.e. “structural” political knowledge, esp. knowledge of the polity). Although not totally separated, they still are distinct types of political knowledge (Westle 2005). Furthermore, this division is similar to what Jennings (1996) called “textbook knowledge” of the mechanics of the political system vs. “surveillance knowledge” of current political events and politicians, and that distinction is supported by Delli Carpini and Keeter (1996) as well.

Theoretical basis and empirical evidence. “Civic knowledge promotes political participation” (Galston 2001, 224), political competence is a precondition of the involvement into politics (Pickel 2002, 71) – these two statements summarise the actual research status quite well: More extensive knowledge about polity



(political structures), politics (political processes) and policy (political contents), and other political competences are presumed to enable and motivate to engage politically.

Especially Delli Carpini and Keeter (1996) have argued that knowledge of politics not only promotes the process of political identification but also influences other political competences and, thus, actual political participation. Defining knowledge as a personal resource and following the political culture school, this is in line with assumptions of resource approaches which usually look at socio-demographic variables like education to explain political participation. Civic education or political knowledge therefore is a critical aspect of acting as a citizen: "a well-informed citizen should be more likely to be attentive to politics, committed to democratic principles, feel efficacious, and engaged in various forms of participation" (Johann 2010, 5). If that is true, the promotion of political knowledge might appear as an exceptionally relevant task for every citizen.

Besides, Johann (2010) found that both knowledge facets – symbolic as well as structural political knowledge – were positively correlated with voting with a stronger association for symbolic knowledge. Furthermore, structural knowledge was positively related to unconventional political participation while symbolic political knowledge showed a negative effect on more conventional activities. At any rate, several studies underline the positive role of political knowledge as predictor for at least voting and conventional political participation (e.g. Amadeo et al. 2002; Krampen 2000b; Oesterreich 2003; Torney-Purta et al. 2001; Schulz et al. 2010a).

For political reasoning, however, empirical evidence is flawed. There are not many studies concerned with the role of analytical abilities in the political realm. But yet Schulz et al. (2010a) measured political knowledge using a considerable amount of items on political reasoning. At least this study indicates that among adolescents political reasoning is positively related to (intended) voting or conventional political engagement.

However, taking into account rational choice paradigms or action theoretical models of political participation as well, the question about the actual necessity of objective political competences (and political knowledge as a content-related competence) has to be raised: What if subjective components are sufficient in explaining political participation? How much do they explain in addition to objective competences (if the last have any explanatory value at all)? Here, by adapting the terms, subjective behavioural control (in action theoretical models) might be seen as partly equivalent to subjective (political) competences (resp. internal political efficacy). Following the action theoretical model it might be true that, controlled for each

other, not objective competence(s) but the subjective one is more important: Maybe it is about the personal control *convictions* and *feelings* of competence and not the real knowledge and ability (cf. Ajzen 1991; 2001; Bandura 1977; Krampen 1991; 2000a; 2000b; Ryan, Deci 2000; Vetter, Maier 2005)? What if subjective competence mediates the role of objective competences? That is going to be tested in the fourth section. Before that, evidence for the importance of subjective political competence is presented.

2.2.2 The role of subjective political competence

The concept "self-efficacy" is based on the distinction of "outcome expectations" ("a person's estimate that a given behavior will lead to certain outcomes") and "efficacy expectations" ("the conviction that one can successfully execute the behavior required to produce the outcomes") (Bandura 1977, 193). The second one is the estimation that the person itself is able to successfully act to gain the objective and can be named "subjective competence" or "internal efficacy". Based on Almond and Verba (1965), in terms of politics this concept means the individual's sensation or the *feeling* that one is capable to understand political facts and processes and to be able to take political influence. It refers to the feeling of being politically powerful on one's own and often is also designated as "internal political efficacy" (e.g. Campbell et al. 1954). On the contrary, external political efficacy as a feeling of political responsiveness has nothing to do with subjective political *competence* (Vetter 1997; Vetter, Maier 2005). Thus, the interest of this article is only on subjective political competence which is near-completely equivalent to internal political efficacy by definition. Both terms are used interchangeable (e.g. Koch 1993), but in the following for reasons of conceptual clarity the term subjective political competence is preferred (cf. Pickel 2002).

Empirical evidence. Empirical evidence for the meaning of subjective political competence draws an unequivocal image: Numerous studies show that subjective political competence (or internal political efficacy, self-concept of political competence) plays a significant (positive) role concerning political participation (e.g. Abravanel, Busch 1975; Janas, Preiser 1999; Krampen 1990; 1991; 2000b; Pickel 2002; Preiser, Krause 2003; Schmidt 1999; Schulz et al. 2010b). While Krampen (2000b, 290) states that "the variables of frequency of political activity in everyday life, self-concept of political competence, and political knowledge in adolescence are the most significant discriminators for voting versus nonvoting behavior of young adults", for Spannring (2008, 49) "the lack of political efficacy is one of the major obstacles to participation." For voting and conventional political activities, objective political knowledge obviously is



the key causal component (e.g. Amadeo et al. 2002; Oesterreich 2003; Torney-Purta et al. 2001; Schulz et al. 2010a), but if we want to predict participation in unconventional or non-traditional political activities, subjective political competence might be the more robust predictor (e.g. Fend 1991; Kuhn 2006; Schulz et al. 2010b).

That does not, however, answer the question at stake yet. Using multivariate regression analyses, Johann (2010) found that knowledge variables continuously showed stronger effects on political behaviour than subjective political competence. Interestingly, structural political knowledge but not subjective competence had a positive effect on unconventional (legal) political protest while “conventional” (in the terms of Johann “problem-oriented”) political participation was positively related to subjective political competence on the one hand, but negatively to symbolic political knowledge on the other.

Hence, the role of subjective vs. objective political competences is undoubtedly equivocal – especially since studies indeed find positive correlations between objective and subjective measures though just of moderate extent (Fischer 1997; Maier 2000; Westle 2005; 2006; 2009; Westle, Johann 2010). This implies that adolescents as well as adults are able to assess their political competence somewhat adequate, but ultimately the relation seems to be by no means perfect. Furthermore, these findings might support the assumption that both, objective and subjective competences have separate effects on political participation.

Additional influential variables. Finally, for central influential variables research usually finds higher levels of (objective as well as subjective) political competences for older and higher educated as well as male² adolescents (Fend 1991; Fischer 1997; Gaiser et al. 2005; Grönlund, Milner 2006; Kuhn 2006) – so these variables may explain differences in political participation, too. Additionally, since Schulz et al. (2010a) found that nowadays girls score higher in political knowledge, the role of political reasoning may make a considerable difference because that study put special emphasis on items related with this domain. In relation to political participation, young men are more often engaged in traditional, party-related as well as political protest activities while young women prefer participation in informal groups (e.g. Gaiser, de Rijke 2010). Furthermore, the existence of a migration background is negatively associated with diverse forms of political participation, but certainly differences in

education can explain this finding (e.g. Gaiser, de Rijke 2010; Heß-Meininger 2000).

Hypothesis. Before taking a closer look at my own empirical evidence, what is expected here and how could the expectations be explained shortly? – To sum up, I presume that the (perhaps in bivariate analyses existing) separate effect of subjective political competence *and* political knowledge on political action overlap and that in multivariate analyses subjective political competence is a stronger (or the only remaining) predictor of (intended) political participation. I follow the assumption of action theoretical models that control convictions – rather than (possibly even not known) objective competences – are most important to initiate political action. In addition, there might be different effects of (different kinds of) objective vs. subjective political competences on different forms of political engagement. As mentioned above, political knowledge seems to be important especially for voting while for other forms of political engagement subjective competence might be more important. Since several empirical studies have shown the importance of political knowledge for voting behaviour this mediation should not appear for participation in elections. Whether political reasoning yields another and different pattern than political knowledge or it is important for other forms of participation is also going to be examined: Probably there are different patterns and effects for political knowledge vs. political reasoning. Thus, subjective political competence is expected to mediate the statistical influence at least for non-electoral political engagement especially for political knowledge, whereas (due to missing substantiated empirical evidence) for political reasoning no specific pattern is hypothesised in advance.

3. Operationalisation of central variables and realisation of the study³

3.1 Sample and realisation of the study

Research was conducted in March/April 2010 as subsidiary part of a greater study with university students. To get a relatively homogeneous sample, only students who had the German citizenship and who acquired their school-leaving qualification in Germany are included because the assessment referred to the German polity (i.e. knowledge that should be learned at *German* schools). In this way, the sample consists of 76 university students of the local department of psychology.

At that department, every test subject filled in a paper-and-pencil-test answering the competence questions where the subjective measures were presented before the objective ones. Before that, the participants answered an online questionnaire about their past political activity and their intentions to engage

2 Besides, the pattern of wrong, correct and “don’t know” answers differs by gender (Westle 2005; 2006; 2009; Westle, Johann 2010) and women seem to possess less “conventional” political knowledge while performing better in the policy-knowledge dimension (Stolle, Gidengil 2010).

3 Analyses were calculated using Mplus 6 resp. SPSS 18.



in politics among other things. All questionnaires were written in German and all students got a special kind of credit which all of them need to complete their studies, so there should not be any motivation-based selection bias.

The mean age of the respondents is 23 years, ranging from 19 to 36 years of age. On average the participants were in the second (51 %) or the fourth semester of their studies (29 %). Most of the rest participated before the semester turn and were in their first semester at university (15 %). Corresponding to the gender distribution at the department of psychology most of the respondents are female (almost three of four). Furthermore, nearly half of them have a migration back-

ground whereas 53 % live in Germany for at least the third generation.

3.2 Operationalisation of political competence

Subjective political competence. A six-item index for measuring subjective political competence is used. The items were developed based on the work of Krampen (1991), Falter, Gabriel and Rattinger (2000), and Pickel (2002). The six-item index is of high internal consistency ($\alpha = .91$), and the confirmatory factor analysis confirmed the assumption that all items load on only one factor (Moosbrugger, Schermelleh-Engel 2007; see figure one).

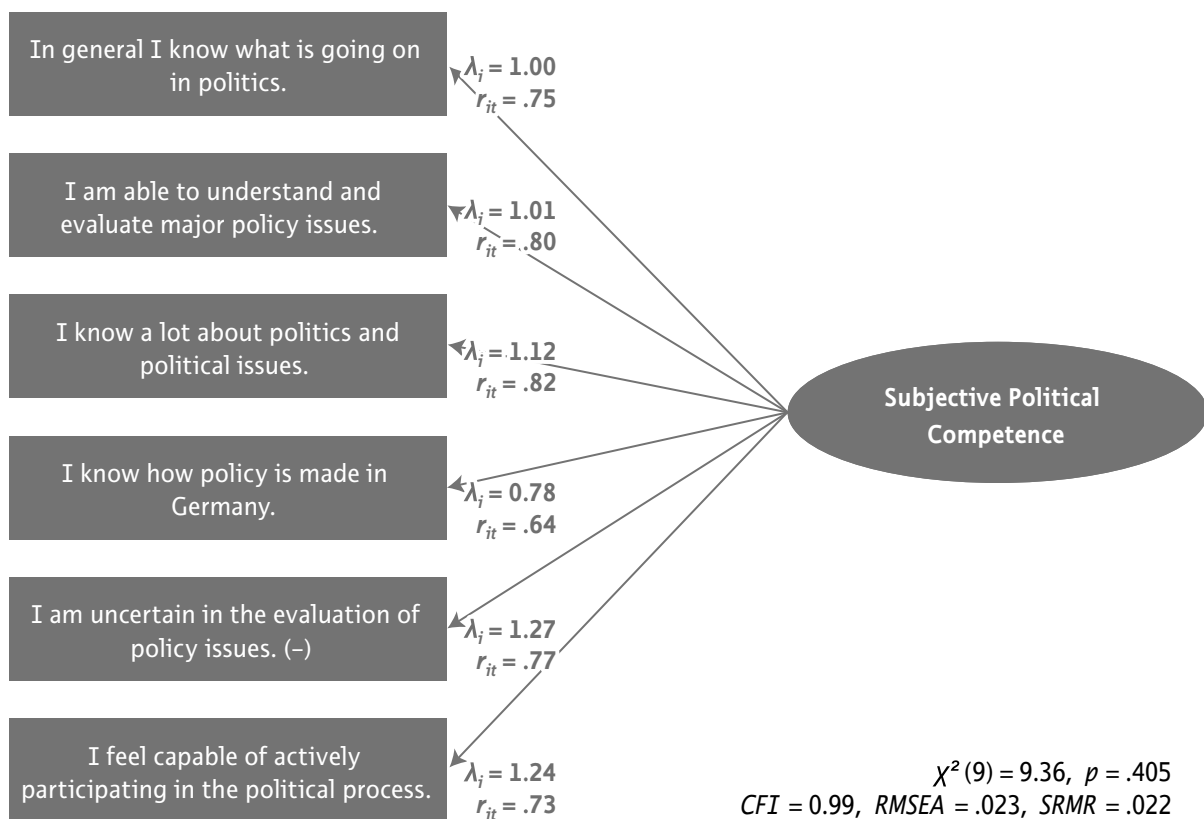


Figure 1: Confirmatory factor analysis for subjective political competence (unstandardised factor loadings (λ_i), item discriminations (r_{it}), and fit indices). (Items translated into English – original item language is German.) Scale marking: 0 = not true at all ... 4 = absolutely true.



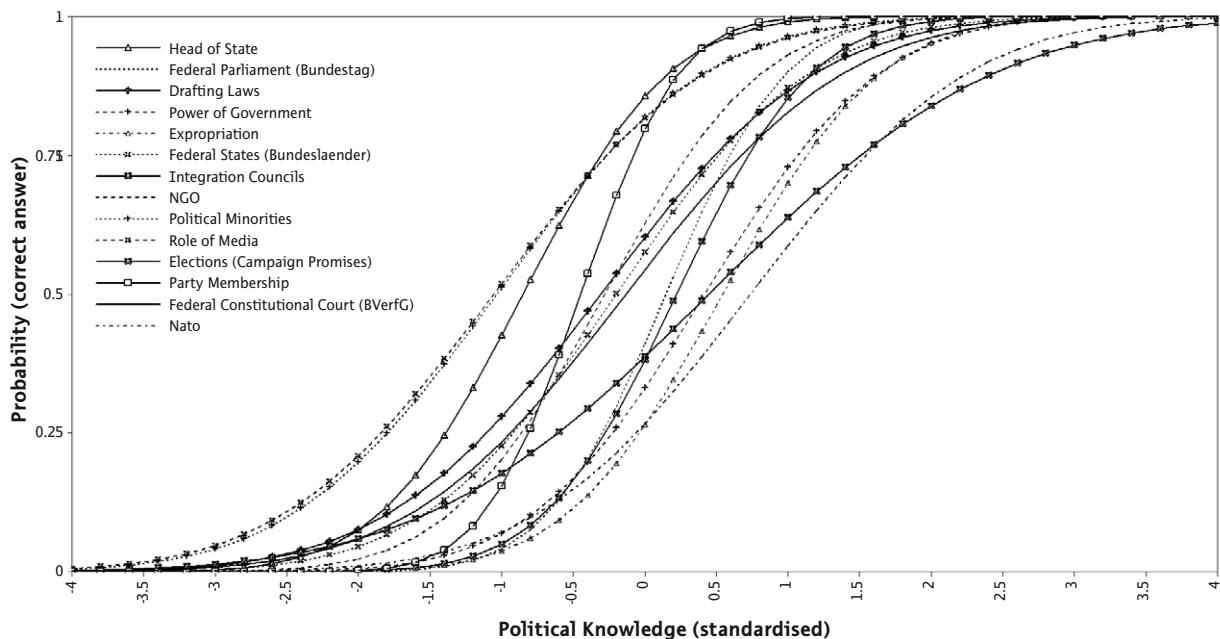


Figure 2: Item Characteristic Curves (ICC) for the 14 test items selected for analyses using a 2PL-Birnbaum model.

Objective political competence. For developing an original and (for university students) adequate political knowledge test I fell back on the work of Greve et al. (2009), Fend (1991), Ingrisch (1997), Krampen (1991; 2000b), Price (1999), Schulz and Sibberns (2004), and Westle (2006). According to a pretest, 29 items were selected for the final assessment⁴. After data collection, every knowledge item was dichotomised (wrong vs. right answer)⁵, and 15 items were removed due to missing selection criteria⁶. The 14 remaining items (figure two) showed a very good adaptation to a one-dimensional model (Hu, Bentler 1999; Muthén 2004) and, thus, were weighted by their item discrimination parameter (Rost 2004, 134 f) and summed to the

index “political knowledge”: $\chi^2(77) = 70.03$ ($p = .700$), $CFI = 1.00$, $RMSEA = 0.00$, $WRMR = 0.699$ ($\alpha = .73$).

Furthermore, because dichotomisation might have led to a loss of information and because structural knowledge may be overrepresented in the overall knowledge index despite weighting all items, two items measuring more or less symbolic political knowledge (i.e. “Elections” and “Party Membership”, see figure two) were differentiated into 13 binary items⁷. Though significantly correlated ($r = .67$, $p < .001$), this two-dimensional model again proved to be adequate: $\chi^2(274) = 278.89$ ($p = .407$), $CFI = 0.99$, $RMSEA = 0.15$, $WRMR = 0.796$. Therefore, besides the overall knowledge index two weighted indices for symbolic ($\alpha = .86$) and for structural political knowledge ($\alpha = .67$) were constructed as well (see also 2.2.1; Delli Carpini, Keeter 1996; Jennings 1996; Johann 2010). Moreover, all analyses were calculated for both dimensions separately as well as for the overall knowledge index (only the results for the last one will be reported unless there are significant differences compared with the other two despite the strong correlation between both dimensions).

In addition to the factual knowledge items, the students were presented three open question forms to measure their ability to political analysing and reasoning, modelled on Andreas et al. (2006) and Massing and Schattschneider (2005). Approximately one

4 Most of the items were multiple choice items with one correct and three incorrect options. The complete test can be obtained from the author.
 5 Although correct knowledge, wrong knowledge and missing knowledge (“don’t know” or leaving the question out) are different aspects (e.g. Johann 2008; Mondak 1999), missing values were treated as wrong answers. This is in line with the usual definition of knowledge which includes that one has to believe that one’s own answer is correct, and with the finding that answering “don’t know” indeed seems to indicate missing knowledge (e.g. Luskin, Bullock 2005). Furthermore, there are too little cases to undertake separate analyses regarding this question.
 6 A 2PL-Birnbaum model was modelled and tested (a guessing parameter was not introduced for several reasons). To compute the knowledge variable(s), classic and probabilistic test theory were combined (cf. Bortz, Döring 2006; Greve et al. 2009; Kelava, Moosbrugger 2007; Moosbrugger 2007; Rost 2004): Finally, only items with item difficulties within the interval $0.20 \leq p_i \leq 0.80$, with item discriminations $r_{it} > .20$, and which contributed significantly and positively to the construct were included (for symbolic knowledge, the criteria were softened slightly; see below).

7 That is possible due to the question form of these two items because here all respondents had to match parties and their campaign promise(s) resp. (socio-)political organisations and corresponding representatives. For structural knowledge, each of the resulting 13 items was coded 0/1 (incorrect/correct match) (whereas for the overall index these items were coded 0 for a maximum of 50 % correct matches and otherwise 1).



month after data collection, the answers were rated by two prospective teachers (male and female), and rerated four to six weeks later. The resulting coder reliabilities are all acceptable ($CR > .69$). Thus, the index "political reasoning" was computed using the mean of the ratings and adjusting them to a range from zero to one ($\alpha = .73$).

Table one in section four (4.1) presents the means, standard deviations and inter-correlations as well as Cronbach's Alpha for the competence and the political engagement variables. It can be seen that political competences are slightly above the scale centre. In addition, some significant statistical differences with regard to socio-demographic variables exist: Men score higher both on the knowledge indices (overall index: $t = -4.01, p < .001$; structural knowledge: $t = -2.92, p = .005$; symbolic knowledge: $t = -6.16, p < .001$) and on the subjective competence variable ($t = -3.80, p < .001$). Besides, for political reasoning and age a negative correlative association is found ($r = -.25, p = .029$). Migration background is not significantly related to any competence measure.

3.3 Measuring political participation

All respondents stated whether they had voted in the German parliamentary election in 2009, participated in conventional political activities (dichotomised measure of two items, e.g. participated in an election campaign), unconventional behaviour (sum index with five items, e.g. signed a petition), and non-normative, illegal political protest (sum index with 6 items, e.g. blocked a house for political reasons) (no/yes for each item). For instance, this allocation is broadly analogous to Gaiser et al. (2010) and Heß-Meiningner (2000). Moreover, every student answered how likely he or she will participate in one of those actions in the future (0 = definitely not ... 4 = definitely). However, for electoral participation they were asked about any future political election in Germany. For illegal activities, with regard to social desirability of the responses, the students answered how much they sympathised with people taking part in those activities (0 = do not understand at all ... 4 = completely understand). The dimensionality for conventional ($\alpha = .47, r = .31$) vs. unconventional activities ($\alpha = .81$) as well as for non-normative political protest ($\alpha = .86$) was verified using principal components analysis.

Additionally, the students were asked if they had participated as pupils at their school, i.e. if they had been a member of the pupil representation, class or vice-class president, or if they had been engaged in a protest movement at their school (no/yes for each item). Furthermore, they stated how probable they will engage in several activities at their university (0 = definitely not ... 4 = definitely). These activities are: voting in an election to the student council, attending a student assembly, participating in a protest movement, becoming a member of the student council ($\alpha = .81$).

On the one hand, a high readiness to engage in future elections, a low appreciation of non-normative political protest and a missing actual as well as intended engagement in conventional actions is noticeable (table one, 4.1). On the other hand, school participation (performed in the past) differs substantially according to the respective activity asked for, whereas the readiness to engage at university is quite low (table four, 4.4). Moreover, men participated more often in conventional and illegal political activities in the past but are less likely to vote in future elections. Furthermore, younger students tend to be more sympathetic for non-normative political protest and again the existence or absence of a migration background shows no significant bivariate association with any of the variables of interest.

4. Empirical evidence: Students and the subjective-objective-question

4.1 Bivariate correlative analyses

According to the (bivariate) inter-correlations of the variables of interest (table one), subjective competence is a strong predictor of (intended and past) political participation throughout – with exception of intended participation in future elections and acceptance of non-normative participation. What can be seen, too, is that structural political knowledge is significantly associated with political analysing and reasoning and with participation in the election while there is a tendentious positive correlation with unconventional participation in the past. Knowledge is only with conventional participation associated significantly. However, symbolic political knowledge shows a medium and negative effect on the acceptance of illegal political activities.

Table 1: Means, standard deviations, internal consistency, and inter-correlations of the central variables¹

	<i>M</i> ²	<i>SD</i> ²	α^2	Political competences (objective/subjective)					Political participation (past)				Political participation (intention/sympathy)				
				01	02	03	04	05	06	07	08	09	10	11	12	13	
01 Political knowledge (overall index) (0...7.476)	4.07	1.68	.73														
02 Structural knowl- edge (0...5.892)	3.25	1.33	.67	.96***													
03 Symbolic knowl- edge (0...9.742)	6.41	2.76	.86	.79***	.21*												
04 Political reasoning (0...1)	0.63	0.19	.73	.21*	.57***	.23*											
05 Subjective compe- tence (0...4.286)	2.17	0.91	.91	.21*	.57***	.23*	.12										
06 Voting in general election 2009 (0/1)	0.87 ³	0.34	-. ⁴	.12	.24*	.12	.23*	.12									
07 Conventional partic- ipation (0/1)	0.16 ³	0.37	-. ⁴	.09	.11	.09	.20*	.19	.41***								
08 Unconventional par- ticipation (0...5)	1.82	1.31	.55	.11	.20*	.09	.20*	.38***	.30**								
09 Non-normative/ illegal participation (0...6)	0.61	1.26	.76	.03	.06	.03	.06	.30**	-.01	.44***							
10 Voting (0...4)	3.72	0.81	-. ⁴	.06	.34**	.28*	.09	.44***	.24*	.19*							
11 Conventional partic- ipation (0...4)	0.91	0.82	-. ⁴	.28*	.09	.17	.25*	.24*	.17	.13							
12 Unconventional par- ticipation (0...4)	2.19	0.98	.81	.17	.09	.17	-.09	.25*	-.09	-.20*							
13 Non-normative/ illegal participation (0...4)	1.69	0.76	.76	.02	.47***	.47***	.53***	.47***	.47***	.53***							

- 1 For all variables, the range is given in brackets in the first column.
- 2 *M* = mean, *SD* = standard deviation, α = Cronbach's Alpha.
- 3 The mean corresponds to the percentage of respondents who engaged in the mentioned activity/activities.
- 4 Index consisting of only one or two items. Thus, Cronbach's Alpha is not reported.
- 5 Significant correlations are denoted as follows: ***: $p \leq .001$, **: $p \leq .01$, *: $p \leq .05$; +: $p \leq .10$

In the following, regression analyses for past political engagement and intended political participation are presented. The predictor variables were entered in four blocks: first the knowledge or reasoning variable(s), then subjective political competence, finally socio-demographic control variables (age, gender, migration background), and in a last step the related past political activity variable was also included (for the intention variables as criteria). With respect to the small sample size, more than the mentioned controls could not be considered as further variables in the analyses⁸.

8 According to the empirical evidence reported in chapter two and since educational level is equal for all respondents, these three are the most important socio-demographic control variables to be considered. Furthermore, it should be noted that age and gender are not normally distributed, i.e. there were more women and more than 77 % between 19 and 23 years old. Because one respondent did not answer the question about gender, in the third step the sample size is reduced to $n = 75$. Nonetheless, the findings for the first two steps also hold if this case is excluded.

4.2 Past political activity

Past political activity is not logically dependent on actual political knowledge but one may argue that the knowledge might have already existed before the engagement (especially since the respondents were young adults and had already left school; cf. Jennings 1996). Because of this (cross-sectional) difficulty of the causal relation between knowledge and engagement, the two relevant regression analyses are just presented in brief. Here only the knowledge variables were included while later a further look on the reasoning variable follows⁹.

According to the *t*-test, students who voted in the election to the German parliament in 2009 obtained

9 This is because of the missing bivariate correlations between political reasoning and past political activity. Likewise, additional multivariate analyses with past engagement as dependent variables yielded no significant results for political reasoning.



significantly more points in the knowledge test than students who did not vote. This is true especially for structural political knowledge ($t = 2.13$, $\beta = .24$, $p = .036$): students who participated in the election are more knowledgeable than those who did not participate while there is no such relation for subjective political competence. Furthermore, while the overall index of political knowledge is not significantly related to participation in the election in the logistic regression analysis (with voting as *criterion*), structural political knowledge is ($Wald = 4.03$, $OR = 1.79$, $p = .045$; $Nagelkerke-R^2 = .11$). As already in the t -test, subjective political competence is not significantly related to the criterion of interest in the bivariate logistic regression model ($Nagelkerke-R^2 = .07$), and including this variable into the analysis with political knowledge loosens the significance of the knowledge variable without explaining much more of the variance in the criterion ($Nagelkerke-R^2 = .12$). Including control variables does not change the observed pattern, but excluding the subjective political competence leads to (sometimes marginally) significant results for the structural knowledge variable. In summary, political knowledge – especially the structural facet of it – might be the more important variable in explaining participation in political elections (though political knowledge is not significantly related to voting intentions it may, however, be a determinant of *actually executing* the behaviour).

Looking at the ordinal regression analysis for participation in unconventional political activities in the past one finds a positive and significant effect of the overall index of political knowledge ($Wald = 3.60$, $OR = 1.28$, $p = .048$; $Nagelkerke-R^2 = .05$). Interestingly and as hypothesised, including subjective competence drops the knowledge variable out of significance

($Wald = 0.06$, $OR = 1.04$, $p = .809$) while only the newly included variable is significant ($Wald = 6.78$, $OR = 2.10$, $p = .009$; $Nagelkerke-R^2 = .13$). This time it seems that subjective political competence is the more powerful predictor of political engagement (figure three), because the mentioned result holds even if control variables are included. In any case, the “mediation” of political knowledge via subjective competence is statistically significant (Sobel test: $z = 2.85$, $p = .004$) (though one should be careful to speak of a fully mediation because of the cross-sectional difficulty regarding the causal direction).

4.3 Readiness to engage politically in the future

For political knowledge, only the intention to participate in conventional political activities in the future shows a significant and positive association (except the positive relation between symbolic knowledge and acceptance of non-normative political actions, see below). The two-step analysis with political knowledge and subjective political competence clearly confirms the assumption (figure three): Though structural knowledge is significant in the first step ($t = 2.11$, $\beta = .24$, $p = .038$; $R^2 = .06$), in the second step this variable drops off significance ($t = -0.11$, $\beta = -.01$, $p = .913$). Then only subjective competence is a predictor of readiness to participate conventionally ($t = 3.50$, $\beta = .45$, $p < .001$; $R^2 = .19$). Again, the Sobel test confirms a significant mediation ($z = 3.01$, $p = .002$). Considering the socio-demographic control variables or/and past political activity, only subjective political competence remains significant. Consequently, political knowledge seems to be wrapped up in the subjective measure of competence and therefore does not have explanatory power itself anymore.

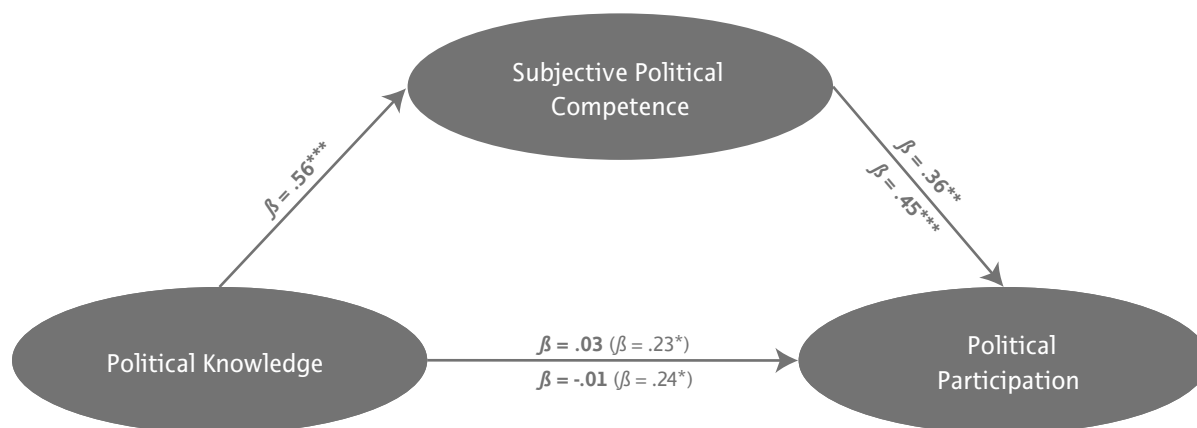


Figure 3: Subjective political competence as mediator of overall political knowledge for the criterion (1) participation in unconventional political activities in the past (above), respectively (2) willingness to conventional political participation in the future (below) (standardised coefficients).

***: $p \leq .001$, **: $p \leq .01$, *: $p \leq .05$

Interestingly, this pattern does not hold for political reasoning and analysis (table two). If political knowledge is replaced by the variable just mentioned, both political reasoning as well as subjective political competence are significant and positive predictors of readiness to engage in conventional political action (model one). Thus, the statistical importance of the objective ability to analyse and think in political contexts is more or less independent from the influence of subjective

political competence – even when controlled for socio-demographic variables (model four). Model two further indicates that objective political knowledge is not independently associated with the intention to participate. In addition, models three and five show that participation in past conventional activities does not change anything, although it might be surprising that reported (past) behaviour is not importantly related to the intention to act in a similar way in the future.

Table 2: Linear regression analyses for readiness to participate in conventional political actions (standardised coefficients)

	Model 1		Model 2		Model 3		Model 4		Model 5	
	β	<i>t</i>	β	<i>t</i>	β	<i>t</i>	β	<i>t</i>	β	<i>t</i>
Political reasoning/analysing	.279**	2.75	.286**	2.78	.280**	2.76	.244*	2.25	.242*	2.23
Subjective pol. competence	.394***	3.88	.428***	3.50	.359**	3.23	.470***	4.07	.437***	3.56
Political knowledge (overall)			-.062	-0.51						
Past conventional pol. activity					.086	0.78			.090	0.80
Age							-.076	-0.72	.083	0.78
Gender (female/male)							-.150	-1.31	-.159	-1.38
Migration background (no/yes)							-.042	-0.40	-.043	-0.41
<i>R</i> ²	.268		.271		.274		.297		.303	

***: $p \leq .001$, **: $p \leq .01$, *: $p \leq .05$

Remarkably, this analysis yields a different result than the following one, where the willingness to participate in unconventional political activities in the future is the criterion (table three). This time, again the ability to political reasoning remains positively and significantly related to the criterion. But the index for subjective competence loses its significance (model one). Therefore, not the subjective perception of being a politically competent citizen seems to be important but the objective ability to analyse political contexts and to argue politically. However, when controlled for the three socio-demographics, subjective political competence regains its previous

significance (model three). But still it should be noted that the objective competence variable appears to be a very important predictor of readiness to engage in (non-electoral) legal political actions in the future, whereas the subjective competence variable may vary in its effect depending on the items included. This conclusion is supported by models two and four where one can see that under control for past political activity (which itself is a very important positive predictor) only the objective measure of political reasoning is significantly and positively related to the intention to engage using unconventional but legal political means.



Table 3: Linear regression analyses for readiness to participate in unconventional political actions (standardised coefficients)

	Model 1		Model 2		Model 3		Model 4	
	β	<i>t</i>	β	<i>t</i>	β	<i>t</i>	β	<i>t</i>
Political reasoning and analysing	.246*	2.20	.244**	3.15	.281*	2.41	.240**	2.97
Subjective political competence	.204+	1.83	-.079	-0.94	.267*	2.15	-.005	-0.06
Past unconventional pol. activity			.737***	8.92			.726***	8.77
Age					.083	0.72	-.026	-0.33
Gender (female/male)					-.207*	-1.68	-.173*	-2.03
Migration background (no/yes)					.139	1.22	.068	0.86
<i>R</i> ²	.118		.581		.185		.617	

***: $p \leq .001$, **: $p \leq .01$, *: $p \leq .05$, +: $p \leq .10$

Finally, in table one, symbolic political knowledge is positively related to the acceptance of illegal political protest. No other variable shows any significant bivariate association to the last-mentioned activities, and even in multivariate analyses when subjective competence, participation in non-normative political activities in the past or/and the three socio-demographic variables are entered into analyses, symbolic knowledge is tendentially significant (while only non-normative past political behaviour itself is significant) (no table). Under additional control for structural political knowledge, symbolic political knowledge is still significantly related to sympathy for illegal political participation ($t = 2.04$, $\beta = .30$, $p = .046$; $R^2 = .37$).

4.4 Excursus: Participation in school and at university

The correlative results for school and university engagement are presented in table four (correlations with political participation are not discussed in detail though presented in brief). Additional *t*-tests yield that former participants in a pupil representation at school score higher on nearly all competence vari-

ables: they have more political knowledge (overall index: $t = 2.21$, $p = .031$; structural knowledge: $t = 2.23$, $p = .028$), a higher ability to political reasoning ($t = 2.00$, $p = .049$), and they report significantly higher subjective political competence ($t = 2.42$, $p = .018$). Surprisingly, the answer on that variable results in no bivariate difference for political participation.

Students who had been (vice-)class president at school are also more subjectively competent ($t = 2.49$, $p = .015$), but furthermore, they more often participated in the general election in 2009 ($t = 2.18$, $p = .036$) and unconventional past political activities ($t = 2.31$, $p = .024$). Moreover, they report a higher willingness to engage in unconventional political actions ($t = 2.04$, $p = .045$). Finally, students who were part of a protest movement at their school feel subjectively more competent ($t = 3.47$, $p < .001$), are more likely to have participated in conventional ($t = 2.38$, $p = .021$), unconventional ($t = 2.75$, $p = .008$), as well as non-normative political activities in the past ($t = 2.02$, $p = .049$), and they are more willing to participate in conventional political activities in the future ($t = 2.41$, $p = .018$).



Table 4: Correlations between participation at school/university and political competences and political participation

		<i>Member of pupil representation at school</i>	<i>(Vice-)Class president at school</i>	<i>Participation in school protest movement</i>	<i>Readiness to participate at the university</i>
Mean		0.33 ¹	0.66 ¹	0.42 ¹	1.83 ²
Standard deviation		0.47	0.48	0.50	1.00
<i>Political competences (objective/subjective)</i>	Political knowledge (overall)	.25*	.18	.17	.12
	Structural knowledge	.25*	.20*	.19*	.10
	Symbolic knowledge	.18	.09	.18	.10
	Political reasoning	.23*	.13	.03	.17
	Subjective pol. competence	.27*	.28*	.37***	.33**
<i>Political participation (past)</i>	Voting in general election 2009	.18	.29*	.18	.23*
	Conventional participation	.00	.08	.29*	-.11
	Unconventional participation	.16	.26*	.30**	.62***
	Non-normative/ill. participation	.18	.11	.25*	.52***
<i>Political participation (intention/sympathy)</i>	Voting	-.04	.06	.16	.22*
	Conventional participation	.13	.11	.27*	.31**
	Unconventional participation	.16	.23*	.20*	.74***
	Non-normative/ill. participation	.13	.16	.07	.49***

1 Mean corresponding to the percentage of interviewees that executed the activity.

2 Range: 0..4.

***: $p \leq .001$, **: $p \leq .01$, *: $p \leq .05$; *: $p \leq .10$

One should be aware that this behaviour took place in the (obviously since many month if not years closed) past. Therefore, in the following the competences are modelled as dependent on school engagement. Here a mixed pattern can be found: firstly, the membership in a student representation is a significant predictor of political knowledge ($t = 2.21$, $\beta = .25$, $p = .031$). Controlled for socio-demographics, significance slightly exceeds five per cent ($t = 1.96$, $\beta = .21$, $p = .054$) (male gender, then, is positively significant). Secondly, while for political reasoning having been a student representative is only narrowly significant in the bivariate regression analysis ($t = 2.00$, $\beta = .23$, $p = .049$), its p -value declines under control for the socio-demographic variables ($t = 2.12$, $\beta = .24$, $p = .031$) (age has a significant positive effect). And finally, for subjective political competence one finds a comparable result: the bivariate finding ($t = 2.42$, $\beta = .27$, $p = .018$) remains nearly stable in the multivariate analysis ($t = 2.22$, $\beta = .23$, $p = .030$) (male gender is significantly related to that criterion). For having been the (vice-) class president at school and for participation in a school protest movement the bivariate findings related to political competences do not change. To sum up, participation in school seems to be of higher predictive value for subjective competence and political reasoning while for knowledge school participation

is not such an important predictor any longer when controls are included.

Lastly and as depicted in table four, in bivariate analyses only subjective political competence is significantly and positively related to the readiness to participate at university in the future. Furthermore, all three items for past participation at school correlate only marginally with that intention ($.20 < r < .21$ with $.05 < p < .01$), and detailed analyses do not reveal any considerable result regarding objective competences either, so no detailed analysis is presented.

5. Summary of main findings

In summarising the findings, the hypothesis was confirmed at least partially: Indeed, political knowledge (esp. its polity facet) seems to have an original or at least a stronger effect on voting than subjective political competence. Since that could not be verified for the intention to vote in future elections the finding remains equivocal¹⁰. Nonetheless, for (past) unconven-

10 However, the different links between political knowledge and voting in 2009 resp. intentions to vote may be due to the fact that the intention was not merely related to general elections but also e.g. local elections. If in contrast voting had influenced actual political knowledge one probably would have expected a stronger association for symbolic than for structural knowledge.



tional political activity as well as for intended conventional political participation a complete mediation of political knowledge via subjective political competence was found. These results are in line with international research (e.g. Schulz et al. 2010a; 2010b) and support the hypothesis that political knowledge may be more important for voting, whereas for non-electoral normative accepted engagement knowledge is mediated through subjective political competence. In addition, already bivariate analyses indicated the very relevance of subjective competence for non-electoral political participation as well as for the intention to engage at university. Consequently, subjective political competence may be important for political activities that require higher effort than merely going to the polling booth and casting one's vote.

Surprisingly, the pattern for political reasoning is quite different, indicating that it differs qualitatively from political knowledge: For the intentions to engage in conventional and unconventional political action the competence of analysing and reasoning has strong and more stable positive effects than subjective political competence throughout. Although the subjective competence variable predicts political action, analytical abilities are something different with original potential to predict engagement or behavioural intentions (that are strong predictors of actual action; Ajzen 2001). Thus, the role of subjective competence may vary in its effect on intentions to engage in legal political activities depending on (profound) objective competences.

Finally, in multivariate analyses gender was the only socio-demographic control variable that sometimes emerged as significant predictor of participation. The effects for gender coincide with actual research since young women are more likely to engage in unconventional political activities while (at least in bivariate analyses) young men seem to be "conventionally" active (e.g. Gaiser, de Rijke 2010). Missing significances for age may be due to the homogenous age distribution within the sample, and the absence of effects of migration background might appear because of the same level of education of all respondents (German A level).

6. A developmental perspective? – Concluding remarks, additional theoretical considerations and future analyses

Conclusively, some further findings remain to be considered in addition. For example, since there is a significant effect of political reasoning on intentions to engage legitimately but not on actual/past behaviour, this finding should be questioned in detail. Possibly that can be interpreted as evidence for an alternative assumption: Maybe the students had not been competent enough in the past but now they have devel-

oped their ability to reasoning to a great extend so that this competence evolves its original effect only now. In contrast, knowledge as possible precondition of political reasoning could be wrapped up in the subjective assessment of one's own political competence in university students whereas now political reasoning emerges as an independent causal component of participation. Conversely, it could also be that students who are more competent in the way of political reasoning tend to state that they intend to engage legitimately because they might perceive political engagement as (allegedly or actually) social desirable.

However that be, the mentioned finding gives chance to consider two antagonistic ideas of possible relations between different political competences and political participation from a developmental perspective: A1 – On the one side, it is reasonable that – presumably because of the adjustment or adaptation of the subjective to the objective competence – while for children the objective measure might be an independent predictor of actual participation on its own (above or at least besides subjective competence), for grown-ups (starting from late adolescence) the subjective measure is probably just as good as or maybe even better than the objective dimension of political competence in predicting real political participation. A2 – On the other side, conceivably because of the children's rudimentarily political knowledge, an elementary ability to reasoning, and also missing possibilities to engage politically, merely their subjective competence may be a predictor of intentions to engage in politics. When the objective competences are developed (in late adolescence or early adulthood), however, these possibly absorb the importance of subjective competence. Therefore, in the following some theoretical considerations on aspects of development of political identity during adolescence and early adulthood are depicted shortly.

Following Oerter and Dreher (2002; Fend 1991; Reinders 2003; Torney-Purta 2004), in adolescence the attitudinal foundations for a socially responsible participation in society are set and political identity evolves. Most important for taking on political responsibility as a citizen is early adulthood, meaning that from age 18 on the young adult does not merely think about social and political coherences but also increasingly tries to participate in society and in the political realm (Krampen, Reichle 2002; Oerter, Dreher 2002). Hence, the developmental-psychological and the social cognition perspective can be combined with the action-theoretical model of political participation: Cognitive and moral development are narrowly associated with the development of political attitudes and competences (political reasoning and opinion making, political activity as part of finding one's own identity), and (subjective) political competences are necessary to engage in political action (e.g. Preiser 2002; see also



sections two and four). That also includes the acquisition of political knowledge as a foundation for other political competences (2.2). Thus, while the media usually depicts the political in singular cases, people normally acquire their factual political knowledge and knowledge about the political system by attending civic education classes at school (e.g. Rippl 2008; Rattinger 2009). In addition, schools may foster other competences like cogitation, too, thereby setting possible prerequisites for active political participation. However, when the pupil has come of age (in a political sense), on average, big growth of political knowledge cannot be expected any further because of the now missing structured civic education (which appears to be very important for the acquisition of at least structural political knowledge; e.g. Jennings 1996).

Simultaneously, when children grow older they usually tend to judge their competences in a more realistic way (Butler 2005). Applied to the matter at stake, younger children often overrate their abilities, i.e. they might tend to overrate their actual political competence. But as they grow older, they should learn to rate their (subjective) political competence similar to their objective competence. Thus, the just mentioned two considerations A1 and A2 are imaginable: While during childhood both dimensions may be original and more or less distinct determinants of political action, the special role of objective competence (or at least political knowledge as prerequisite of other political competences) might now be completely adapted on or added up in the subjective competence. Therefore, the role of objective political knowledge or competences might statistically and at first sight diminish in favour of subjective competence (A1).

Reversely, it is reasonable that due to only elementary education during childhood merely subjective competence may be a predictor of intentions to engage in politics. When the objective competences are developed, however, these possibly absorb the importance of subjective competence or emerge as equal and independent predictors besides subjective political competence (A2)¹¹. Thus, while children and young adolescents probably have not developed their political competences completely, they perhaps intend to participate in future elections but not in other political activities (e.g. Schulz et al. 2010a; 2010b) because they even are not and potentially also do not feel competent enough to engage in the last-mentioned. Therefore, maybe only children who feel competent intend to engage in other forms than voting whereas from late adolescence on people may have evolved objective political competences so these could develop original effects on several forms of political engagement besides voting.

11 That could explain the findings of Johann (2010) referred in section two (2.2.2) since he analysed a sample of adults.

To summarise the preceding considerations, the main hypothesis this article is based on would refer to A1: Since during childhood and early adolescence objective competence and subjective assessment differ considerably, both may have separate effects on participation independent of each other – what is presumed not to be true in early adulthood. Possibly, due to civic or social engagement in school as well as civic education, subjective political competence raises and with it the readiness to participate in political action. The perhaps existing separate effect of subjective and objective political competence on participation may more and more overlap because of the more realistic estimation of one's own competence according to school assessments and the growing actual political knowledge acquired through civic education classes and the media.

At least for the mediation of political knowledge via subjective competence on conventional participation in the past and intended unconventional engagement in early adulthood empirical evidence was presented. However, for political reasoning no such mediation appeared. This result might be indication for A2, and it could also be interpreted in the way that political knowledge as prerequisite of political reasoning diminished in favour of subjective political competence as well as objective political reasoning. However, there is no strong correlation between knowledge and reasoning so this assumption is slightly precarious. Nevertheless, without longitudinal data no profound and ultimate proposition is possible – but it seems absolutely reasonable that various kinds of political competence and different facets of political knowledge have more or less *diverse effects on various forms of political action!*

Moreover, data on school participation has been presented: Participation in less demanding activities of manageable size at school is positively related to intentions to engage in the future in legitimate action. In contrast, having been a pupil representative might not only be important for raising subjective political competence. Unlike the other forms measured here, it could also be important in gaining (structural) political knowledge and in fostering one's competence to analyse politics. However, the role of schools in the process of political socialisation seems to be important (e.g. Jennings 1996; Rippl 2008; Rattinger 2009). Although no data could be presented for the argument that political knowledge may initiate political engagement in early adolescence, political self-efficacy (i.e. subjective political competence) may be strengthened through civic education and school participation and thus affect political participation in the long-term. It is a truism that schools foster political knowledge through civic education, and my own data slightly supports the assumption that school engagement may foster subjective political competence as well (table four), while positive relations between school participation and objective political compe-



tences appear to exist as well although to a weaker extend (esp. concerning political reasoning).

Finally, a further finding appears also to be interesting: Symbolic political knowledge is the only variable that has a (positive) significant relation with sympathy for non-normative political participation. There is no explanation for this very interesting finding yet, but one could assume that well informed (instead of naming them well-knowing because the symbolic facet contains merely actual information while the structural part includes longer-termed and “substantial” facts) people who know the politicians and their related parties/organisations and who correctly remember the promises politicians gave during the election campaign are possibly more frustrated or disappointed by politics and politicians. Their knowledge may come from a particular media use; maybe they have engaged in a normative way in the past but did not have success. Hence, these students might not believe in or trust the legitimate ways of political participation any more whereas they show sympathy for actions of political protest that are not legally accepted (Gamson 1971; furthermore, additional analyses of my own supplementary data tendentiously point to that direction). Anyway, symbolic political knowledge is superficial compared with structural political knowledge. Hypothetically, this differentiation makes the crucial difference: Maybe the more superficial symbolic political knowledge a person possesses (in addition to his or her structural knowledge), the more the person sees (legal) politics as a “shabby business”, and the more the person accepts, or possibly also engages in, illegal political protest – even under control for other variables and especially under control for the level of “profound” structural knowledge.

Anyway, the original effects of political knowledge seem to be mediated to a great extent by subjective political competence at least in early adulthood. If anything, then, compared with subjective political competence, political knowledge seems to have only (stronger) effects on voting or, in the case of symbolic knowledge, on sympathy for non-normative action. Because of the importance of political reasoning, schools should especially foster the ability to analyse political issues and to competently follow the media when reporting politics or policies since this is positively related to intentions to engage in legal political action (by not ignoring knowledge transfer). Therefore, civic education might be crucial in becoming a competent and active citizen.

One may, however, wonder about one variable not mentioned throughout this article: political interest. Indeed, political interest or involvement is also an important variable in explaining political engagement (e.g. Cohrs, Boehnke 2008; Neller 2002; Schneekloth 2010). Political interest usually is strongly and positively associated with subjective political competence

($r = .81$), thereby if introduced into regression analyses indicating collinearity ($VIF \approx 3$). Furthermore, if interest was included, too, only causal analyses would be appropriate because then the main question would be whether political interest stimulates knowledge acquisition or is at least influenced by subjective competence or reversely. Since there is no longitudinal data yet, no such analysis was presented. However, it should be noted that in every case where subjective competence mediated the role of political knowledge, the mediator variable itself was “mediated” or “outperformed” by political interest (though subjective competence instead of political interest was significantly related to conventional activity in multivariate analysis)¹². Because it seems reasonable that political interest is affected by actual knowledge¹³, in future research the causal relation will be investigated in detail.

In conclusion, several tasks remain for future research: firstly, longitudinal data to explore the causal role of subjective political competence and political interest relating political action will be collected. Furthermore, shortened knowledge indices are measured, too, because the by no means perfect correlations between objective measures and subjective competence indicate that both are partly different (Westle, Johann 2010). Thus, the causal association for all the mentioned variables will be explored in detail in future research including also measures for political trust and external political efficacy as they may have additional explanatory value. Moreover, a further aim would be to (re-)measure the ability to political analysing and reasoning using additional items and to include other explanatory variables as well (because of the small amounts of explained variance reported in section four).

Eventually, a last disclaimer: all findings reported here are for university/psychology students only. Therefore, they possibly will be not replicated for a general population sample or for people with lower degrees of education. Accordingly, a further task would be not only to look at a general population sample but at different *subsamples* (e.g. migrants). Thereby, also pedagogical intervention (or action) might be easier to implement into practical civic education if we knew what is appropriate or necessary for special target groups, while at the same time not neglecting the acquisition of a minimum level of *each* political competence to become a *competently active and reflective citizen*.

12 Nonetheless, political knowledge then again was no original source of political participation. It should be noted that, in contrast, for example Amadeo et al. (2002) found a stronger relation between the intention to vote in elections and political knowledge than between internal efficacy or political interest and intended voting in multivariate analyses.

13 Although path models have been explored they were not presented due to missing longitudinal data.



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